

Title: Excel Dashboard Add-In – User Guide

Getting Started:

Installation:

Open Excel and navigate to Insert > Get Add-ins.

Search for “Excel Dashboard Add-In” and click Add.

The add-in appears in your ribbon. Click the Dashboard button to launch.

Creating Your First Dashboard:

Upon first load, a default title widget is displayed.

Click Add Widget and choose from charts, metrics, text boxes, Gantt charts, and more.

Use the toolbar to drag and position widgets. Adjust their size by dragging from the corners.

Connecting Data:

For charts and metrics, select Edit Widget and specify the worksheet name and cell range that contains your data.

After confirming, the add-in automatically pulls values and updates the visualization.

Customizing Appearance:

Click the edit icon on any widget to adjust colors, fonts, titles, and alignment.

Use the title widget to give your dashboard a descriptive headline.

Experiment with line widgets to visually separate sections.

Project Management Template & Gantt Charts:

Use Insert Project Management Template to create a specialized worksheet with tasks and dates.

Generate a Gantt chart widget to visualize task timelines and dependencies.

Saving and Sharing:

Click Save to store changes locally. The dashboard layout and data associations are preserved.

Export as PDF from the toolbar to generate a sharable snapshot.

For advanced scenarios, use Presenter Mode to show your dashboard full-screen.

Tips & Best Practices:

Keep metrics concise and highlight critical KPIs.

Use consistent colors and fonts for a professional look.

Refresh charts regularly to ensure you're viewing the latest data.

Troubleshooting:

If data doesn't appear: Check that the correct worksheet name and cell range have been provided.

If a widget's size or position isn't updating: Try toggling edit mode or refreshing the page.

For technical issues, contact support at [Support Link].

3. Support and Troubleshooting Guide (PDF)

Title: Excel Dashboard Add-In – Support & Troubleshooting

Common Issues:

Widget Not Updating:

Verify that the cell addresses and worksheet names for metrics or charts are correct.

Use the Refresh All Charts button on the toolbar to re-pull data from Excel.

Add-In Not Visible or Not Loading:

Ensure that you are signed into Microsoft 365 and have the correct permissions.

Check the Office Add-ins panel in Excel to confirm the add-in is enabled.

Data Validation Errors in Gantt Sheets:

The Gantt template uses data validation. If you encounter invalid entries, correct them based on the prompts or tooltips.

Undo/Redo Not Working as Expected:

Undo/redo functionality relies on an internal state history. If your dashboard is brand new or recently reloaded, try performing a new action first, then use undo/redo.

Performance Issues:

Large workbooks or complex dashboards may slow down updates.

Try closing other Excel workbooks or reducing the number of widgets.

Frequently Asked Questions (FAQ):

Q: Can I use this add-in offline?

A: The add-in requires an online environment for full functionality, especially for data refreshes.

Q: How often do charts refresh automatically?

A: Charts refresh on demand when you click the refresh button. They do not auto-refresh in real-time unless triggered by certain Excel worksheet changes.

Q: Can I integrate external data sources?

A: Data must be present in your Excel workbook. You can import external data into Excel using standard methods, then reference those ranges in the add-in.

Support Contacts:

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Support Link: <https://chitek.co.site/>

For additional resources, visit the product documentation or reach out.