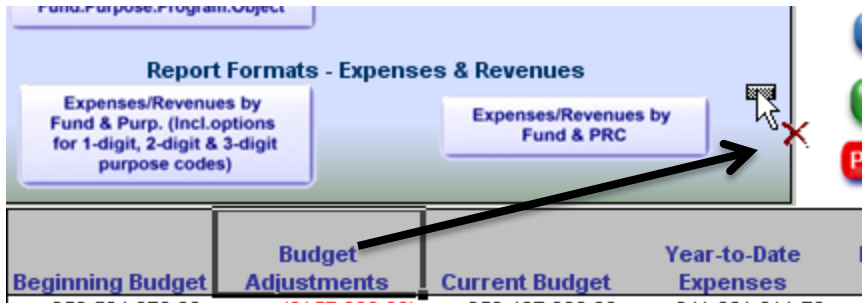


Using Charts in the CCI Board Report Spreadsheet

(Office 2007 version)



Board Report Charts



To chart a comparison of current budget amounts, you will first want to remove all of the numeric fields EXCEPT the current budget field. Click once on the header and click and drag up and to the right until you see the red x.

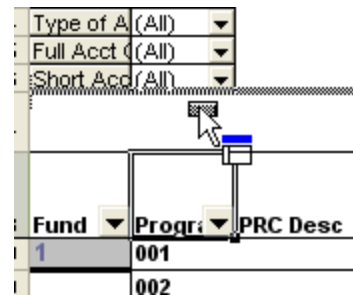
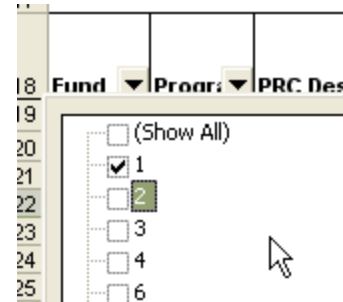
In this example, we will chart budget based on program area for fund 1.

Fund	Program	PRC Desc	Current Budget
1	001	Classroom Teachers	\$53,407,080.00
	002	Central Office Administration	\$908,366.00
	003	Non-Instructional Support Per.	\$2,576,346.00
	005	School Building Administration	\$3,152,288.00
	007	Instructional Support	\$6,417,654.00
	008	Dollar Allot for K-3 Teachers	\$334,000.00
	009	Non-Contributory Employee Ben.	\$2,289,800.00
	010	WAIVERS POSITIONS TO DOLLARS	\$1,793,142.00
	011	NBPTS EDUCATIONAL LEAVE	\$0.00
	012	Driver Training	\$530,107.00

Board Report Charts

When charting, you should narrow your information down to small pieces of information. For example, we might want to chart this by fund.

Click on the filter for fund and select Fund 1

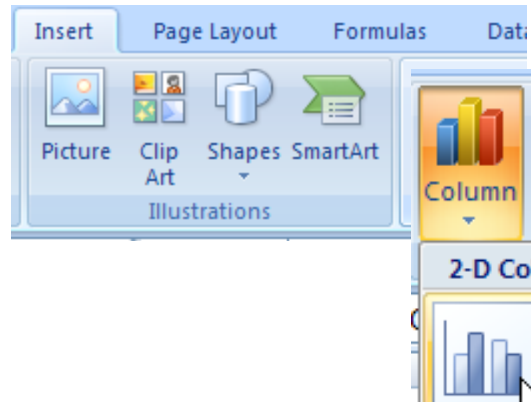


We may also want to remove the Program number and leave just the PRC Description. When charting, remove all unnecessary data items.

