

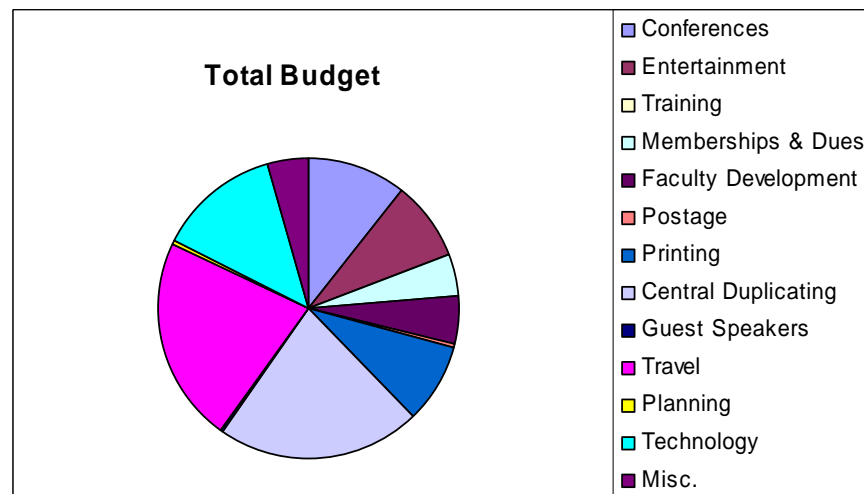
## Excel Tips from June Workshops

### Class 3: Charts and Graphs

#### Overview:

In this class, we worked with two types of charts: pie charts and column charts. There are many other types of charts that Excel can create for you which we briefly examined as well.

We first made a pie chart that gave us a picture of how our total budget breaks down into each budget item. The chart we made looked like this:

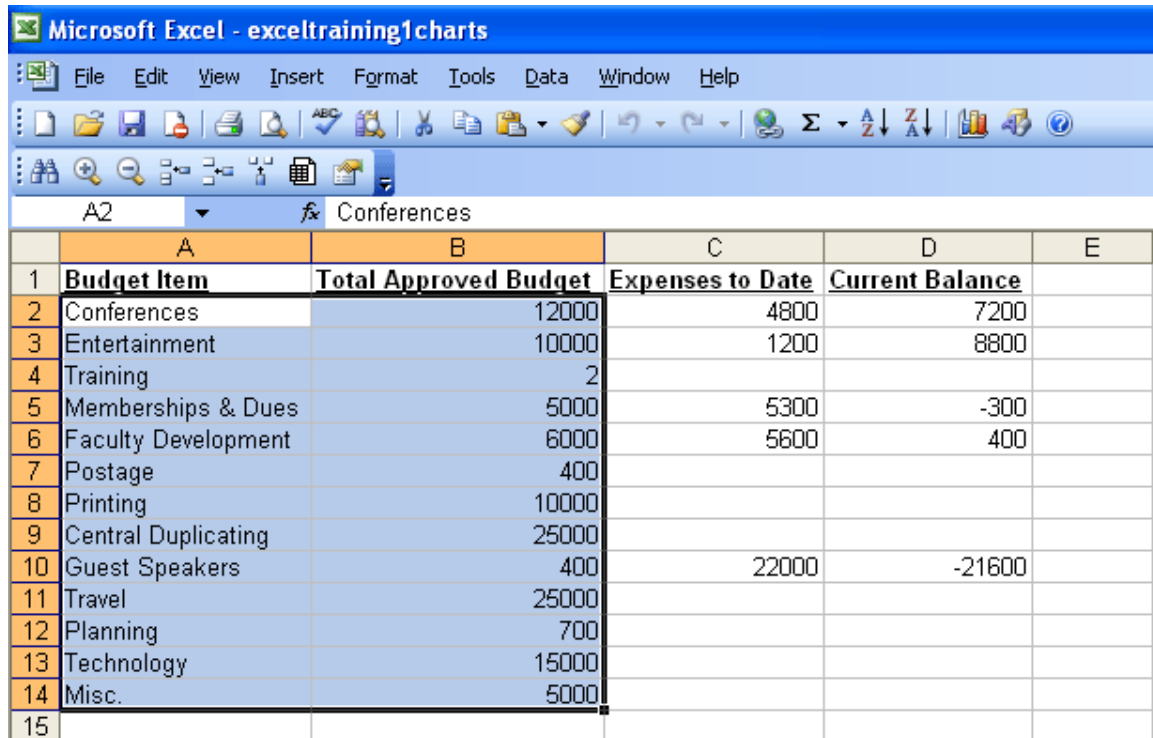


To create this, we worked off of our Master worksheet in our Excel budget file. Recall that the Master worksheet looked like this:

