Activity Overview

At this point in the course, you've explored how spreadsheets can be used to support data-driven business decisions. In this activity, you will use a spreadsheet to make a simple chart. By the time you're done, you'll understand how to create a simple graphical representation of information. Data analysts use this skill to make reports, presentations, infographics, and more engaging and accessible.

Scenario

Review the following scenario. Then complete the step-by-step instructions.

The scenario: Analyze patterns in monthly sales

To help determine optimal inventory and staffing levels, your company has asked you to analyze total sales trends for the last three years. Because your firm relies on tourists for the bulk of its sales, leaders know that demand for inventory and staffing requirements vary based on the tourist season. They have asked you to identify peak months to help with forecasting requirements for next year. To do this, you'll create a chart.

Working with spreadsheets

Follow the instructions to complete each step of the activity. Then answer the questions at the end of the activity before going to the next course item.

Step 1: Access the template

The monthly sales spreadsheet

To use the spreadsheet for this course item, select the link below, then select the "Use Template" button to open your own version of the spreadsheet.

Step 2: Open the Spreadsheet

If you haven't done so already, open the Monthly sales spreadsheet.

Step 3: Review the data

This spreadsheet contains total sales data for each month beginning in January 2021 and ending in December 2023. A portion of the spreadsheet is shown below.

A1		fx Month	
	A	**B**	
1	**Month**	**Total Sales**	
2	Jan-21	$57,650	
3	Feb-21	$63,950	
4	Mar-21	$52,350	
5	Apr-21	$49,750	
6	May-21	$42,535	
7	Jun-21	$37,800	
8	Jul-21	$36,950	
9	Aug-21	$35,125	
10	Sep-21	$38,750	
11	Oct-21	$42,035	
12	Nov-21	$48,950	
13	Dec-21	$59,850	
14	Jan-22	$65,750	

Step 4: Create a chart

To make it easier to understand monthly sales trends, use these steps to create a chart:
1. Select cell A1.
2. Choose Insert > Chart. Google Sheets inserts a chart to the right of the data. By default, Google Sheets creates a line chart.
3. Notice that Google Sheets generated a title automatically for the chart, "Total Sales vs. Month," and added labels of "Total Sales," for the vertical axis, and "Month" for the horizontal axis. It also automatically opens the Chart editor panel on the right side of the window, with the Setup tab opened.
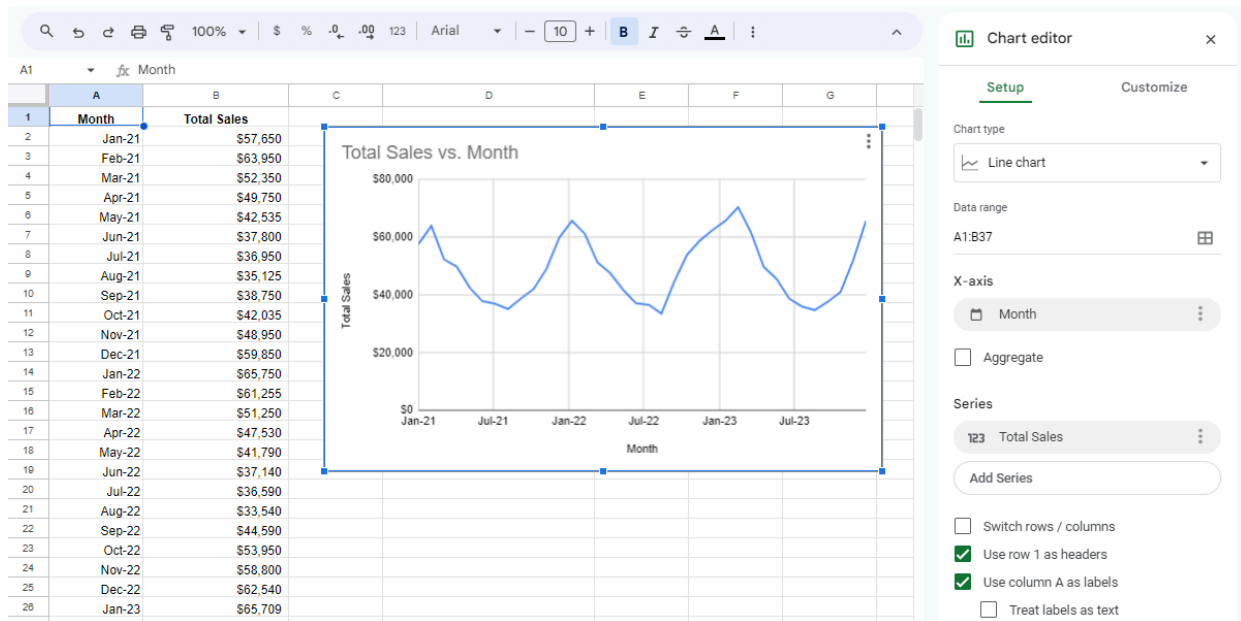
The trend appears to be flat overall, varying between about $40,000 and $60,000 with consistent peaks near January and consistent lows near August.

This is a simple example of how you can use a chart to visualize data in a spreadsheet. You'll learn more about creating, modifying, and interpreting data visualizations in an upcoming lesson.

Step 5: Adjust the chart

Use the Chart editor panel to make changes to the chart. In the Setup tab, you can change the chart type, data range, axis labels, and more. For example, the chart type drop-down list changes the type of chart from line chart to a different style, such as a bar chart. In the Customize tab, you can change many other options, such as the chart's style. If the Chart editor panel isn't open, double-click on the chart to open it. Then, change the various components of the chart by selecting them within the chart or by navigating to them from the Chart editor panel.

In this example, change the chart title to "Monthly sales." Follow these steps:

1. If necessary, open the Chart editor panel by double-clicking on the chart.
2. In the Chart editor panel, select the Customize tab.
3. Expand the Chart & axis titles section.
4. Verify that the Chart title is selected from the dropdown, then change the title to Monthly sales. Your chart will nowdisplay the title "Monthly sales"
5. If you're using Microsoft Excel, double-click on the title in the chart to edit directly.

Get creative! Don't be afraid to play around with the options. You can always save or download another copy of the template if you want to start fresh!

Pro Tip: Save the activity spreadsheet template