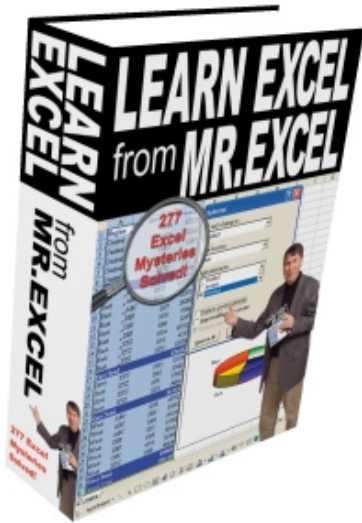




Free Preview – Week #31
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This week - five topics on using data validation.

ADD A DROPDOWN TO A CELL

Problem: You need your sales managers to select a product from your product line. All of the pricing lookups in the worksheet rely on the product being entered correctly. You find that if you allow the manager to type an entry, they will find too many ways to misspell the item. You may be expecting “PDT-960”, only to find they entered “PDT 960”, “960”, and many other variations, as shown in Fig. 1482. If you could offer them a list to select from, they would automatically select the correct spelling of the product.

**Part
IV**

	C8		=IF(ISBLANK(\$B8),"",VLOOKUP(\$B8,\$K\$2:\$M\$6,2,FALSE))				
	A	B	C	D	E	F	G
1	XYZ Company Sales Order						
2							
3	Customer:						
4							
5	Qty	Item	Description	Unit Price	Ext. Price		
6	25	PDT-960	Data Entry Terminal with Scanner	795	19,875		
7	10	PDT-710	Data Entry Terminal - 512K	250	2,500		
8	125	PDT 960	#N/A	#N/A	#N/A		

Fig. 1482

Strategy: You can easily allow the manager to select from a list by using the Data – Validation command. It turns out that every cell has a data validation setting to allow any value. You can change this default setting.

- 1) Select a cell and choose Data – Validation from the menu, as shown in Fig. 1483.

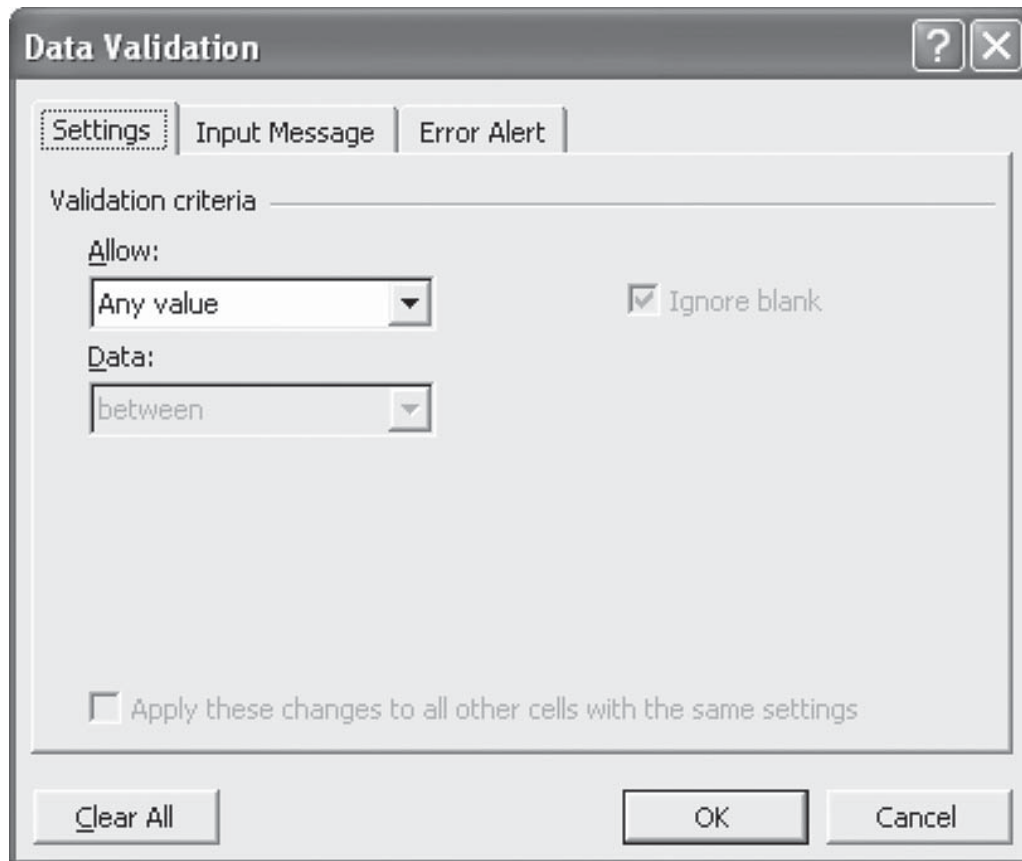
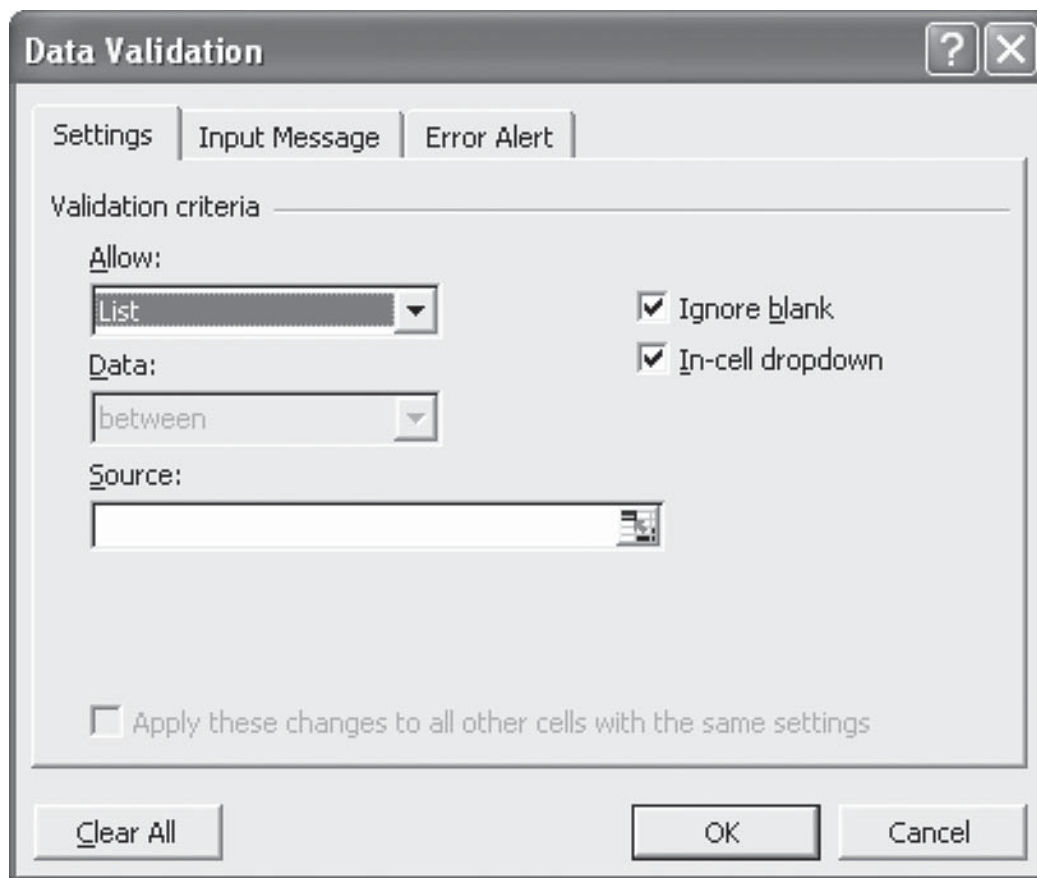
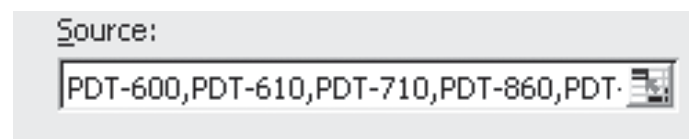


