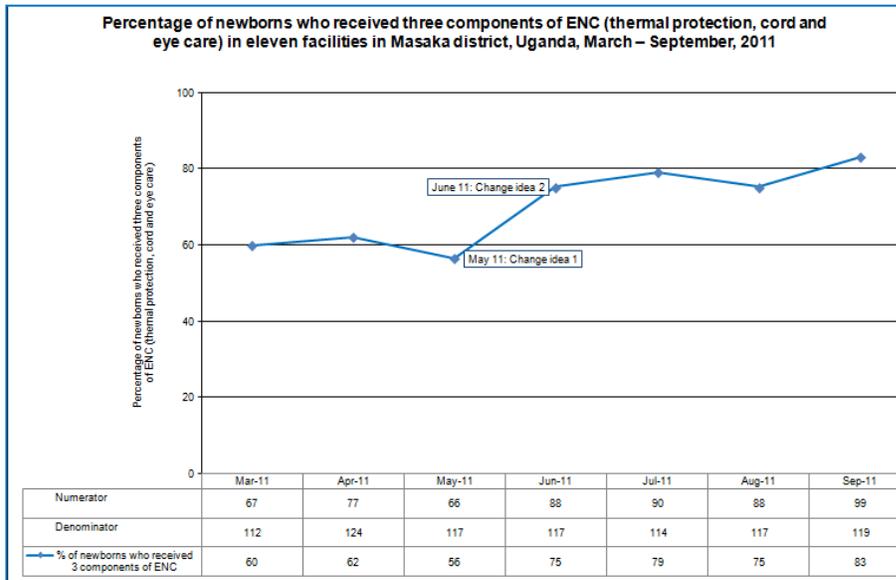


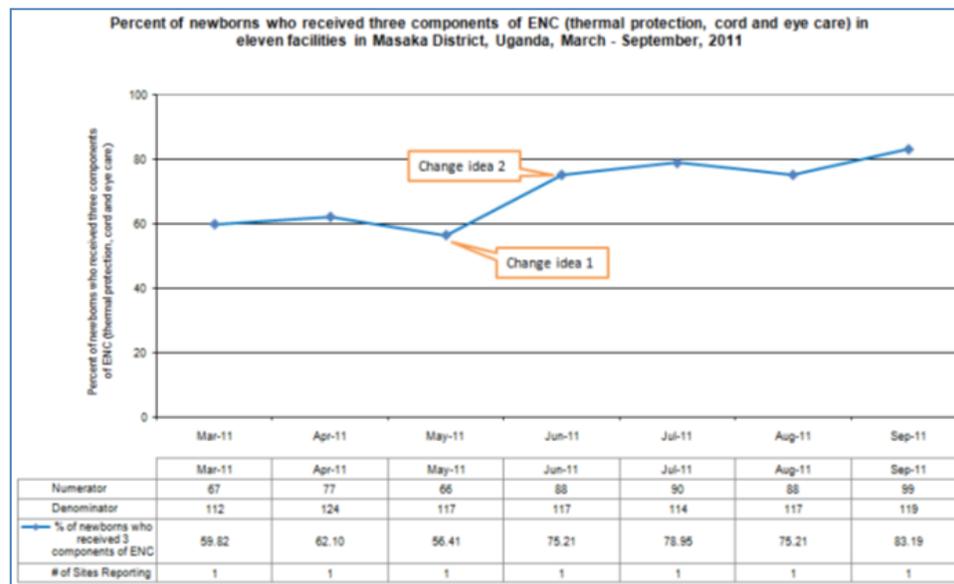


Annotating Run Charts Using Data Labels

This document explains how to use Excel's data labels function to annotate run charts. There are several advantages to using data labels instead of inserting shapes such as call-out boxes. First, the data label is associated with a specific point on the run chart, so if the run chart is rescaled when new months or years of data are added, the annotation will move with the data point. For example, in the charts below, annotations are made using data labels on the left and using inserted call-out boxes below:



