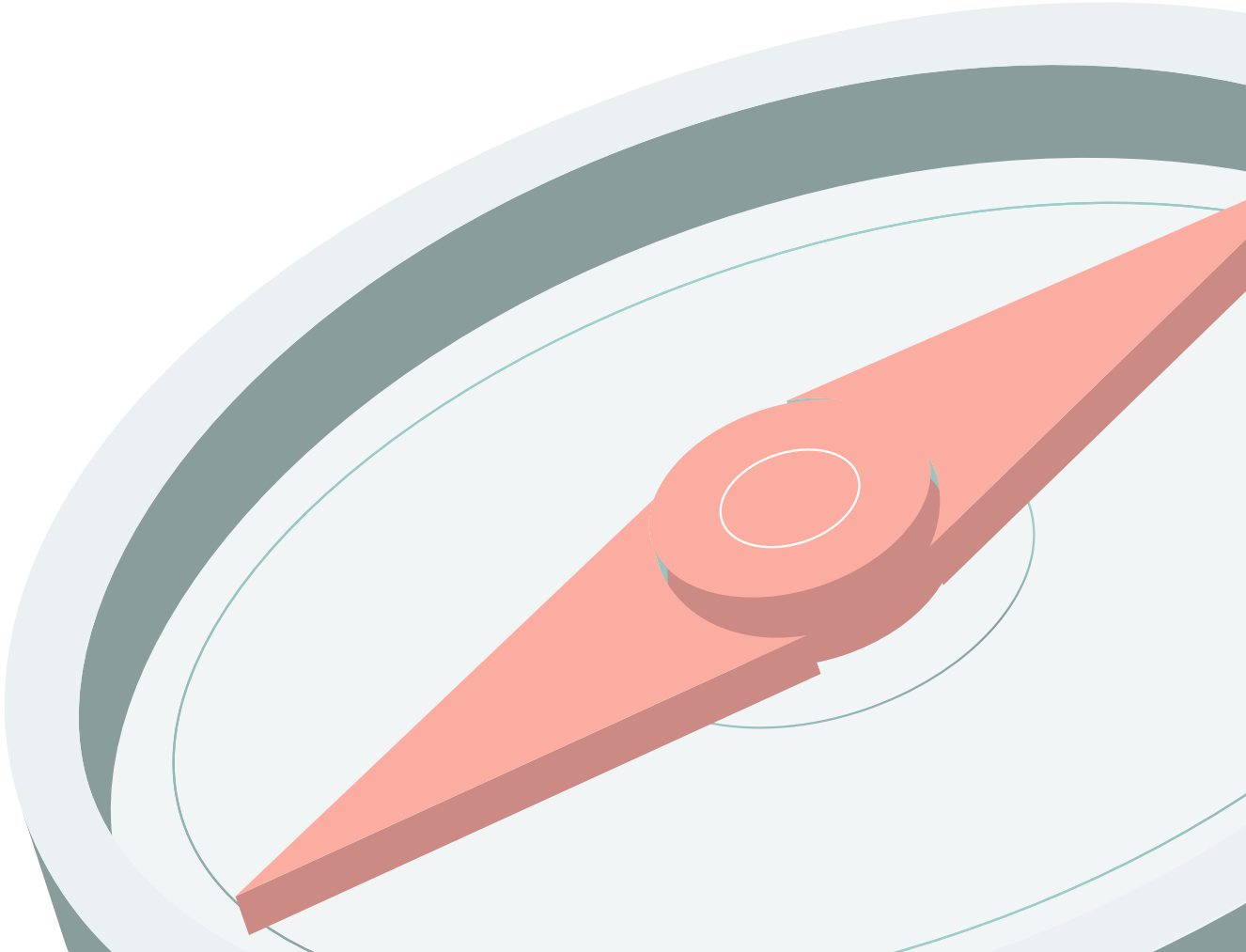
10/10/2023

PERFECTXL

EXPLORE

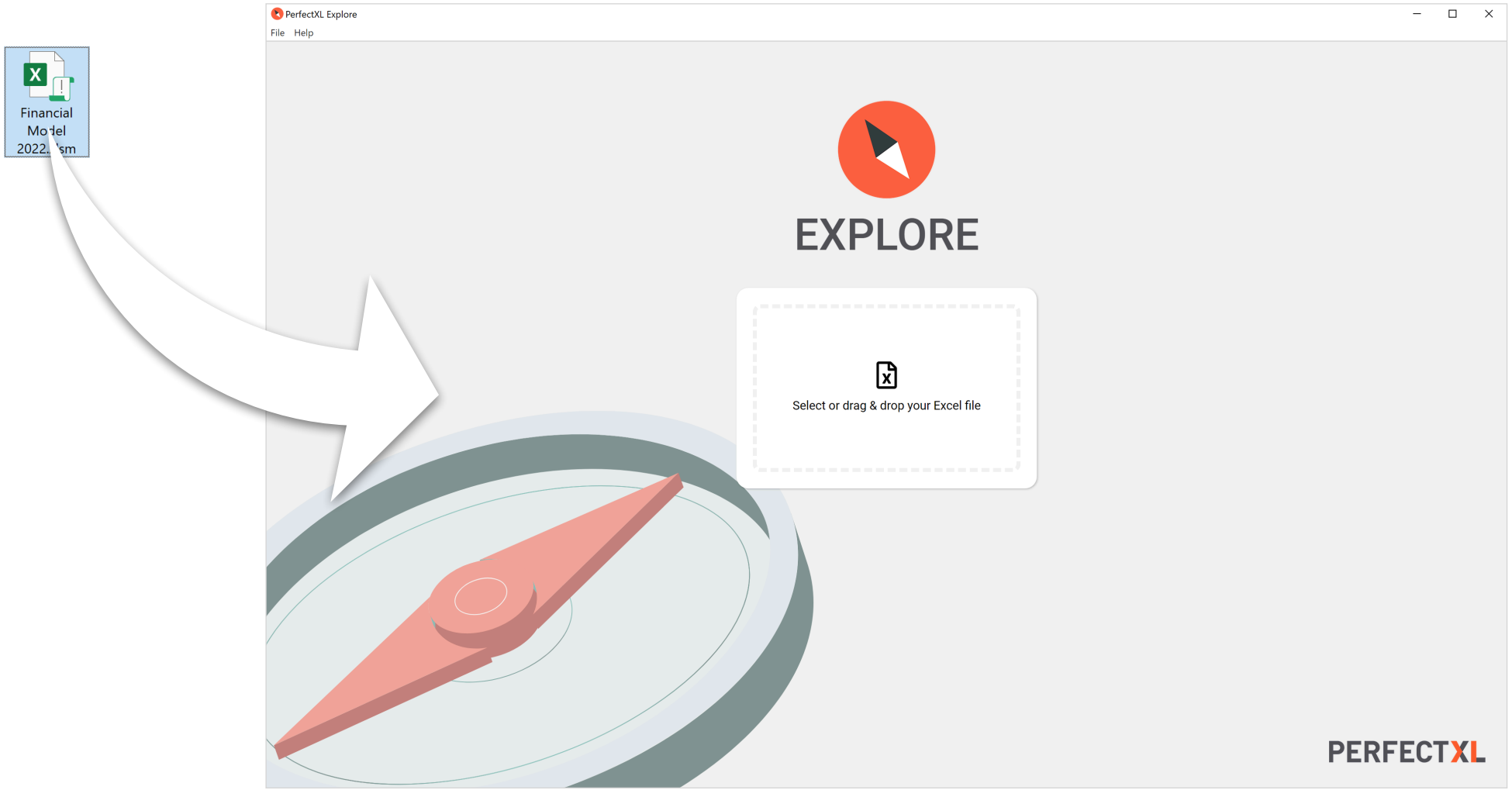
User Manual v1.4



PERFECTXL Suite

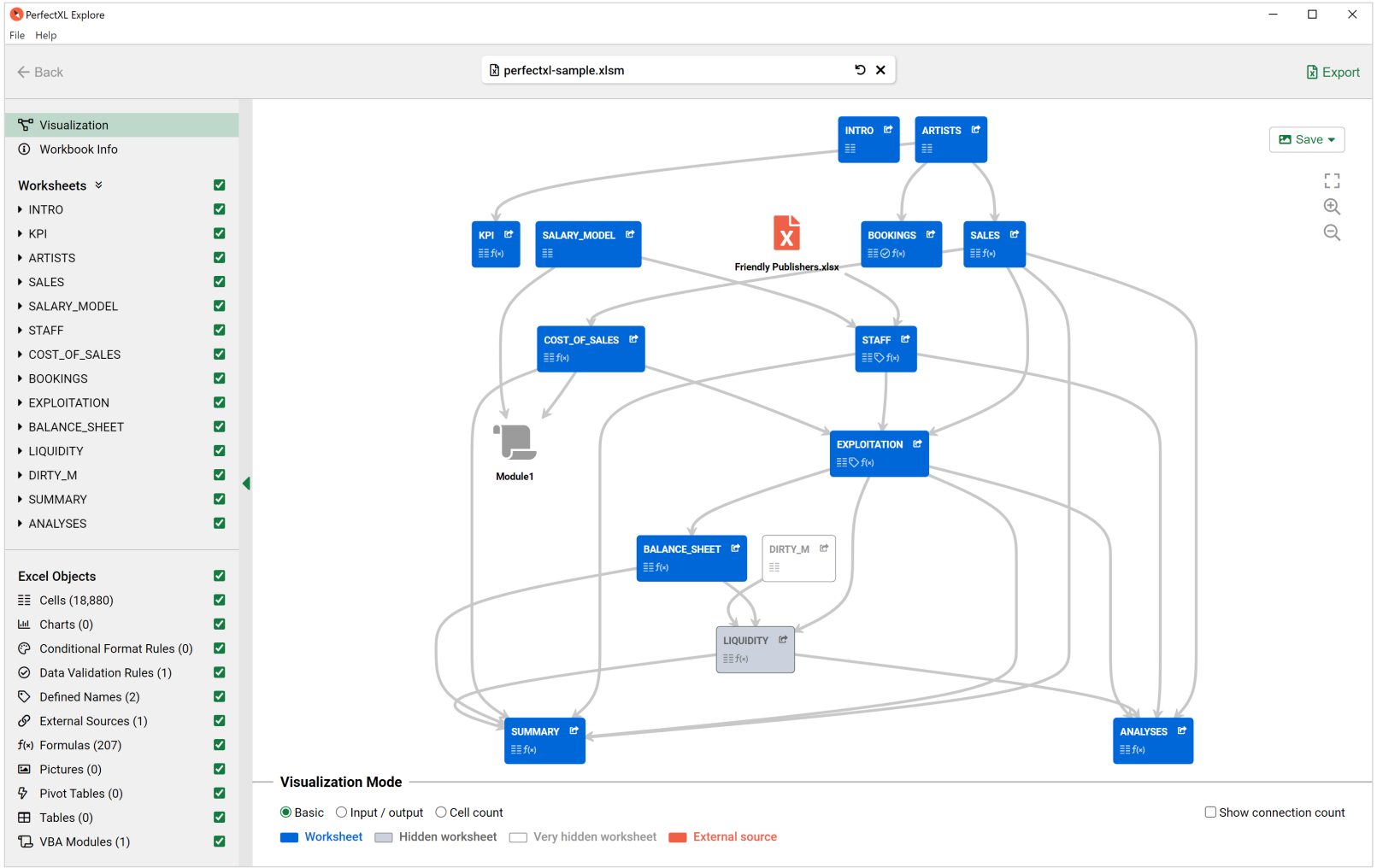
Getting started

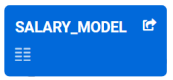
Drag a spreadsheet into PerfectXL Explore to begin analyzing it.