Fig. 1483

- 2) Choose the Allow dropdown and change “Any value” to “List”. The checkbox for In-Cell Dropdown appears and is automatically checked, as shown in Fig. 1484.

**Part
IV***Fig. 1484*

- 3) You can type your list right in the Source field, as shown in Fig. 1485. Or, if you already have the list of products on the worksheet, you can reference the range containing the list. This particular worksheet already has the valid products as the first column of a lookup table used to get prices.

*Fig. 1485*

- 4) Select the Collapse button at the right end of the Source box and highlight the range containing the valid products, as shown in Fig. 1486.



Fig. 1486

- 5) Choose OK to close the Validation dialog. As shown in Fig. 1487, each time the cell is selected, a dropdown will appear.

5	Qty	Item	Descripti
6	25	PDT-960	ta Entr
7	10	PDT-710	Data Entr
8	125	PDT 960	
n			

Fig. 1487

- 6) Choose the dropdown arrow, and the manager will be able to select from a list of products, as shown in Fig. 1488.

Item	Descripti
25 PDT-960	ta Entr
10 PDT-600	ta Entr
.25 PDT-610	
PDT-710	
PDT-860	
PDT-960	

Fig. 1488

Additional Details: After you have set up the validation in one cell, you can copy it to other cells. Select cell B6 and hit Ctrl+C to copy. Select cells B7:B20. Select Edit – Paste Special – Validations.

Gotcha: I am always on the lookout for the sales manager who knows just a little too much about Excel. If the manager were smart enough to delete row 5, he could also delete row 5 of the lookup table off to the right.

Gotcha: In Excel 97, any validation cells that appear above the Freeze Panes area will not work.

Gotcha: If someone copies a bunch of cells from J10:J20 and pastes them over your validated cells in B, the validation will not work. Anyone can get an invalid value in the cell by using copy and paste.

Summary: Use the List option with Data Validation to provide a drop-down in the cell.

