Epic Excel Template Pack User Guide

Epic Excel Template Pack

www.EpicExcelTemplatePack.com

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Epic Excel Template Pack

Contents

Overview

The Epic Excel Template Pack is a single Excel spreadsheet with over 100 sheets and over 400 templates including graphics, call outs, information cards, mini boards, executive summaries, dashboards, charts and much more. It is designed to help you quickly and effectively build reports from scratch or enhance your reports with a template like a pyramid chart.

What's Included

Epic Excel Template Pack.xlsm designed for Excel 2016, 2019 and Excel 365.
Help guide.pdf

Two Important Note – Do Not Skip

The Epic Excel Template Pack and this guide is provided "As is" and may contain errors, bugs, misunderstandings, and different expectations. When using either you must always check your work for errors, anomalies, template bugs, Excel bugs and other things that could negatively affect your project. Do not assume that anything in the Epic Excel Template Pack or this guide is error free. We accept no responsibility for any damages or loss arising out of the use of either. Testing should be an integral part of your project development strategy, do not ignore it.

Always backup your work on a regular basis do not rely on automatic backups, in your project folder create a _Backups folder and regularly put copies of your work in it, they should be named using the format YYYYMMDD-Filename-Description for example 20200708-SalesAnalysis-DataImported.xlsx this allows you to revert back to a copy should anything go wrong. Always ensure that your project and its backups are stored in two locations, otherwise a simple hard drive failure could lead to you losing all your work.

Support

Purchase of the Epic Excel Template Pack gives you 30 days of support to help you get started, helping you to navigate it, explain things and point you to our other resources. However, it does not include doing any custom work. To get support send an e-mail to support@epicexceltemplatepack.com

You also get access to our Epic Excel Template Pack YouTube channel with videos on how to get the most out of the pack.

Additional support is provided via our GitHub project page, simply raise an issue, and issue can be help with something, a bug you've noticed or a recommendation.

In this guide it is assumed you know the basics of Excel like navigating spreadsheets, entering information, using formulas, creating charts, but if there is something you don't know you should use the support channels above.

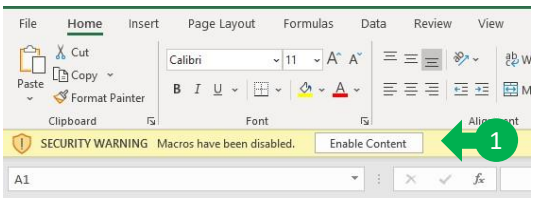
Conventions Used in this Guide

When a term has blue text on a light blue background it indicates a command or object.
A string of actions like clicking File and then Save is represented like File>Save.
When referencing something in a screenshot you will see a green number in brackets **(1)** you should look for the corresponding number in the screenshot as a green circle with the number and an arrow.

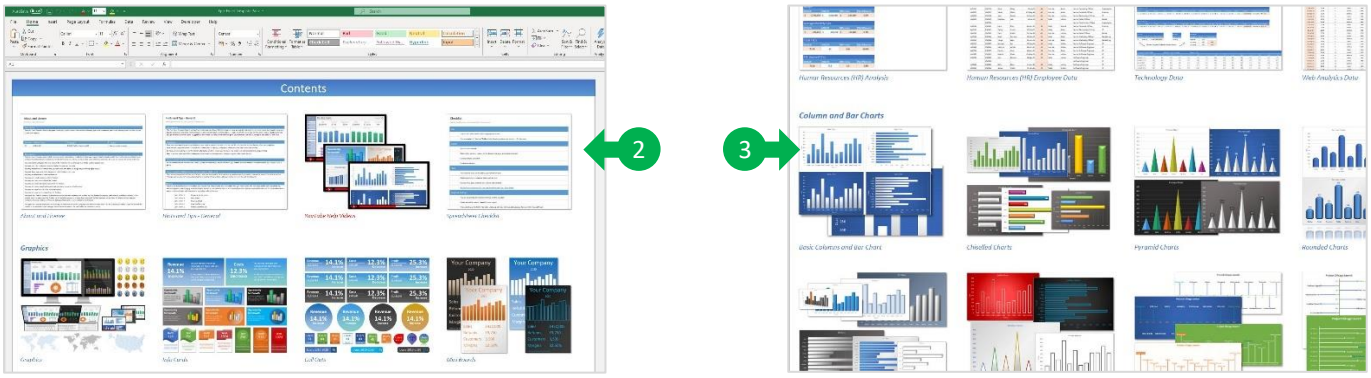
Getting Started

There are many ways to use the Epic Excel Template Pack but I would recommend that when you start a project you create a template folder and place a copy of the Epic Excel Template Pack in it so you can use the templates from it.

