

Appendix C

Excel Best Practice Techniques and Hip Pocket Tips

EXCEL BEST PRACTICES FOR BUSINESS is filled with a substantial amount of information. To make this information convenient and readily accessible, the top 150 best practice techniques and tips from this book are provided here (Table C-1). You can use this reference to quickly locate essential information you may need without having to search through the more detailed book index.

From time to time, be sure to check for updated information on my site:
www.evolvingtech.com/excel

TABLE C-1 LIST OF EXCEL BEST PRACTICE TECHNIQUES AND HIP POCKET TIPS

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
1	Accessible (Excel) provided graphical components compatible with screen reader software	13	Interface for a List Box and a Button
2	Adjusting constraints and setup of an optimization problem to take into account real world conditions	8	Real-World Adjustments
3	Adjusting global and individual voice settings (and national language support)	13	Voice Settings
4	Advanced Filters: setup, multiple complex criteria, and usage of formulas within advanced filters	6	Advanced Filters
5	Anatomy of an Assistive Portal Interface	13	An Assistive Portal Implementation
6	Automatic smart borders	7	Perimeter Surveillance

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TABLE C-1 LIST OF EXCEL BEST PRACTICE TECHNIQUES AND HIP POCKET TIPS
(Continued)

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
7	Automatically picking up names of cells and constraints in the Answer Report of the Solver	8	The Answer Report
8	Automating the rearrangement of columnar data	6	They Threw in the Kitchen Sink
9	Basic design of the Assistive Portal Interface	13	Basic Implementation Steps
10	Basic setup of a "Forms" List Box	5	Setting Up A List Box
11	Basic step for setting up web based XML queries	12	XML in Excel 2003
12	Basic steps in performing spreadsheet makeovers	10	First steps in the makeover
13	Basics on Visual Basic	12	Some Visual Basic Syntax and Elementary Concepts
14	Block Sorting (& Scaffolding) Technique	3	Block-sorting
15	Bullet-proofing data entry	6	Bullet-proof your data entry
16	Catching potential errors caused by the Excel handle bar replication	11	Some observations for beginning your assessment
17	Caveat on the user of the Limits Report generate by the Solver	8	The Limits Report
18	Caveats on accessing and adjusting XML Maps	12	The All-In-One Worksheet
19	Caveats on creating and modifying JAWS verbosity settings (new file vs. best match vs. exact match)	13	Things You Need To Know About Settings
20	Common keyboard commands for JAWS and the Excel Application Software	13	Listing 13-1: Common JAWS Keystroke Commands (items in boldface are specific to Excel)
21	Comparing apples to oranges - a classic example	11	A partial checklist for discerning mistakes

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
22	Conditional Formatting: understanding the use of formulas vs. values when used in conditional formats	7	Rules of the road
23	Constructing a SOAP based UDDI4J API call in the XML-RPC Handler	CD	UddiSearchHandler.java
24	Constructing cell references on-the-fly	3	Using Indirect With Concatenate
25	Context switching: example (1) - spinner controls like an up/down arrow button (spinner control sets which dataset gets graphed in the existing chart)	5	Setting Up A List Box
26	Context switching: example (2) - spinner controls like an up/down arrow button (spinner control sets which part of a sequence or timeline gets analyzed and graphed in the existing chart)	8	The Analysis Layer
27	Context switching: example (3) - data feeds in a portal page (managed via an Organizer Map)	12	Simple Client Portals
28	Context switching: example (4) - dual list box	13	An Assistive Portal Implementation
29	Converting tabular data to SQL	3	Data Surgery and Data Manipulation
30	Creating a sequence of digits along a row or column based on the first two numbers	7	Automatic adjustment for a range of data
31	Creating Chart titles and captions whose codes can be based on formula calculations in a spreadsheet cell	8	Usage Of Fourier Analysis In Excel And A Sample Spreadsheet Tool
32	Criteria for spotting a data mirage	9	Strategies for assessing whether you have a data mirage
33	Data Overpass: example (1)	4	Dataedit Worksheet
34	Data Overpass: example (2)	9	Square Peg/Round Hole Scenario
35	Defining a batch of user defined names in rapid succession	1	User-Defined Names within Excel Spreadsheets

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TABLE C-1 LIST OF EXCEL BEST PRACTICE TECHNIQUES AND HIP POCKET TIPS
(Continued)