	A	B	C	D	E
1	<b>Budget Item</b>	<b>Total Approved Budget</b>	<b>Expenses to Date</b>	<b>Current Balance</b>	
2	Conferences	12000	4800	7200	
3	Entertainment	10000	1200	8800	
4	Training	2			
5	Memberships & Dues	5000	5300	-300	
6	Faculty Development	6000	5600	400	
7	Postage	400			
8	Printing	10000			
9	Central Duplicating	25000			
10	Guest Speakers	400	22000	-21600	
11	Travel	25000			
12	Planning	700			
13	Technology	15000			
14	Misc.	5000			

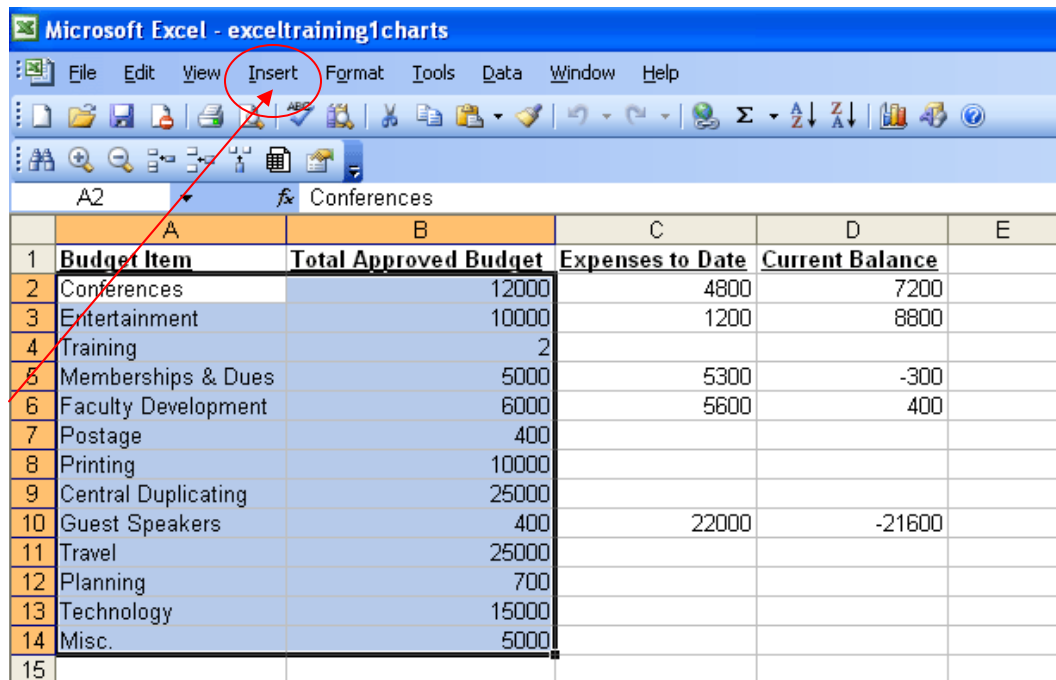
To make this chart, we used Budget Items and Total Approved Budget numbers. First, you need to **highlight** all of the budget items (conferences, entertainment, etc.) as well as their

corresponding budget numbers. Don't include the headings in row 1 ("Budget Item" and "Total Approved Budget"). See below for an example.