Create the chart

Fund	PRC Desc	Current Budget
1	ACADEMIC/INTELLECTUALLY GIFTED	\$995,317.00
	ALTERNATIVE PROGRAMS AND SCH	\$796,323.00
	ASSISTANT PRINCIPAL INTERN	\$16,277.00
	At-Risk Student Services	\$2,383,788.00
	Behavioral Support	\$88,950.00
	Central Office Administration	\$908,366.00
	CHILD AND FAMILY SUPPORT	\$356,338.00

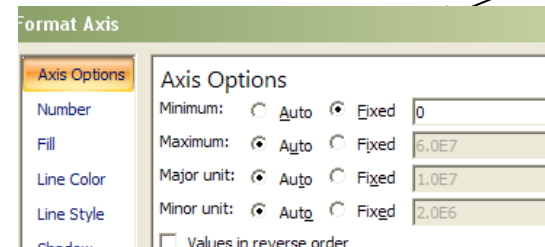
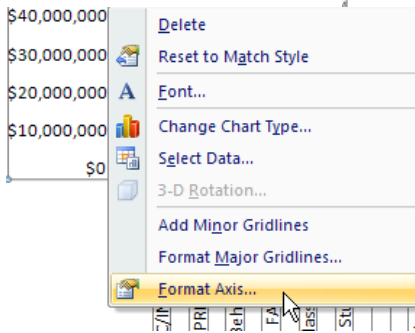
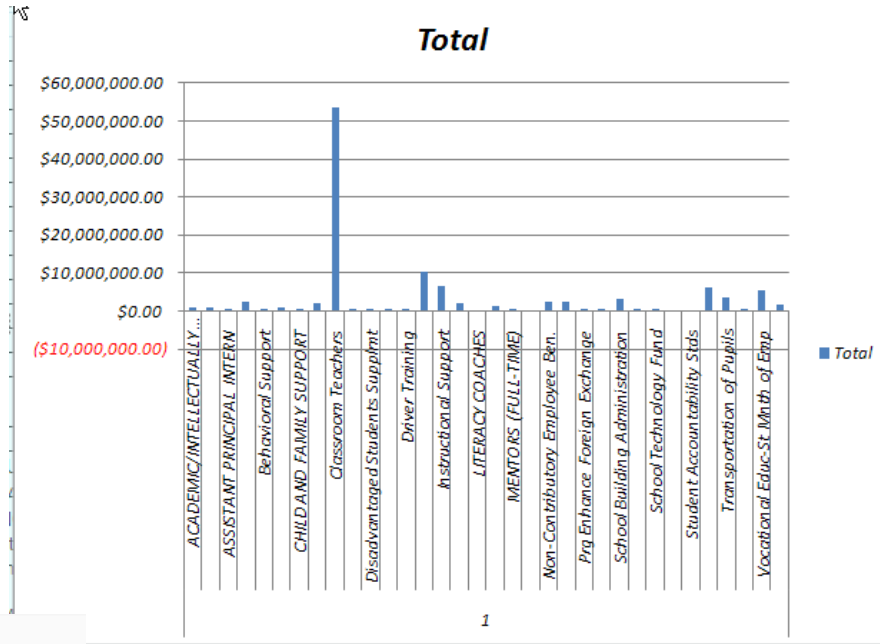
Now that we have just the information that we need for the chart, we are ready to create our chart.



Click on Insert from the menu and select the type of chart to insert.

Changing the Scale

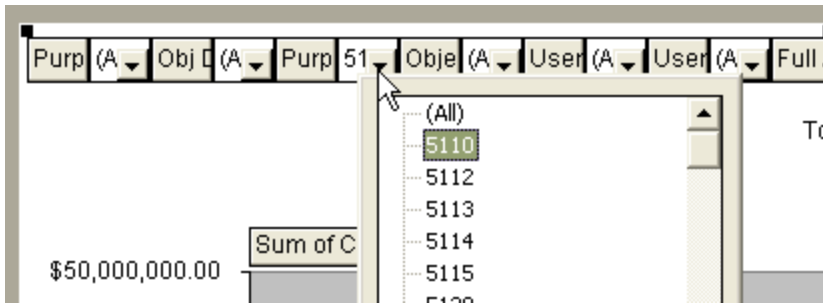
Your chart will look similar to this one.