With data labels

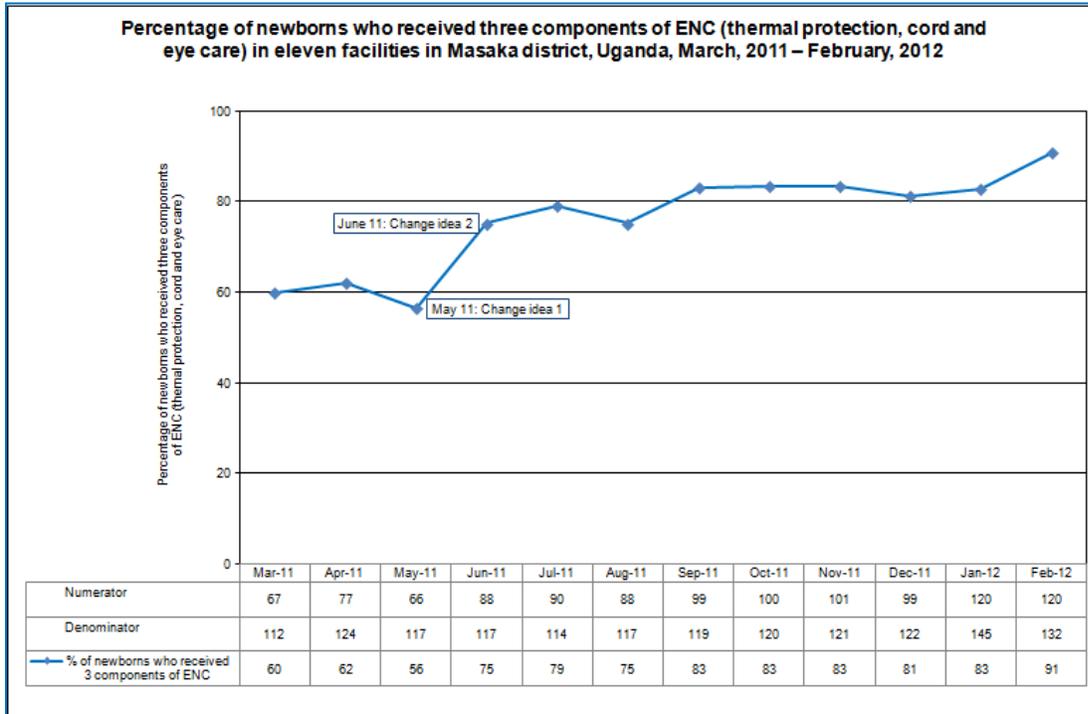


With call-out boxes

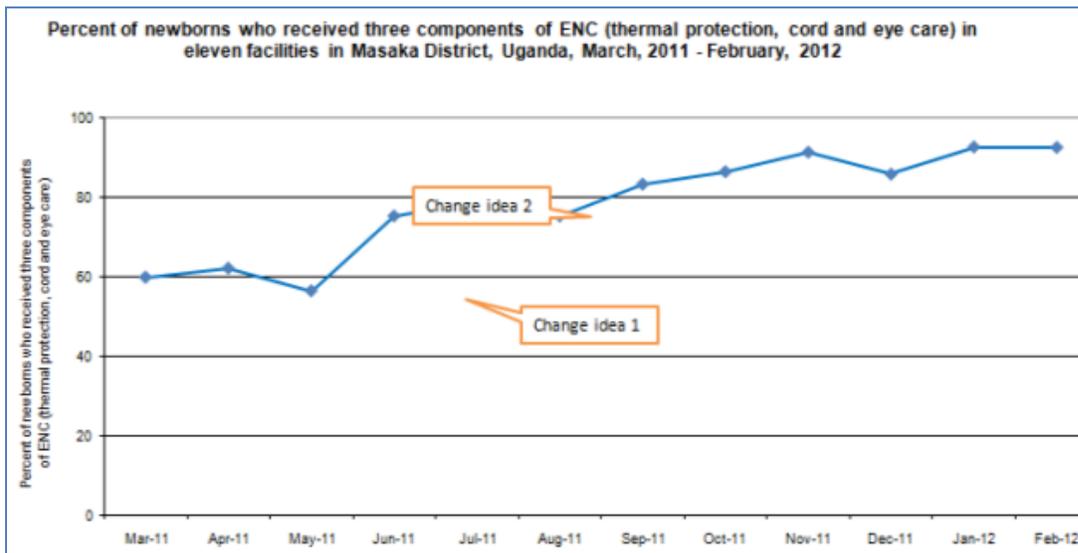
OCTOBER 2011

This job aid was prepared by Simon Hildebeitel of University Research Co., LLC (URC) for use by staff of the USAID Health Care Improvement Project, which is made possible by the generous support of the American people through the United States Agency for International Development (USAID). The USAID Health Care Improvement Project (HCI) is managed by URC under Contract No. GHN-I-03-07-00003-00. This guidance does not reflect the official policy of USAID or of the United States Government.

