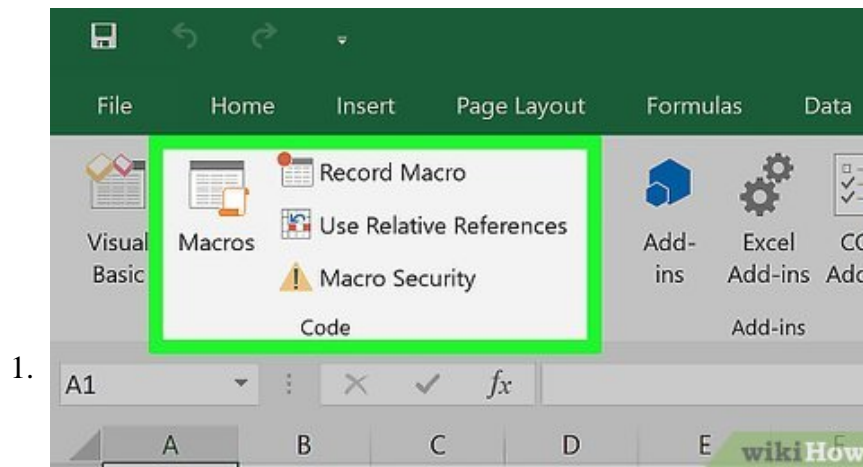


# How to Automate Reports in Excel

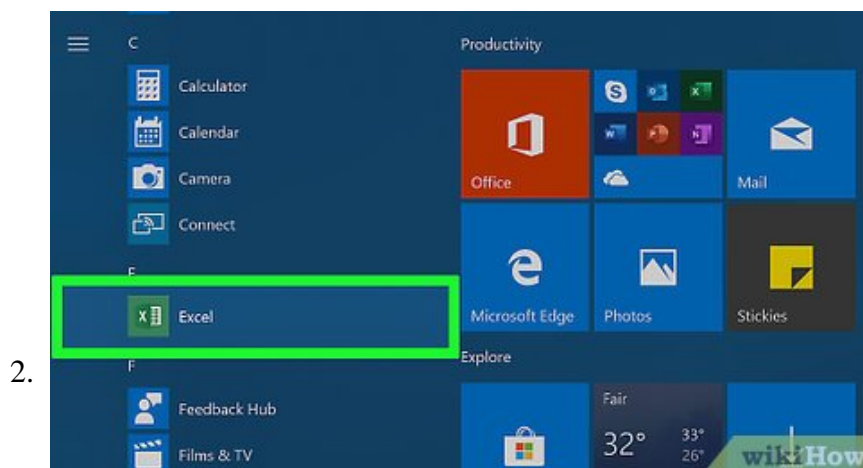
This wikiHow teaches you how to automate the reporting of data in Microsoft Excel. For external data, this wikiHow will teach you how to query and create reports from any external data source (MySQL, Postgres, Oracle, etc) from within your...

Method 1 of 2:

## For Data Already In Excel

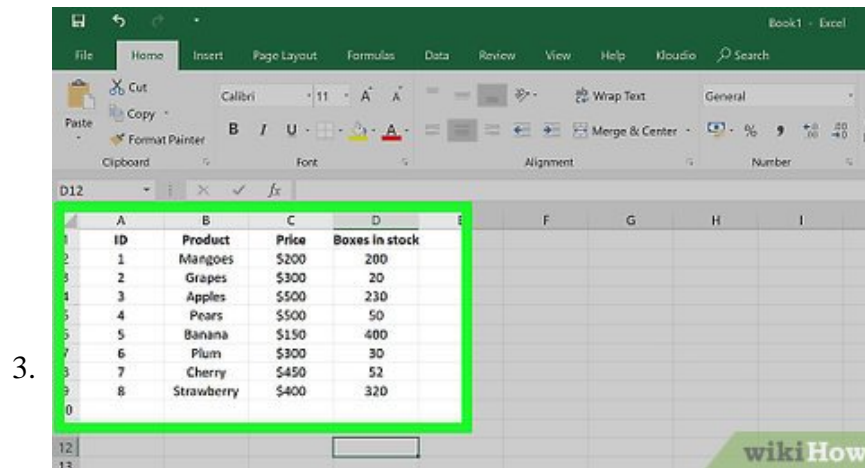


**If the data you need to report on is already stored, updated, and maintained in Excel, you can automate reporting workflows using Macros.** Macros are a built in function that allow you to automate complex and repetitive tasks.

