

# CloudCostChefs Cost Tracker Template - README

## Introduction

Welcome to the CloudCostChefs Cost Tracker Template! This Excel workbook is designed to help you track, analyze, and optimize your cloud costs across multiple providers without enterprise complexity. This README provides detailed instructions on how to use the template and get the most value from it.

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## Getting Started

### Initial Setup (5 Minutes)

1. **Open the Template:** Open `CloudCostChefs_Cost_Tracker_Template.xlsx` in Microsoft Excel or compatible spreadsheet software
2. **Enable Editing:** If prompted, click "Enable Editing" to allow full functionality
3. **Review Welcome Page:** Start with the " Mise en Place" sheet for quick-start instructions
4. **Set Your Budget:** Navigate to the " Budget Planning" sheet to enter your monthly budgets
5. **Enter Your First Month:** Go to the " Monthly Data" sheet to enter your first month's actual costs

## Monthly Workflow

1. **Collect Data:** Gather cost data from your cloud provider billing dashboards
2. **Update Monthly Data:** Enter the data in the " Monthly Data" sheet
3. **Review Dashboard:** Check the " Dashboard" for insights and alerts
4. **Track Optimizations:** Record any cost-saving initiatives in the " Cost Optimization" sheet
5. **Document Context:** Add notes about significant changes in the " Notes & Documentation" sheet

## Sheet-by-Sheet Guide

### Mise en Place (Welcome)

**Purpose:** Introduction and quick-start guide

**How to Use:**

- Read through the welcome message and checklist
- Follow the numbered steps to get started
- Review Chef's Tips for best practices

### Dashboard

**Purpose:** Visual overview of your cloud cost performance

**How to Use:**

- Review this sheet weekly for a high-level overview
- Check budget utilization and status indicators
- Identify top cost drivers
- Monitor trends over time
- Track optimization savings

**Note:** This sheet contains placeholders for charts. In a future version, these will be automatically generated based on your data.

### Monthly Data

**Purpose:** Core tracking table for all cloud costs

**How to Fill:**

1. Enter the year and month in columns A and B
2. Fill in costs for each category (Compute, Storage, etc.) in columns C through I

3. Enter provider-specific costs in columns J through M (AWS, Azure, GCP, OCI)
4. Enter your budget amount for the month in column O
5. Add any relevant notes in column T

**Automatic Calculations:**

- Column N: Total Monthly Cost (sum of categories)
- Column P: Variance (\$) from budget
- Column Q: Variance (%) from budget
- Columns R & S: Month-over-Month changes

## Budget Planning

**Purpose:** Financial planning for cloud costs

**How to Fill:**

1. For each month row (Jan-Dec), enter your planned budget for each category
2. Enter any seasonal adjustment factors in column N
3. Add notes or justifications in column O

**Automatic Calculations:**

- Column M: Total Budget (sum of all categories)
- Row 14: Annual totals for each column

## Cloud Providers

**Purpose:** Multi-cloud management and comparison

**How to Fill:**

1. In the Provider Cost Comparison section:
  - Enter total costs for each provider
  - Fill in category breakdowns
  - Calculate percentages of total spend
  - Track year-over-year changes
1. In the Service Mapping section:
2. Map equivalent services across providers
3. Add costs for comparison

## Cost Optimization

**Purpose:** ROI tracking for cost-saving initiatives

**How to Fill:**

1. Enter initiative name and description

2. Add implementation date
3. Select status (Planned, In Progress, Implemented, Cancelled)
4. Enter implementation cost (\$)
5. Enter monthly savings amount (\$)
6. Add owner name and priority
7. Include any relevant notes

### **Automatic Calculations:**

- Column G: ROI (%) calculation
- Column H: Payback period in months

## **Charts & Analysis**

**Purpose:** Visual insights into cloud spending

### **How to Use:**

- This sheet contains placeholders for charts
- In a future version, these will be automatically generated
- You can manually create charts based on your data if desired

## **What-If Scenarios**

**Purpose:** Planning and modeling for cost scenarios

### **How to Use:**

1. Workload Migration Calculator:
  - Enter current provider cost
  - Enter target provider cost
  - Enter migration cost
  - View break-even calculation
1. Add your own scenarios as needed

## **Notes & Documentation**

**Purpose:** Context tracking and documentation

### **How to Fill:**

1. Major Cost Changes Log:
  - Enter date, description, impact, and justification for significant cost changes
1. Team Notes & Observations:
  2. Record date, author, note content, and any follow-up actions