Set minimum to 0

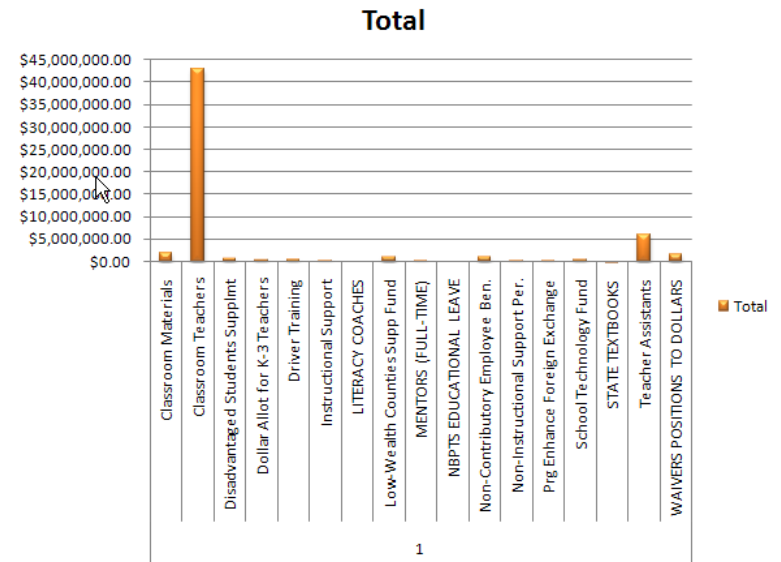
If you need to change the scale, right click on the scale and select "Format Axis"

Filtering data on the chart

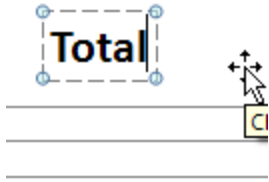


Note: The chart will automatically adjust as you filter and re-arrange data on the pivot table.

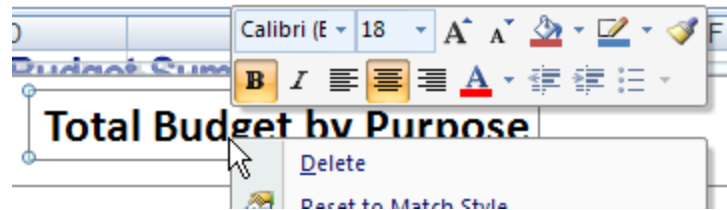
For example, to change the chart to show just purpose code 5110 – filter on the Purpose code field on the pivot table. Notice the change in the chart...



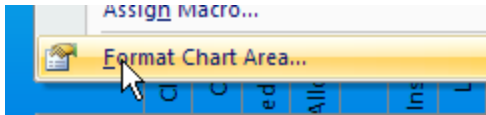
Changing the Title



To change the title – simply click in the title and type. Right click on the title to access the formatting toolbar.

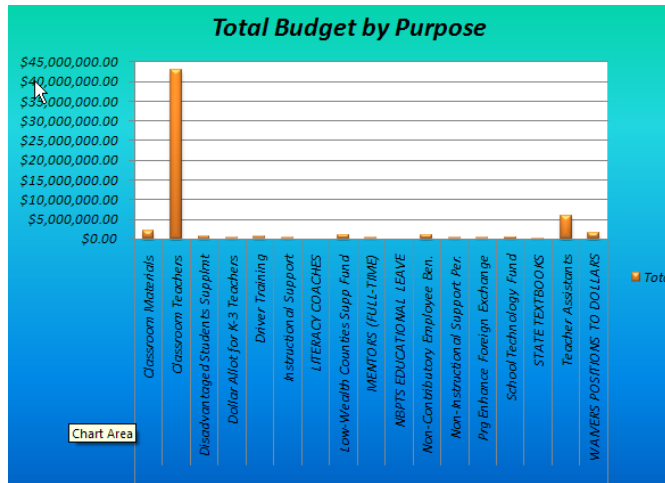
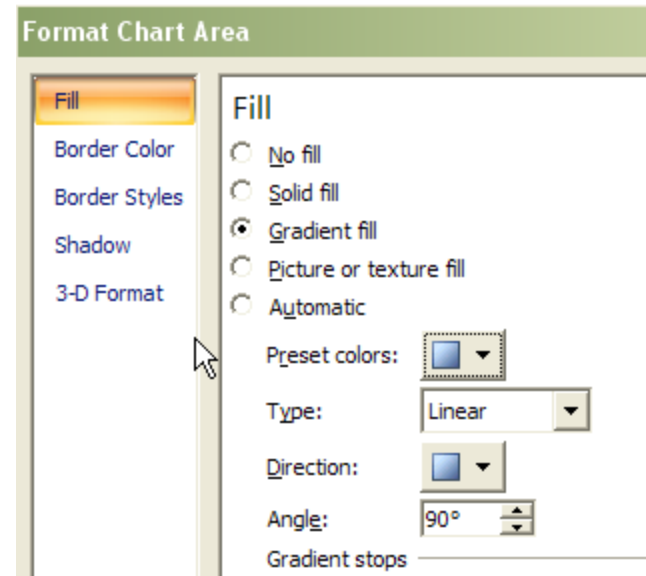


