# Uploading MS Excel Templates

Report Writer has a functionality to add Excel files to report templates. This means the report data will save to the defined sheet within the Excel file allowing any pivot tables and calculations you previously formatted to refresh with the new data.

This can save a lot of time especially if you often run the same report and wish to analyse the data using MS Excel Pivot Tables and Graphs.
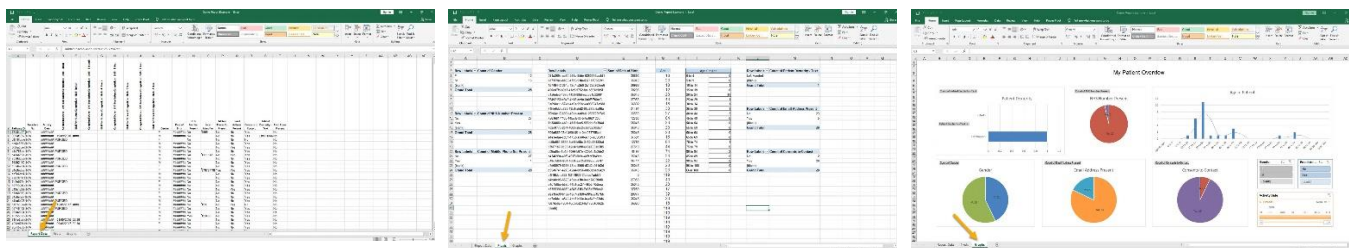

See above the Excel Workbook we formatted earlier. We have the 'Report Data' sheet which we gathered from a report we had built and run in Amplitude. A sheet with our Pivot Tables and some calculations and a sheet with graphs to display our data.

Before we go to Amplitude and upload the document, we need to clear the data.