Commands Discussed: Data – Validation

STORE LISTS FOR DROPDOWNS ON A HIDDEN SHEET

Problem: As shown in Fig. 1489, the Validation dropdown will not allow you to specify a list on another worksheet.

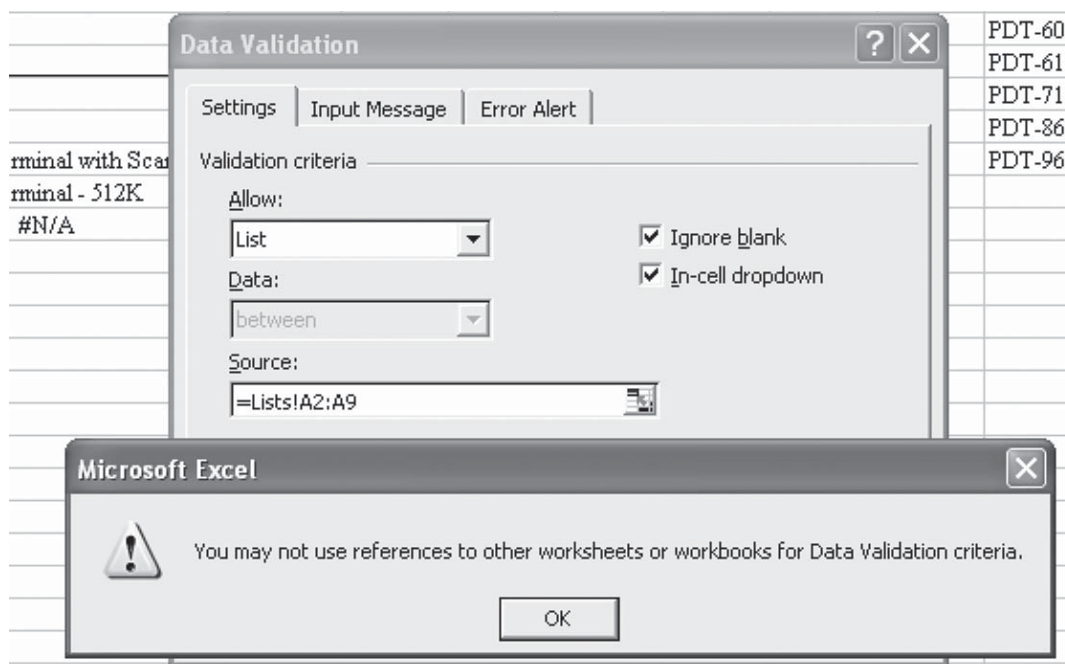


Fig. 1489

This forces you to keep your validation lists in an out-of-the way section of a current worksheet. No matter where you hide the list, someone manages to find a way to inadvertently delete items from it.

Strategy: There seems to be one workaround that works, at least up through Excel 2003. Follow these steps.

- 1) Insert a blank worksheet in the workbook. Type your list on this worksheet.
- 2) Highlight the list. Click in the Name box to the left of the formula bar. Type a name, such as ItemList, and hit Enter, as shown in Fig. 1490.

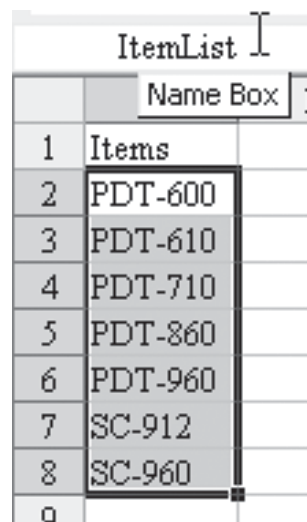


Fig. 1490

- 3) This action sets up a workbook-level named range. Hide the new worksheet with Format – Sheet – Hide.
- 4) On the original worksheet, select a cell. From the menu, select Data – Validation. Change the Allow box to List. In the Source box, type an Equal sign and the name of your range, as shown in Fig. 1491. Choose OK.