The first time you open the Epic Excel Template Pack you should receive a security warning that macros have been disabled you should click Enable Content **(1)** which will enable the macros.



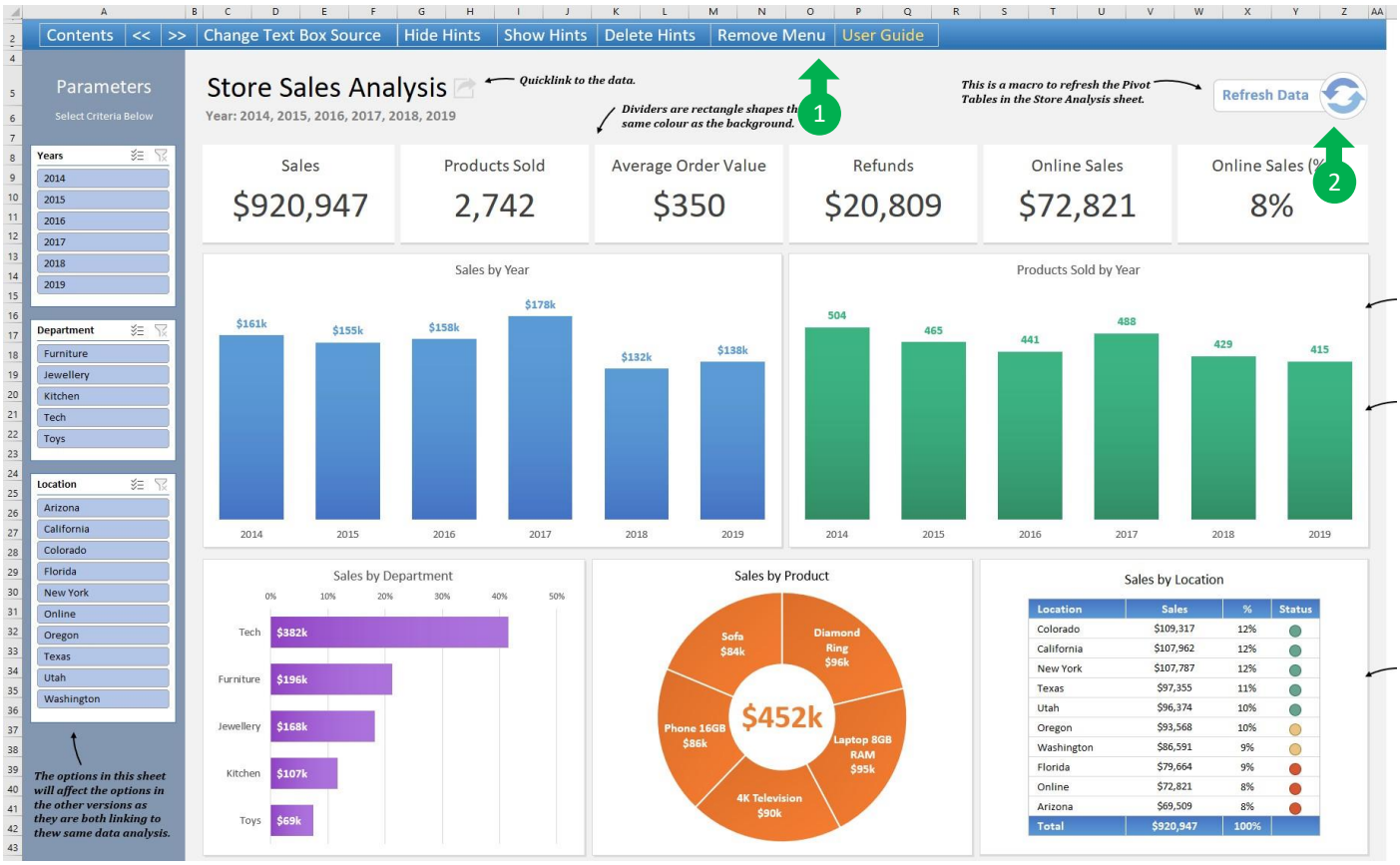
The first sheet that you should see is the Contents sheet **(2)** with thumbnails of all the sheets, from here you can select a sheet and then use the template(s) on that sheet. You should either start from the Epic Excel Template Pack or edit a template and then copy it over to your report. In this example we are going to select the Basic Column and Bar Chart **(3)** as this has the most common features that you will find.