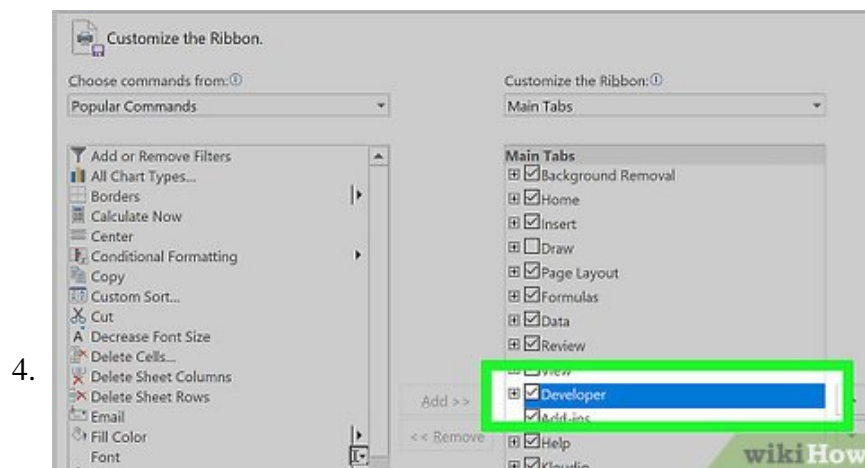


**Open Excel.** Double-click (or click if you're on a Mac) the Excel app icon, which resembles a white "X" on a green background, then click **Blank Workbook** on the templates page.

1. On a Mac, you may have to click **File** and then click **New Blank Workbook** in the resulting drop-down menu.
2. If you already have an Excel report that you want to automate, you'll instead double-click the report's file to open it in Excel.

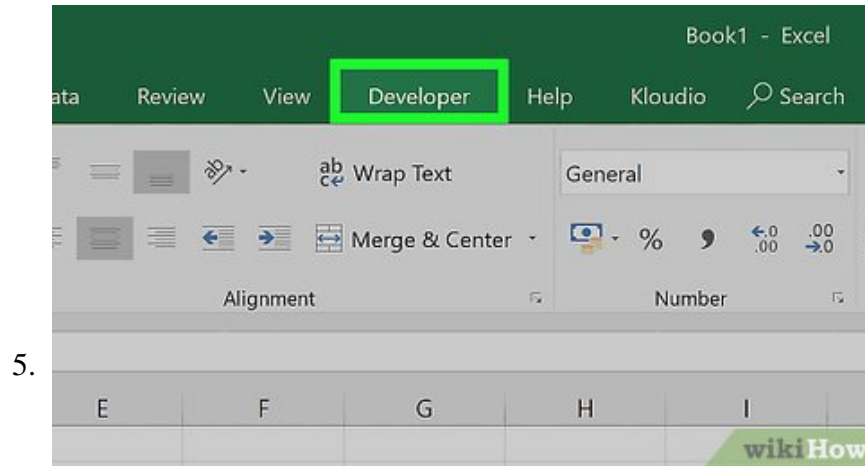


**Enter your spreadsheet's data if necessary.** If you haven't added the column labels and numbers for which you want to automate results, do so before proceeding.

