

mailbarrow

po box 6284 east perth
western australia 6892

tel 0412 581 486

fax +61 8 6210 1662

email info@mailbarrow.com

web www.mailbarrow.com



52 EASY WAYS TO PREVENT SPREADSHEET PROBLEMS (LITE)

(now there's one for every week of the year!)

Have you ever met someone who thought they were an expert in something ... but in reality, they didn't have a clue about what they were talking about?

Haven't we all!

At Mailbarrow, we were working with spreadsheets **before Windows was invented** (yes ... that long!). We have a well-established track record in Excel consulting and have been providing our services to clients **all over the world** for many years.

One of the things we've found over the years is that many people have similar problems using Excel. Yet there is a whole range of secrets that can make a **HUGE** difference to your productivity.

We'd like to help as many people as possible become more efficient at using spreadsheets. So what we've done is to condense our many years' experience and spreadsheet wisdom into this helpful guide.

You're currently reading the LITE version, which is just a list of all the section headings included in the FULL version.

The FULL version includes:

- **48 pages of really useful, practical tips** on using Excel's features to the max, getting more done, and designing better spreadsheets.
- **Helpful, easy-to-follow, detailed advice** about how to improve your spreadsheets by avoiding the issues noted.
- **Screen shots and worked examples** for most of the items listed.
- **Powerful illustrations** of exactly what to do (and what not to do!).

We highly recommend that you obtain the FULL version of this document – it will literally transform your spreadsheeting experience.

For more details on how to get your copy of the FULL version, please visit
http://www.mailbarrow.com/services_excel_prevent.php

Obtain the FULL version and make your spreadsheets SOAR!

Formulas & Functions

1. Avoid hardcoding values in formulas – enter the data in cells then reference these in your formulas.
2. Don't mix formula and data entry areas together. Consider having separate areas that are readily distinguishable for data entry, calculations, and output.
3. Use absolute cell references and/or named ranges when copying formulas that refer to a particular cell or range. Try to design formulae that will apply to a block of data, this makes it easier to copy. Hence you may have to use mixed references eg \$A1 or A\$1.
4. Always document long formulas so you (and others) can remember what the formula does – especially those formulas with multiple nested functions and numerous layers of brackets.
5. Check the offset you use in Vlookup, Hlookup, or other reference functions and be careful when you insert rows or columns in your Vlookup or Hlookup range.
6. Be careful when inserting a new row or column of data just before a function such as Sum, Subtotal, Average etc – be sure to amend the function's range.
7. Watch out for circular references.
8. Never clear a cell using the space bar, use the Delete key instead.
9. Take care when using data of different units in formulas (eg m and km, l and ml etc). Ensure correct conversion is used or ideally perform the conversion in a separate calculation.
10. Ensure your spreadsheet can handle unusual situations such as zero or text values in cells (particularly where formulas use division).
11. Don't use SUM to calculate subtotals – use SUBTOTAL.

Printing

12. If you're using manual recalculation, ensure you re-calculate before printing.
13. If you set a print area to show one portion of the sheet, don't forget to change/clear this when trying to print the full sheet.
14. If you use the print option "Fit to x pages wide by y tall", your manual page breaks will be ignored.

Named Ranges

15. When deleting range names or rows/columns containing these, ensure the names aren't used in any functions or macros.
16. When adding rows or columns at the end of named data tables, be sure to amend the range name.
17. Avoid copying a formula that includes a named range from one spreadsheet to the other as this creates a hidden link between the workbooks.

Files

18. Use the Autosave add-in to avoid losing your work.
19. When you use the Autosave add-in, do “Save As” with a new filename as soon as you open the file. This will avoid accidentally over-writing the original file.
20. Make sure you save changes before quitting.

Formatting

21. When cutting and pasting cells that have border formatting, ensure you reinstate the correct borders.
22. Consider using “Center Across Selection” rather than “Merge Cells” – merged cells can cause issues during certain operations.
23. Watch out for long text entries that disappear under data cells but should be wrapped text.
24. Applying formatting to a sheet that has Auto Filter turned on can lead to some unexpected results when you remove the Auto Filter. Best to turn it off first.
25. Ensure your PC has the correct international settings – especially for dates.

Charts

26. Limit the number of data series on a chart to 5 or less, otherwise it becomes too cluttered and cannot be easily understood.
27. Where chart data series have different scales, plot them on different axes.
28. Ensure your axes scale and titles are correct. Consider linking them to a cell.
29. If you’re using a chart type such as “line” ensure there is a logical relationship between the data.
30. Don’t include series totals in chart data series.

Database Tables

31. Don’t use the same field name in a database table more than once.
32. Don’t try to use your spreadsheet as a relational database – it won’t work!
33. If you have tens of thousands records in your database table, it’s probably time to think about using Access.
34. Don’t allow blank rows and/or columns in database tables.

Miscellaneous

35. Don’t try to GOTO hidden cells.
36. Use manually calculated test data that can independently verify your calculations.
37. Layout your spreadsheet in a logical manner and avoid spaghetti referencing (where formulas use cells from all over the spreadsheet).
38. If your spreadsheet will be used in multiple locations/environments, make sure you test it using all possible international settings, Excel versions, and PC environments and possibly on a Mac.

39. Watch out for hidden rows or columns when copying, pasting, inserting, deleting or moving.
40. Even if your spreadsheet will only be used by you, include instructions, details regarding the workbook's purpose, author, version, and updates.

VBA Macros

41. Don't hardcode cell or range addresses in VBA macros.
42. Ensure your custom menus don't use the same initial letter more than once.
43. If others will use your spreadsheet, protect your sheets and VBA modules via password – only allow others to make changes where you want them to.
44. Ensure your buttons and controls are linked to macros or cell references.
45. If you use a custom status bar message, make sure you reset it.
46. Watch out for endless loops.
47. Always document your code.
48. As much as possible, write code and functions that are modular and can be easily re-used.
49. Always use "Option Explicit", but use "On Error Resume Next" and "GOTO" sparingly.
50. Use clear, systematic variable names.
51. Disable screen updating when running macros.
52. Don't use the macro recorder alone to write all your code.

More Information

If you'd like to know more about the significance of some of the points mentioned, and how to incorporate these into your work, please contact us on +61 412 581 486, visit www.mailbarrow.com or e-mail info@mailbarrow.com

You are currently reading the LITE version of this document. To obtain a copy of the FULL version, please visit http://www.mailbarrow.com/services_excel_prevent.php

Thank you

The Mailbarrow Team