At the top is the Menu Bar **(4)** here you'll find buttons for navigation, changing the text box source, show/hide hints and to remove the Menu Bar. You then have the templates, here we can see four **(5)** with two others at the bottom and one on the right side out of view, clicking on a data series will highlight the underlying data **(6)** which you can change. On Showcase Boards, Dashboards and Executive Summaries that data can be on the left, right or below the main content. You will also find helpful hints **(7)**.

Macros

There are a limited number of macros in the Epic Excel Template Pack the majority of these relate to the Menu Bar **(1)** there is only one template set that uses an optional macro, this the Store Sales Analysis dashboards **(2)** which is used to refresh the underlying pivot tables.



Most of the Menu Bar macros can be accessed through keyboard shortcut keys, whilst some such as Hide Menu Bar / Unhide Menu Bar are only accessible through keyboard shortcut keys. All the shortcuts are list below;

Ctrl + Shift + C	Return to Content
Ctrl + Shift + N	Next sheet
Ctrl + Shift + P	Previous sheet
Ctrl + Shift + H	Hide the menu bar
Ctrl + Shift + U	Unhide the menu bar
Ctrl + Shift + R	Remove the menu bar
Ctrl + Shift + I	Hide Hints
Ctrl + Shift + S	Show Hints
Ctrl + Shift + D	Delete Hints
Ctrl + Shift + T	Change text box source

Change Text Box Source

In various templates and especially the Info Card, Call Outs and Mini Boards a text box is used to display information. To achieve this is a text box using Insert>Shapes>Text Box once the text box is placed on the sheet, in the formula bar you can type for example =A1 and it will display the value from cell A1. You can then format the text box as needed. However, if you then want to change the source data of the text box to say =A2 the value in cell A2 will show in the text box however, the current formatting of the text box will be lost and will reflect the formatting in A2. To prevent this from happening you can use the Change Text Box Source macro, simply select the text box, click Change Text Box Source in the Menu Bar and then select the new cell that you want to link to. The text box will show the value of the cell you selected whilst retaining the original formatting. If you are copying a text box to a different workbook you can select the text box and use the shortcut keys Ctrl + Shift + T to access the Change Text Box Source functionality.

VLOOKUP versus INDEX MATCH

In the Epic Excel Template Pack I have avoided using VLOOKUP formulas instead favouring a combination called INDEX MATCH instead. This is because INDEX MATCH has several advantages over VLOOKUP. Let us take a look at an example VLOOKUP formula.

=VLOOKUP(A1,$B$2:$F$100,3,FALSE)

The VLOOKUP formula states, find the value in A1 in the range B2:F100 and once you find it return the value from the third column in this case column D. The first issue with VLOOKUP is you can only return the values from columns on the right of the column with the criteria you are trying to match so column B onwards, you can't lookup to the left. The second issue is that third, 3, column is hard coded, which means if you insert a column after column B you'll get the wrong result unless you change the 3. Instead we can use a combination of INDEX MATCH instead like this;

=INDEX($F$100,MATCH(A1,$B2:$B100,0))

Here we are saying the result we want is in column F, the criteria is A1 and the criteria is to be found in column B (B2:B100). We can get the result from either side of column B and if we insert columns the results column will change to accommodate the newly inserted column(s). This provides a more flexible formula, you should note that it is also more efficient than VLOOKUP which can be critical when you are working with large data sets.

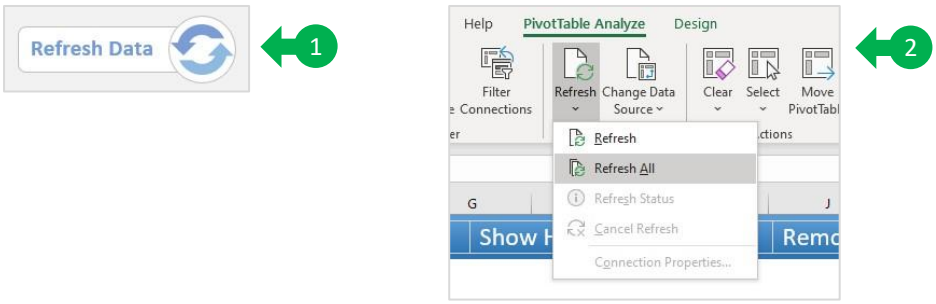
Store Sales Analysis Dashboards

The Store Sales Analysis dashboards are based on the information in the Store Data sheet, if you update this data then the pivot tables in the Store Data Analysis sheet must be updates, the relationship is;