Changing the background



Right click in a blank area around the chart and select “Format Chart Area”

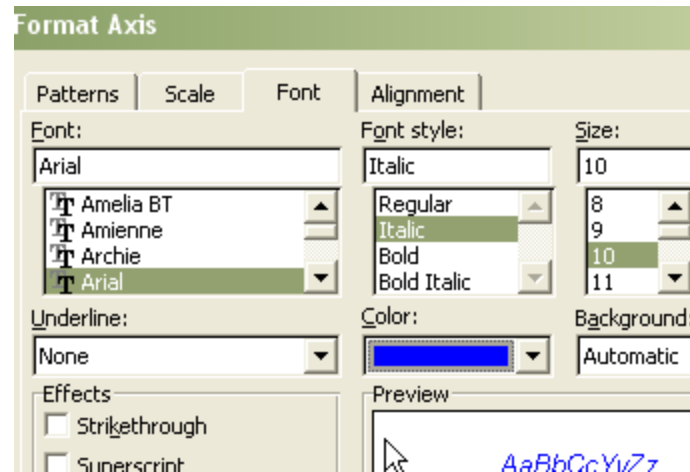
Select options for the “Fill”. Note – try using a Gradient fill for an interesting effect.



Changing the font



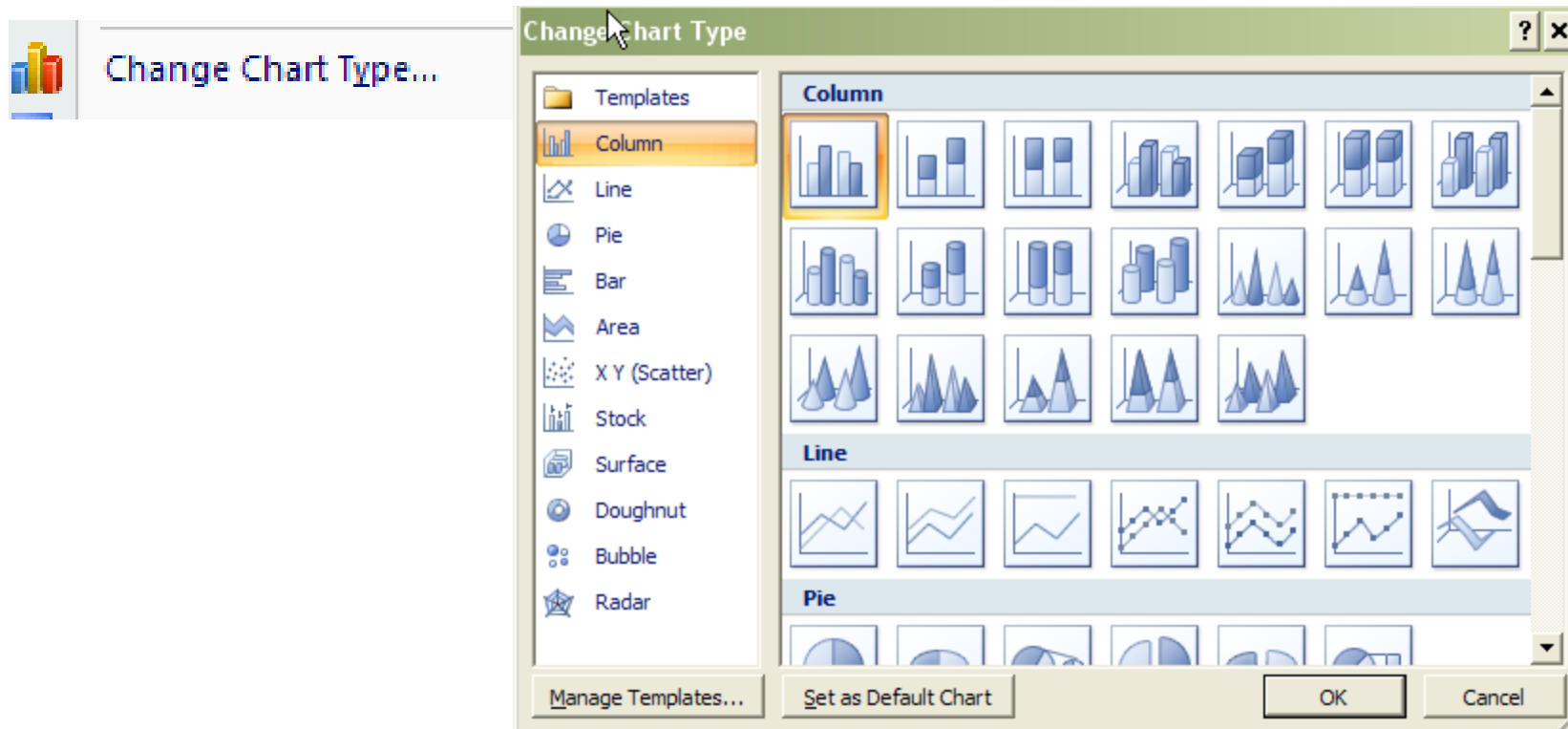
Right Click on the area where you want to change the font. Select “Format...”