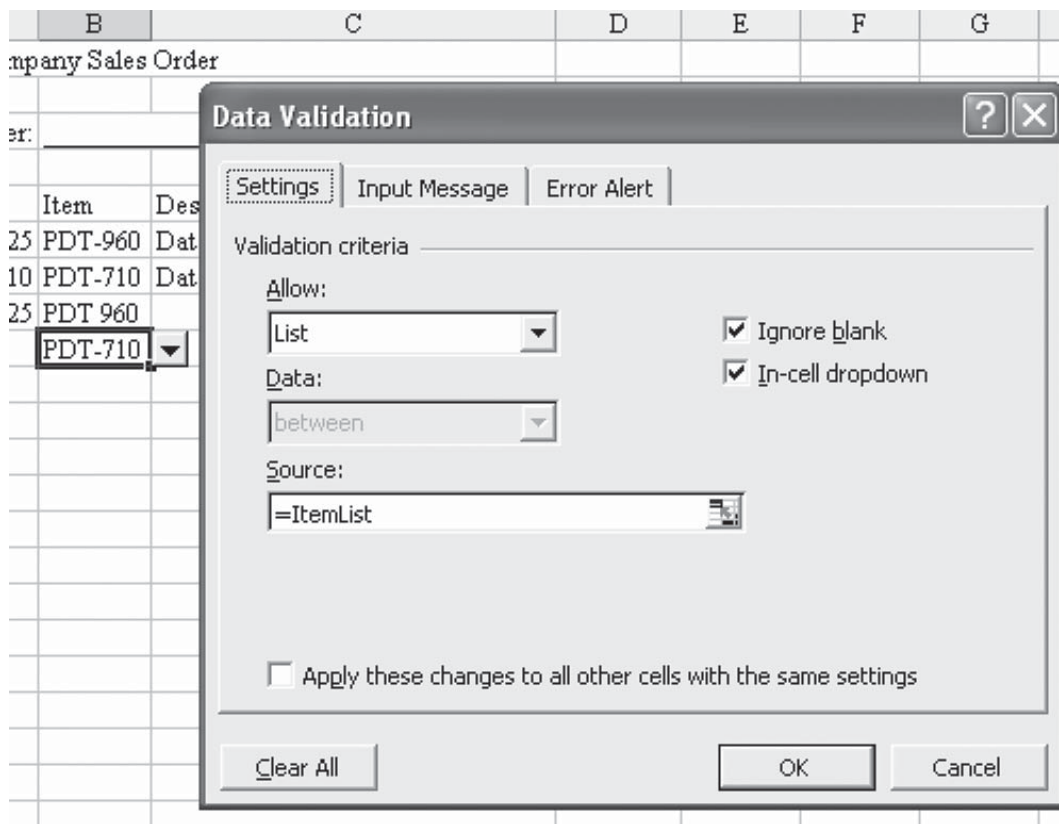


Fig. 1491

Result: The cell will have validation based on a range on another worksheet.

Summary: Although you cannot officially have validation lists on another sheet, by using a workbook-level named range, there is a workaround.

Commands Discussed: Data – Validation

ADD A TOOLTIP TO A CELL TO GUIDE THE PERSON USING THE WORKBOOK

Problem: Excel offers all sorts of tooltips to help you understand the toolbars, as shown in Fig. 1492. Wouldn't it be cool if you could add a tooltip to a cell?

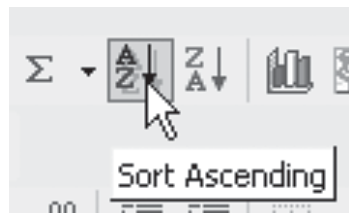


Fig. 1492

Strategy: You can easily add an informative tooltip to any cell. The tooltip will appear when someone selects the cell.

- 1) Move the cell pointer to the cell. From the menu, choose Data – Validation. On the Validation dialog, go to the Input Message tab, as shown in Fig. 1493.

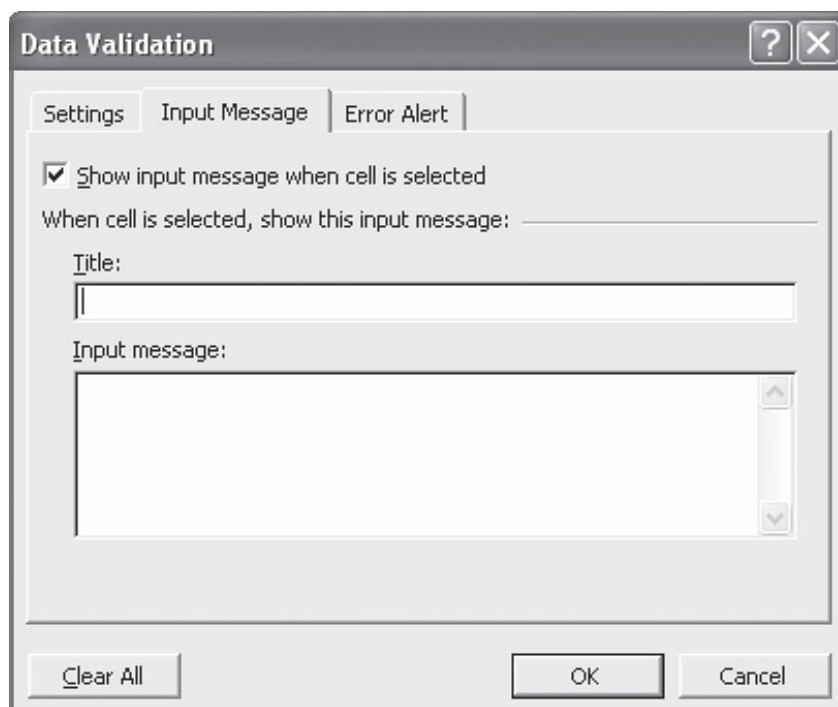
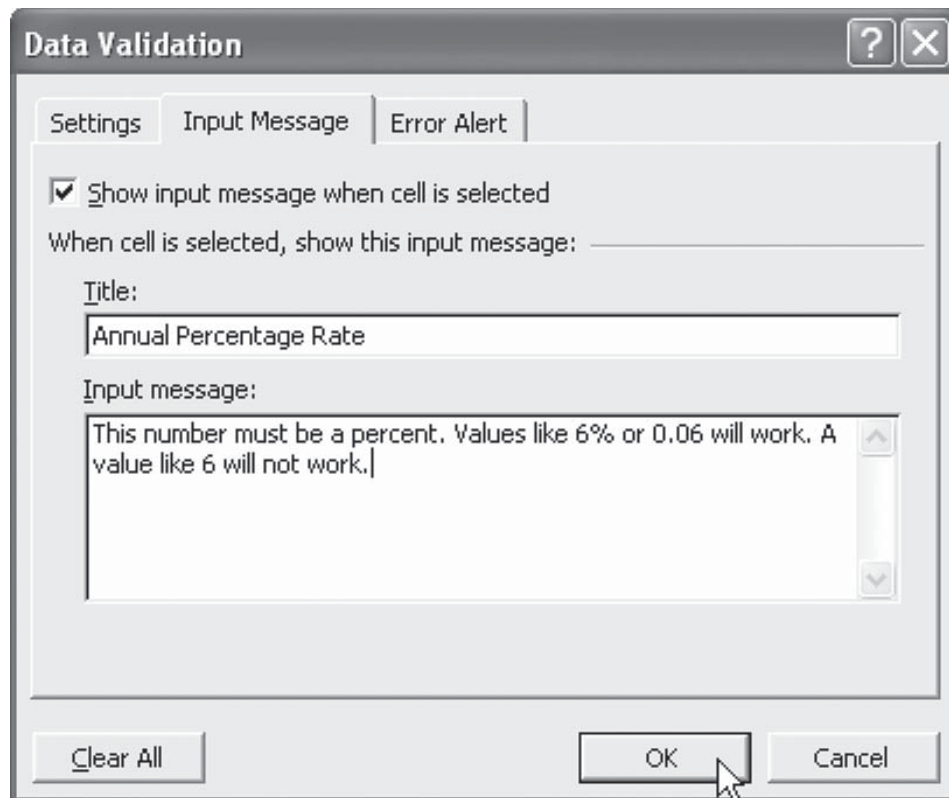