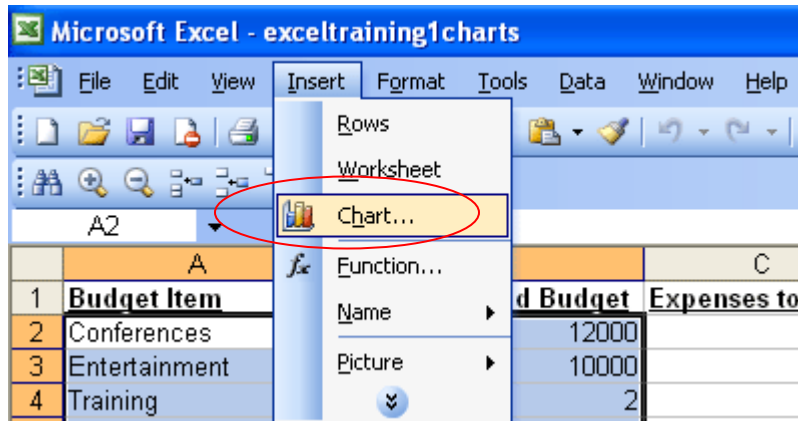


	A	B	C	D	E
1	<b>Budget Item</b>	<b>Total Approved Budget</b>	<b>Expenses to Date</b>	<b>Current Balance</b>	
2	Conferences	12000	4800	7200	
3	Entertainment	10000	1200	8800	
4	Training	2			
5	Memberships & Dues	5000	5300	-300	
6	Faculty Development	6000	5600	400	
7	Postage	400			
8	Printing	10000			
9	Central Duplicating	25000			
10	Guest Speakers	400	22000	-21600	
11	Travel	25000			
12	Planning	700			
13	Technology	15000			
14	Misc.	5000			
15					

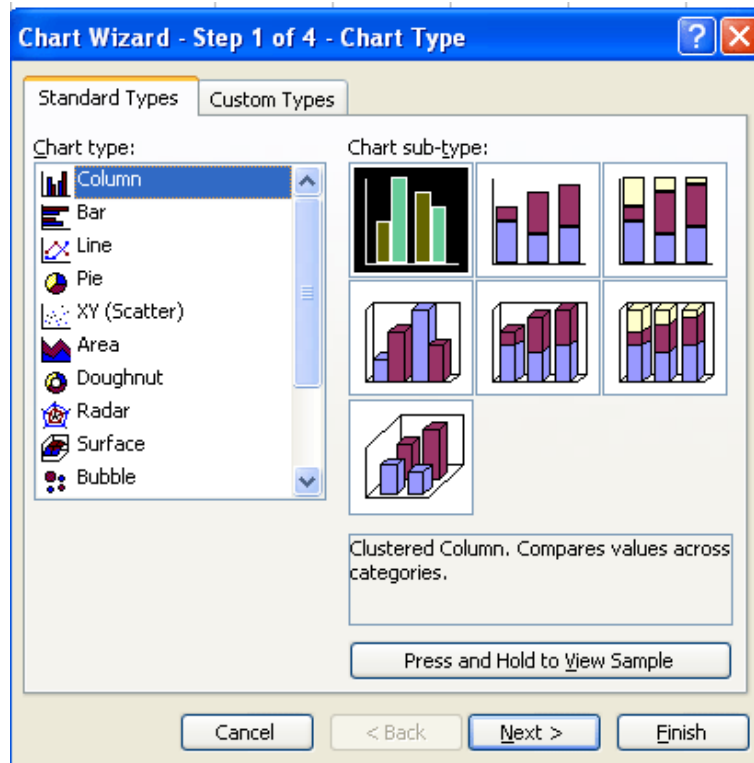
Once this information is highlighted, click on **Insert** (on the first toolbar at the top of your screen) and then **Chart**. See below for an example.



