

Lesson 9

Lesson 9

Charting to Assess Trends and Relationships

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Learn how to:

- ◆ Create a chart
- ◆ Customize a chart
- ◆ Make a chart format re-usable
- ◆ Create a trendline

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Presenting Data Graphically

- ◆ A picture is worth a thousand words (or numbers)
- ◆ With Excel you can easily create and customize a variety of graphs (known as charts)

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Create a Chart

- ◆ Select the Data Range
 - ✓ If you are using a PivotTable as your data source, make sure that the “Enable Selection” is turned off (refer item 2 on page 145 in textbook)
- ◆ Click on the Chart wizard (on standard tool bar)
 - ✓ Step 1: select the type of chart (Column, Bar, Pie etc)
 - ✓ Step 2: specify if each field is in different column or in different rows (often it is in columns)
 - ✓ Step 3: specify titles for the chart, for the X & Y axis
 - ✓ Step 4: specify if the chart goes into a new sheet (called ChartSheet) or is embedded in the current sheet
 - ✓ click Finish. You have created your chart

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Customize a chart

- ◆ First get acquainted with the chart. It has many parts such as chart area, plot area, legend, data series etc.
 - ✓ You can change / specify the format for each of these (refer pages 146 - 149)
- ◆ Note that once you have created a chart, any changes made in the data source will be automatically be reflected in the chart

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Printing the Chart

- ◆ Printing a chartsheet is no different from printing a worksheet
- ◆ But if your chart is embedded in a worksheet, you have the option of printing both the data and worksheet on the same page (as it appears on the screen) or printing just the chart
 - ✓ To print just the chart, point to an empty area of the chart background, and when you see the tip “Chart Area” click the chart. You have just selected the chart. Now you can see the print preview and it shows just the chart. Go ahead and print
 - ✓ To print both the chart and the data source, deselect the chart by clicking anywhere outside the chart, and then choose the print option

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Making a Chart Format Re-Usable

- ◆ Once you have customized your chart, you might want to save the format for using with any future charts
- ◆ On the chart menu click on “chart type”
 - ✓ if you don’t see the chart menu, right click on chart area
- ◆ Choose “custom types” in the chart dialog box
- ◆ Click on “User-defined” under “Select From” and click “Add”
- ◆ Type a name and description for your custom format, and click OK
- ◆ Your custom format is now ready to be used, the next time you create a new chart

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Forecasting Trends

- ◆ Select the data range and click the Chart Wizard
 - ✓ Generate the kind of chart you want (as described earlier)
 - ✓ Right click any data marker on the chart and the resulting shortcut menu, click on Add Trendline
 - ✓ In the Add Trendline dialog box, click Linear on the Type tab
 - ◆ To know more about the various forecasting types, you need to take courses in Statistics
 - ✓ In the Options tab, specify how much into the future you want to forecast, by typing in the “Forward” box.
 - ✓ Click OK, and you have the forecast based on your data

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