Fig. 1493

- 2) On the Input Message tab, type a title for the tooltip. In the message area, type instructions for the person filling out the worksheet, as shown in Fig. 1494.



**Part
IV**

Fig. 1494

Result: When you move the cell pointer to that cell, an informative tooltip will appear, as shown in Fig. 1495.

	A	B	C	D	E
1	Loan Calculator				
2					
3	Amount Borrowed	25000			
4	Annual Interest Rate	5.90%			
5	Number of Months				
6					
7	Monthly Payment	\$48			
8					
9					
10					

Fig. 1495

Summary: Using the Input Message of the Validation dialog allows you to create helpful tooltips, which can appear in any cell.

Commands Discussed: Data – Validation

CONFIGURE VALIDATION TO “EASE UP”

Problem: You set up a worksheet with data validation to ease the job of the sales managers. One of the managers is entering an order for a brand new product. The product is so new that it does not appear in the product list. Using default Excel list validation, the rep will be nagged and prevented from entering the order for the new product, as shown in Fig. 1496.

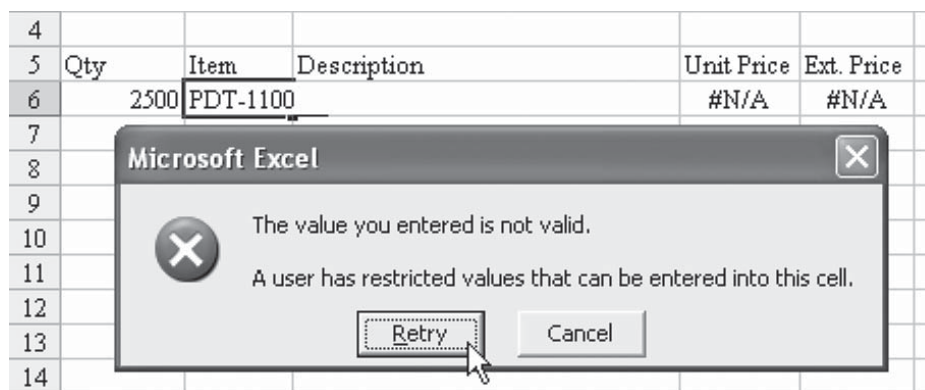


Fig. 1496

You can tell what will happen here. At the next sales conference call, the sales manager will say that he couldn't enter his \$4.5 million order because the lousy spreadsheet wouldn't let him. As the spreadsheet designer, you will be demoted to manager of the "revenue prevention" department.

Strategy: There are three different settings on the Error Alert tab for Validation. By default, you get the hard-line version of the message, as shown in Fig. 1496. This is known as the Stop style of Validation.

Tip

If you are ever the victim of a poorly designed spreadsheet that will not let you enter a value that you know is valid (i.e., you are smarter than the spreadsheet), the solution is to enter the value in an out-of-the-way location on the worksheet. Copy the value and paste it to the cell with validation. The validation will be defeated.

On the Error Alert tab of the Validation dropdown, you can change the Stop to a Warning, as shown in Fig. 1497.

