

Things to do to make Excel easier to use, worksheets more robust & most importantly more accurate.

Best Practice	Reasons	Results / Issues
Colour Entry Cells	This makes it obvious to both the originator & other users where data is to be entered. (Lotus changed unprotected cells to blue from black)	Easier to follow, formulas get trampled less often. (Wasn't the cell to the left a bit more obvious?)
Enter data only once.	Use formulas to calculate much of the workbook. This should include the date of the reports, titles, column headings (i.e. months) or other repeating data. A Common tab can be used to maintain all common elements.	Output will be consistent with the same headings, dates etc. Often users will 'hardcode' values into sheets making it more difficult to correct (i.e. GST rates). If done correctly, the next update won't require changing headers, etc. in all the various tabs in use.
DON'T hard code formulas!	Use separate cells to determine factors, rates etc. Then refer to these cells or range names in all future calculations. Updating a single cell or set of values means the entire sheet can be recalculated without extensive work.	When cells are hard coded (fixed) within a column but need to vary, it is very common that formulas get trampled causing errors. Consistent formulas within columns should always be maintained.
Use a template to start.	Excel is often not set correctly causing formats to be 'ugly'. Headers & footers also have to be manually entered. Using a template retains these.	Consistent formats for all tabs.
Be Consistent	Excel allow data to be placed anywhere. This flexibility can make a spreadsheet difficult to maintain. Set-up all sheets consistently, with similar data in the same tab, dissimilar data in a separate tab.	Easier to follow, maintain, with formulas & content "stable" & more accurate.
Format the sheet	Unformatted sheets are often more difficult to follow. Highlight, underlining will allow for easier reading.	Easier to read, more focus.
Use Headers & footers w run time, filename	This allows an easy way to determine when the file was last printed. If it needs amending, the file name will allow for easy relocation.	Know when the file was last printed & can easily locate the original. For time sensitive reports, this time stamp confirms what the current versions is.
Number formatting	Excel can handle loads of formatting, be warned it's ugly. Using a template will help minimize the ugly bits.	Once a template is establish, headers, footers & formatting will be consistent for all future tabs.
Cell Comments	These are particularly useful when other users/employees need to use preconfigured workbooks. Comments can be used to provide 'help' to determine sheet usage.	Can be used to provide a rudimentary online help. You cannot & should not use them for "data" storage. You can't perform functions with them.

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Copy the tab, not the contents	Copying the tab will also ensure formats, headers, footers, etc. are also copied.	Generally more efficient than copying contents. Some problems will persist (links), but are usually easier to correct.
Link/Merge Tabs	Allows for multiple tabs to be printed with page numbers in a single pass. Or all cells, formats, headers, etc to be updated simultaneously. Coloured tabs make it more obvious which ones are merged.	WARNING!! ALL cells can be changed in all merged tabs. Be sure to use this with caution. Turn this off immediately after the merge function has been used.
Validate all formulas	Determine what numbers are required & take steps to ensure that errors or omissions are caught. This should include, cross footing, confirming values, capturing exceptions. You'll need to give this area considerable thought for complex sheets.	More accurate sheets that can withstand the many variables thrown at it more readily. Validating formulas will force some discipline into the spreadsheet design from the outset & will frequently prompt a change in the layout / design.
Leave the Rodent ALONE!!	Learn to use key board commands for many tasks including Cut, Copy & Paste. As well as the relatively unknown duplicate down or right (Cntl+D, Cntl+R). Other obvious choices Cntl+S (Save), Cntl+P (Print).	You will save considerable time over the use of the mouse. Ever wonder why typing speeds are lower since the advent of PCs? Culprit: the damned Rodent!
Use Range Names	If you have various variables or ranges within you workbook, use range names. (Insert, Name, Define)	Range names are easier to use in formals & can easily be accessed by using F5 (Go To).
Use Auto Filters	This will allow you to limit the data to only what you need to see/ work with. Large blocks of data become more manageable. Filters are cumulative providing significant control over the rows.	Rows are coloured Blue to confirm when filters are on (Black when off). Reports can be printed selectively (rows only) with minimal effort. Locating data is far easier.
Set security.	This will prevent users from 'trampling' formulas, however it will take numerous iterations to get the sheet security correctly set-up. The process of unprotecting cells can sometimes be tedious, but in the right circumstances worthwhile.	Secure worksheet, will prevent damage to templates, but can cause frustration if security is set too tight or incorrectly.

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Learn to use Pivot Tables, filters, validation, sumif, & other key formulas	Pivot tables, while limited in their use, can take large amount of data & make it meaningful. Other tools can make a significant difference in the time it takes to complete tasks. Think about what is being manipulated & rekeyed to determine function to use.	When used correctly, these more powerful, but lesser known features can save time, increase accuracy & simplify the Excel sheet. Go home on time for a change!!

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