When additional months of data are added, the data label annotations stay in the right place:

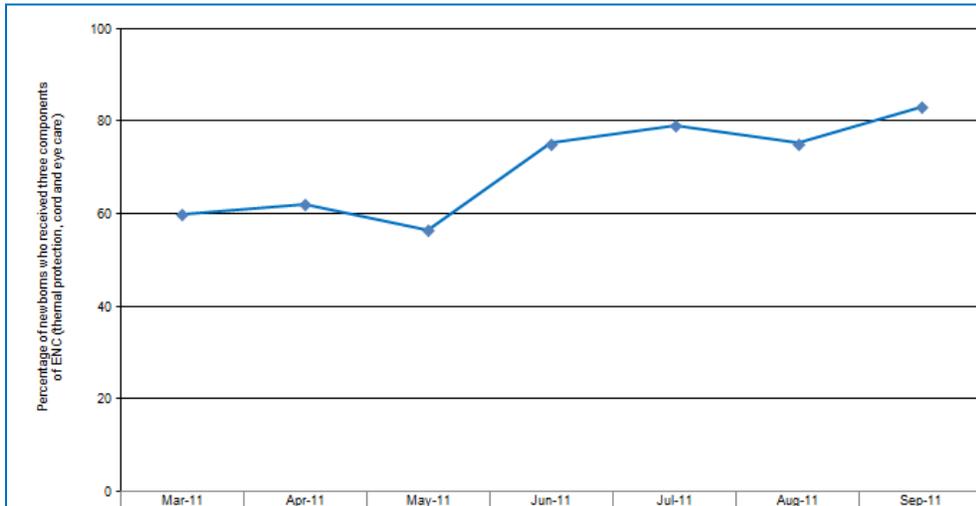


Using Call-Out boxes, the labels no longer point to the correct month:



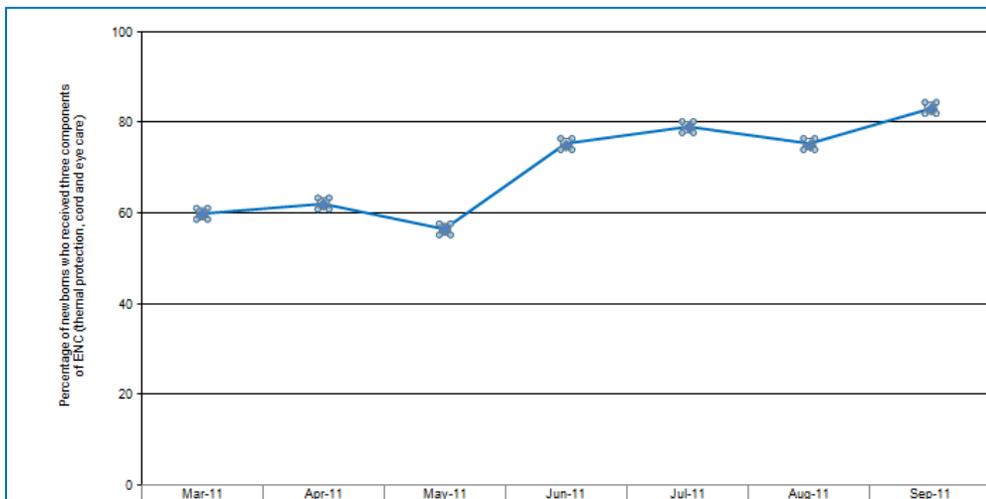
Another advantage is that by using data labels, we can give HCI run charts a cleaner, more consistent look, although that may be a matter of opinion.

To annotate using data labels, the first thing you do is select the point on a run chart you wish to annotate by left-clicking on it.

