Lesson 8: Excel Charts and Budgets

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| Handouts | Class Prep | Agenda |
| * Day 8 Daily Agenda * Inserting Charts Handout | * Sign-In Sheet * Handouts stapled * Flash-drives for students * “Excel Day 3 Budget Template” Minimized | * Creating Charts * Formatting Charts |

**Objective:** To learn how to create budgets and visual graphics on Excel for both personal and professional use.

Intro (5 mins)

1. Good afternoon, everyone!
2. Reminders and Objective
   1. Reminders: Bathroom break, 10 second try it yourself, don’t hesitate from asking questions. \*\*Practice makes perfect!

**Say**: Alright! The past two classes we really focused on different Excel functions and formulas. However, today, we’re going to do a little more “math” review of Excel in order to really hone in those skills even more and practice, but we will also learn how to create visuals, such as charts, with that data, on Excel.

**Ask**: First, why do you think people would want to create charts on Excel? What could charts be used for? *(Give a minute for class to respond)*

**Charts could be used for:**

* Presenting large of amount of data
* Making a presentation less dull or boring
* To portray a certain amount of data in a more clear understandable way

*Guided Practice, “January Spending” Sheet*

**Say:** To review, let’s fill out the first part of January together: finding the Average, Min, and Max using the functions we learned during our last class.

* *Have students finish filling out data totals and leftover money for January*

**CLASSROOM COMFORT:** Great! How does everyone feel?

**Say:** Great job, everyone! So now, we’re going to continue with another activity very similar to the one we just did, but we are *also* going to learn how to create a chart with that data.

*Guided Practice, “February Spending” Sheet*

**Say**: Alright! So today’s table looks very similar to January. However, we’ll be using fewer functions to figure out February’s budget.

* Explain: February’s Budget Layout

**Ask:** Just by looking, what functions are we going to use? *(Give a minute for class to respond)*

**Say**: That’s right! We’re going to find the total’s for each week. We can use the “Cell Reference Method” to do so. *(Do the first two weeks together, first doing point and click then doing “Cell Reference Method”, going horizontally in the Totals section only)*

* OPTIONAL: Color the cells similar to how “January” is colored and add borders

**CLASSROOM COMFORT:** Great! How does everyone feel? Are we ready to move on?

*Guided Practice, “February Spending” She*et, *Creating a Chart*

**Say:** Great. So now that we’ve figured out our budget spending for February, let’s learn how to create a chart with this data.

Creating Charts with Excel

**Say**: Numbers are great and Excel is really helpful with budgeting, but *charts* are ways for us to see the data and numbers *visually*. *Under the “Insert” tab*, Excel can help us create all different sorts of charts:

* Bar Graphs
* Pie Charts
* Line Graphs, and more!

**Say**: Ok. To make a chart, we must first select the data that contains the total amount spent for rent, food, transportation, household items, miscellaneous etc… if we want to create a chart to portray the total spent for the month. **After we’ve selected the data, we will:**

* 1. Click on the **Insert** tab
  2. Click on the **Pie Chart** icon.
  3. Title the pie chart to “February Spending”

**Say**: Great! Now, please turn to your computers and do the same!

**CLASSROOM COMFORT:** Looks good! How does everyone feel? Can we move on to formatting charts?

*Guided Practice, Formatting February Pie Chart to a Column Chart*

Formatting Charts

**Say**: Great. Now that we have our charts, we can do some formatting and change the colors, labels, and even the chart type, if we want. Doing this, we can make the data more appealing to our audience!

**To do this, we will:**

* + 1. Select the pie chart.
    2. Click on the Chart Tools: Design tab.
    3. Explore different “chart styles”, “change colors”, “quick layout”.

**Say:** Great! Now I’d like for you to turn to your computers and do the same! *(Walk around class to support)*

**CLASSROOM COMFORT:** Looks good! How does everyone feel? Ready to move on?

**Say:** Ok. Now, if we want to change the chart type, we can do that too! Let’s change our current Pie Chart to a Column Chart instead.

**If I want to change the chart type, I would:**

1. Select the chart.
2. Open “**Chart Tools: Design**” tab .
3. Click “**Change Chart Type**” (A “Dialogue” box should open)
4. Click on “**Column**” on the left hand corner.
5. On the left hand side, click on “column”.
6. Select the preferred column chart.
7. Hit “OK”.

**Say**: There are many different types of charts that you can choose from. Like you just saw, I changed my Pie Chart to a Column Chart. However, you can switch yours to another type if you’d like. Please turn to your computers and change your own chart type! *(Walk around class to support)*

**CLASSROOM COMFORT:** Looks good! How does everyone feel?

*Independent Practice: Create a chart and format that chart for January’s Spending*

**Say:** Making charts is pretty nice and it can be very helpful in a presentation. For a little independent practice, please turn to your computers and create a chart of your choice for our January Spending budget! You can create any chart and also format it any way you’d like. Remember to add a title! If you have any questions, just ask!

Conclusion

**Say:** Awesome job, today! That’s all I have for today. I hope you all enjoyed learning about charts. Do you have any final questions before we end class? Today was our last day focusing on Excel. Tomorrow, we will be learning about something completely different: Google Hangouts!