

Data Validation or keeping your precious data safe

So you have created your wonderful spreadsheet. Now how do stop those pesky users (including YOU on a bad day) entering bad data?

Introduction: How do I set a maximum number for the cell?

1. Highlight the area you want to apply data validation to
2. You can highlight the entire column or click in the top cell, press Ctrl + Shift + Arrow down just to select pre-existing data.
3. Click on **Data – Data Validation**
4. On the **Settings** tab, choose **Whole Number**
5. Choose **Less than** or **Less than or Equal to** from the dropdown
6. Enter the value e.g. 20 or if it's a cell, click on the cell that contains the value you want to use as the maximum
7. To help the users, it can be useful to add a message
8. Click on **Input Message**
9. In the **Input Message** box, type something like “number must be less than 20”
10. And if they persist....
11. Click on the **Error Alert** tab and in the **Error Message** box, you could type something like “what part of “enter a number less than 20 did you not understand?” x

How do I only allow values between certain amounts?

1. Follow steps 1-4 above
2. Choose **Between** from the dropdown
3. Enter your **maximum** and **minimum** values.
4. Apply the **Input Message** and **Error Message** as above if required. (Steps 7-11 from above)

How do I only allow items from a specific list in?

The clue is in the name...you will be using a list

Method 1 – Create your list – static

1. Use this method if the items in your list will not be changing e.g. months, days etc.
2. On a separate worksheet, create the entries. (Type them vertically)
3. It can be useful to put your list entries on this sheet and call this sheet **Lists**
4. Highlight your list
5. In the **Name Box** (to left of formula bar) enter the name you want to give this range.
6. Note no spaces allowed in this name e.g. week_days NOT week days
7. Press **Enter**
8. Return to the sheet you want to apply the data validation to
9. Follow steps 1-3 in

Introduction

10. Choose **List** from the list
11. Click in the **Source** box
12. Press **F3** to call up your list of range names
13. Click on **week_days**
14. Now you will have a dropdown box where you can pick the week days from
15. Apply steps 7-11 from the Introduction if you want to add an error message.

Method 2 – Creating a dynamic list

1. Follow steps 1-3 as in Method 1
2. Click in your list.
3. Click **Insert – Table**
4. If your table doesn't have a heading, leave the box for **My table has headers** unticked.
5. Note that it may add a "**column 1**" at the top.
6. You can remove that by deselecting **Header Row** from the **Design** tab (right hand side)
7. Now follow steps 5-15 from **Method 1**
8. The difference with this is that if you add a new item to your list, it will be automatically reflected in your data validation list

I only want certain dates entered

From the **Introduction**, follow steps 1 – 3

1. On the **Settings** tab, choose **Date**
2. Note that from the **Data** tab, you can choose from any of the following:
3. **Between** (Enter your **Start Date and End Date**)
4. **Not Between** ((Enter your **Start Date** and **End Date**)
5. **Equal to** (Enter your date here)
6. **Not Equal To** (Enter the date here)
7. **Greater than** (Enter the date here i.e. later than this date)
8. **Less than** (Enter the date here i.e. earlier than this date here)
9. **Greater than or equal to** (Enter the date here i.e. later than or equal to this date)
10. **Less than or equal to** (Enter the date here i.e. earlier than or equal this date here)

An example of how to use this would be to **use =today() in the Date box using Less Than** to restrict date entry to only those dates in the past.

I only want the users to enter certain text lengths in it.

An example of this would be where you only want users to be able to enter an 8 digit number.

1. Follow steps 1-3 from the **Introduction**
2. On the **Settings** tab, choose **Text Length**
3. Choose **Equal to**
4. Enter **8**
5. Note that you have the same set of choices as referenced in the **I only want certain dates entered** section. i.e. greater than, lesser than etc.
6. Apply the **Input Message** and **Error Message** as above if required.

How do I extend the data validation?

So your data validation is working well but now you find you need to extend it.