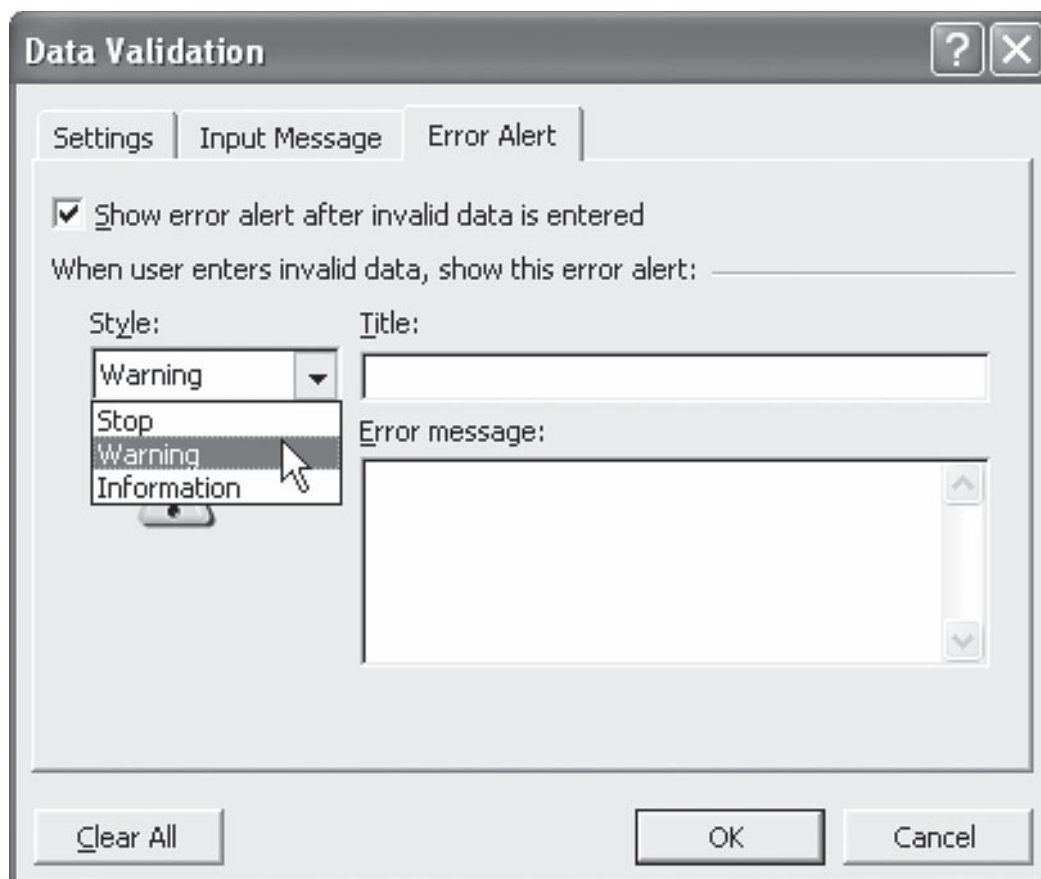


Fig. 1497

In this case, the user is greeted with a dialog with three buttons. As shown in Fig. 1498, the Default button is No, but they can override to allow the value if they are absolutely sure.

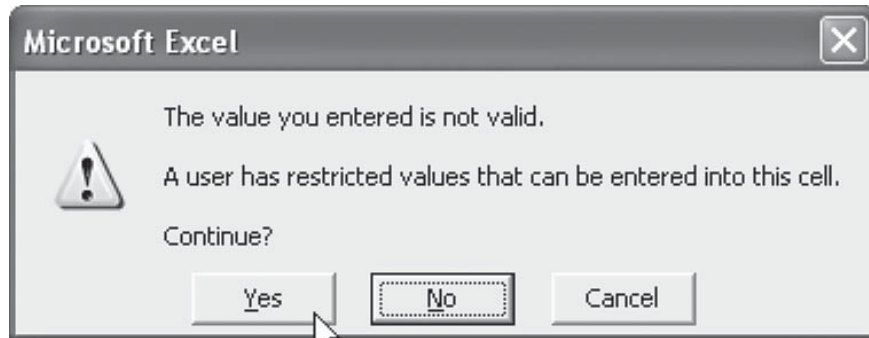


Fig. 1498

The final choice is to set the Error Alert style to Information. This choice is the “ease up” king. The error message defaults to having the OK button selected, as shown in Fig. 1499.

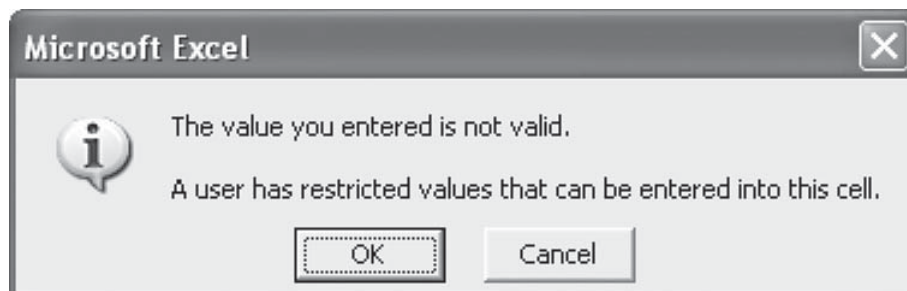


Fig. 1499

Additional Information: You can fill in the title and message boxes on the Error Alert tab to make the message more useful, as shown in Fig. 1500.