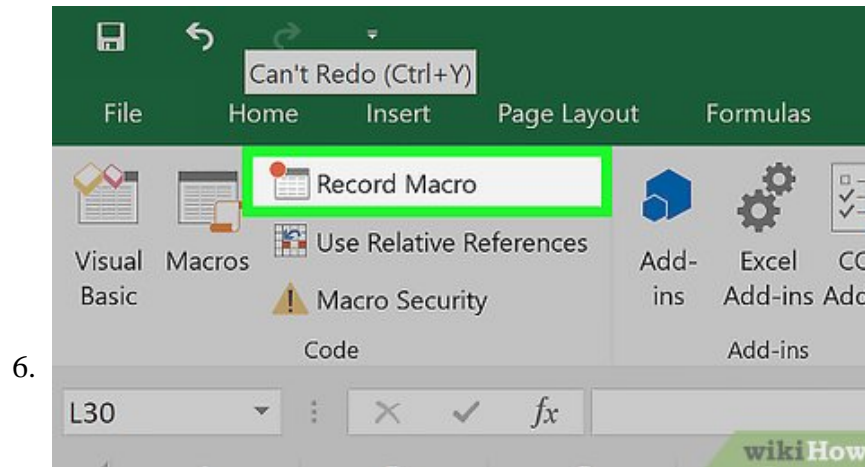


**Enable the **Developer** tab.** By default, the **Developer** tab doesn't show up at the top of the Excel window. You can enable it by doing the following depending on your operating system:

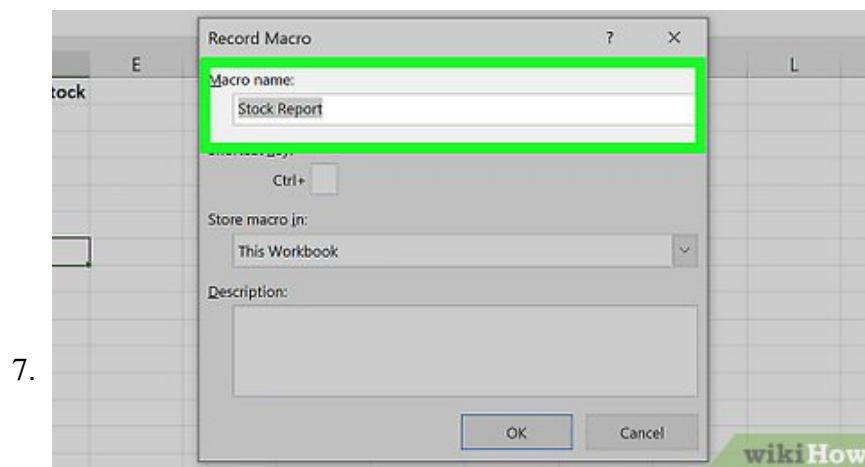
1. *Windows* — Click **File**, click **Options**, click **Customize Ribbon** on the left side of the window, check the "Developer" box in the lower-right side of the window (you may first have to scroll down), and click **OK**.<sup>[1]</sup>
2. *Mac* — Click **Excel**, click **Preferences...**, click **Ribbon & Toolbar**, check the "Developer" box in the "Main Tabs" list, and click **Save**.<sup>[2]</sup>



Click **Developer**. This tab should now be at the top of the Excel window. Doing so brings up a toolbar at the top of the Excel window.

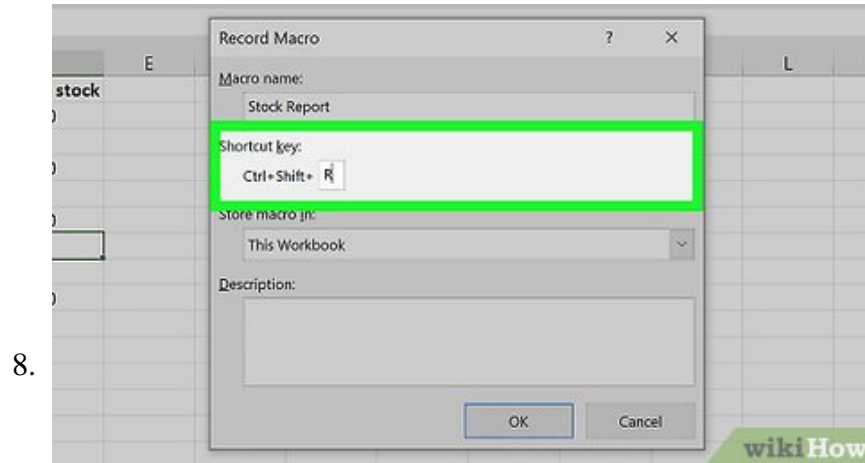


Click **Record Macro**. It's in the toolbar. A pop-up window will appear.