Overview

PerfectXL Explore opens with a visualization of the workbook structure. Options on the lefthand side allow you to explore elements in your spreadsheet by worksheet or by object type, such as charts, formulas and pivot tables.





Blocks represent worksheets

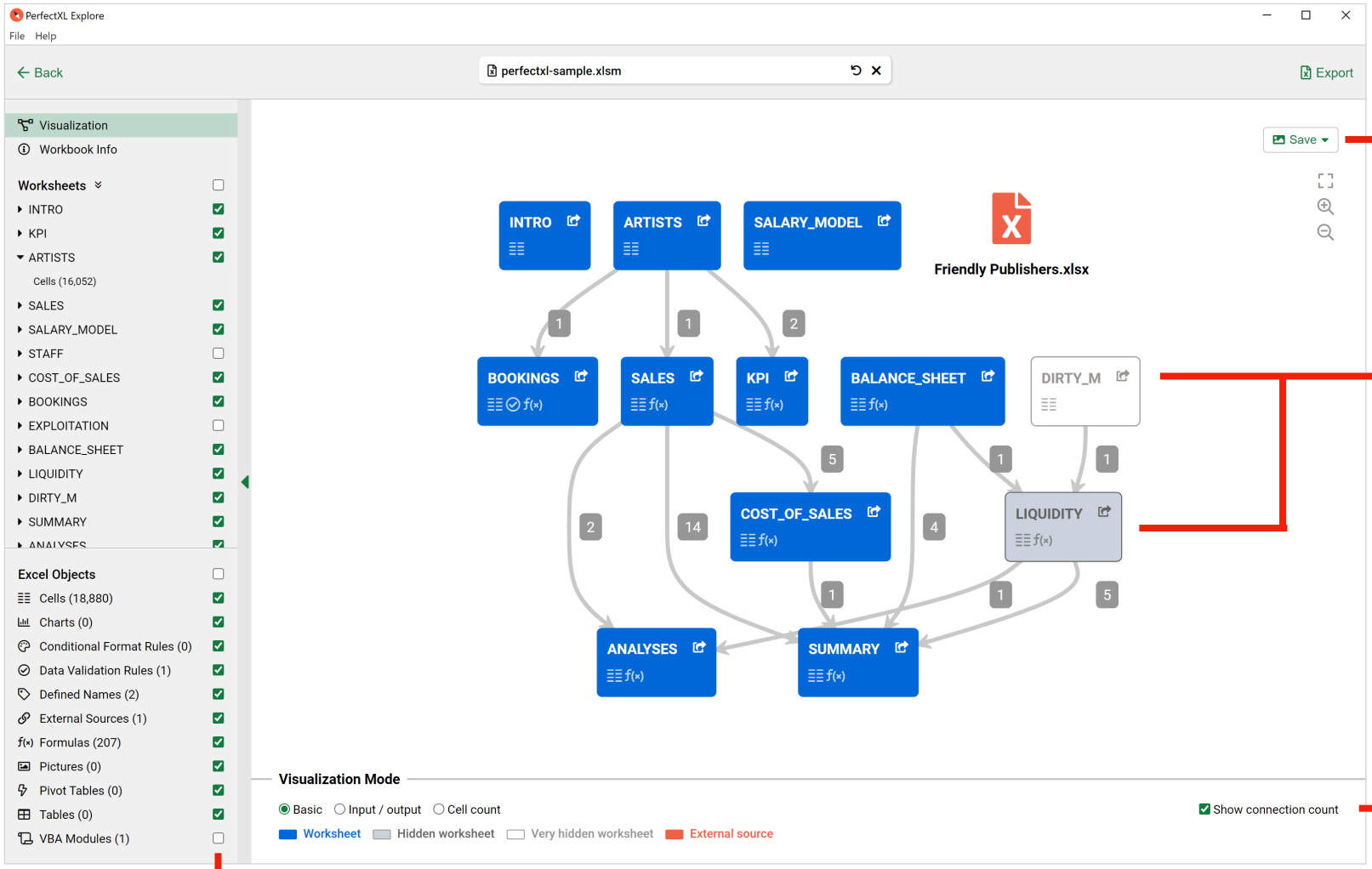
Special cases, such as globally defined names, VBA modules or external sources, are given their own shapes.

Arrows indicate flow of information

For example, an arrow pointing from sheet A to sheet B could indicate a formula in sheet B is referring to cells in sheet A.

Exploring a spreadsheet model

The visualization shows key relations between worksheets, VBA-code and external dependencies.



At any time, click here to save the currently shown visualization as PNG, SVG or PDF.
This could be helpful when documenting a model.

Light-coloured worksheets are (very) hidden in Excel

Click on this icon to jump to the worksheet in Excel

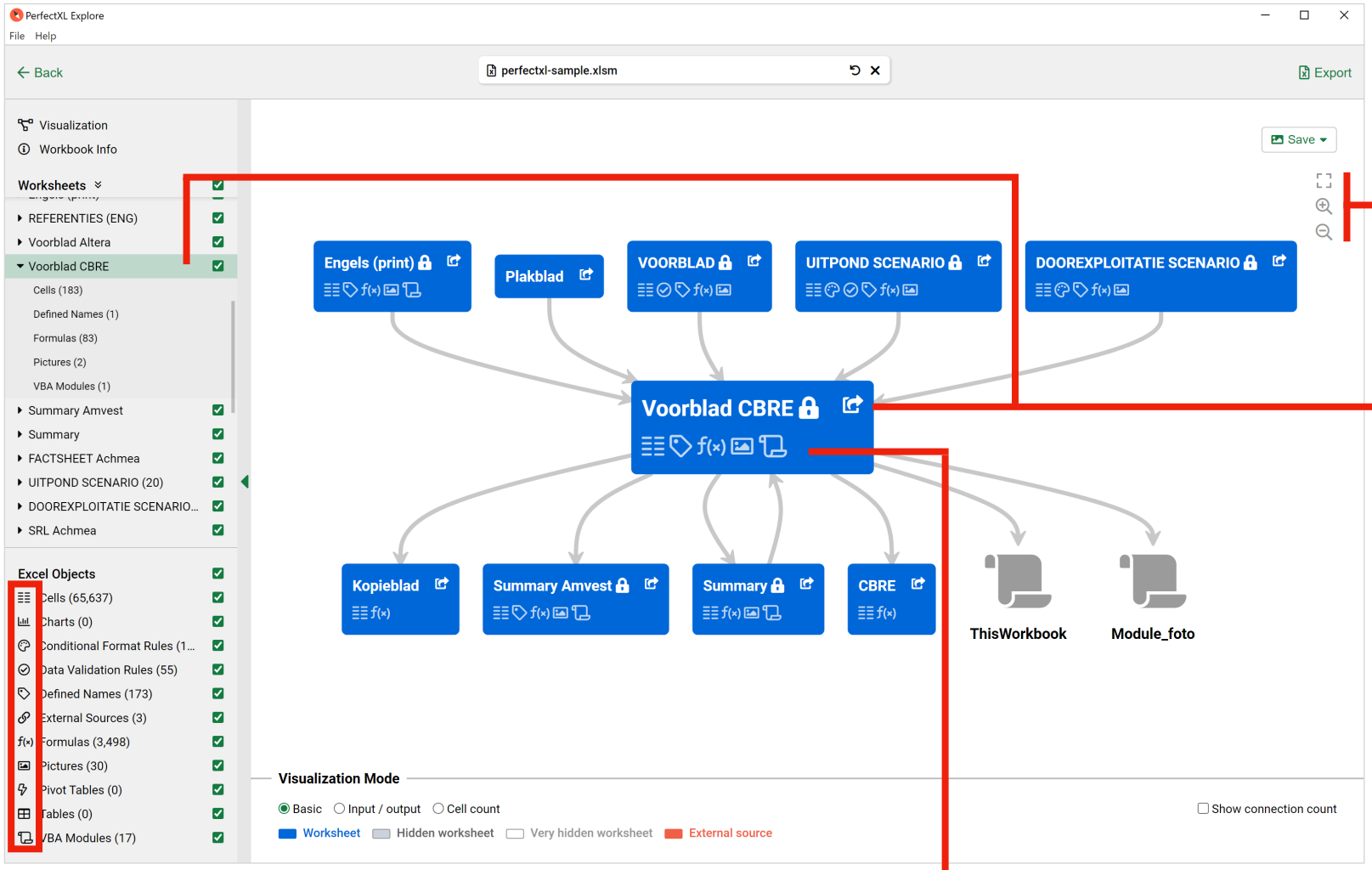
Check to display how many connections (e.g. cell references) link two items.

5

Uncheck any worksheet or Excel object type to exclude it from the visualization

Getting up close

Zoom, pan around or click any worksheet in the side panel or in the visualization to focus on that worksheet.



Use these buttons to zoom in and out

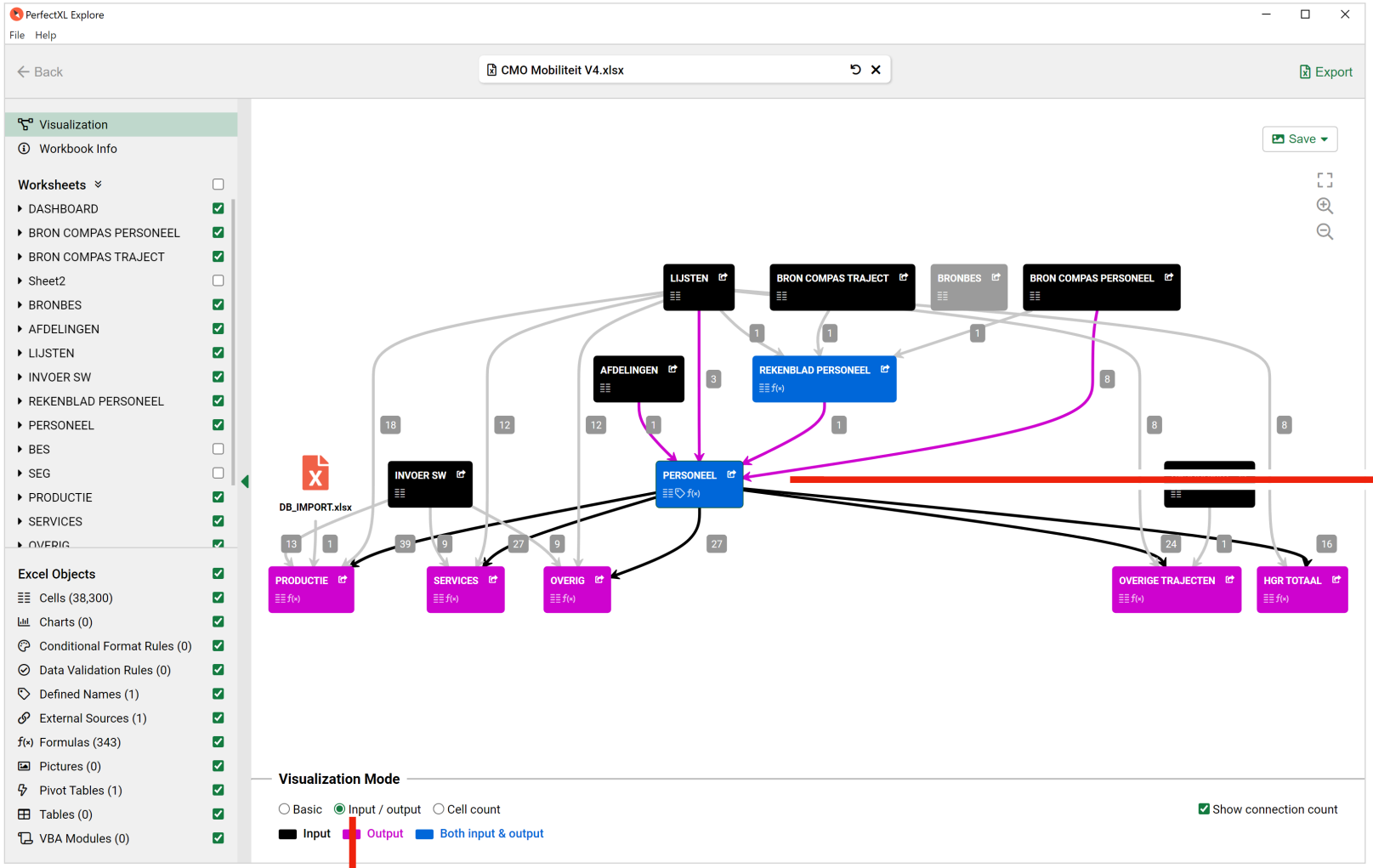
The ⛶ re-centres and resets the scaling to 100%

