Making Excel Work for Your Tribal Community

Drop-down List Reference Guide

Capacity Building
CENTER FOR TRIBES

MAKING EXCEL WORK FOR YOUR TRIBAL COMMUNITY
Drop-down List Reference Guide

Adding a drop-down list to your spreadsheet can provide consistency in data and aid in reporting your data correctly. A drop-down list is simply a list of values programed in your spreadsheet so instead of workers typing in the value, they click on the drop-down and choose from the list of values. There are probably several appropriate columns in your spreadsheet that could use drop-down. For example, gender could be a drop-down list of "Male" and "Female"or Type of Report (Physical abuse, neglect, emotional abuse etc.) Below is a simple example of how to build a drop-down list in your spreadsheet.

### Adding a Drop-down List to an Excel Spreadsheet

1. Starting with a blank spreadsheet, use your mouse to right click on the bottom tab that says "Sheet" and choose "Rename" Name this sheet "Values." Add the items you want for your drop-down list with each item in a separate cell.
   Note: It's usually best to put them in alphabetical order from top to bottom.
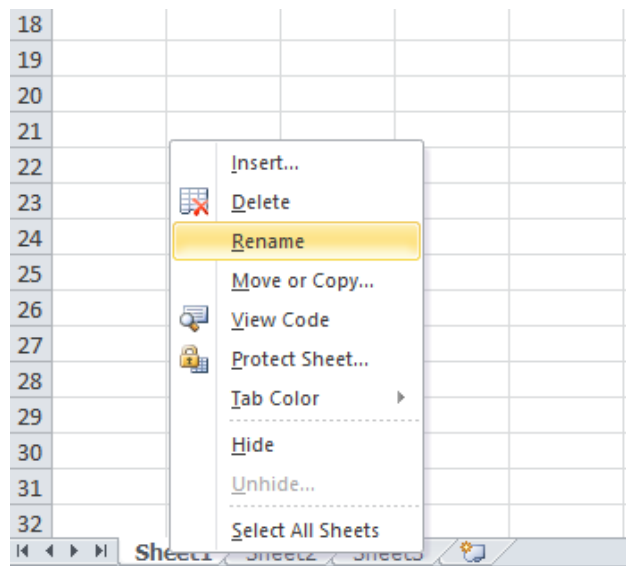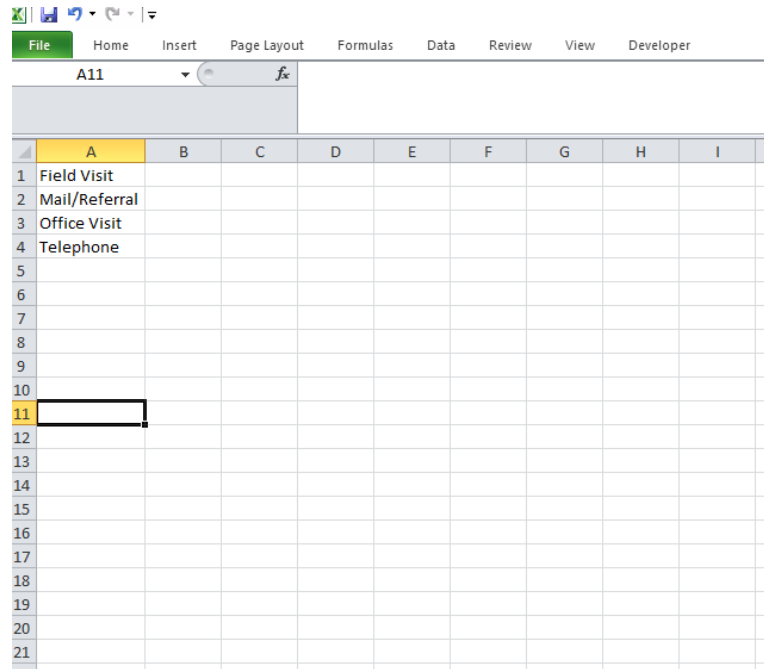
2. At the bottom of the workbook, click on the tab to switch to the next worksheet (or add a worksheet if using Excel 2017). Type the column header in the first cell. Select the cells below it by clicking and highlighting the selected cells. These are the cells that will have the drop-down list, so highlight as far down as you need to. If you have about 35 intakes/reports a month, then highlight at least 35 rows in the column.
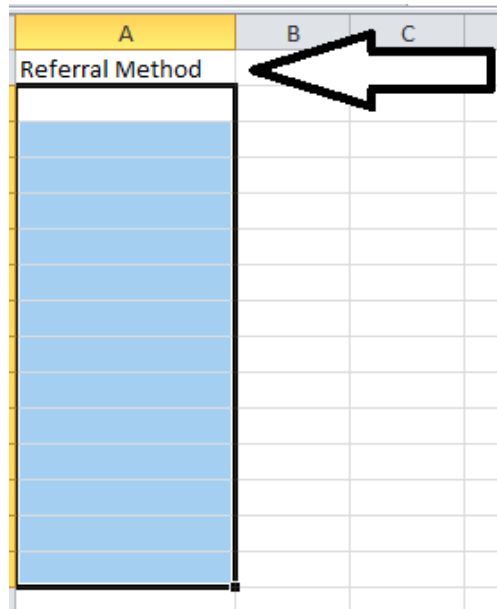
3. The next step is to validate the data. You are selecting the values for the drop-down that matches the column heading. In the Excel tool bar, click on the "Data" tab, then the "Data Validation" button, and then select "Data Validation" from the drop-down menu.
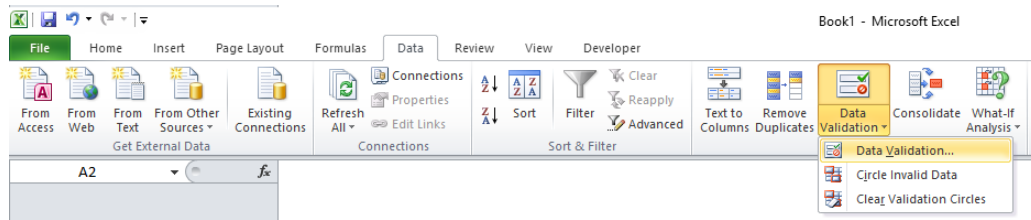