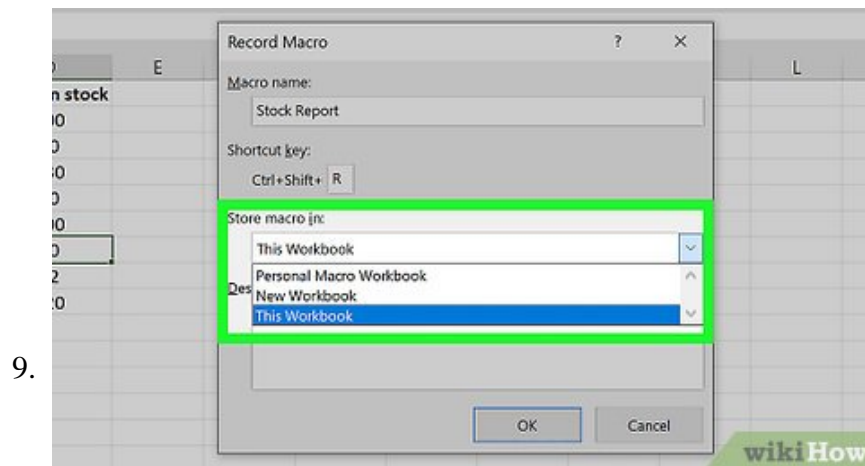
**Enter a name for the macro.** In the "Macro name" text box, type in the name for your macro. This will help you identify the macro later.

1. For example, if you're creating a macro that will make a chart out of your available data, you might name it "Chart1" or similar.



**Create a shortcut key combination for the macro.** Press the **Shift** key along with another key (e.g., the **T** key) to create the keyboard shortcut. This is what you'll use to run your macro later.

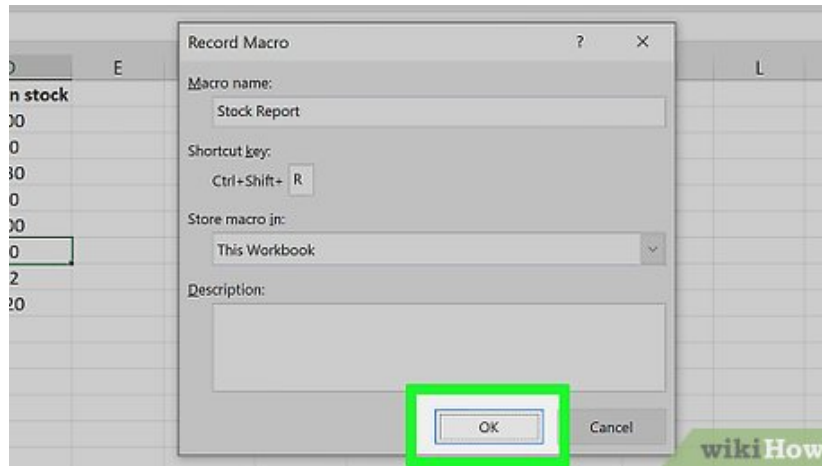
1. On a Mac, the shortcut key combination will end up being **Option + Command** and your key (e.g., **Option + Command + T**).



**Store the macro in the current Excel document.** Click the "Store macro in" drop-down box, then click **This Workbook** to ensure that the macro will be available for anyone who opens the workbook.

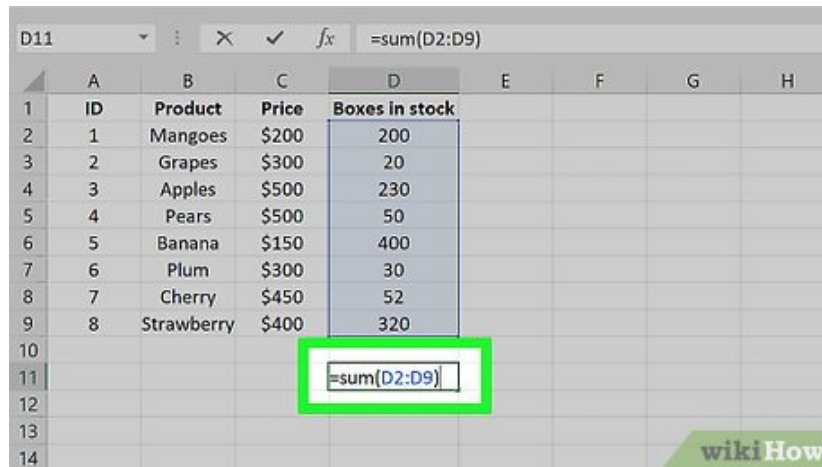
1. You'll have to save the Excel file in a special format for the macro to be saved.