Store Sales Analysis Dashboard ← Store Data Analysis Transforms Data ← Store Data All Transactions

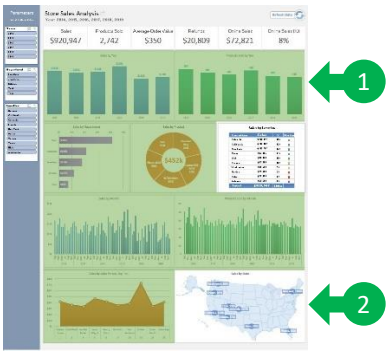
Refreshing Pivot Tables

You can update the pivot tables by clicking the Refresh Data button **(1)** on the Store Sales Analysis dashboard or from the Store Data Analysis sheet click on any pivot table then select PivotTable Analyze>Refresh>Refresh All **(2)**. Note that the Refresh Data macro performs additional checks to ensure your data is complete.



Pivot Charts

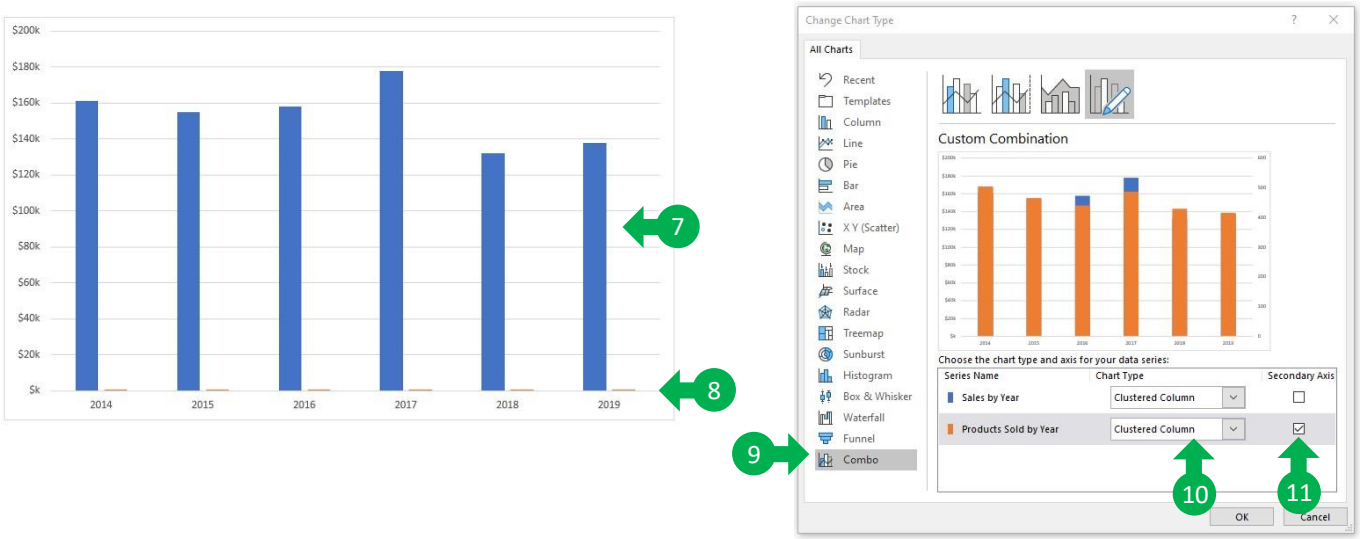
In Excel there are two ways to create a chart, the first is a standard chart based on a range of data, the second is to create a Pivot Chart this is a chart that is based on a Pivot Table. In the Epic Excel Template Pack the Store Sales Analysis dashboard uses Pivot Charts **(1)** for all charts except the US Map Scatter Chart **(2)**. Every other template in the Epic Excel Template Pack uses standard charts.



