# How to Create Offline Financial Charts to Analyze your Budget and Transaction Data

Example 1, Comparing Spending Multiple Years, One Category of Spending

1. Access Argos
2. Select 'Transaction by Date Range' Report
3. Select the Date Range, Fund, Org, Account of interest/ comparison, Program
4. Choose to 'Check box to retrieve information'
5. Once the data appears on the lower half of your screen, Select the GEAR icon in the lower right of the data screen and choose 'Export all to CSV', then choose to 'Save file' and save the file in a location (and with a name) where you will be able to locate it easily
6. The data file you just downloaded from Argos in MS Excel.
7. Sort the data by "transaction date"
8. Next, split the transaction dates at the end of each fiscal year (May 31st) by adding a new row at this point.
9. Add a new column next to the "transaction amount column"
10. Add the amount of the fiscal year in the column for particular fiscal year (Fiscal year is June 1 – May 31)
11. Repeat steps 8 – 10 for each year
12. Once each year has been added up from the individual transactions, make a separate table that will hold the data that will create the chart.
13. You can either re-type the information or you can use the "=" symbol and pick up the number from the cell with the Excel worksheet to fill in your chart.
14. This is the sample table:

2006-2007	$2,005.12
2007-2008	$2,126.99
2008-2009	$2,903.95
2009-2010	$7,137.84
2010-2011	$5,269.07
2011-2012	$7,505.61
2012-2013	$6,008.19
2013-2014*	$1,832.24

15. Once the table is complete, highlight the table, and select "Insert, Column" to have the same Chart as below. From here, you can select "Chart Tools" to customize your title, colors, legend, etc. for your chart.
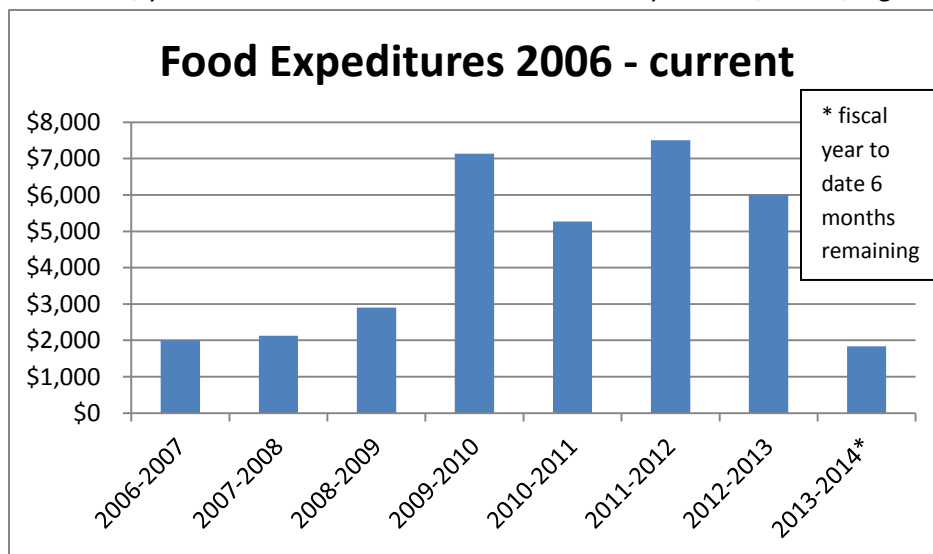
Example 2, Comparing Budget vs. Spending by Account

1. Access Argos
2. Select 'Budget and Transaction by Fiscal Year' Report
3. Select the Fiscal Year, Fund, Org, Account of interest/ comparison
4. Once the data appears in the Transaction Detail tab, Select the GEAR icon in the lower right of the data screen and choose 'Export all to CSV', then choose to 'Save file' and save the file in a location (and with a name) where you will be able to locate it easily
5. The data file you just downloaded from Argos in MS Excel.
6. This is the sample table:

Account title	Adjusted budget	YTD activity
Miscellaneous Income	$0.00	$476.00
Office Supplies	$1,900.00	$2,187.90
Instruction/Lab Supplies	$2,500.00	$1,836.93
Clothing	$300.00	$421.50

Once the table is complete, highlight the table, and select "Insert, Column" to have the same Chart as below. From here, you can select "Chart Tools" to customize your title, colors, legend, etc. for your chart.

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