

## PREVENT EXCEL USER ERRORS – MY TOP 6 TIPS

### 1. Ensure users know which file to use (version control)

- Name files clearly including date or version number
- Move old files to sub-folders so that the main folder contains only the final version e.g., move prior versions sent out or used in meetings to “Archive” and back-ups to “zzz old”

### 2. Restrict access to authorized users only

- Save files in server location with restricted access e.g., only finance department
- Add password to open or change, if appropriate: File, Save As, More options (under file name and type), Tools (next to Save button), General options...

### 3. Develop workbooks using best practice rules for clarity and ease of use

- Add a cover sheet showing contact person, workbook status and purpose, a list of sheets with short descriptions → so users get a good overview and know who to contact in case of questions
- Use a clear workbook structure with separate sections for inputs, calculations, and outputs → so users can understand the structure and easily find their way around
- Add an instructions sheet → so users know how to use the workbook
- See my blog for details <https://www.how2excel.com/en/garys-golden-ground-rules/>

### 4. Clearly mark input cells so users know what they may change

- Use consistent formatting e.g., light grey with white border, protection turned off
- Define and use cell styles for ease of use

### 5. Use data validation to restrict inputs to valid entries

- Restrict inputs to
  - integers e.g., 1 to 5 for fixed asset useful lives or 1 to 12 for month numbers
  - decimals e.g., only positive numbers ( $\geq 0$ ) for cash inflows or only negative numbers ( $\leq 0$ ) for cash outflows
  - a list (dropdown) e.g., of valid scenario names, cost centre codes, yes/no (approved?)
  - custom e.g., date is a Monday
- For more details, see my blog <https://www.how2excel.com/en/prevent-user-errors-using-data-validation/> or video <https://www.how2excel.com/en/prevent-user-input-errors-using-data-validation/>

### 6. Protect worksheets, so only input cells can be changed

- Lock formula cells and unlock input cells; define and use cells styles for efficiency.
- Turn protection on for each worksheet, if desired with password
- Use two macros for efficiency: (i) protect all sheets upon opening file and (ii) remove all sheet protection by entering a password, to enable changes.
- See my blog for details <https://www.how2excel.com/en/protect-your-spreadsheets/>

### Further learning

- Here is the link to my one-hour webinar video explaining all six tips: <https://www.youtube.com/watch?v=JuLeqV7gwo8>
- For more details on how to avoid errors of all kinds, please read my book “Avoid Excel Horror Stories”, available on Amazon: <https://lnkd.in/dNaKPZP>