The active worksheet in the side panel takes centre stage in the visualization. Only directly related worksheets and objects are included in the visualization.

These icons correspond to the icons under Excel Objects and show at a glance what sort of things can be found inside a worksheet

Understanding input & output

What are the input sources? Where are the conclusions? Which sheets are doing the heavy lifting?

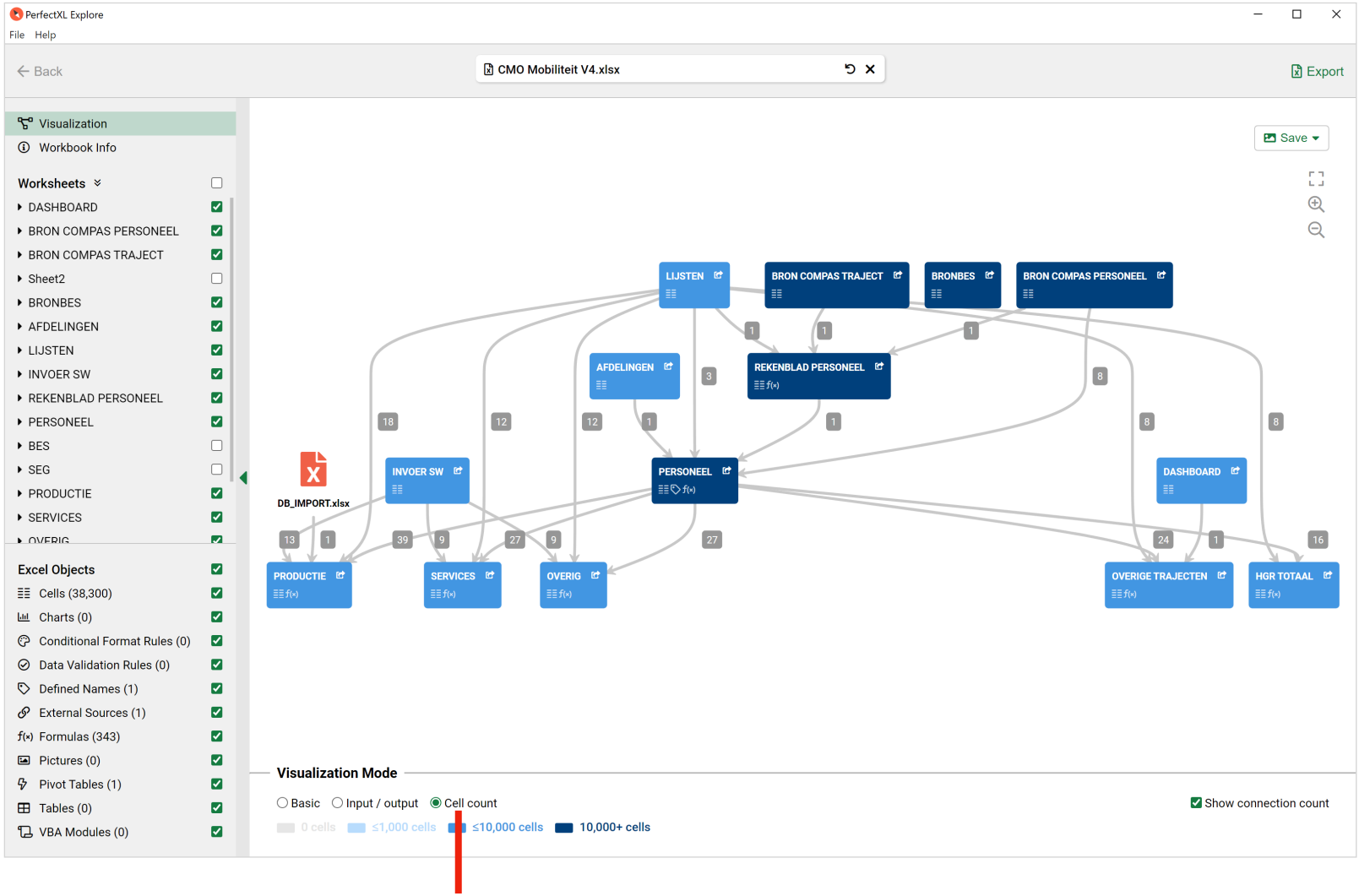


Hover worksheets or Excel objects to reveal incoming (purple) and outgoing (black) connections.

Switch to **Input / output** mode to colour worksheets based on their dependency with other worksheets.

Understanding data distribution

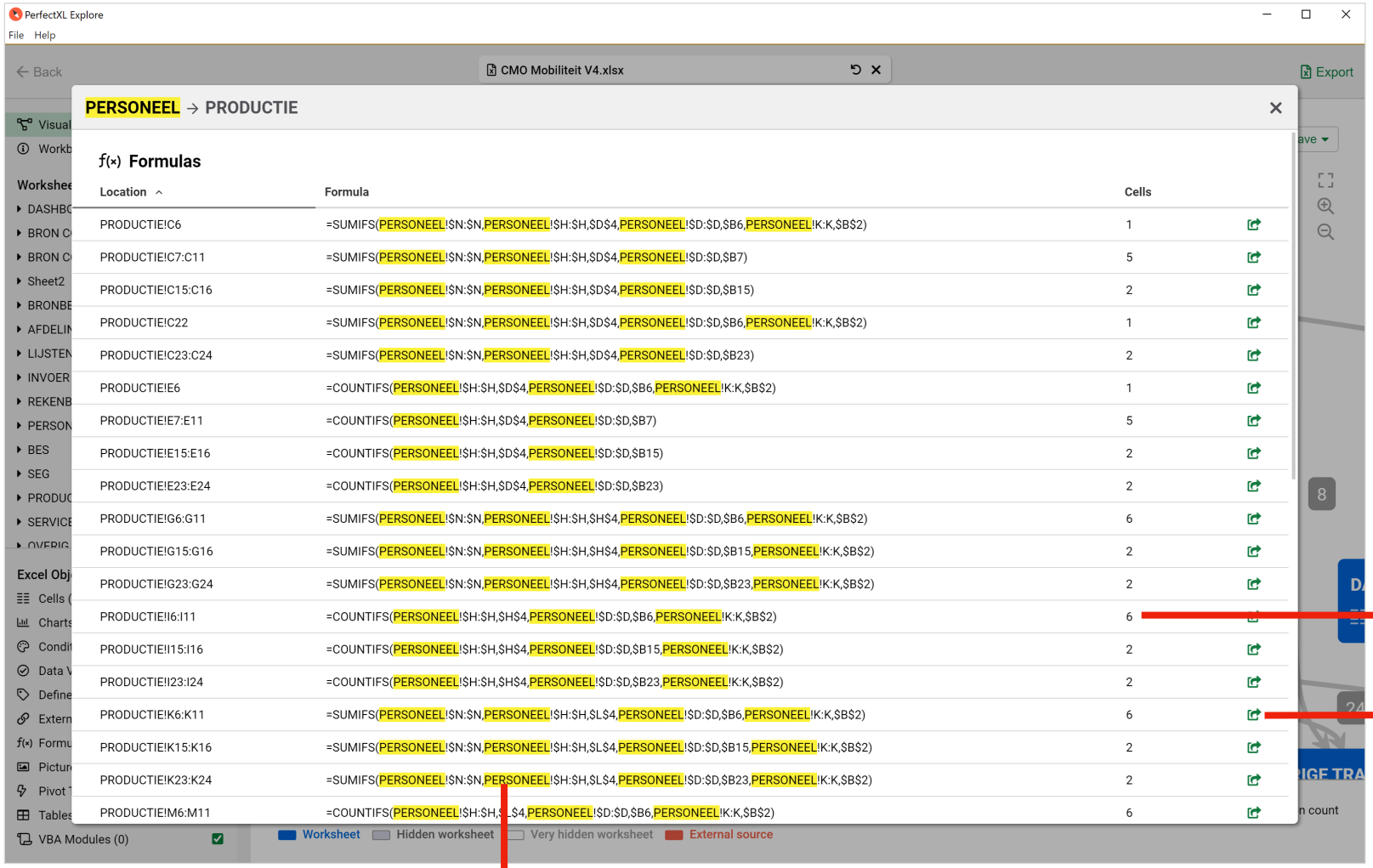
Which sheets contains the most cells? And which ones are (almost) empty?



Switch to **Cell count** mode to colour worksheets based on how much data they contain (non-empty cells).

Understanding relations

How does information flow from one place to antoher? Click any arrow to find out.



Having clicked an arrow connecting PERSONEEL and PRODUCTIE, the ensuing popup shows which formulas in PRODUCTIE are referencing cells in PRODUCTIE.

The most common relations come from formulas in cells, but charts, conditional format rules, data validation rules, named ranges, (pivot) tables and even pictures and VBA can form relations too.