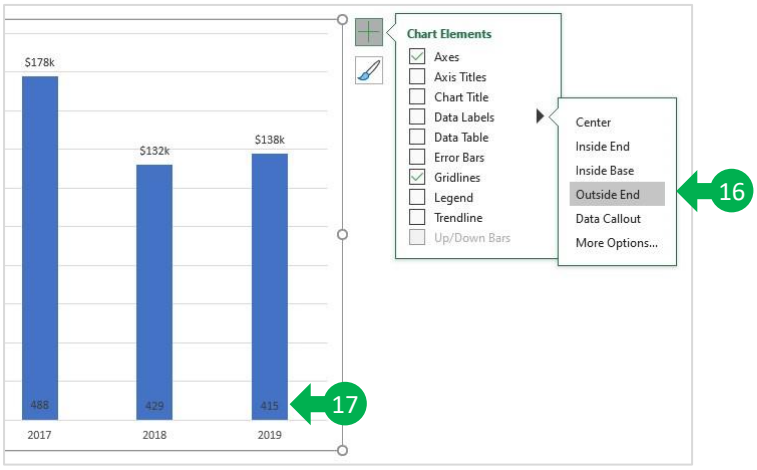
There are a couple of points you should understand about the way Pivot Charts have been created in the Store Sales Analysis dashboards. Below is the Sales by Year chart **(3)** when it was first created based on the Sales by Year pivot table **(4)** in the Store Data Analysis.

The first step is to remove all the fields **(5)** by selecting the chart then clicking PivotChart Analyze>Field Buttons>Hide All. Then select and delete the legend **(6)**. You will then notice that you can see the blue column that represents the Sales by Year **(7)** but also just about the orange bar that represents the Products Sold by Year **(8)** as this chart is suppose to show only Sales by Year we don't want to show the Product Sold by Year columns, in a standard chart we would simple remove the data series, however, in a PivotChart it will always display all the data series in the

underlying pivot table. Therefore we have to hide the series we do no want to show, to do this you will need to turn the column chart into a combination chart by selecting the chart then clicking Design>Change Chart Type from the Change Chart Type box select Combo **(9)** ensure both Series Names have Chart Type as Clustered Column **(10)** and the one that you do not want to show has Secondary Axis ticked **(11)**.



Once you click OK you will then have a chart with both data series on top of each other **(12)** and a second vertical axis **(13)**. The final steps are to select the orange Products Sold by Year column **(14)** and sets it fill to No Fill, and remove the axis you do not need **(15)**, if removing the Secondary Vertical axis causes issues you can simply reduce the font size and change the text to match the background colour (white). You can then add Data Labels **(16)** ensuring you select and delete the Data Labels for the series you do not want show **(17)**.