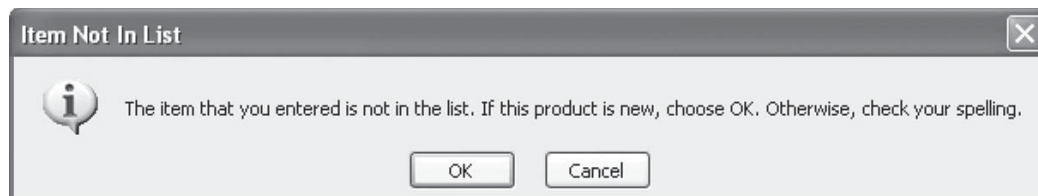


Fig. 1500

Summary: You can decide how strict to make the Validation by using the Error Alert tab on the Data Validation dialog.

Commands Discussed: Data – Validation

USE VALIDATION TO CREATE DEPENDENT LISTS

Problem: You want to create two dropdown lists. The second list should be dependent on what is selected in the first cell.

Strategy: Use the INDIRECT function as the source of the second list. Follow these steps:

- 1) On a blank sheet, set up a list of items for the first dropdown: Reading, Science, Math, and Geography. Name the range “Subjects”, as shown in Fig. 1501.

Subjects	
A	B
1	Reading
2	Science
3	Math
4	Geography
5	

Fig. 1501

- 2) In another column, set up a list of choices available for reading.
- 3) Name this list Reading, as shown in Fig. 1502.

Reading	
A	B
1	Reading
2	Science
3	Math
4	Geography
5	

Fig. 1502

- 4) Repeat Step 3 for each item in list 1, as shown in Fig. 1503. In each case, the name of the new range must match the value in column A.

	Math		fx	Patterns		
	A	B	C	D	E	F
1	Reading	Construct Meaning	Physical Science	Patterns	American History	
2	Science	Extends Meaning	Chemistry	Problem Solving	Ohio History	
3	Math	Identifies Main Idea	Biology	Number Relations	Ancient History	
4	Geography	Identify Main Character	Earth Science	Geometry	Politics	
5				Algebra		
6				Estimation		
7						

Fig. 1503

- 5) Set up the first dropdown list, where users will pick the subject. Select the cell. From the menu, select Data – Validation. Change the Allow box to be List; in the Source box, type =Subjects, as shown in Fig. 1504.

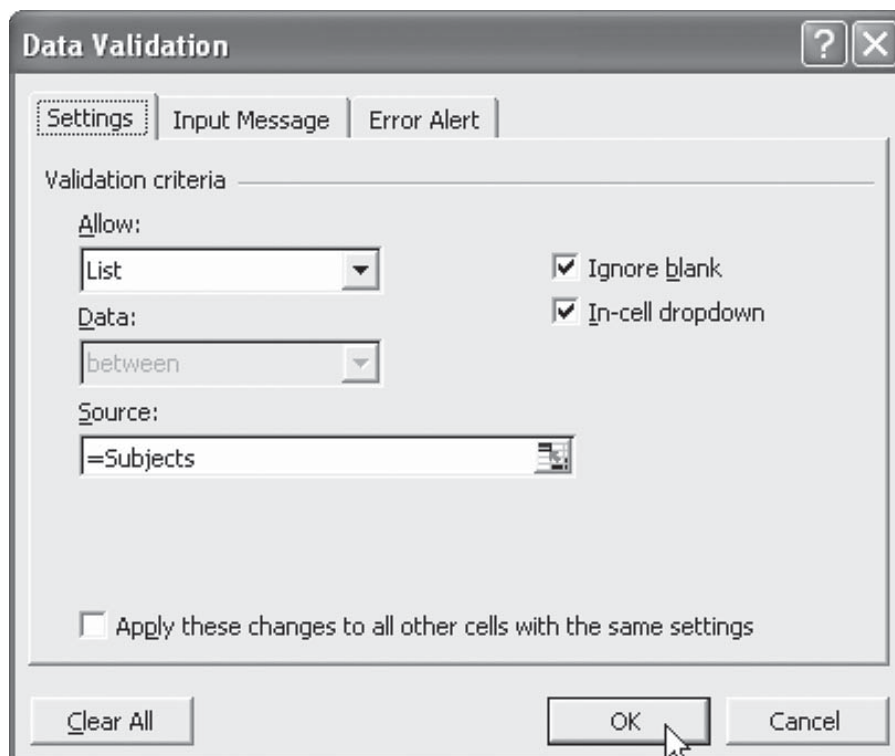


Fig. 1504

- 6) When you choose OK, cell D2 will have a dropdown list of subjects, as shown in Fig. 1505.