Click on the Font tab and select the style and color of the font.

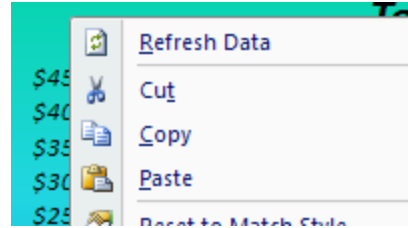
Selecting the Type of Chart

The default type is a bar chart. You can change the chart type. Right click in a blank area on the chart and select “Change Chart Type”



Copy the chart into Word

Important: There is a one to one relationship between the pivot table and the chart. If you filter or change the data on the pivot table, the chart will change as well. If you want to create multiple charts from your data then create the chart and format it. Then copy the chart into a word document.



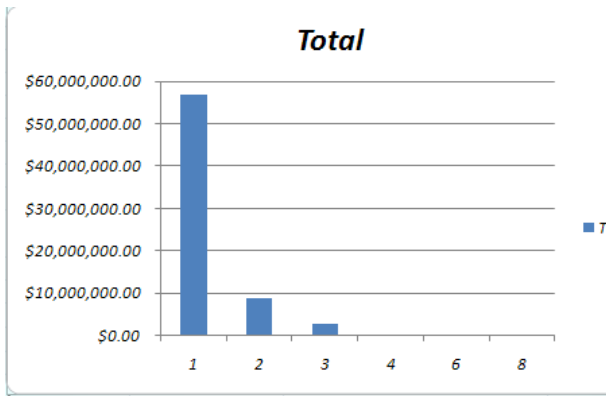
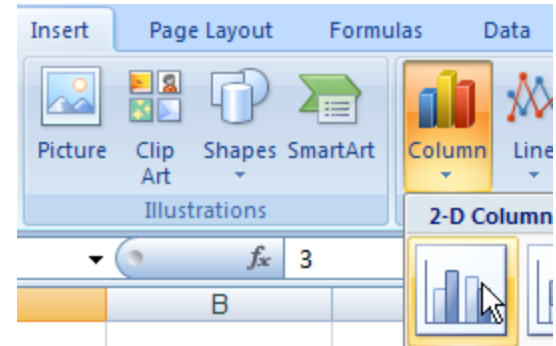
Right click on a blank space on the chart and select Copy.

Go to the Word Document and paste.