Go to the Report Data sheet and clear all the information leaving only the column headings (rows 1 and 2).
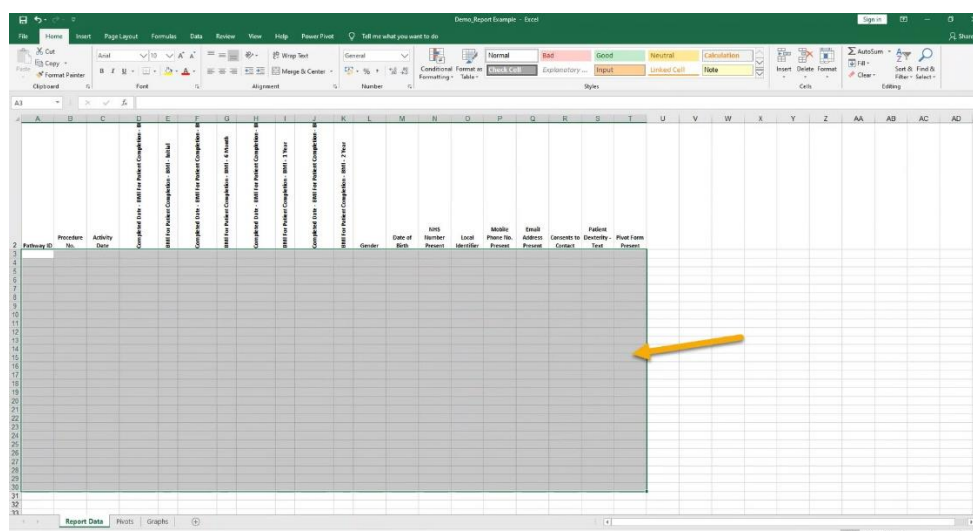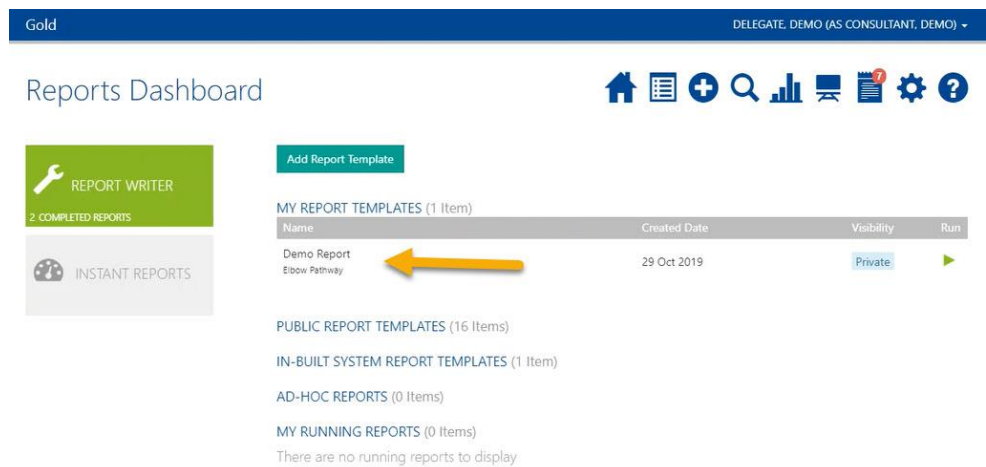
Go to the sheet with the PivotTables, click on one of the tables to open the PivotTable Tools, click Analyze, then Refresh and Refresh All.
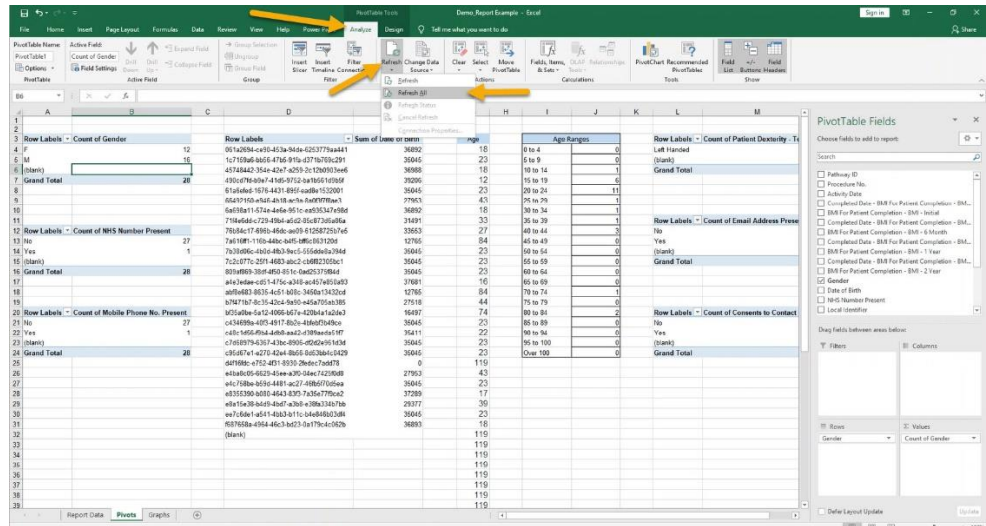
All the Pivot Tables should then be empty.

Save and close the document.

Go to Amplitude and find the report you originally got the data from. Click into the report to edit the template.

Click 'Choose File' and open the document you just saved.
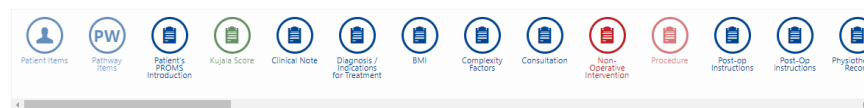
Then into the 'Excel Worksheet Name' box enter the name of the sheet which had the raw data on, in this case it was Report Data and will normally be this unless you have specifically changed it. Bear in mind this is case sensitive. Scroll down and click Save.

Next time you need the report, run it as you normally would. Download the file and open in Excel.
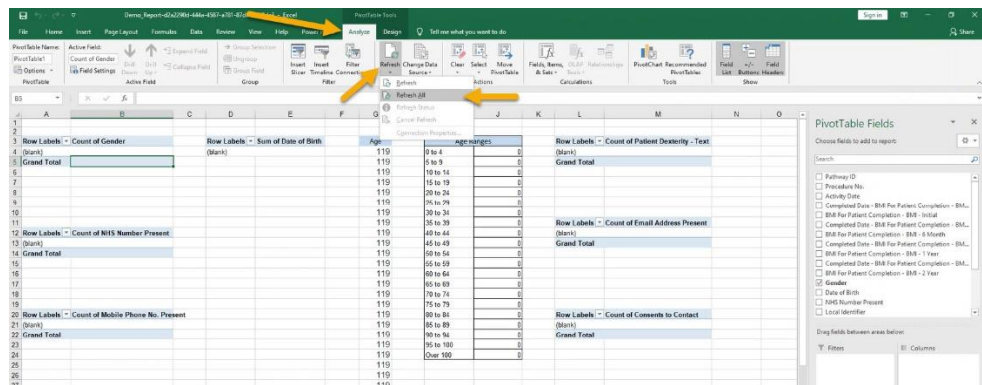
Click Enable Editing in the top yellow bar.