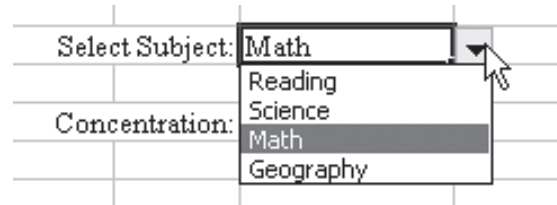


Fig. 1505

- 7) To set up the second dropdown, select cell D4. From the menu, select Data – Validation. Change the Allow: dropdown under Validation Criteria from Any Value to List. In the Source box, enter this formula: =INDIRECT(D2), as shown in Fig. 1506.

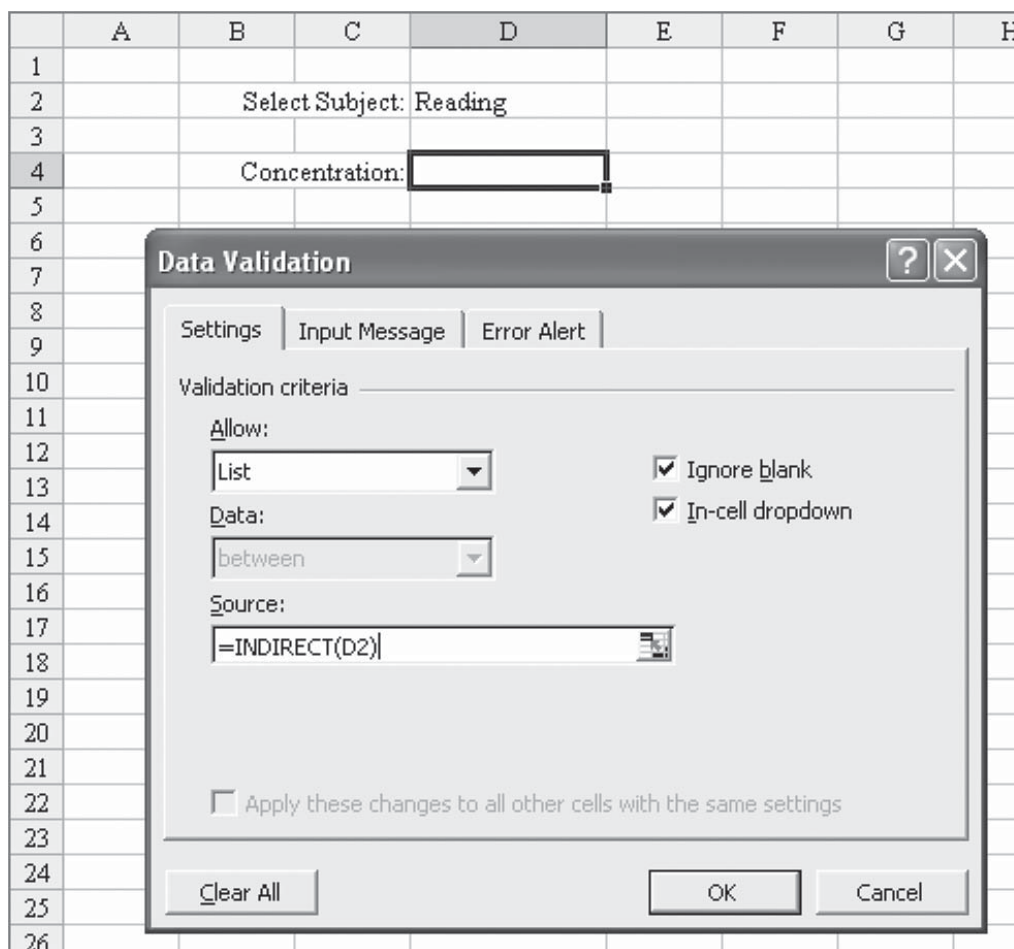


Fig. 1506

Result: When you select a value in D2, the formula for the second dropdown list will automatically update, as shown in Fig. 1507. The INDIRECT function looks in D2 and hopes to find a formula there. When they select Reading in D2, then the validation formula becomes =Reading. Since you cleverly set up a named range called Reading, Excel is able to populate the list.

	A	B	C	D	E
1					
2			Select Subject:	Reading	
3					
4			Concentration:	Extends Meaning	
5				Construct Meaning	
6				Extends Meaning	
7				Identifies Main Idea	
8				Identify Main Character	

Fig. 1507

When you change D2 to be Math, the =INDIRECT(D2) will become =Math. Again, since you have a named range called Math, Excel is able to fill in the second dropdown with Math subjects, as shown in Fig. 1508.

	A	B	C	D	E
1					
2			Select Subject:	Math	
3					
4			Concentration:	Number Relations	
5				Patterns	
6				Problem Solving	
7				Number Relations	
8				Geometry	
9				Algebra	
10				Estimation	

Fig. 1508

Summary: Using the INDIRECT function as the formula in the List for Data Validation will allow you to set up a second validation list that is dependent on the choice in the earlier list.

Commands Discussed: Data – Validation

Functions Discussed: =INDIRECT()