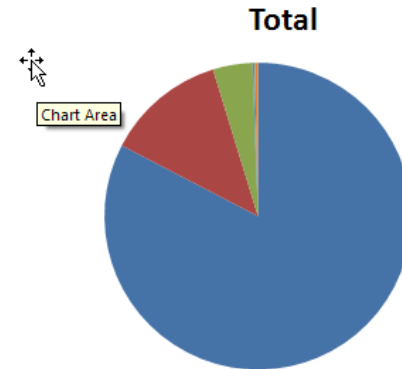
Example 1 – Budgets by Fund

Fund	Current Budget
1	\$108,906,688.00
2	\$40,861,401.07
3	\$26,335,856.53
4	\$9,564,502.08
6	\$1,640,000.00
8	\$4,081,176.25
Grand Total	\$191,389,623.93

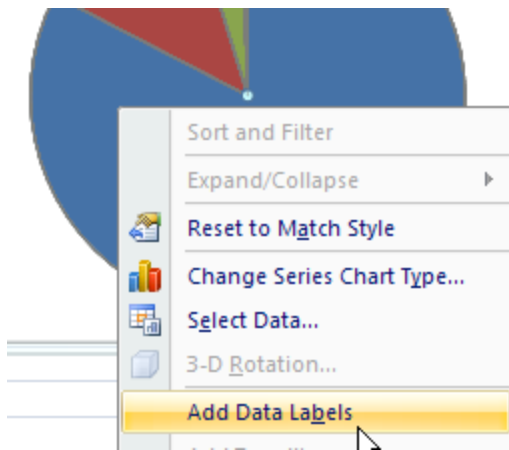
Drag all pivot items off of the pivot table EXCEPT the Fund and the Current Budget. Select Insert, Column Chart



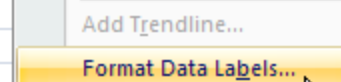
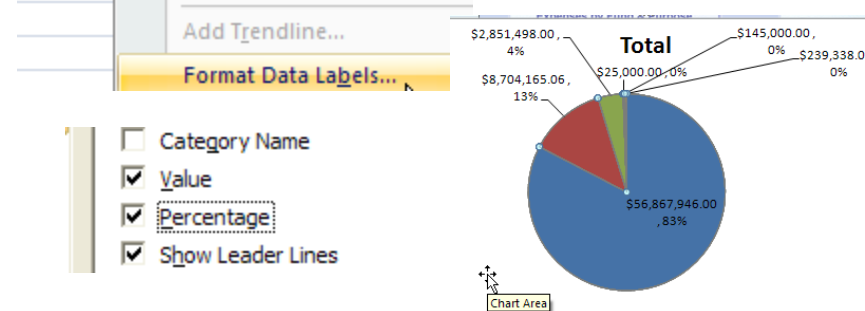
Right click on the chart and select "Change Chart Type" and change to a Pie Chart.



Right Click and select Format Data Labels



Right Click and select "Add Data Labels"

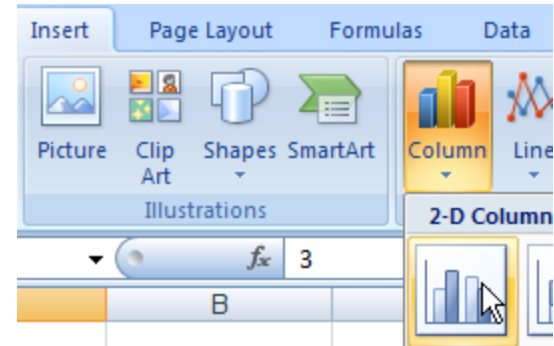


- Category Name
- Value
- Percentage
- Show Leader Lines

Example 2 – Budgets by 1-digit Purpose Code

Fund	Current Budget
1	\$108,906,688.00
2	\$40,861,401.07
3	\$26,335,856.53
4	\$9,564,502.08
6	\$1,640,000.00
8	\$4,081,176.25
Grand Total	\$191,389,623.93

Drag all pivot items off of the pivot table EXCEPT the Fund and the Current Budget. Select Insert, Column Chart