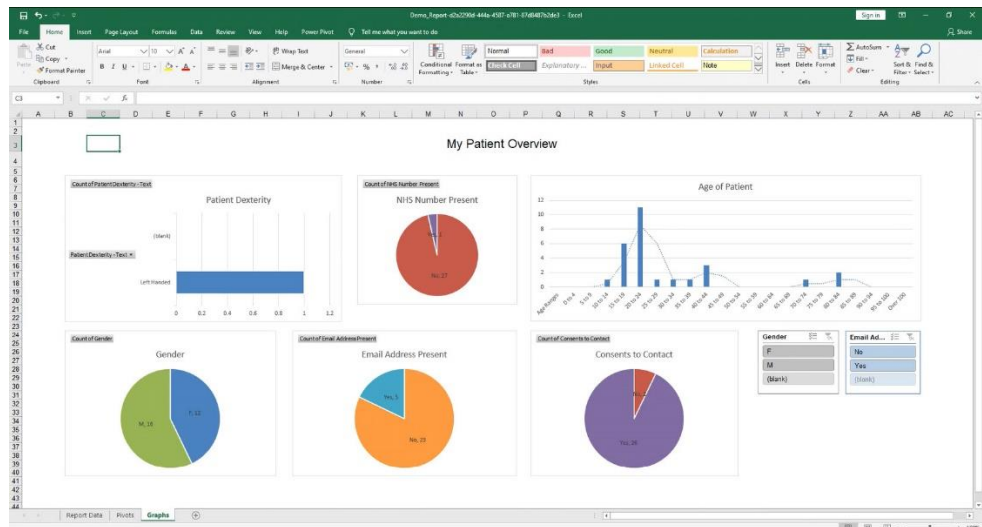The data will automatically save in the Report Data sheet.
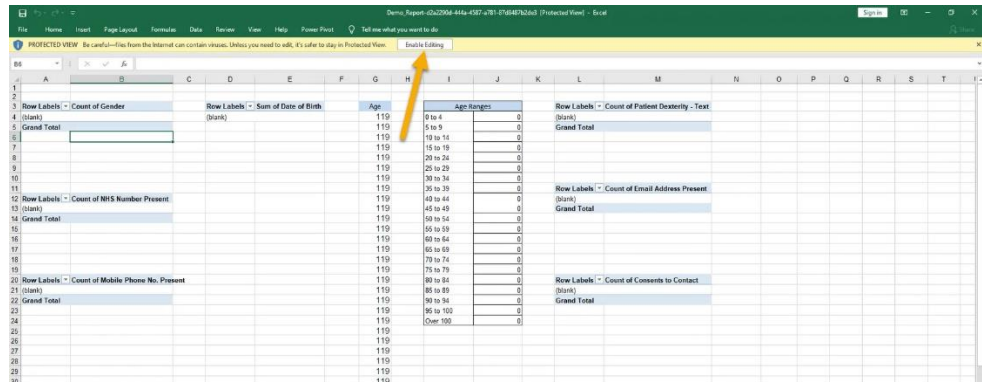
Go to the sheet with the pivot tables, click on one of the tables to open the PivotTable Tools, click Analyze, then Refresh and Refresh All.

The PivotTables should then all refresh with the new data.

The graphs will also have refreshed.

Troubleshooting: Pivot tables not refreshing properly

If the pivot tables do not fresh properly with the new data this is because either:

- The new data is causing the pivot tables to overlap - to solve this cut and paste the pivot table which is causing the problem to another space in the sheet and try refreshing again.

- The Report Data column headings have changed. This may have been caused by a system upgrade or a clinical change to the pathway. To fix this re-select the pivot table fields.