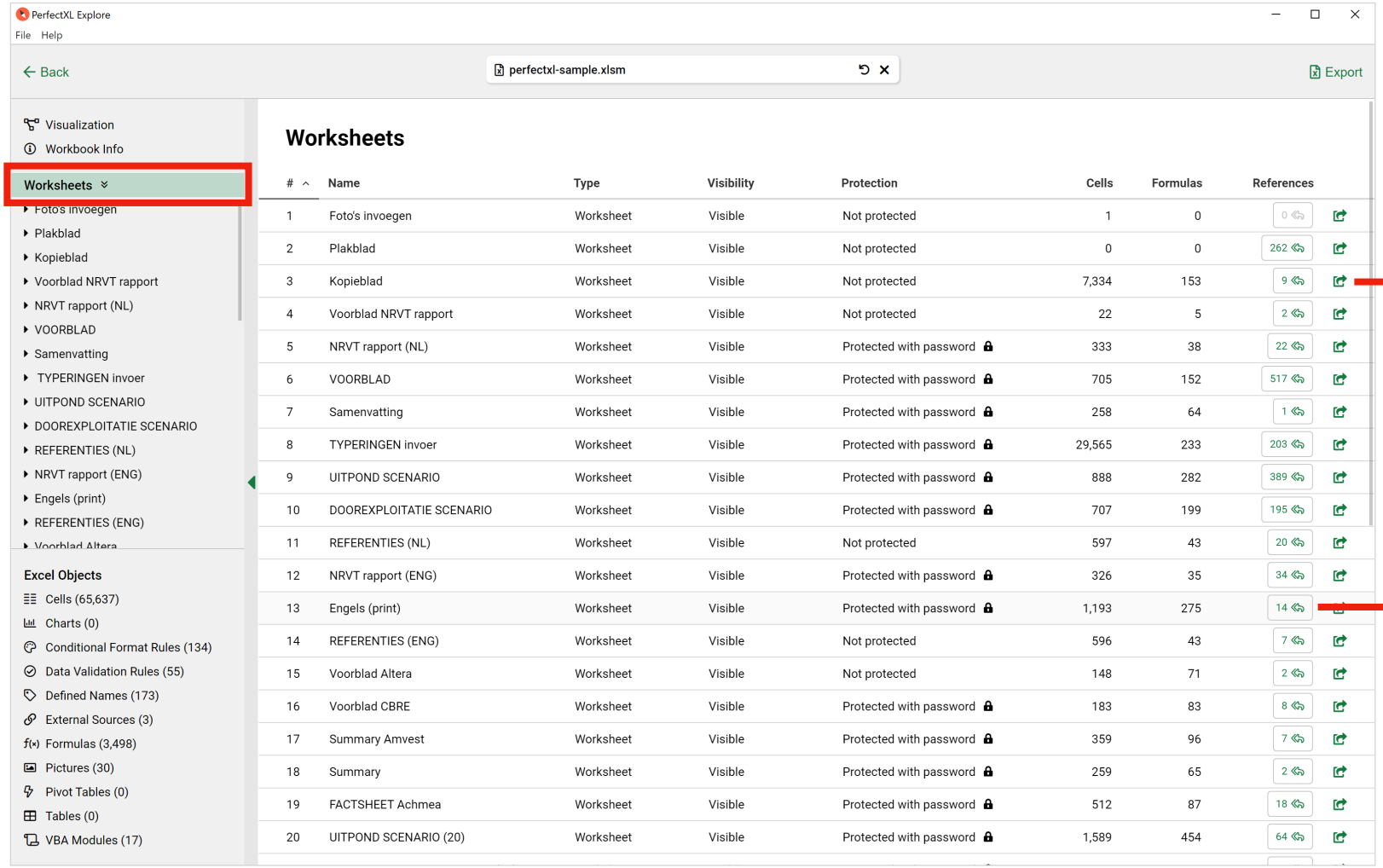
This means the formula is extended to cover 6 cells.

Click here to jump to this formula in Excel.

Highlights make it easy to spot references, especially in long formulas.

Worksheets

A simple yet useful list of worksheets in your spreadsheet.

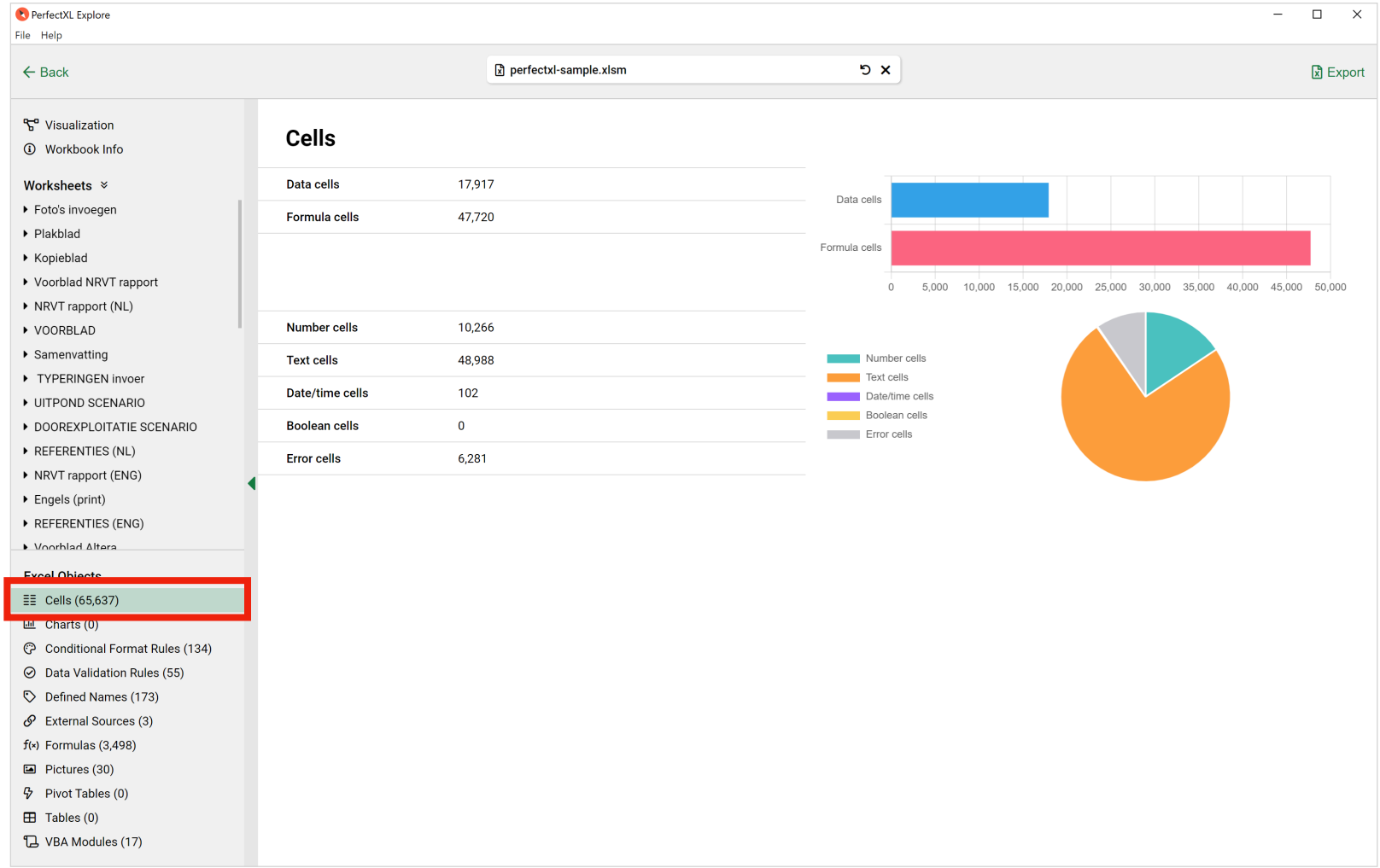


Go to worksheet in Excel

See where this worksheet is referenced

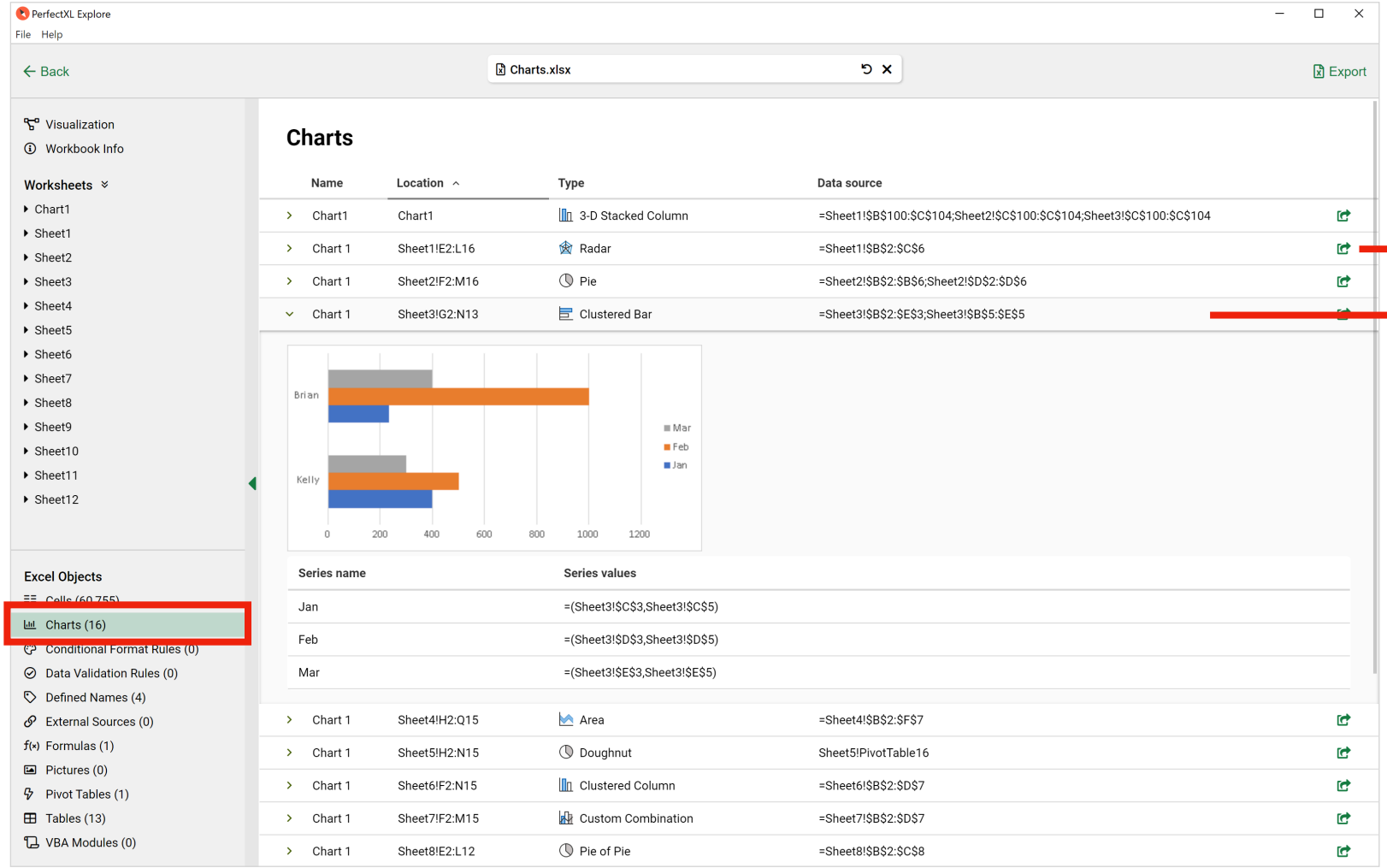
Cell usage

Is the workbook primarily running calculations, or is it full of data?



Charts

See a collection of all the charts & graphs in your spreadsheet.