4. In the "Settings" tab, from the options under "Allow," select "List." Under "Source," click on the button.
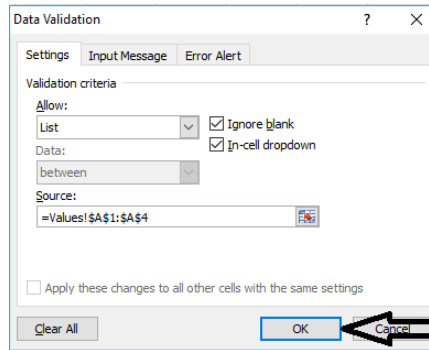
5. When the "Data Validation" box pops up, go back to the "Values" worksheet and highlight the drop-down values you entered. The cell range will copy into the data validation box. Then click on the button.
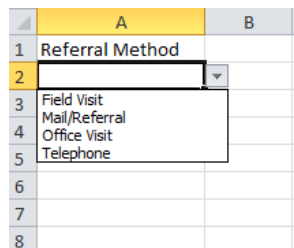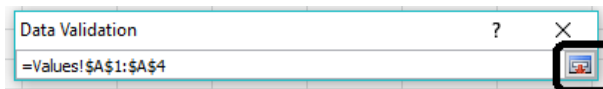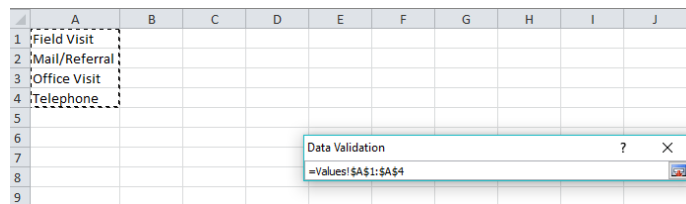
6. Click "OK" in the data validation window. Your drop-down list is now in the cells you chose.
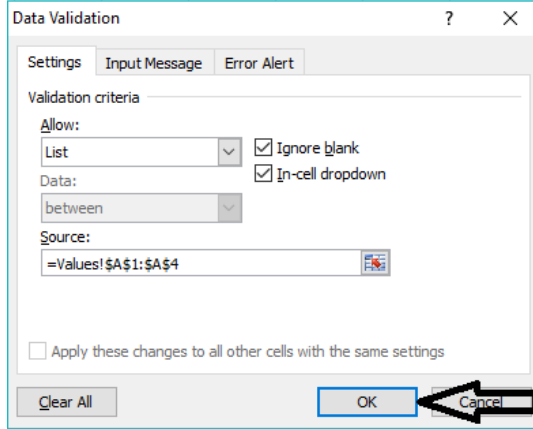
7. Click into your intake worksheet, and check out the drop-down list you just built.

VIEW THE COMPANION VIDEO