1. Highlight where you want to extend it to.
2. Make sure you have included cells with the data validation
3. Click on **Data – Data Validation**
4. You will receive a message that says “ **The selection contains some cells without Data Validation settings. Do you want to extend Data Validation to these cells?**”
5. Click on **Yes**
6. **Your data validation dialog box will open up**
7. Click OK.

How do I copy the data validation to another part of the sheet?

1. Click on cells with data validation
2. Click on **Copy**
3. Highlight the cells you want to copy the validation to.
4. Click on **Paste – Paste Special.**
5. Choose **Validation**
6. Now test.

How do I stop people changing some entries?

The most straightforward way to do that is by cell protection. But it's not intuitive. The idea is that you indicate the areas you want people to be able to change and lock down everything else.

1. Begin by highlighting the areas you WANT people to be able to change.
2. Click **Ctrl** and **1** (to open the **Format Cells** dialog box)
3. Click on the **Protection** tab
4. Clear the **Locked** box
5. Go to **Review – Protect Sheet**
6. Choose what you want people to be able to do.
7. Enter your password
8. You will then be prompted to re-enter it.

9. In order to make any changes other than the specified ones, you will have to unprotect the sheet (**Review – Unprotect Sheet**) by entering the password.

I want to delete the list

1. Click on **Formulas – Name Manager**
2. Click on the range you want to delete
3. Press **Delete**

I want to change the list

If you need to change the list

1. Simply follow the steps in Method 1 and at step 13, click on the new list you want to use.

How do I remove data validation?

1. Highlight the list you want to remove the data validation from
2. **Choose Data – Data Validation**
3. From the **Allow** box, choose **Any Value**
4. To extend the removal to all the cells, tick the **Apply these changes to all other cells with the same settings** box

I don't even want other users to open my file

1. Click on **Review – Protect Workbook**
2. Enter your password
3. Don't forget to write down your password in a safe place

If you are responsible for the work of someone else, make sure they tell you what the password is. I've heard horror stories about disgruntled employees who have left without giving the password....(and on a side note, why don't we call happy people grunted...?)

OK, I'll let them look, but not touch

1. Go to **File – Save As**
2. Click on **Browse** (if you are using Excel 2010 or later)
3. Go to folder you want to save it into.
4. Click on **Tools** (bottom right hand side)

5. Click **General Options** (nope, me neither x)
6. Enter a password that allows the user to open or to modify.
7. Click **OK** and then **Save**.

I don't want duplicates

This method is borrowed from Chandoo.org (bit.ly/1onHjyL) It is set up by using the **CountIf** function.

Let's say we want to prevent duplicates in cells M5:M100

1. From the **Introduction** follow steps 1-3
2. From the **Allow** box, choose Custom
3. In the **Formula** box enter the following:
`=COUNTIF($M$5:$M$100,M5)<=1`
4. Note that what this function does is assess the range \$M\$5:\$M\$100 which is fixed. The M5 part of the formula will change as copied down. Therefore what it will do is see if what is in the current cell is counted more than once i.e. duplicate.
5. Apply your error messages if required (Introduction: steps 7-11)

I want the users to be able to sort and filter the list but not do ANYTHING ELSE.

One would think that specifying Sort and Autofilter in the Protect Sheet box would sort this. Nope, it doesn't.

1. Highlight the area you want users to be able to sort and filter
2. Make sure the Filter is turned on (**Data – Filter**)
3. From **Review – Allow users to Edit Ranges**
4. Don't use a password at this point
5. Click **New**
6. The range you have selected should appear in the dialog box
7. Click **OK**.
8. Then click **Apply** and **OK**
9. Now follow the instructions given in **How do I stop people changing some entries?**
10. Make sure the **Sort** and **Autofilter** boxes are ticked and that the **Select Locked Cells** and **Select Unlocked Cells** are deselected.

Note that for sorting you will have to use the **Data – Sort** dialog box to sort the data.