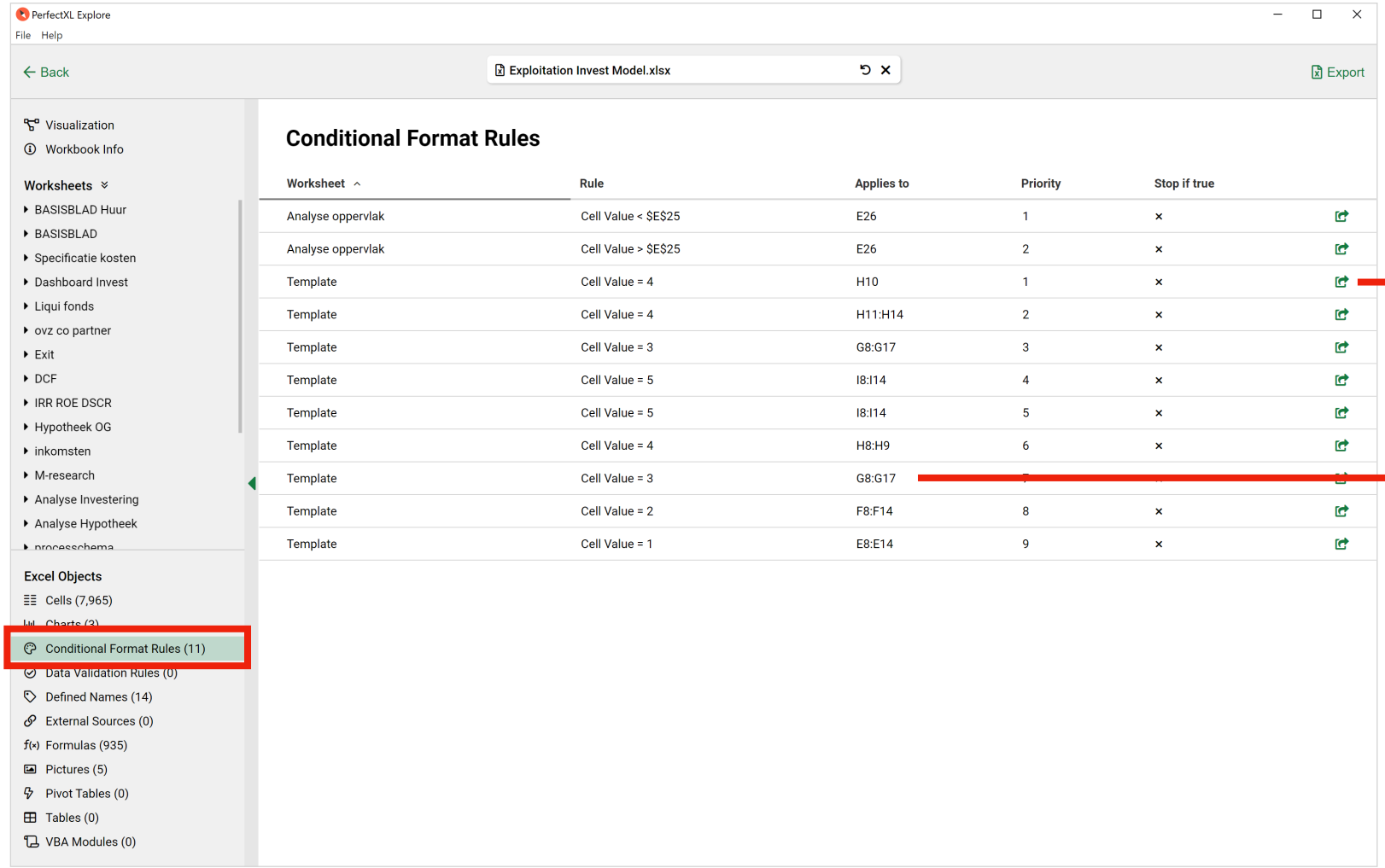


Reveal chart in Excel

Click a chart to toggle details, such as the series definitions and a quick peek at what the chart looks like in Excel

Conditional formatting

View a list of all coditional format rules in your spreadsheet.

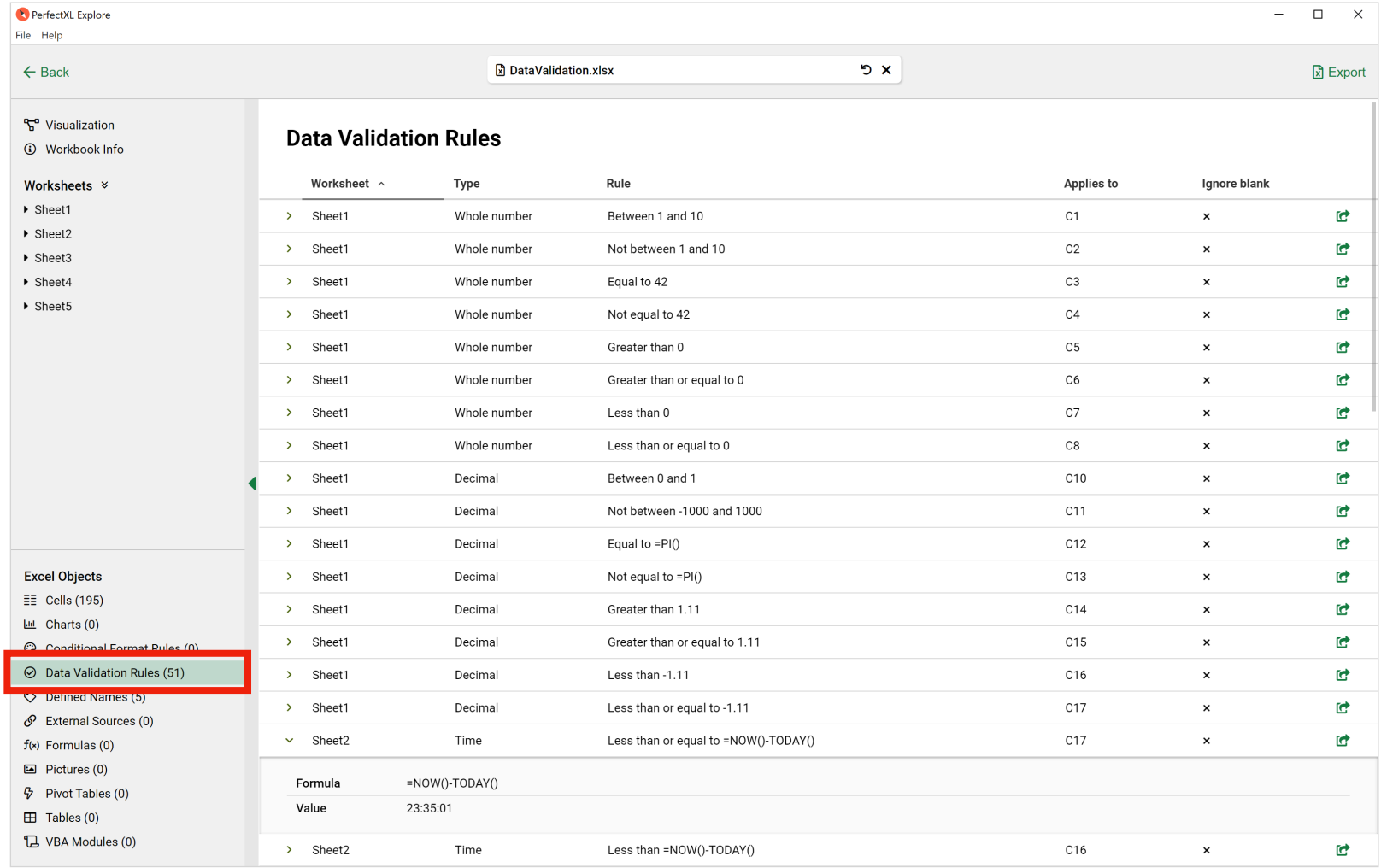


Open the conditional formats dialog in Excel

Quickly see the cell ranges conditional format rules apply to

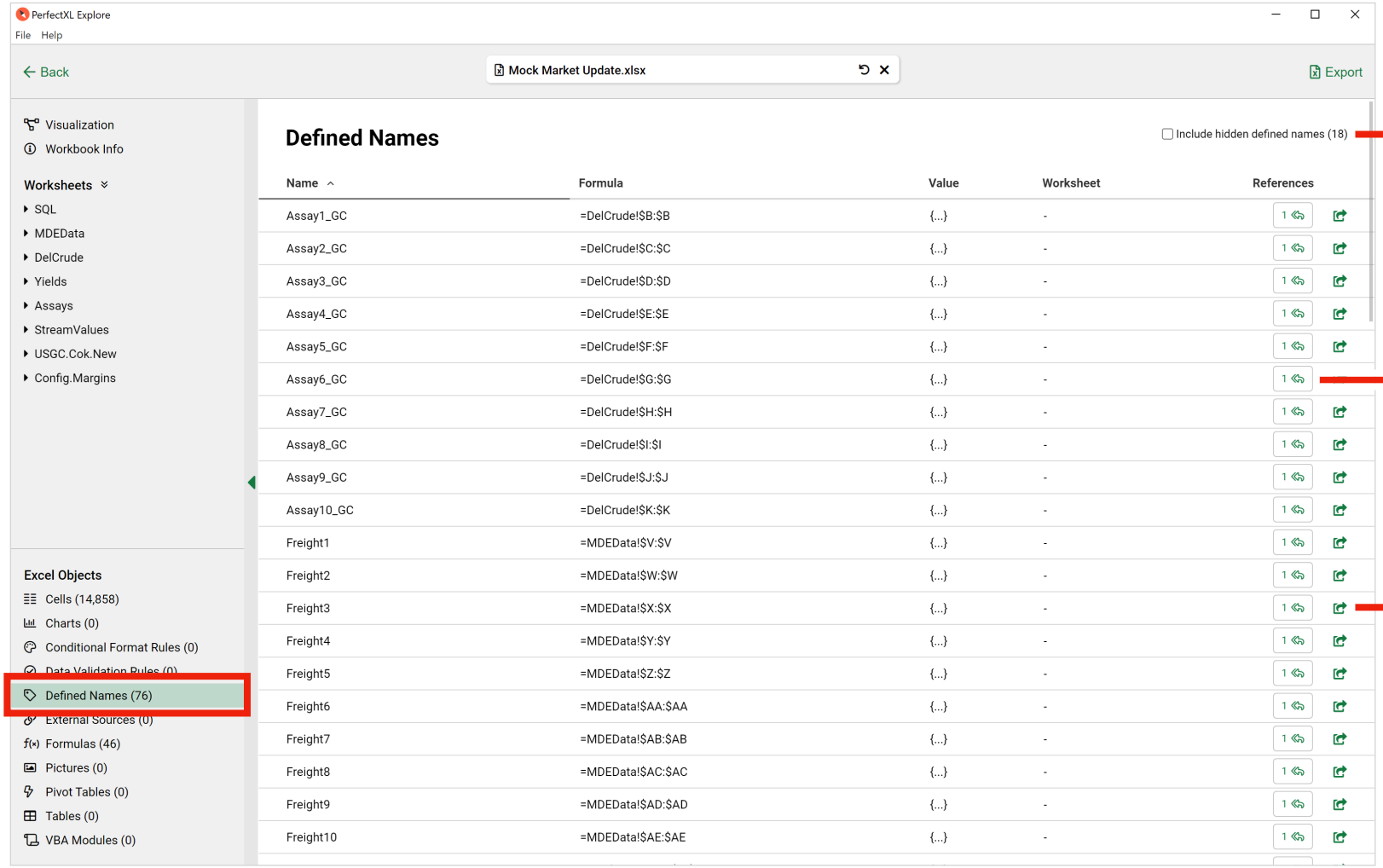
Data Validation Rules

It can be tricky to find which data validation rules are applied to cells in your workbook. PerfectXL Explore lists them for you.