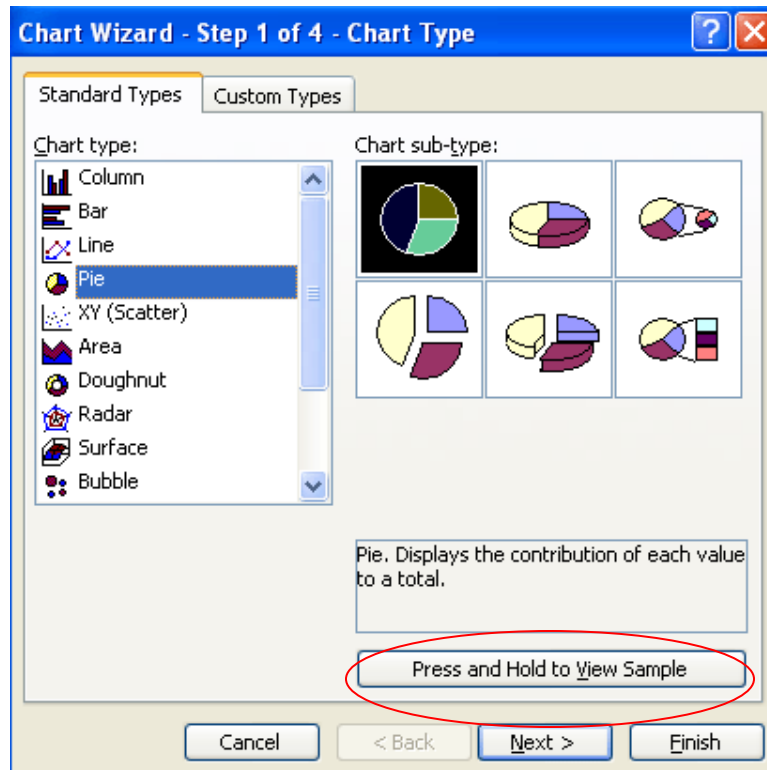
	A	B	C	D	E
1	<b>Budget Item</b>	<b>Total Approved Budget</b>	<b>Expenses to Date</b>	<b>Current Balance</b>	
2	Conferences	12000	4800	7200	
3	Entertainment	10000	1200	8800	
4	Training	2			
5	Memberships & Dues	5000	5300	-300	
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12	Planning	700			
13	Technology	15000			
14	Misc.	5000			
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This will bring up Excel's chart wizard, which looks like this:

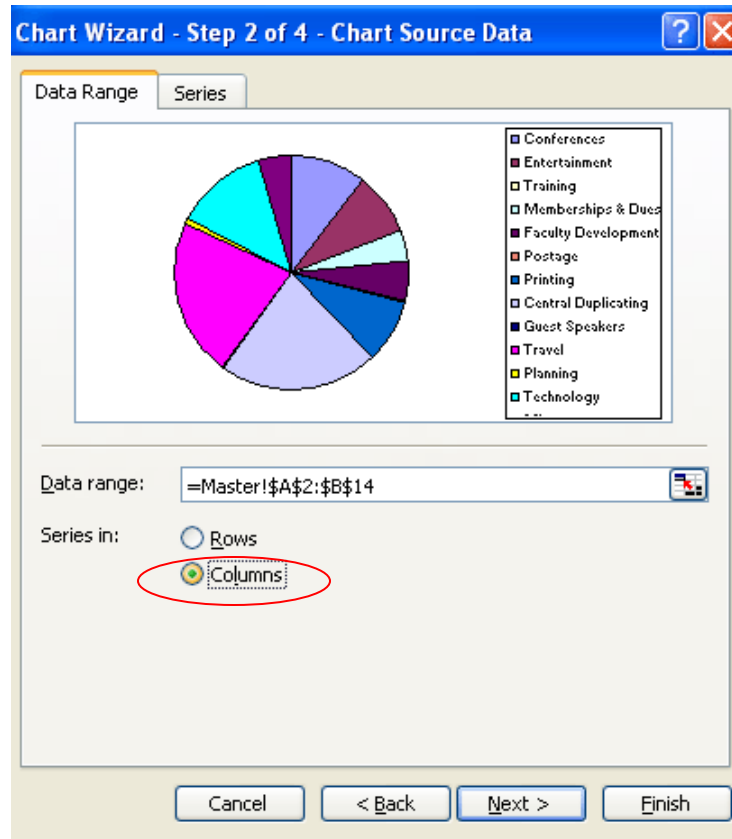


Choose the type of chart you want from the **Chart Types** list. We chose a pie chart for the first example. **Click on Pie.**