10.



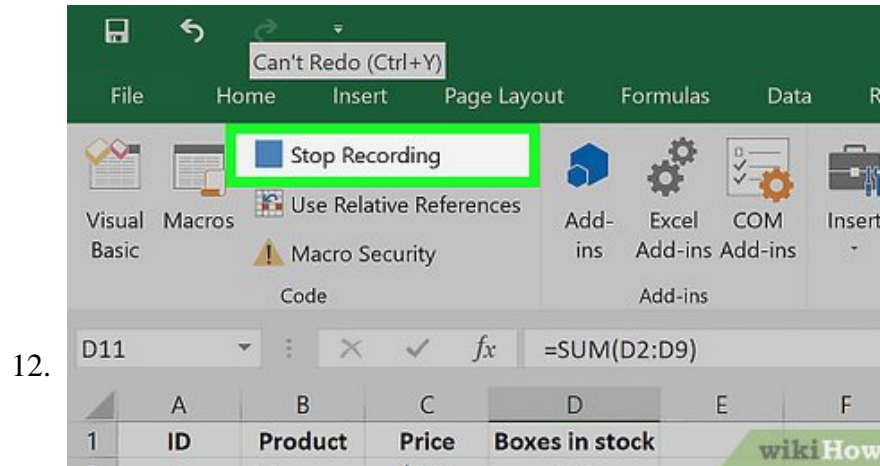
Click **OK**. It's at the bottom of the window. Doing so will save your macro settings and place you in record mode. Any steps you take from now until you stop the recording will be recorded.

11.

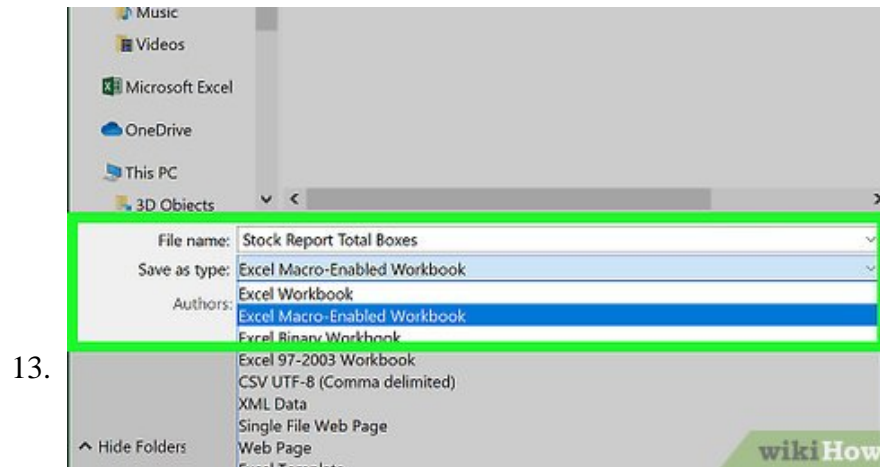


**Perform the steps that you want to automate.** Excel will track every click, keystroke, and formatting option you enter and add them to the macro's list.

1. For example, to select data and create a chart out of it, you would highlight your data, click **Insert** at the top of the Excel window, click a chart type, click the chart format that you want to use, and edit the chart as needed.
2. If you wanted to use the macro to add values from cells **A1** through **A12**, you would click an empty cell, type in `=SUM ( A1 : A12 )`, and press **Enter**.

