



19 Tips For Leaving Your Legacy With Excel Files

The following is a checklist with 19 techniques that will help you improve the usability of your Excel files. The goal is to make your files easier to use both now and in the future.

- ☐ 1. **Instruction Guide:** Create a sheet at the front of the workbook that explains how to use or update the file. Be as detailed as possible and include screenshots or links to instructional videos. Add a workflow diagram to help users visualize the process.
- ☐ 2. **Define Roles:** Put a list of the file owners, authors, and users/consumers so users know who to contact with questions. Define the expectations for each role. This helps prevent unwanted edits from users that are only supposed to be consuming the file.
- ☐ 3. **Document Everything:** Keep track of major changes to processes within the file. Add detailed comments to complex code/macros and formulas so users can understand how they work.
- ☐ 4. **Table of Contents:** Adding a table of contents to the front of workbook with clickable links to each sheet makes it much easier for users to navigate your files. See our posts on a *TOC List* and *TOC Gallery* (if you really want to impress your users).
- ☐ 5. **Data Validation:** Offers several features to help users with data entry in cells. Including drop-down lists, dates and data types, input messages, and error alerts.
- ☐ 6. **Notes and Comments:** Use these on cells and ranges to explain formula calculations, input requirements, changes, conversations, and more.
- ☐ 7. **Simplify Formulas:** I'm a big fan of keeping formulas short and easy to read, instead of long nested formulas. One way to do this is by using "helper" columns/cells where you break a long formula into multiple cells. This can make it easier for users to dissect formulas and learn how they calculate.
- ☐ 8. **Organizing Sheet Tabs:** Use tab colors to organize sheet tabs for various categories like inputs, calculations, and outputs. This will help users navigate your workbook, and know which tabs NOT to touch.
- ☐ 9. **Cell Styles:** This feature of Excel allows you to use consistent cell formatting across all workbooks. Creating a policy/guideline for your organization to follow will help file authors make this a best practice.



- ☐ **10. Pivot Tables:** Although they might sound complex, pivot tables help you create summary reports **WITHOUT** complex formulas. You can also add slicers to filter reports and make them interactive. Checkout our **3-part video series on pivot tables** to learn more.
- ☐ **11. Data Entry Forms:** This can make it easier for users to input data that has strict requirements, or if you don't want users modifying the spreadsheet. There are several ways to create data entry forms in Excel including VBA userforms, Office Add-ins, Microsoft Forms, and Power Apps.
- ☐ **12. Automate Processes:** Many manual processes can be automated with tools like Power Query, VBA Macros, Office Scripts, Power Automate, and more. This can save users time, prevent errors, eliminate boredom, and make work more enjoyable.
- ☐ **13. Hide Stuff:** Users that are not as Excel savvy as you might get easily overwhelmed by looking at complex spreadsheets. Hide rows and columns with the Group feature. And hide unnecessary worksheets or move them to the back of the file.
- ☐ **14. Excel Tables:** This feature of Excel can make it easier to manage your data and write formulas. There are **pros and cons to using Tables**. If users are editing your file then they should know how tables and table formulas work.
- ☐ **15. Format for Printing:** If your boss/users like to print reports then you'll want to make it a habit to use Page Setup to prepare your files for printing. This includes page breaks, headers, footers, sheet numbers, dates, logos, etc. Checkout my **free Format Copier** to save time with applying formatting to multiple sheets or files.
- ☐ **16. Spell Check:** Typos are embarrassing. Hit F7 on the keyboard to run spell check. <- See what I did there?
- ☐ **17. Check Accessibility:** This is a relatively new feature of Excel located on the Review tab of the ribbon. It will help ensure your workbook is ready for users with disabilities.
- ☐ **18. Date & Data Translations:** If your users are in different countries then dates and numbers might be formatted differently. Excel does a decent job of translating data for the user's locale. However, it's a good idea to explain potential translation issues.
- ☐ **19. Publish Early:** I've made the mistake of waiting to share my file with users until it's "perfect". Perfection can be an illusion that is highly subjective. I strongly encourage you to publish/share your file with users before you think it's ready, and collect feedback(I know, it's nerve racking). This not only saves time, but users also get excited to be involved in the process and usually have great ideas for improvement.