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
36	Defining JAWS custom spreadsheet regions	13	Defining Spreadsheet Regions
37	"Diff" comparison of two spreadsheets	9	The Swatch Comparison
38	Drill down to source data in a PivotTable	4	Pivot data drill-down
39	Essential macro code for opening a spreadsheet to a specific location (and providing for customization without macro recoding)	13	Listing 13-2: The following is placed in the code for 'ThisWorkbook' in the VBA Project for your workbook
40	Essential Web Services concepts explained	12	Web Services -- a simplified explanation
41	Event management technique for running a specific macro anytime a new entry is made in a spreadsheet cell (and reselecting the cell)	12	Fine-Tuning Your Software
42	Excel Lists and their role in rendering, accessing and manipulating XML in worksheets	12	Turning Your Map Elements Into Lists
43	Finding the JAWS configuration and settings files	13	Listing 13-1: Common JAWS Keystroke Commands (items in boldface are specific to Excel)
44	Formula for displaying current filename of a spreadsheet without full path info (and not using any macros)	CD	see the formula for: '[ch13-06AssistivePortal.xla]Config!ConfigThisFile
45	Formula Replication Techniques (Advanced)	5	Special Issues (And Their Resolution) In Replicating Formulas
46	Formula Replication Techniques (Basic)	1	Best Practice Topic: Evolving a strategy toward Absolute vs. Relative vs. Hybrid cell references

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
47	Functions for text manipulation: representative examples using LEFT, MID, RIGHT, REPT, REPLACE, SUBSTITUTE, LOWER, UPPER, PROPER, LEN, TRIM, CHAR, CODE, CLEAN, VALUE, TEXT	3	Some more functions for data manipulation
48	Goal Seek caveats	8	Some Things You Need To Be Aware Of
49	Guide for calculating, understanding, and using derivatives	8	A crash course on differential calculus
50	Guidelines for placing XML Lists in your spreadsheet	12	Step 4: Interaction with the Other Parts of Your Spreadsheet Application
51	Guidelines for print settings (1)	2	Step 6: Refining Your Spreadsheet's Appearance
52	Guidelines for print settings (2)	2	Excel Templates
53	Harnessing positional arrangements of information to manage data	10	The Recommended Approach
54	How to create a .xlt template	2	Excel Templates
55	How to have the programs in your Windows start menu sorted in alphabetical order (for easier navigation with JAWS)	13	Get Your Windows Start Menu In Order
56	Identifying and making explicit, hidden exceptions to the rule	10	Look For Weaknesses In The Formulas And Identify Ways To Correct For Them (located in two parts of the chapter)
57	Identifying and validating correctness in the formulas	10	Look For Weaknesses In The Formulas And Identify Ways To Correct For Them (located in two parts of the chapter)

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TABLE C-1 LIST OF EXCEL BEST PRACTICE TECHNIQUES AND HIP POCKET TIPS
(Continued)

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
58	Identifying important computations	10	[Identify Obvious Portions Of The Spreadsheet That Are In Need Of Revision], and [Determine What Portions Of The Spreadsheets Have Formulas And What Portions Have Been Etched Out By Hand Or Are Otherwise Hardwired]
59	Implementing a dual level List Box	13	Compound Interfaces
60	Important and subtle issues in using web based queries for importing XML and its Schema	12	Step 2: Tell the Spreadsheet Application How the Received Data is to be Structured
61	Important information about grouping data with PivotTables	4	Some Things You Should Know About Grouping Pivot Data
62	Important navigation design tips for accessible spreadsheets	13	Provide A Trail Of Bread Crumbs
63	Importing XML from a document on your hard drive	12	By the way...
64	Importing XML from a URL specified by a spreadsheet cell	12	Step 3: Interaction between Excel and the Remote Server
65	Increasing the precision of the Excel goal seeking facility	8	Squeezing Water From A Stone
66	In-lined (row) counting and "Anchor" Cells	7	SmartData Used with Anchor Cells
67	Installing a .xla file as an Excel Add-In	11	Installing the Data Audit tool
68	JAWS Frames	13	Other Techniques