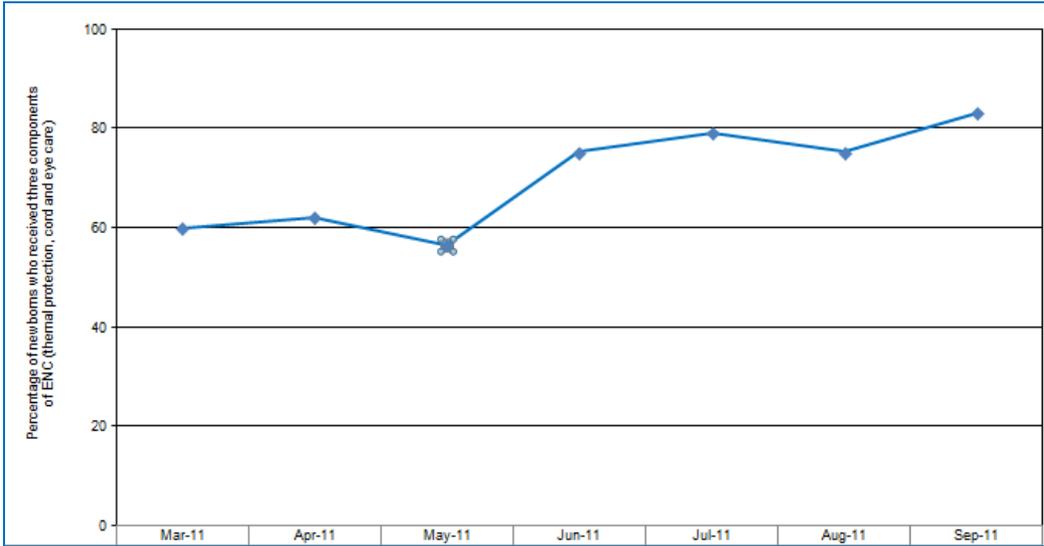


The point you select should be the point on the run chart representing the month in which the event described in the annotation occurred. In the example above, we want to label the point for May 2011 if testing of change idea 1 began in May, even though the effect of that change may be seen in the increased performance in June. For consistency's sake, all annotations should indicate the timeframe in which the annotated event occurred rather than the timeframe of the presumed effect.

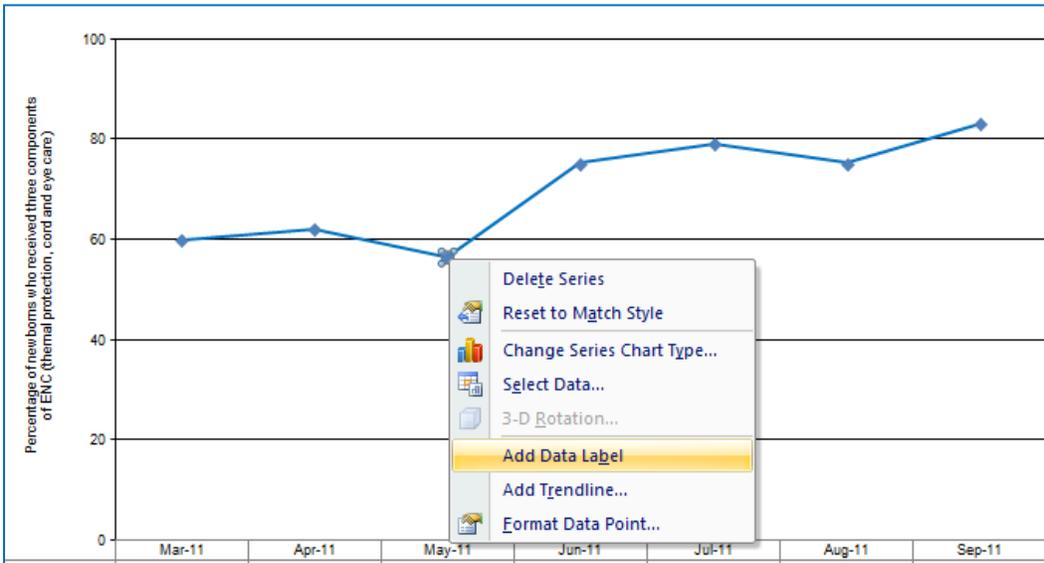
After left-clicking the first time, all the data points on the line will be highlighted:



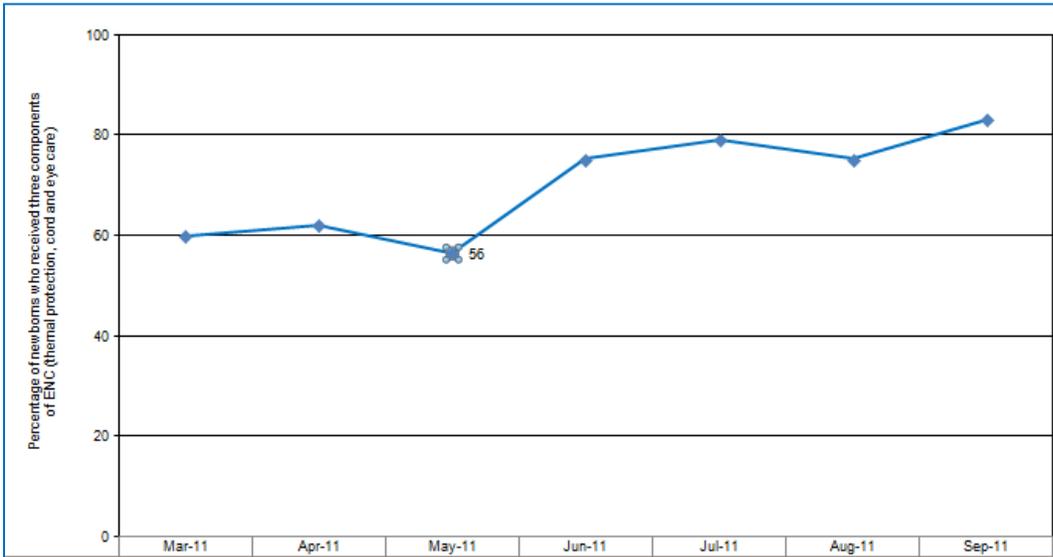
Left-click again so that only the point you wish to annotate is highlighted:



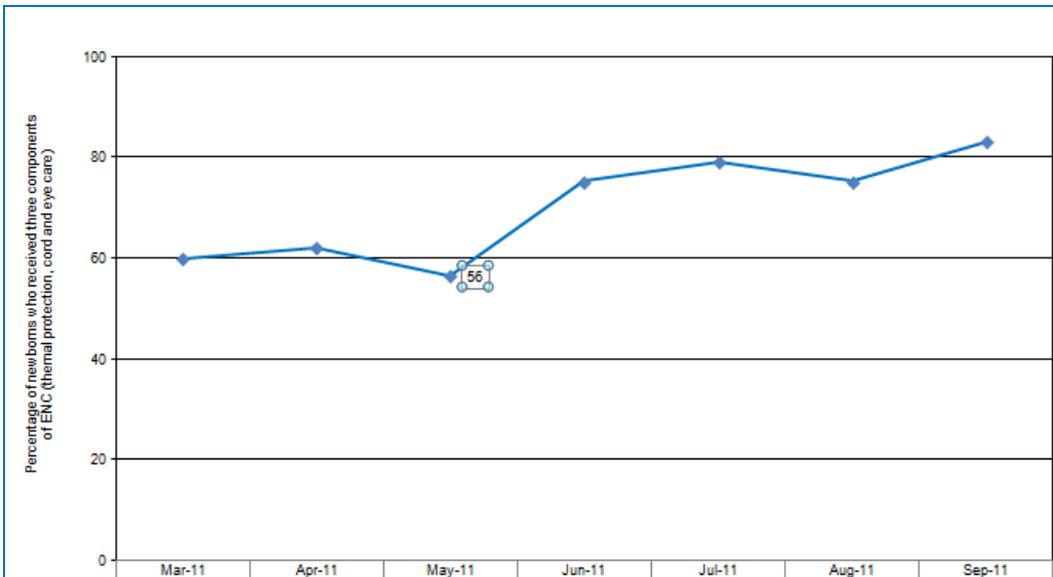
Now right-click on the point to bring up a menu, and select "Add Data Label"



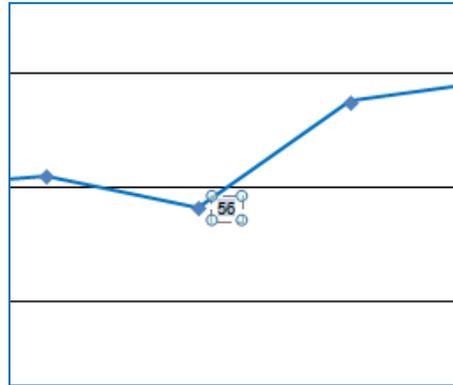
A data label will appear. By default, the label will contain the numerical value of that point on the chart.