Defined Names

View a list of all defined names, also known as named ranges.



Check to include hidden defined names

Hidden defined names are often created by Excel for internal use, but they can also be created by VBA.

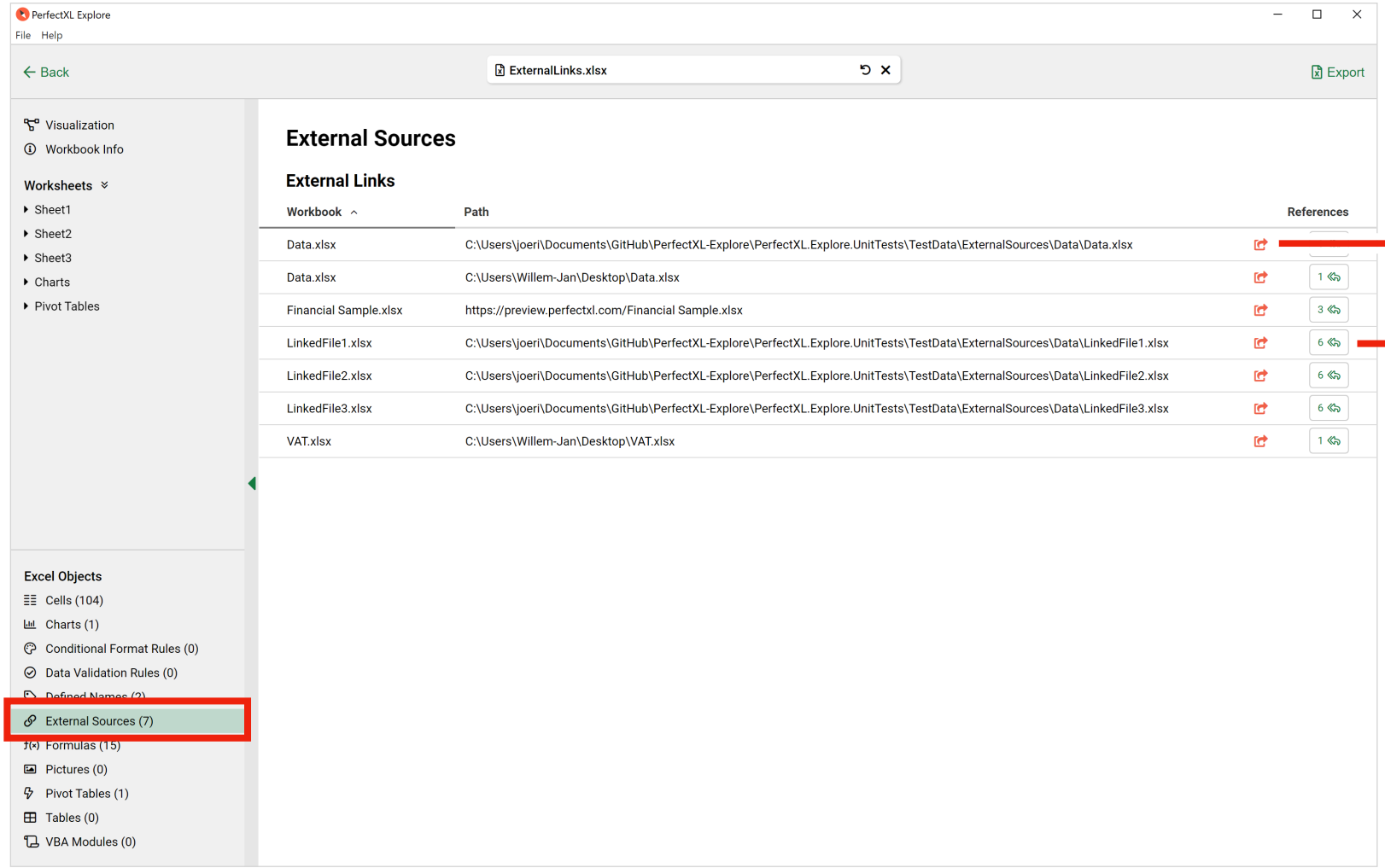
References to this defined name

See where this defined name is used in the spreadsheet

Open defined names dialog in Excel

External links

Is Excel complaining about missing data sources? Easily find where they are referenced under External Sources.

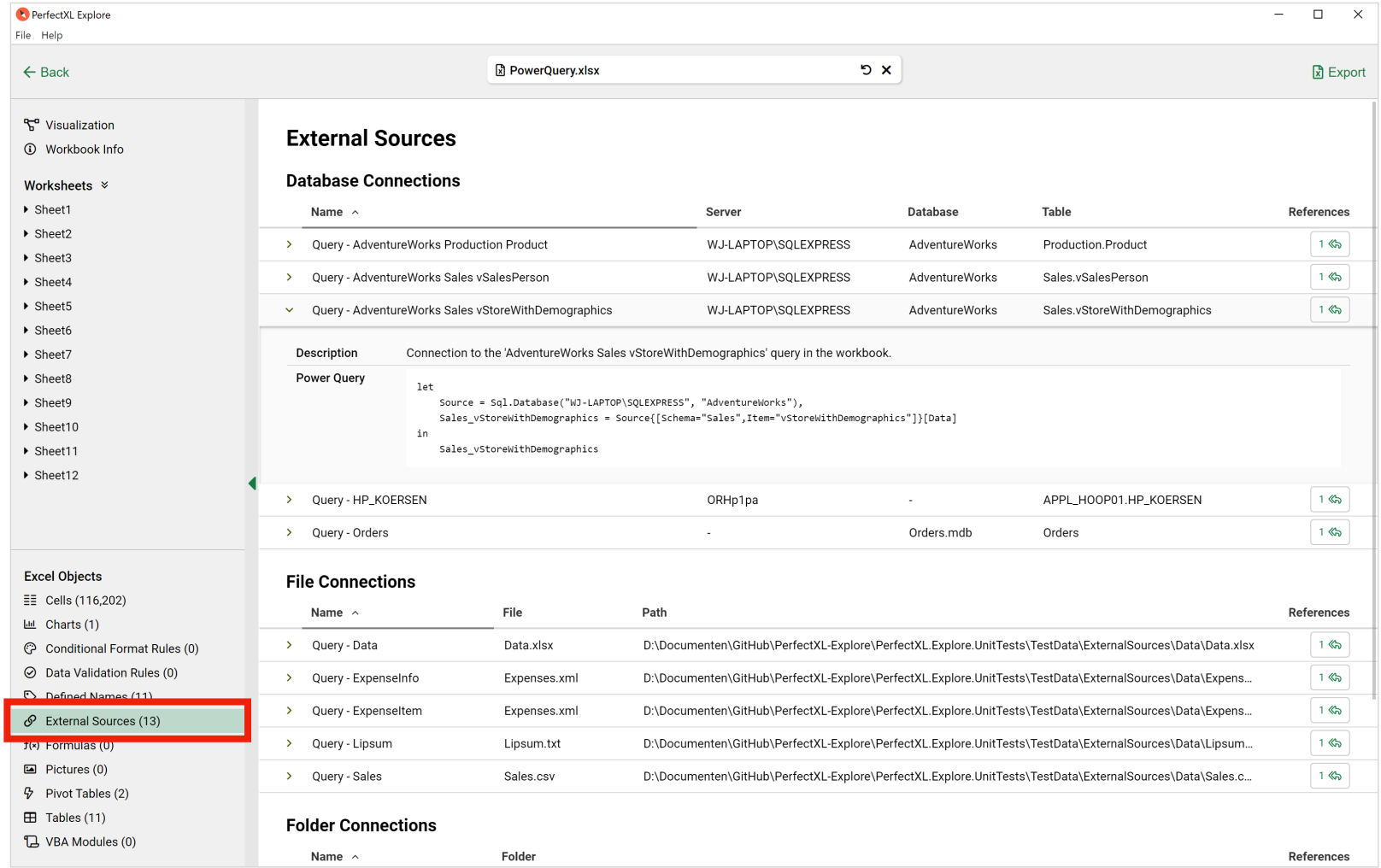


Attempt to open external file if available

See which places in your spreadsheet make a reference to this external link

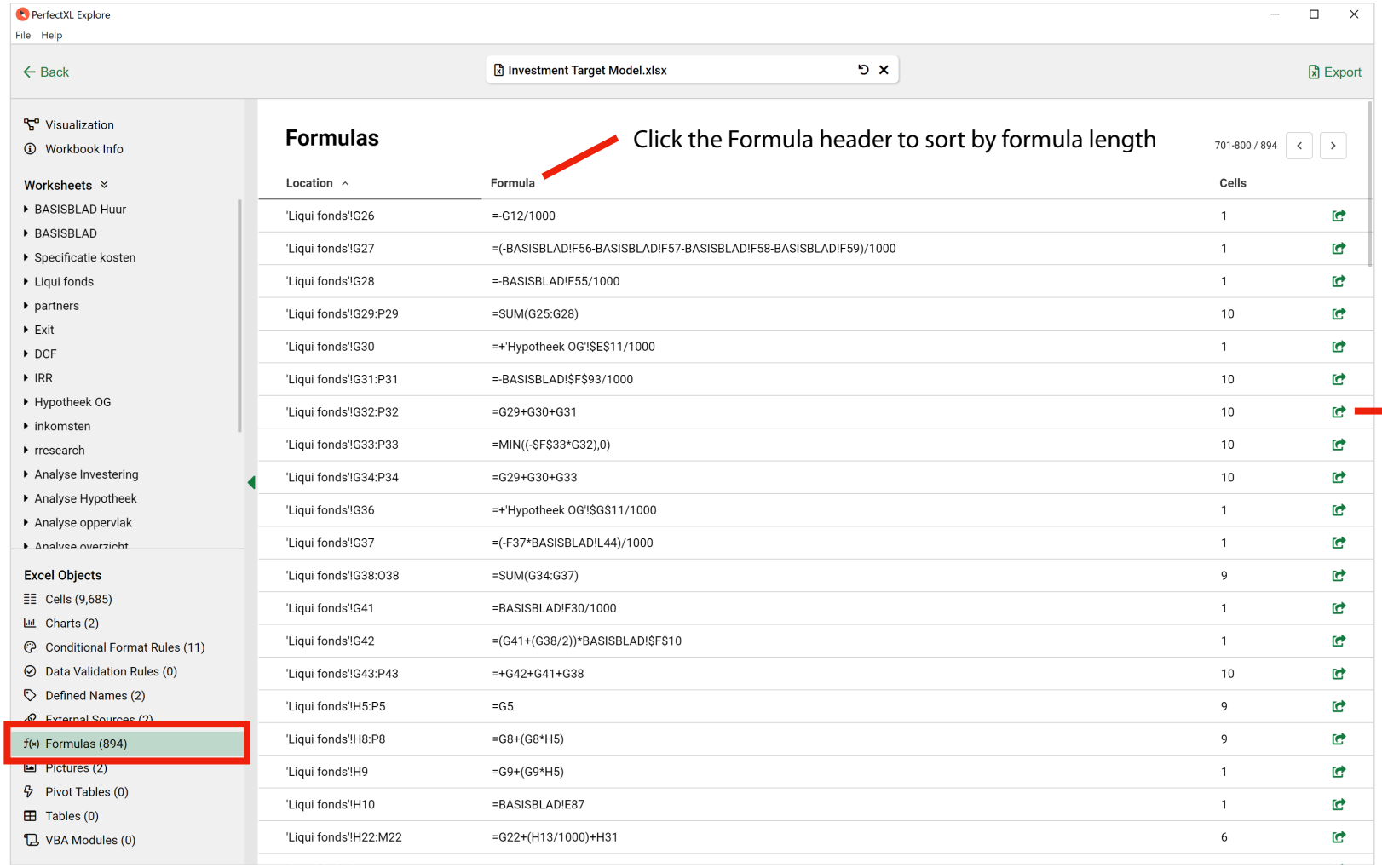
Power Query, databases and more

Aside from cell references to other workbooks, Excel supports all sorts of data connections to external sources, such as databases, files or even entire folders. Often these connections are made with Power Query. View them all in one place under External Sources.