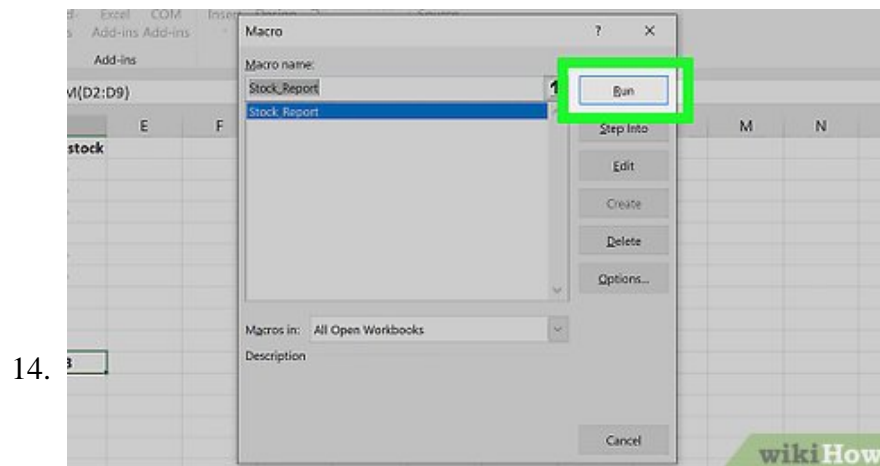


Click **Stop Recording**. It's in the **Developer** tab's toolbar. This will stop your recording and save any steps you took during the recording as an individual macro.



**Save your Excel sheet as a macro-enabled file.** Click **File**, click **Save As**, and change the file format to **xlsm** instead of **xls**. You can then enter a file name, select a file location, and click **Save**.

1. If you don't do this, the macro won't be saved as part of the spreadsheet, meaning that other people on different computers won't be able to use your macro if you send the workbook to them.

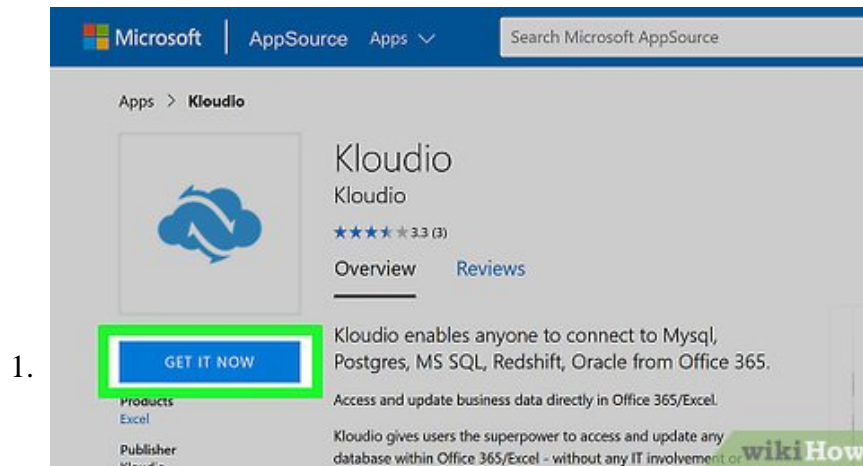


**Run your macro.** Press the key combination which you created as part of the macro to do so. You should see your spreadsheet automate according to your macro's steps.

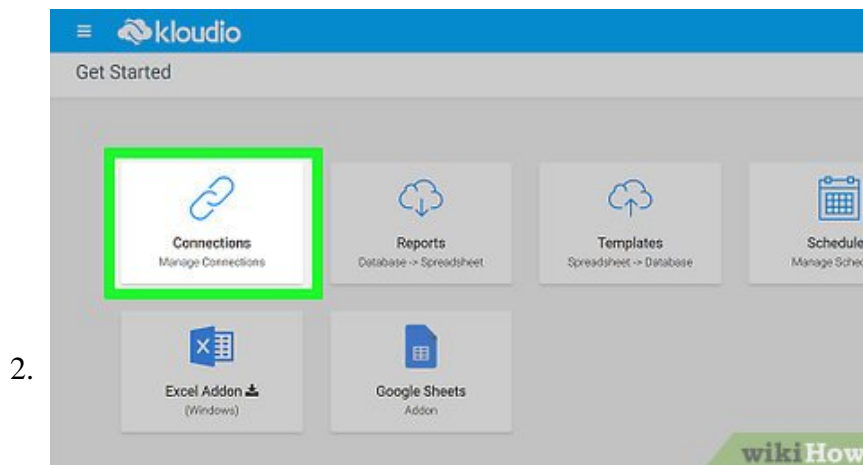
1. You can also run a macro by clicking **Macros** in the **Developer** tab, selecting your macro's name, and clicking **Run**.