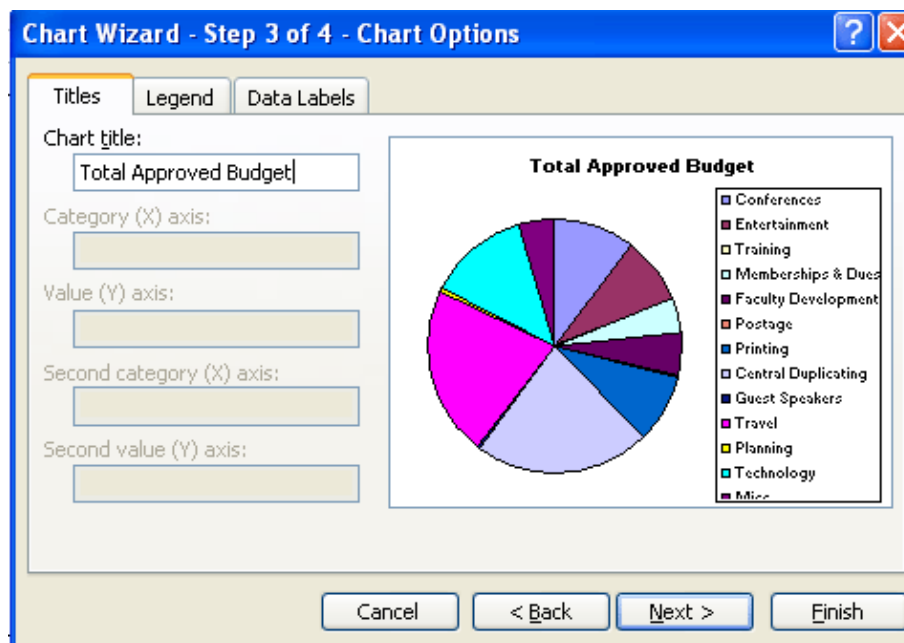


Then choose a type of pie cart. We chose the first one. After you've clicked on the chart you want, you may choose to view a sample of what your chart will look like. Use the **Press and Hold to View Sample** button to see what your chart will look like. If you're satisfied, click **Next**.

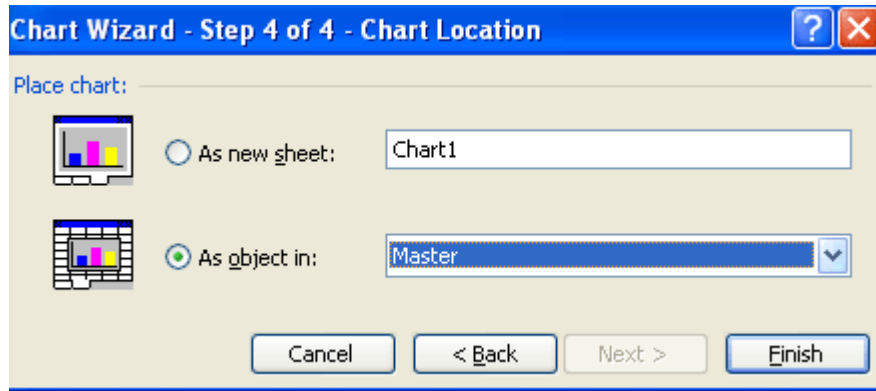
Next, Excel will ask you how your data is displayed. We did ours in columns, so select **columns** and then hit **next**.



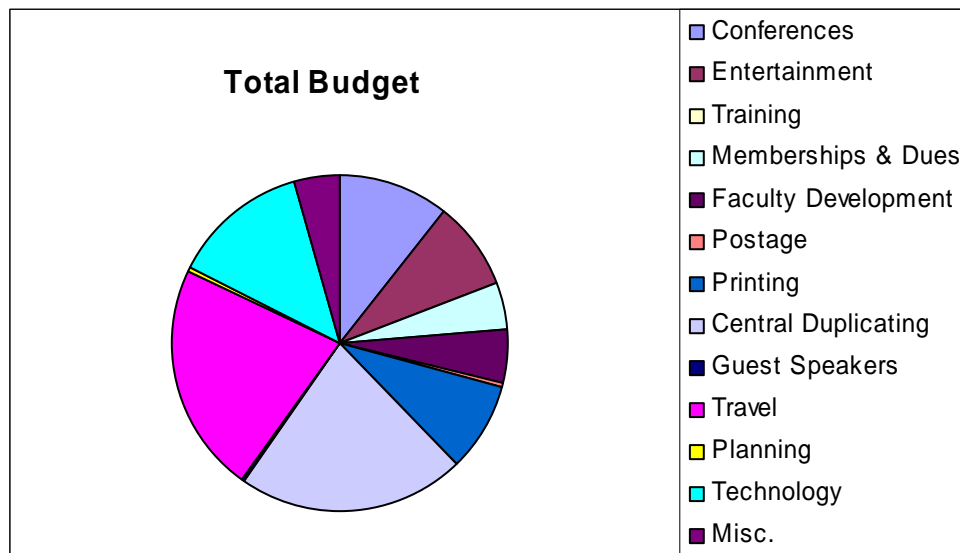
On the next screen, you can choose to enter a **chart title** if you like, as well as decide the placement of the **legend** and any **data labels** you may wish to add. Click **Next** when you're finished with this screen.



