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Welcome to Excel!

First things first – The Ribbon

The ribbon is the bar across the top of the screen and it is where everything happens. There are set tabs that are there all the time e.g HOME – INSERT – DESIGN - PAGE LAYOUT, additional tabs will appear depending what you are working on.

For example if you have chosen to insert a picture, whilst your cursor is clicked in/on the picture on the ribbon will be an additional tab PICTURE TOOLS, FORMAT – this is specific for the activity being performed in Excel at that time.

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This article looks at the DATA tab and Data Validation

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Data Validation has different uses but one that can be most useful is list ...

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When would you use a list in Data Validation?

For example if you have regular suppliers and you record each invoice you receive from them, it is good practice to have the suppliers names in a list to avoid typing errors or alternative ways of displaying their name e.g BT, Brit Telecom, British Telecom.

Being consistent in how the name is spelt/displayed enables good use of the data filter options or Sumif functions to find out, for example, how much you spent with one supplier.

First create your list of suppliers: perhaps call the worksheet 'Admin'



Create the new worksheet where this information in the list will be used – in this example following it's called 'SupplierInvoices'.



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Highlight the column that the information will appear in. Click Data tab, Data Validation and then choose List from the drop down menu.

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Place the cursor in the box marked Source then click into the worksheet 'Admin' and on the top of the column that holds the data. (The advantage here of clicking to select the whole column is that future suppliers can be added to the list).

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In the following screen shot you can see the list in action. Alongside the cells it is possible to select the supplier from a drop down list. It is also possible to type in the name if you know it and enter it spelt correctly. If an unidentified supplier is entered a warning is flagged. Should this in fact be a new supplier simply go to the 'Admin' worksheet and add.

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This is a good example of how to be organised within Excel!