Fund	
3	\$26,335,856.53
4	\$9,564,502.08
6	\$1,640,000.00
8	\$4,081,176.25

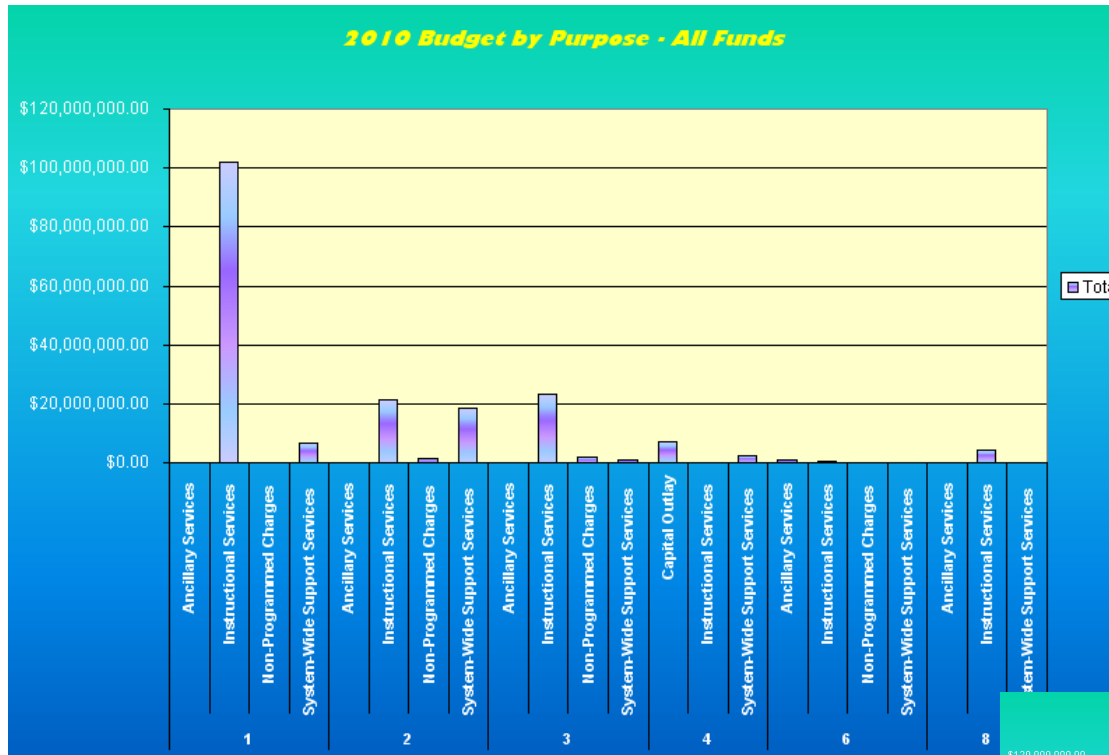
Right click on the pivot table and select "Show Field List"

- 1 digit Purp
- 1 digit Purp Desc
- 2 digit Purp

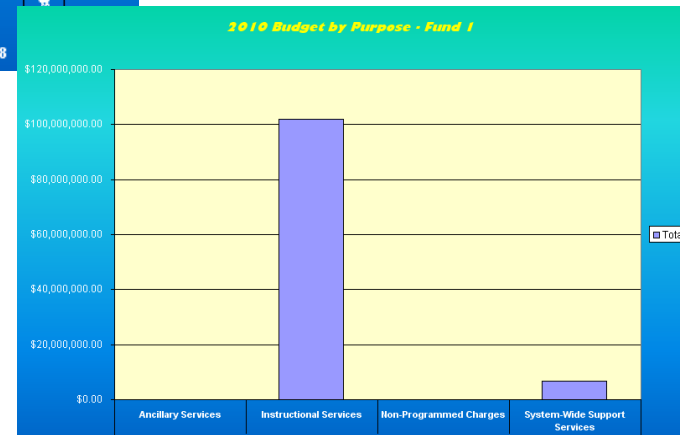
Scroll down on the field list window place a check mark next to "1 digit Purp Desc"

Fund	1 digit Purp Desc	Current Budget
1	Ancillary Services	\$20,000.00
	Instructional Services	\$102,011,878.00
	Non-Programmed Charges	\$0.00
	System-Wide Support Services	\$6,742,558.00
1 Total		\$108,774,436.00

Example 2 (cont'd)



Filter in the pivot table by individual funds to see this information for a particular fund...