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
69	JAWS Scripting	13	Other Techniques
70	JAWS verbosity settings	13	Defining Spreadsheet Regions
71	Keyboard command for silencing JAWS when it won't shut up	13	Preliminary JAWS Concepts: a training wheel approach
72	Keyboard navigation to move around spreadsheets at warp speed	1	Keyboard and cursor navigation tips
73	Layered Pattern Approach: a good reference implementation	8	The Data Viewer tool
74	Layered Pattern Approach: architecture/blueprint	2	Creating a "blueprint" for large or complex spreadsheets
75	List of common formula errors	10	TABLE 10-1 Common Formula Errors
76	List of spreadsheet issues to examine	11	A partial checklist for discerning mistakes
77	Making improvements and simplifications to formulas	10	Look For Weaknesses In The Formulas And Identify Ways To Correct For Them (located in second occurrence of section heading for this chapter)
78	Mapping the existing spreadsheet structure	10	[Determine What Portions Of The Spreadsheets Have Formulas And What Portions Have Been Etched Out By Hand Or Are Otherwise Hardwired], and [View Of The Spreadsheet From 14,000 Feet]
79	Mathematical rules for combining multiple quantities whose values are uncertain	8	Uncertainty rules

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(Continued)

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
80	Naming conventions for accessible spreadsheets	13	Create Easy To Find Signposts
81	New capabilities, features, and limitations of Filters in Excel 2003 (and caveats on its usage)	6	Using Excel Filters
82	Organization of accessible spreadsheets	13	The Basic Framework
83	Overall technique of chiseling a problem - example (1)	5	The Art of Data Slogging
84	Overall technique of chiseling a problem - example (2)	9	Ambiguous and Incomplete Data
85	PC Cursor mode vs. JAWS Cursor mode	13	Preliminary JAWS Concepts: a training wheel approach
86	Phantom Formatting Technique: getting four colors or formats instead of three when using condition formatting	7	The Phantom Formatting Technique and Four Color Tables
87	Practices relating to the Spreadsheet Masthead (WHO, What & when)	2	Step 6: Refining Your Spreadsheet's Appearance
88	Presentation Tear Sheets	6	Presentation Tear Sheets
89	Preventing the auto open macro from automatically running	13	The Starting Point
90	Reading data using OFFSETs: example (1)	3	Reader Offsets
91	Reference architecture for a complex Spreadsheet Portal	12	How The Braided Style Spreadsheet Portal Works
92	Registering new handler code for your personal XML-RPC Server	12	Fine-Tuning Your Software
93	Removing hardwiring from coding: separating hardwired data from your spreadsheet formulas (some examples)	3	The & Joining Operator and Concatenate
94	Removing hardwiring from coding: the Abstraction Layer Approach	13	[An Important Design Strategy], and [Abstraction Layer Approach to Coding]

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
95	Repeat what I just did (and more): cloning print settings	2	The Repeat What I Just Did Feature
96	Repeat what I just did: another example	10	Using The Excel Repeat Facility
97	Running an XML import from a macro	12	Some Visual Basic Syntax and Elementary Concepts
98	Running JAWS in standalone mode and some caveats	13	Getting Acclimated With a Screen Reader
99	Selecting a column of data embedded inside a PDF document	4	Copying and pasting columnar data
100	Sentinel Look-Ahead Technique	3	The Sentinel Look-Ahead Technique
101	Setting the XML Map directly from a schema resulting from a URL request	12	Getting The Schema Directly
102	Setting up a Screen Reader	13	Setting up a Screen Reader
103	Setup of an XML-RPC Server	CD	XML_RPC_Server.java
104	Setup of the Excel Solver for mathematical optimization (defining problems, suggested practices and important gotchas)	8	Summon The Solver
105	Side by side synchronized scrolling	9	The Eyeball Comparison
106	Simple spreadsheet construction: outline of steps	2	Understanding Simple Spreadsheets
107	Simple spreadsheet construction: worked out example	2	Building a Spreadsheet: A Simple Example
108	Simulate random values having a Normal or Gaussian distribution	8	Stochastic and Markov processes
109	Sorting with more than three keyed fields	3	Sorting with more than three columns (or rows)
110	Special techniques in date arithmetic	10	Formulas for the date arithmetic

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(Continued)