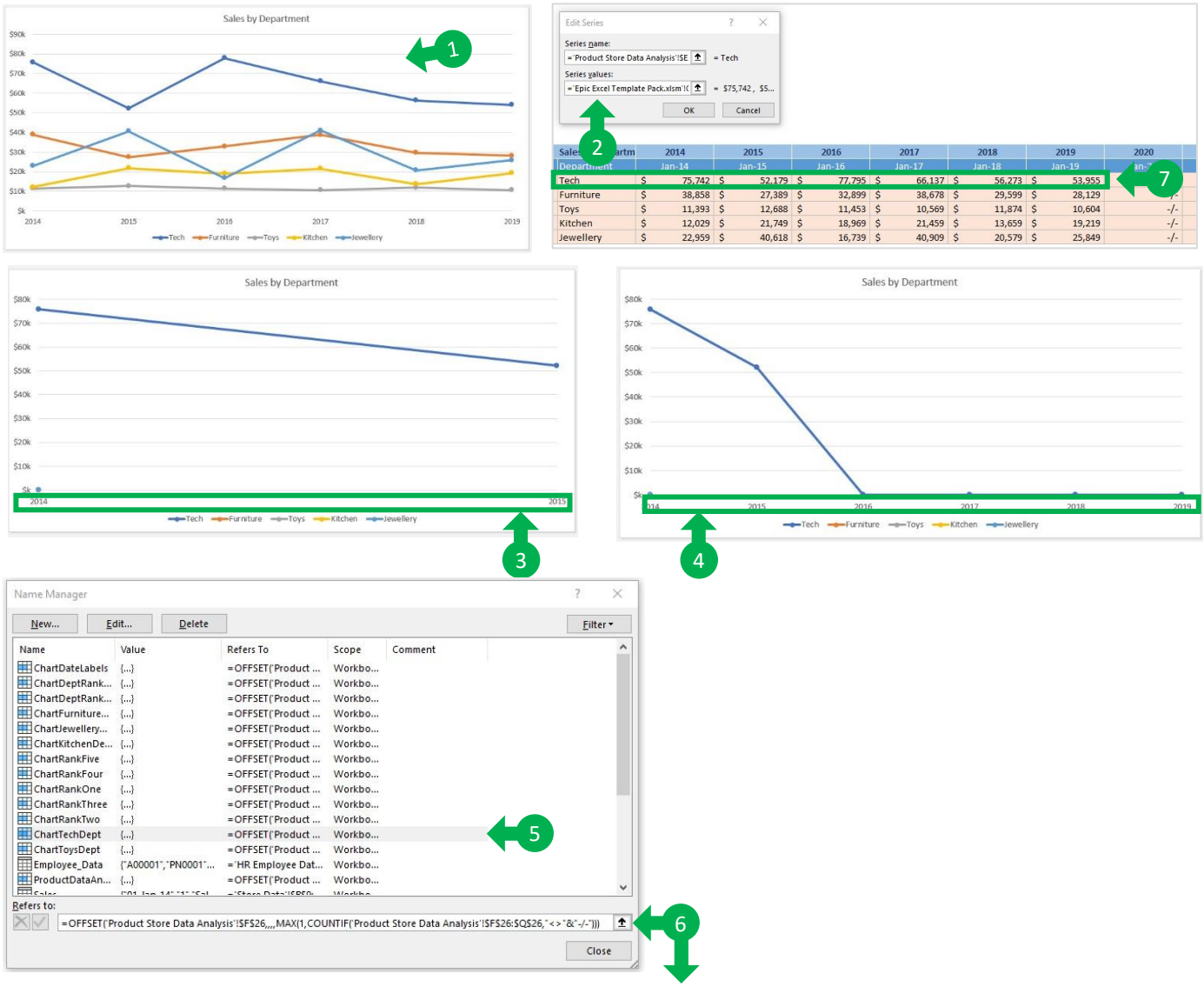
Product Sales Analysis Dashboards

The Product Sales dashboards are based on the information in the Store Data sheets, if you update this data then the Product Store Data Analysis sheet automatically updates as it only contains formulas, the relationship is illustrated below;

Product Sales Dashboard ← Product Store Data Analysis – Transforms Data ← Store Data – All Transactions

Sales by Department Chart

The Sales by Department chart **(1)** is a standard chart however, unlike other charts it does not directly reference a range. If you look at the Series Values for the Tech Department you can see it references a Named Range in the manner ='Epic Excel Template Pack.xlsm'!ChartTechDept **(2)** rather than a normal cell reference. The reason for this is because we only want to show a line for years where data exists **(3)** e.g. 2014 and 2015 rather than plotting all the years on the horizontal axis and showing data for just the first year(s). **(4).**




```
=OFFSET('Product Store Data Analysis'!$F$26,,,,MAX(1,COUNTIF('Product Store Data Analysis'!$F$26:$Q$26,"<>"&"-/-")))
```

The Named Range ChartTechDept **(5)** accessed via Formula>Name Manager is a formula **(6)** which creates a range which starts at Product Store Data Analysis'!$F$21 then it counts the number of times a sales figure exists in the Tech row from F to Q, in this case 6 **(7)** and adds that to F to create the second part of the range K21 so the range for the name ChartTechDept is calculated as Product Store Data Analysis'!$F$21:$K$21.

Excel Tables and Ranges

The following dataset use Excel Table instead of a range;

Web Analytics Data
HR Employee Data
Store Data

Using a table has several advantages over using a basic range, the first thing you will notice is that for formulas we can use headings, for example in the Store Data the data is an Excel table named Sales. For the sum of Sales the formula uses the column heading so we can write =sum(Sales[Sales]) which means sum the column called Sales in the table Sales. In a range based formula we would use =sum(P9:P2750), an advantages of a table is that when you add a new entry you don't have to worry about expanding the sum range.

One of the disadvantages of using a table (it may be an Excel bug/or misunderstanding) is that if you create a formula that uses headings and then fill/drag the formula to other cells, the headings in the formula change in the same way a relative reference would in a standard range based formula. To get around this copy the formula, then select the cells you want to paste the formula, right-click and from Paste Special use Paste Formulas.