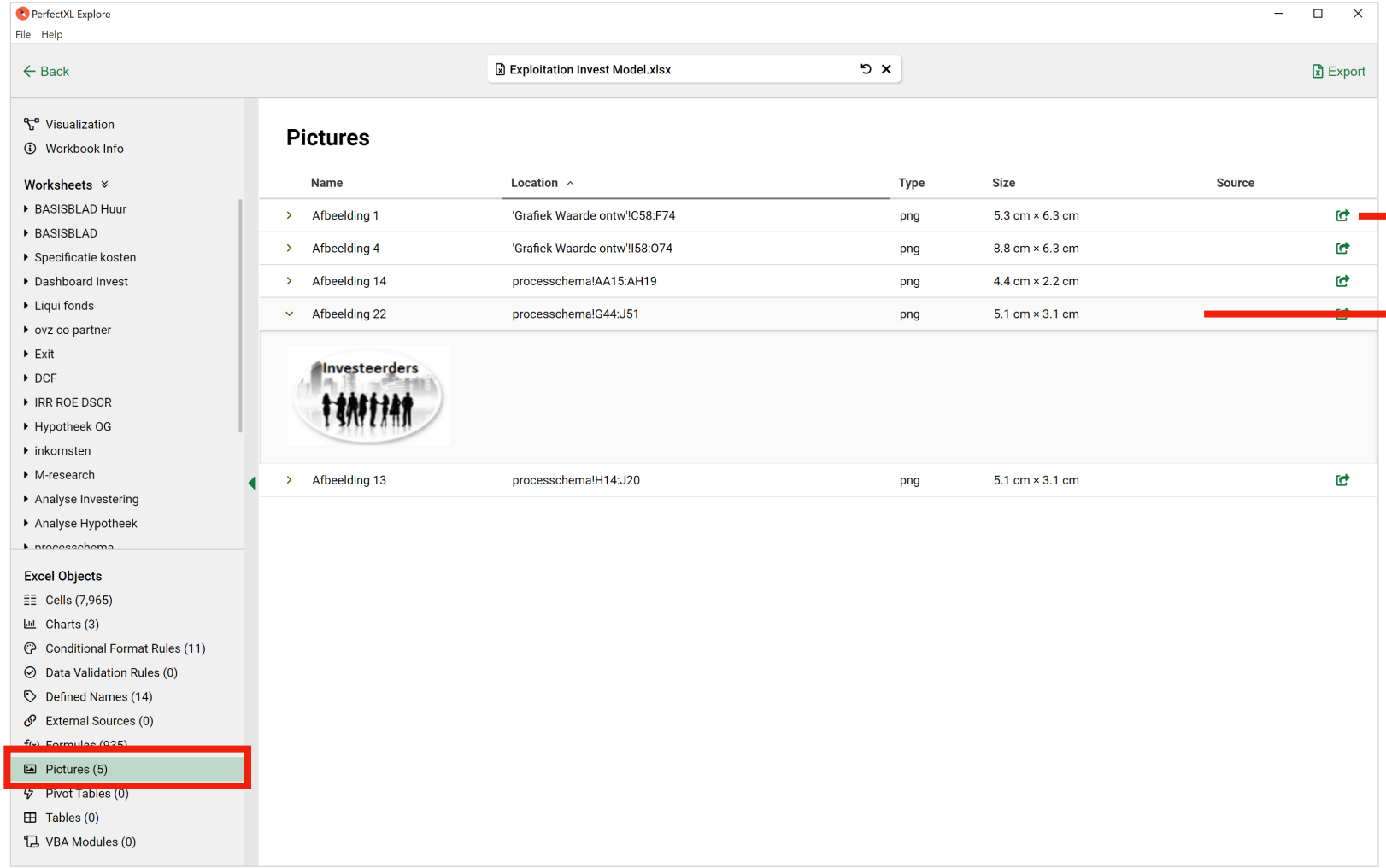
List all formulas

Need a list of all formulas used in a spreadsheet for an audit or for documentation? We've got you covered.



Pictures

Although mostly trivial, pictures can actually be important to be aware of. Too many pictures can bloat a model or slow it down, and some pictures can even contain formulas!