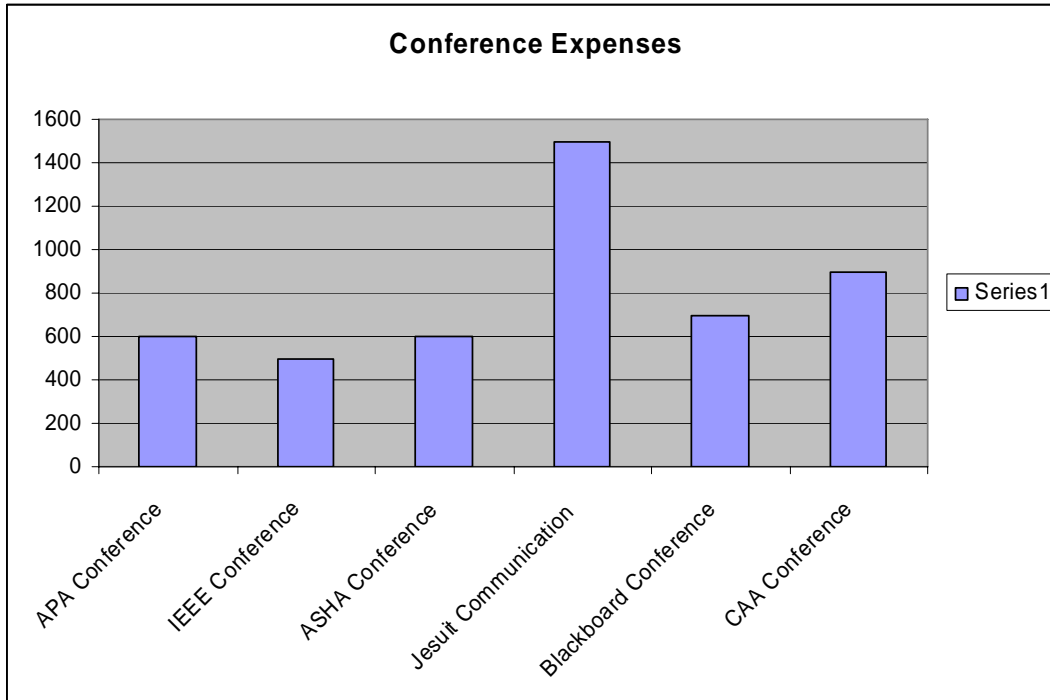
Finally, you can **choose the placement of your chart**. You can include it as an object in the current worksheet (for instance, you can make it part of the Master worksheet), or you can create the chart on its own worksheet. **Choose your preference**, and then hit **Finish**.



Your chart will appear on the worksheet you indicated, and it will look similar to the chart we did in class:



We also created a column chart to show a breakdown of expenses for one budget item. The chart looked like this:



Follow the same steps for inserting a chart given above, except this time, choose Column Chart as the chart type. Remember that you can change the color of the bars, background, or grid lines of the chart by double clicking on them! You'll get a menu with lots of options for your chart. Color options are on the Patterns tab. Play around with these features on your own to make your charts stand out!

If you have any questions that were not covered in this handout, please feel free to contact Jessica Smith at [jlsmith@loyola.edu](mailto:jlsmith@loyola.edu) or x2199.