Example 3 – 1 digit & 2 digit purpose

	Current Budget
Classroom Teachers	\$53,407,080.00
Central Office Administration	\$908,366.00
Non-Instructional Support Per.	\$2,576,346.00
School Building Administration	\$3,152,288.00
Instructional Support	\$6,417,654.00
Dollar Allot for K-3 Teachers	\$334,000.00
n-Contributory Employee Ben.	\$2,289,800.00
ERS POSITIONS TO DOLLARS	\$1,793,142.00
NBPTS EDUCATIONAL LEAVE	\$0.00
Driver Training	\$530,107.00

Drag away all numeric data fields EXCEPT the current budget.

	Fund	Current Budget
7		
8		
9	1	\$108,906,688.00
10	2	\$40,861,401.07
11	3	\$26,335,856.53
12	4	\$9,564,502.08
13	6	\$1,640,000.00
14	8	\$4,081,176.25
15	Grand Total	\$191,389,623.93

Drag all fields EXCEPT the fund to the top portion of the pivot table

Fund		
	3	\$26,335,856.53
	4	\$9,564,502.08
	6	\$1,640,000.00
	8	\$4,081,176.25

Right click on the pivot table and select "Show Field List" Scroll down And place check marks next to "1 digit Purp Desc" and "2 digit Purp Desc"

- Obj Desc
- 1 digit Purp
- 1 digit Purp Desc
- 2 digit Purp
- 2 digit Purp Desc
- 3 Digit Purp
- 3 digit Purp Desc

Fund	1 digit Purp Desc	2 digit Purp Desc
1	Ancillary Services	
	Instructional Services	

Example 3 (cont'd)

1 digit Purp Desc 2 digit Purp Desc

(Show All)

Ancillary Services

Capital Outlay

Instructional Services

Non-Programmed Charges

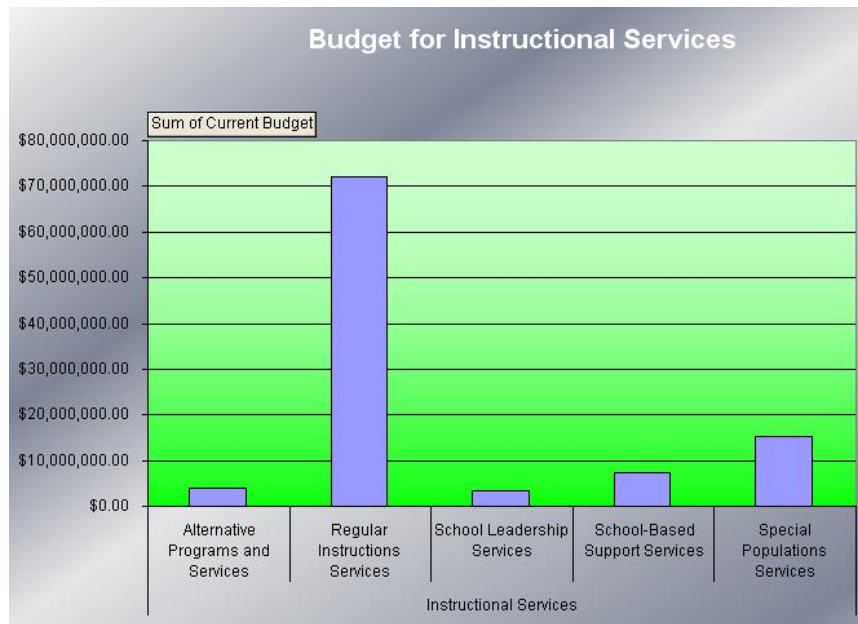
System-Wide Support Services

OK Cancel

Filter for Instructional Services on the 1 digit purpose desc

18	1 digit Purp Desc	2 digit Purp Desc	Current Budget
19	Instructional Services	Alternative Programs and Services	\$3,907,902.00
20		Regular Instructions Services	\$72,047,824.00
21		School Leadership Services	\$3,432,979.00
22		School-Based Support Services	\$7,432,250.00
23		Special Populations Services	\$15,190,923.00
24	Grand Total		\$102,011,878.00
25			
26			

Your data should look similar to this – now chart it!



Remember – you can filter and select another 1 digit purpose code right from the chart!