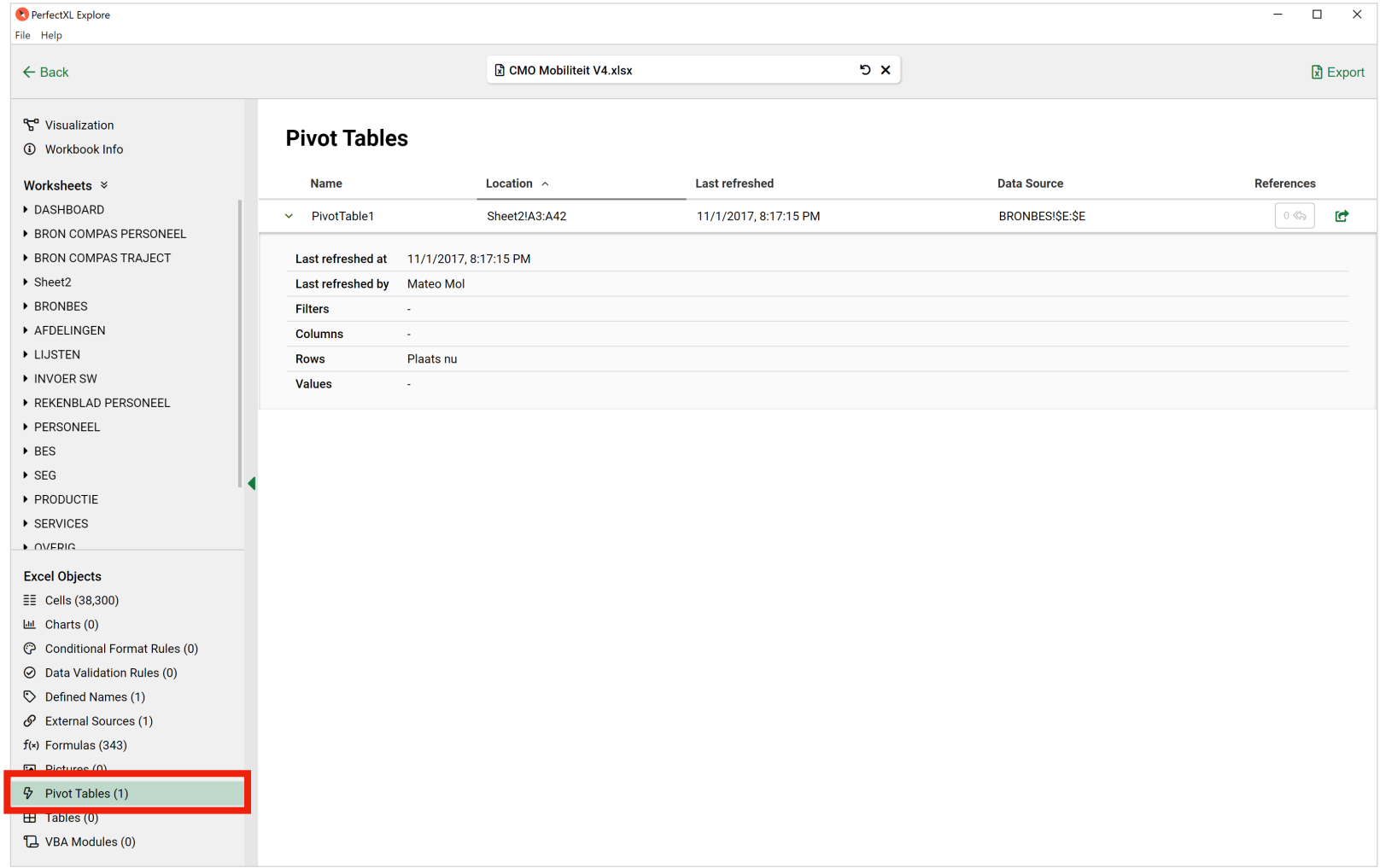


Go to & select picture in Excel

Click on any row to get a preview of the image

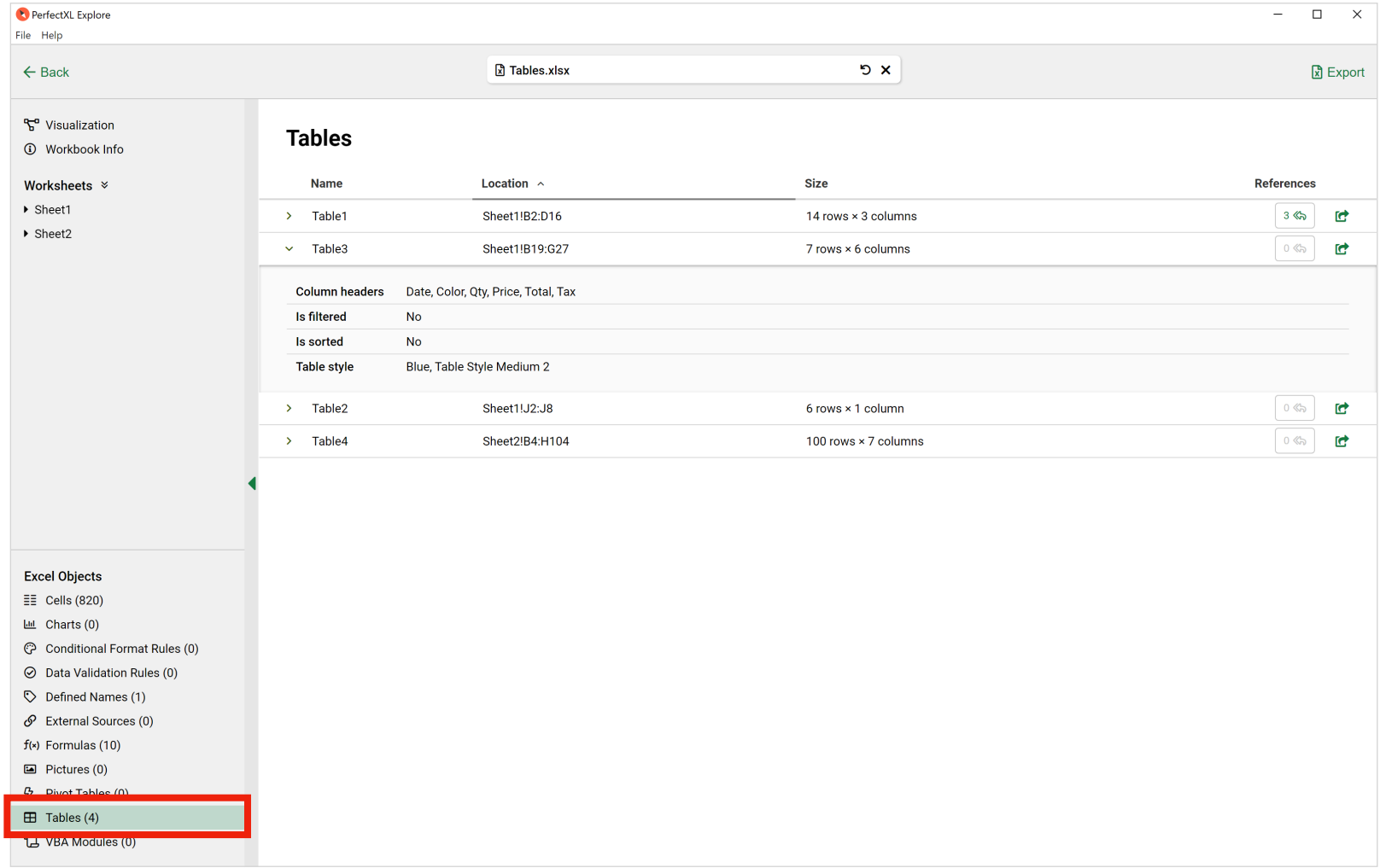
Pivot Tables

Curious where spreadsheet data comes together? Worth having a look at Pivot Tables!



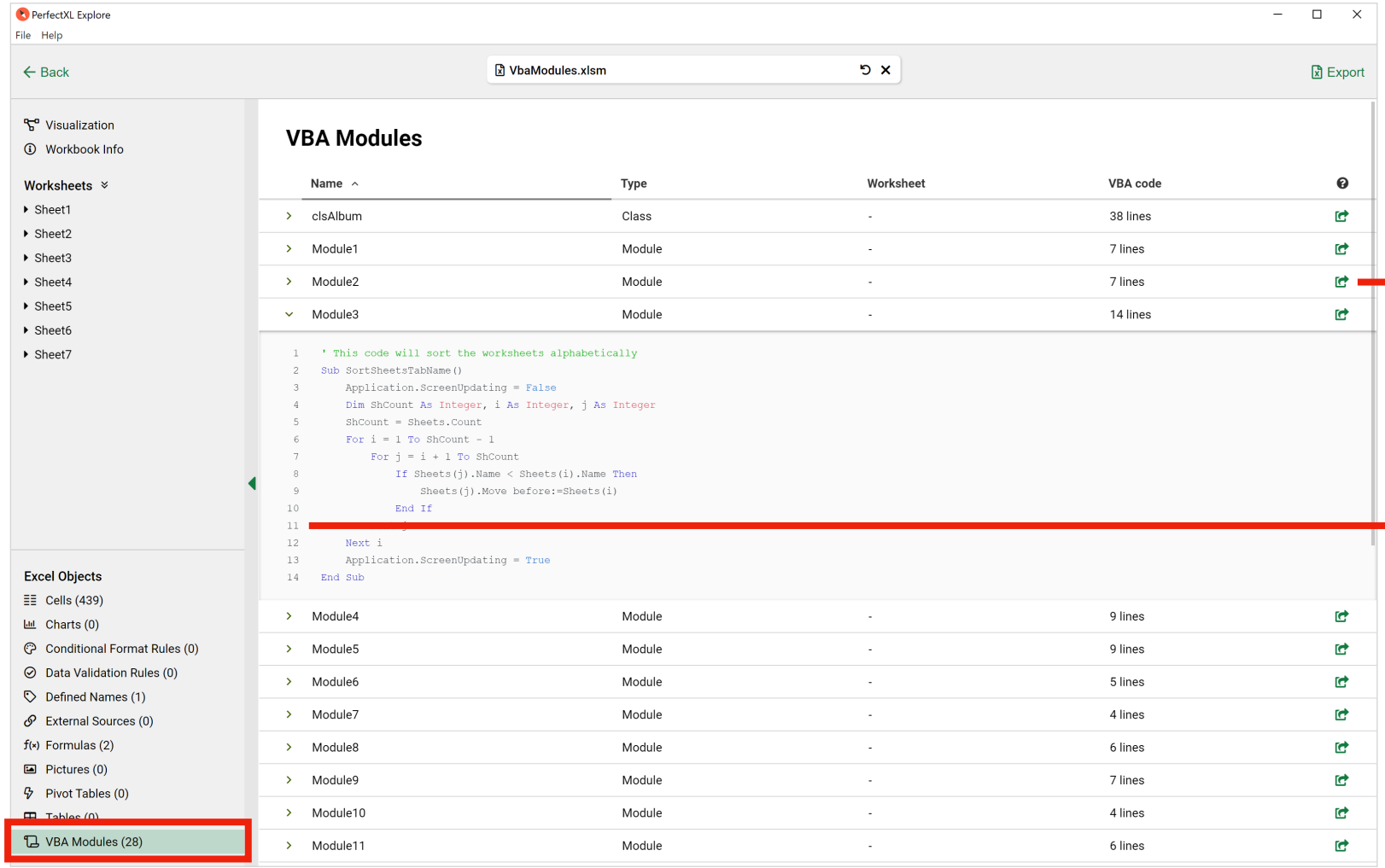
Tables

When data regions are formatted as table in Excel, they'll appear in this list.



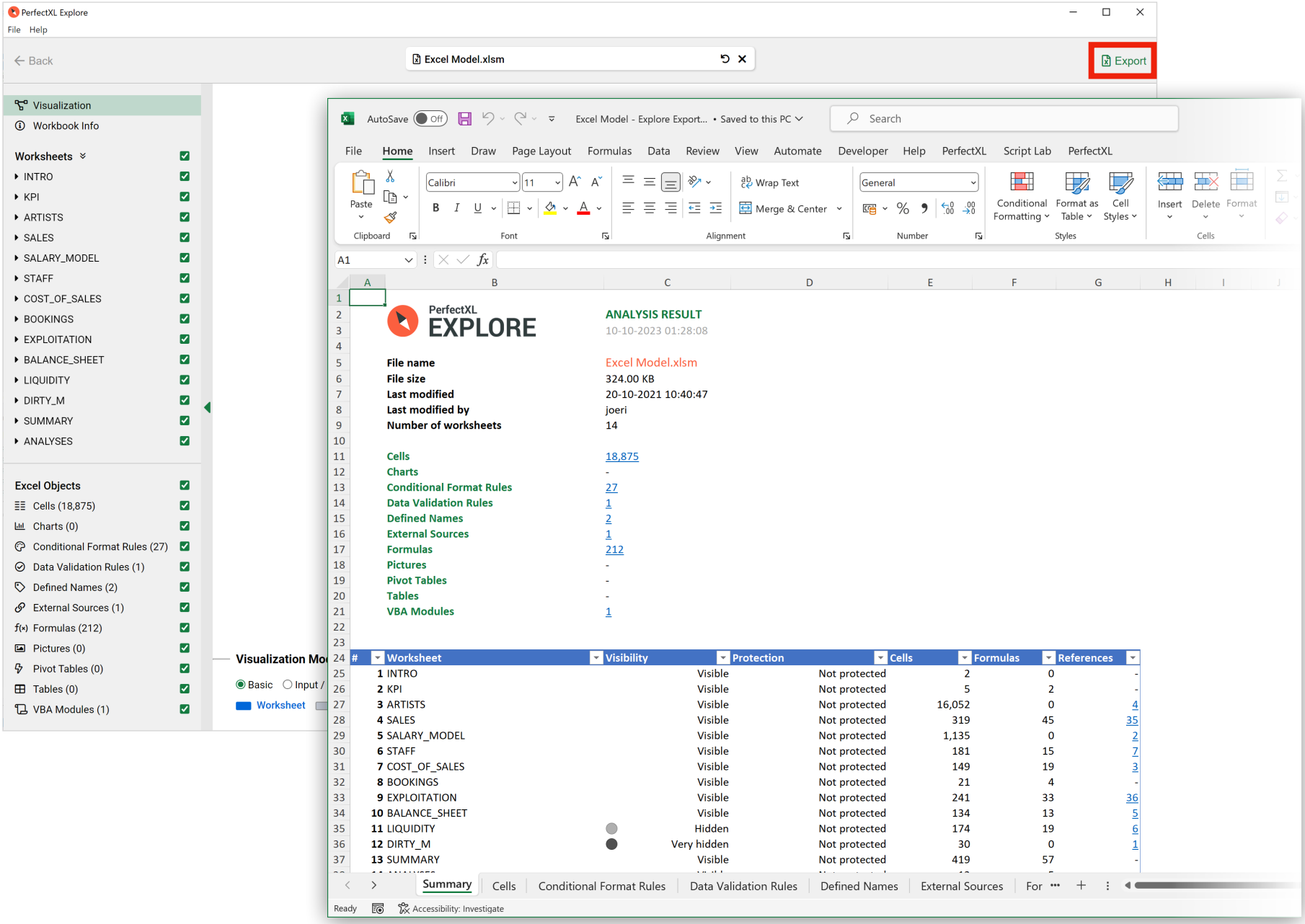
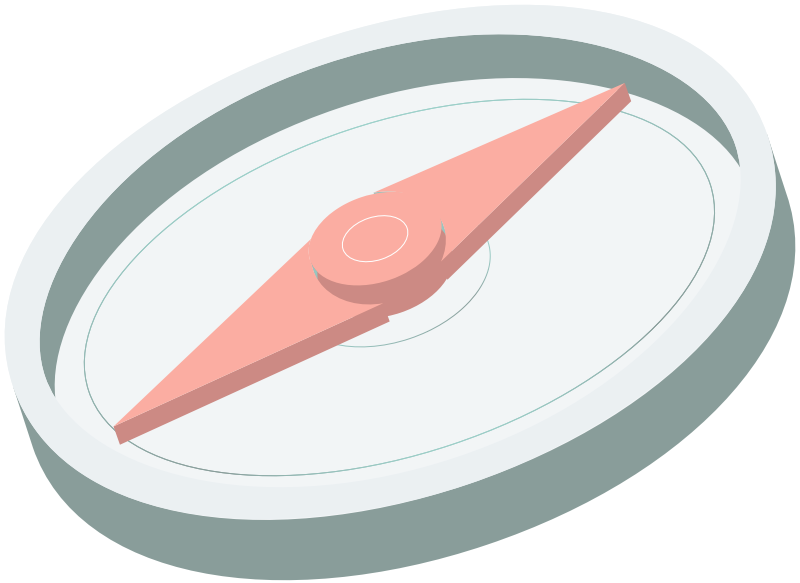
Inspecting VBA

What modules are used in your spreadsheet? Which modules are bigger than the others?



Go to VBA module in Excel's VBA Editor

Click a line number to instantly jump to this line in Excel

Export as Excel

Export all lists to a new Excel file.