# Data Entry Instructions

## Gathering Cloud Cost Data

1. **AWS:**
2. Access AWS Cost Explorer
3. Filter by time period (monthly)
4. Group by service
5. Export to CSV or enter directly
6. **Azure:**
7. Use Azure Cost Management
8. View costs by service name
9. Filter for the appropriate month
10. Export or enter manually
11. **GCP:**
12. Access Google Cloud Billing
13. View reports by service
14. Filter for the desired month
15. Export or manually enter
16. **OCI:**
17. Use Oracle Cloud Billing
18. View cost reports
19. Filter by month and service
20. Enter data manually

## Categorizing Costs

Map cloud services to the appropriate categories:

1. **Compute:**
2. VMs/instances (EC2, Azure VMs, GCE)
3. Container services (ECS, AKS, GKE)
4. Serverless (Lambda, Azure Functions, Cloud Functions)
5. **Storage:**

- 6. Object storage (S3, Blob Storage, Cloud Storage)
- 7. Block storage (EBS, Azure Disks, Persistent Disks)
- 8. File storage (EFS, Azure Files, Filestore)

9. **Network:**

- 10. Data transfer
- 11. Load balancers
- 12. VPN/Direct Connect
- 13. CDN services

14. **Database:**

- 15. Managed SQL (RDS, Azure SQL, Cloud SQL)
- 16. NoSQL (DynamoDB, Cosmos DB, Bigtable)
- 17. Data warehousing (Redshift, Synapse, BigQuery)

18. **Security & Identity:**

- 19. IAM services
- 20. Security monitoring
- 21. Compliance tools
- 22. Certificate management

23. **Analytics & AI:**

- 24. BI tools
- 25. ML/AI services
- 26. Data processing
- 27. ETL services

28. **Other:**

- 29. Any services that don't fit the above categories
- 30. Management tools
- 31. Developer tools
- 32. Miscellaneous services

# Working with Formulas

## Key Formulas Explained

### 1. Total Cost Calculation:

`=SUM(C2:I2)`

Sums all category costs for a given month

### 2. Budget Variance:

`=N2-O2`

Calculates the difference between actual cost and budget

### 3. Variance Percentage:

`=P2/O2`

Shows variance as a percentage of budget

### 4. ROI Calculation:

`=(F2*12-E2)/E2`

Calculates return on investment for optimization initiatives

### 5. Payback Period:

`=E2/F2`

Calculates months to recoup implementation cost

## Adding New Formulas

To add custom formulas:

1. Select the target cell
2. Enter the formula starting with =
3. Reference other cells by their coordinates
4. Use standard Excel functions (SUM, AVERAGE, IF, etc.)

## Customization Options

### Adding New Categories

1. In the "Monthly Data" sheet:
2. Insert a new column between existing categories
3. Update the header with your new category name
4. Adjust the total formula to include the new column

5. In the " Budget Planning" sheet:
6. Add the same column in the same position
7. Update totals formula to match

## Adding New Providers

1. In the " Monthly Data" sheet:
2. Insert a new column in the provider section
3. Add the new provider name as header
4. In the " Budget Planning" sheet:
5. Add the same column in the same position
6. In the "☁ Cloud Providers" sheet:
7. Add the new provider to the comparison table
8. Include in the service mapping section

## Customizing Colors and Styling

1. Select the cells you want to modify
2. Use Excel's formatting tools to change:
3. Font styles and colors
4. Cell background colors
5. Borders and alignment
6. Number formats

## Best Practices

### Data Entry

- **Be Consistent:** Use the same categorization approach each month
- **Enter Data Promptly:** Update within 5 days of month end
- **Keep Notes:** Document unusual spikes or changes
- **Verify Totals:** Cross-check with provider billing statements

### Analysis

- **Weekly Review:** Check dashboard weekly for trends
- **Monthly Deep Dive:** Analyze category breakdown monthly



- **Quarterly Planning:** Review and adjust budgets quarterly
- **Annual Assessment:** Perform comprehensive review annually

## Optimization

- **Target High-Impact Areas:** Focus on top cost drivers first
- **Document All Initiatives:** Record even small optimizations
- **Track ROI:** Calculate and monitor returns on all efforts
- **Celebrate Wins:** Highlight successful cost reductions

## Troubleshooting

### Common Issues

1. **Formulas Not Calculating:**
  2. Check if Excel calculations are set to automatic
  3. Press F9 to force recalculation
  4. Verify formula syntax
5. **Missing Data:**
  6. Ensure all required fields are filled
  7. Check for hidden rows or columns
  8. Verify data was saved properly
9. **Inconsistent Totals:**
  10. Check for formatting issues (text vs. numbers)
  11. Verify formula ranges are correct
  12. Look for hidden or filtered data

### Getting Help

If you need additional assistance:

- Visit [cloudcostchefs.com](https://cloudcostchefs.com) for tutorials
- Check our documentation for updates
- Contact [support@cloudcostchefs.com](mailto:support@cloudcostchefs.com)

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Happy cost tracking and optimizing!

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