Method 2 of 2:

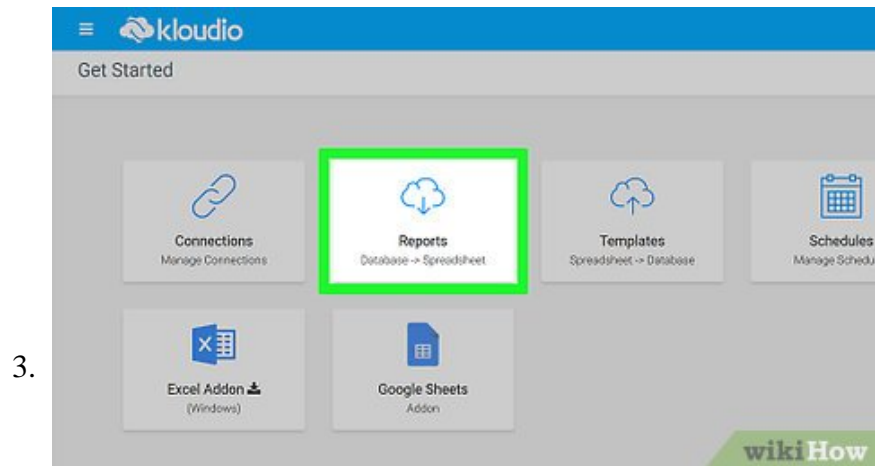
## For External Data (MySQL, Postgres, Oracle, etc)



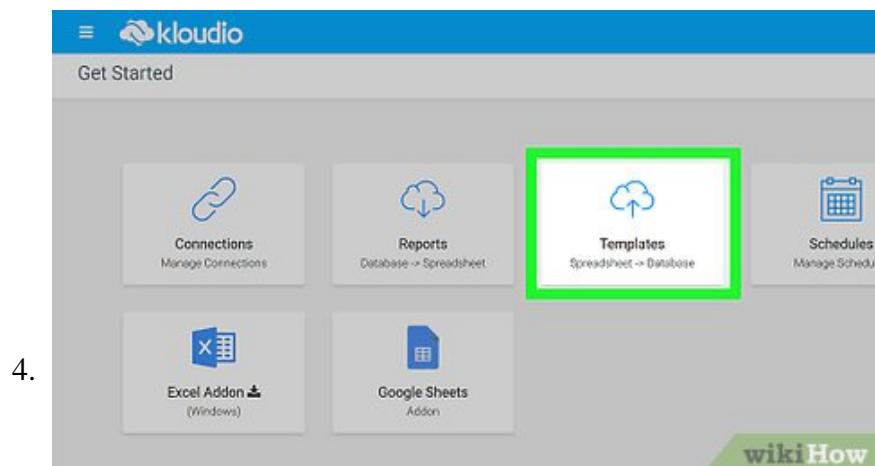
**Download Kloudio's Excel plugin from Microsoft AppSource.** This will allow you to create a persistent connection between an external database or data source and your workbook. This plugin also works with Google Sheets.



**Create a connection between your worksheet and your external data source by clicking the + button on the Kloudio portal.** Type in the details of your database (database type, credentials) and select any security/encryption options if working with confidential or company data.



Once you've created a connection between your worksheet and your database, you will be able to query and build reports from external data without leaving Excel. Create your custom reports from the Kloudio portal and then select them from the drop-down menu in Excel. You can then apply any additional filters and choose the frequency that the report will refresh (so you can have your sales spreadsheet update automatically every week, day, or even hour.)



In addition, you can also input data into your connected worksheet and have the data update your external data source. Create an upload template from the Kloudio portal and you will be able to manually or automatically upload changes in your spreadsheet to your external data source.

You finished reading the article "**How to Automate Reports in Excel**" edited by the [TipsMake](#) team. We hope this article has provided you with many useful tech tips and tricks. You can search for similar articles on tips and guides. Thank you for reading and for following us regularly.