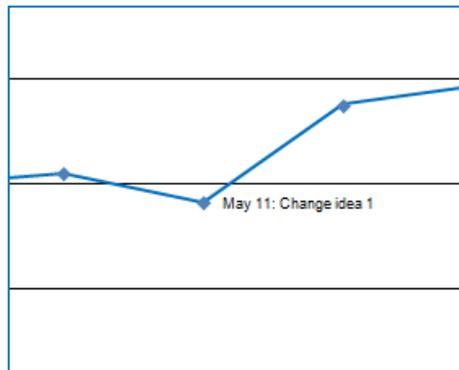
Left-click on the data label to select it. This will highlight the box around the data label.



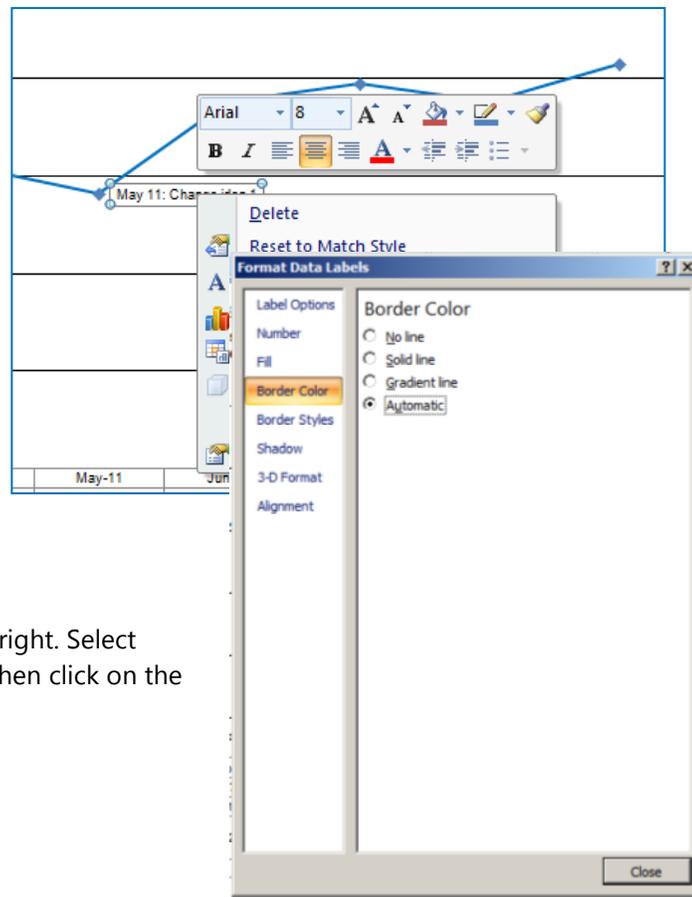
And then left-click inside the box to place the cursor or to highlight the text inside the box:



And then type in your desired annotation. We suggest typing the three-letter abbreviation for the month of the annotation and the year (Nov 10, Jun 09, etc.) before the annotation itself to clarify when the annotation occurred. When you are finished typing, the annotation will now look like this:



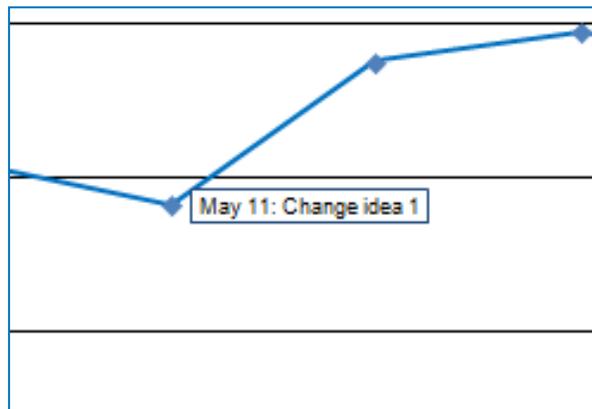
The annotation will look better with a box around it so that it's not just floating text. To add a box, right-click on the data label and select "Format Data Labels" from the contextual menu.



Which will bring up this dialogue box to the right. Select "Border Color" from the list on the left, and then click on the

“Solid line” option and choose a dark blue color. Next, click on the “Fill” option on the list to the left and select “Solid Fill” and change the color to white. When you’re done, click on “Close”.

The annotation will now appear like this:



If the positioning of the label is not ideal, you can left-click on the data label and, holding down the button, drag it to a new location. For example, this label for “Change idea 2” overlaps the charted data. It may be better to reposition it to the left of the point it annotates.

