Excel – Create & Format Pie Charts (Focus – Data Labels & Format Data Point Pane)

Introduction:

A quick guide to formatting pie charts and data labels in Excel.

Learning Objectives: Learners will be able to:

- Create and apply formatting to a pie chart in Excel.
- Identify 3 reasons to present data using a pie charts

Outline:

- Introduction
- Walkthrough on how to create and format parts of a pie chart
- Reasons to apply formatting to charts

Notes:

Background music is set to 10% - Tuesday Vibes (from Camtasia content library.)

Please use the comments to make suggestions for adjustments to the video.

Color Palette:

#397367	#63CCCA	#5DA399	#42858C	#35393C

1. Intro			
Visuals/Graphic	**Script/Audio**	**Programming/Animation Notes**	**Comments**
Background video – person typing on computer (imported from Canva) Callout: Krista Wilcox Callout: Instructional Callout: Designer	In this video, I will be showing you how to create and format pie charts in Excel.	Arrows transition to begin the video Arrows transition to the next slide Before audio: Animate the following callout text: ● Krista Wilcox ● Instructional ● Designer	

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Callout: How to Create a Pie Chart in Excel Callout: Add Data labels & Format Data Points		When audio begins: Animate the following callout text: ● How to Create a Pie Chart in Excel Instructional ● Add Data labels & Format Data Points	

2. Excel Spreadsheet Recording			
Visuals/Graphic	**Script/Audio**	**Programming/Animation Notes**	**Comments**
Screen recording of Excel Spreadsheet. Sketch Motion circling ranges A3:A8 and F3:F8 on screen recording. Callout: Click & hold ctrl key Sketch Motion circling Insert Tab Sketch Motion circling Chart Design Tab Sketch Motion circling Format Data Series Pane on right Sketch Motion circling Point Explosion on the Format Data Series Pane.	To start, you need to identify the data you need to use to create your pie chart. I want to show total sales for the year. To do this, you need to select the range A3:A8 and F3:F8, which are non-adjacent, or not directly in contact with one another. To do this, I will click on cell A3, hold my mouse down and drag it to A8 and release the mouse. Then click on Control on your keyboard (hold it down), and as you are holding down control, select the range F3:F8. You have now selected 2 non-adjacent ranges. Then click on the Insert tab, find the Charts group, and click on the Pie Chart icon. I will choose the 2-D Pie chart. This chart is plain looking, so I want to make some changes so that the information is better communicated to my audience. You can use the chart formatting buttons, located to the right of the chart, to add elements to your chart, change the style, or filter the data visible on the chart. You can also use the Chart Design tab at the top (this will only be visible when your chart is selected). I am going to click on Add Chart Elements on the Chart Design	Arrows transition to the next slide Zoom in and use spotlight animation when selecting the ranges A3:A8 and F3:F8 on screen recording. Zoom in when showing Insert Tab. Zoom in and use spotlight animation when showing the chart formatting buttons. Zoom in when showing the Add Chart Elements drop down – Data Labels Zoom in when showing to do the Point Explosion on the Format Data Point pane	

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2. Excel Spreadsheet Recording			
Visuals/Graphic	**Script/Audio**	**Programming/Animation Notes**	**Comments**
	Ribbon, hover my mouse over data labels, and choose the type of label I would like. I am going to go with the outside end data label. This shows us the actual dollar amount in sales for each person. I also want the salesperson with the highest sales to stand out in the chart. To make it stand out, I am going to add an "explosion" to the piece of the pie that is the largest. To do this, double click on the data series to open the Format Data Point pane on the right side of the screen. Now, I need to click on the largest pie piece, notice when I click on the pie piece, I want to make changes to, you can see the blue circles only around that one piece, which means that is the only one selected. Then go to the Format Data Point pane and change the percentage. Making these changes to the data labels and using the Format Data Point pane, will help to visually communicate information to your audience.		

3. When to use Pie Charts			
Visuals/Graphic	**Script/Audio**	**Programming/Animation Notes**	**Comments**
Background – Image of a pie chart Callout: When to use Pie Charts	When should you use pie charts to visually represent data?- ● When you want to show a comparison of data as parts of the whole.	Arrows transition to begin video Arrows transition to the next slide	

Arrow Callout: Comparing data as part of the whole. Arrow Callout: Showing a small amount of data. Arrow Callout: Using only one series of data. Callout: Specific Examples Arrow Callout: Analyzing data – Comparing sales totals for a team. Arrow Callout: Showing composition or distribution of a variable – Budget allocation of a project.	● They are best for showing a small amount of data; too many pieces will be hard to see in a pie chart. ● When using only one series of data, as pie charts do not have a horizontal or vertical axis like column or line charts. Here are some specific examples of when you may want to use a pie chart: ● Analyzing data – For example, comparing sales totals for a team of people ● Show the composition or distribution of a variable – for example a budget allocation of a project, or the preferences of a survey group.	Add animation to ALL of the callouts so the come in and leave with the audio.	

4. Conclusion			
Visuals/Graphic	**Script/Audio**	**Programming/Animation Notes**	**Comments**
Background – Ribbon from LinkedIn page Callout: Thank you! Callout: “Kristawilcox.com”	Thank you for watching my video. Please visit Krista Wilcox dot com to learn about me and who I am as an Instruction Designer	Arrows transition to begin video Callout are animated to enter with the audio.	