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111	Spotting where errors occur in a complex formula (when each of its components do not contain errors)	11	Formula evaluation
112	Spreadsheet guidelines relating to color blindness	13	Vision Impairment
113	Spreadsheet Portal reference implementation (1)	12	Interactive Participation in an Evolving Survey
114	Spreadsheet Portal reference implementation (2)	12	Use a Spreadsheet Portal to Braid Information
115	Syntax for Excel HYPERLINK function: (1) Hyperlinks to a URL	12	The All-In-One Worksheet
116	Syntax for Excel HYPERLINK function: (2) Hyperlinks to another part of an Excel workbook	13	Hyperlinks
117	Table summarizing case sensitivity of various Excel functions	3	First Steps to Tidying Up Your Data
118	Technique for extending format of text that is longer than the size of the cell width	7	Smart Formatting for Overextended Text
119	Technique for mapping a remote workbook in an Assistive Portal	13	An Assistive Portal Implementation
120	Technique of "Addition in Quadrature"	8	Quantifying Uncertainty: Techniques and Rules
121	Technique of creating a search key	5	Search Enable your Source Data
122	Technique of gathering data of other worksheets (or spreadsheets) otherwise unavailable for conditional formatting	7	Helper cells
123	Technique of incrementing variables in an XSL transformation	12	The XML "Staircase" Problem in Excel 2003 (and Other Things to Keep in Sight)

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
124	Technique of issuing a POST request from an Excel macro	12	Listing 12-4: Pseudo Code for Running yourMethod-(namedRange) on an Instance of JavaClassOfYourChoosing
125	Technique of managing arrays in an XML-RPC Server (instead of a single value)	CD	UddiSearchHandler-StringArray.java
126	Technique of overriding and un-erasing overrides	7	From RAGs to Riches: turn red, amber green into a rich and dynamically interactive array of colors
127	Techniques for addressing the XML "Staircase" Problem	12	The XML "Staircase" Problem in Excel 2003 (and Other Things to Keep in Sight)
128	Techniques for cleaning up data including: pruning unwanted data, eliminating comparison of apples & oranges, resolving ambiguous data, and assuring data uniformity	5	Cleaning up the spreadsheet
129	Techniques to prepare data before importing to a PivotTable	4	Preparing your Data
130	Techniques, guidelines and catalog of popup comments	6	Tips for Spreadsheet Comments
131	The Input Box interface	13	Other Techniques
132	Tracing dependencies to those computations	10	[Formula Dependencies], and [Trace The Formula Dependencies]
133	Tracing formula dependencies	11	Some observations for beginning your assessment
134	Transforming "approximate" binary constraints to exact binary constraints	8	Binary constraint workaround
135	Understanding shadow prices (and Lagrange Multipliers) reported by the Solver	8	The Sensitivity Report

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136	Understanding the aggregate effect of uncertainties when they are systematic (or correlated) vs. random (or uncorrelated)	11	Testing the Reasonableness of Spreadsheets
137	Understanding the difference between the Controls Toolbox and the older Forms controls	13	Graphical Components
138	Unearthing errors in the computations	10	Look For Weaknesses In The Formulas And Identify Ways To Correct For Them (located in two parts of the chapter)
139	Updating external links	11	Test your skills
140	Use of 3rd party tools to generate an XSD Schema	12	Generating The Schema With Third Party Tools
141	Using capitalization to identify which functions in not properly defined (When #NAME? appears in spreadsheet cells)	1	Entering Formulas
142	Using CHOOSE and MATCH to create a custom pick list in a single spreadsheet cell	7	Choose the best match
143	Using Excel to run Java applications and return results in XML	12	Accessing the UDDI Registry from your Spreadsheet
144	Using JAWS to read custom designed spreadsheet tables (with stacked row and column headers)	13	Defining Spreadsheet Regions
145	Using the TEXT function to render numerical values as dates	3	Contending With Excel's Way Of Representing Dates
146	Using the Text Import Wizard for both .txt and .csv files	5	Importing data
147	Walk-thru of setting up an XML-RPC Server for use with Excel	CD	takeaway.txt

No.	Best Practice Technique or "Hip Pocket" Tip	Ch	Section
148	XML data denormalization	12	A Layered Approach For A Spreadsheet Portal
149	XML export difficulties in Excel 2003	12	The XML "Staircase" Problem in Excel 2003 (and Other Things to Keep in Sight)
150	XML Map creation process	12	Step 2: Tell the Spreadsheet Application How the Received Data is to be Structured
