

Charting Progress toward a Goal in Excel

You have seen a thermometer-type display that shows the percentage of a task that is complete. You can easily and quickly create this type of chart even if you are not that experienced in Excel.

The example to the right, is a worksheet setup to track how much money has been raised towards a charity fund raising event.

Cell B17 shows the amount that has been raised to date. A SUM function is used to calculate the amount.

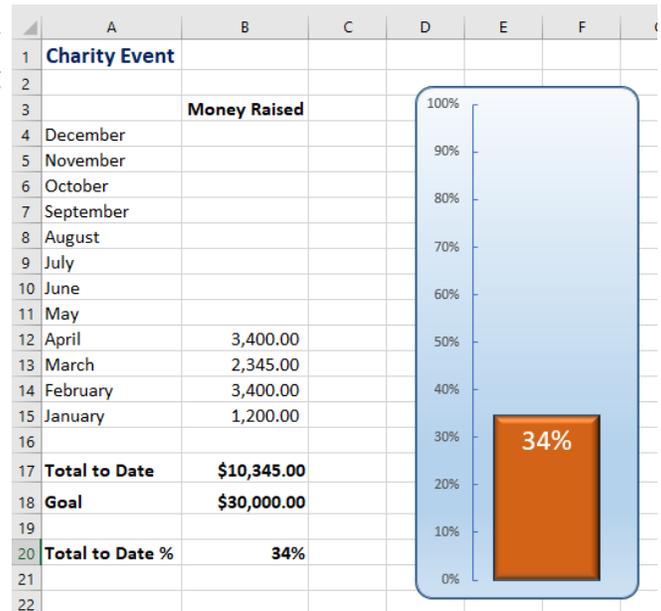
=SUM(B4:B15)

B18 has the Goal amount (\$30,000)

B20 is a simple formula that calculates the percentage of the amount raised so far

=B17/B18

Once you have your data entered, you can create the chart.



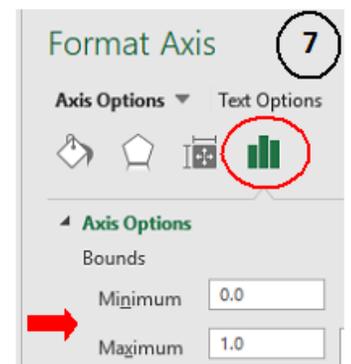
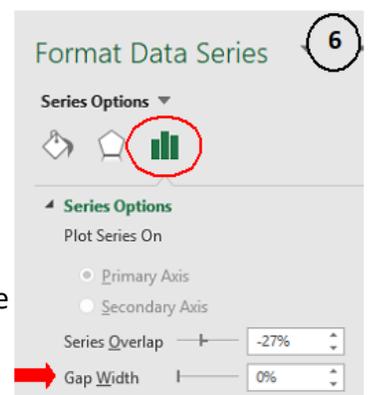
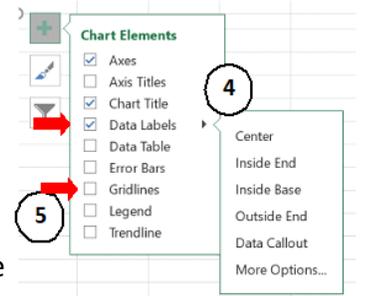
1. Select cell B20 and create a column chart.

Insert tab—Charts group - Column - Clustered Column

Note: There does need to be a blank cell above B20. Without this blank cell, Excel will use the entire range of data for the chart, not just the single cell. You want the chart data series to consist of a single cell.

2. Change the chart title to whatever you want it to be. For this example, let's use Charity Event. You can also simply delete it.
3. Remove the horizontal axis (if one appears).
4. Add data labels (to display the percent accomplished).
Click the Chart Elements icon (plus sign) - Data Labels - Inside End.
5. Remove the Gridlines. Click the Chart Elements icon (plus sign) - Gridlines
6. Format data series (set gap to 0). Right click on the bar column and select Format Data Series. Set the gap to 0. Note: You may want to experiment where you want the gap set.
7. Right click on the value axis and select Format Axis. Change the Bounds Minimum to 0; Change the Maximum to 1.
8. Now is the fun part - move, resize, change colors and background as desired.

Note: The chart screenshot above has a little more formatting than was covered in the instructions.



Need a little more help, watch the video on the "Filling in the Gaps" series at my Youtube channel: www.youtube.com/c/forevermoretraining