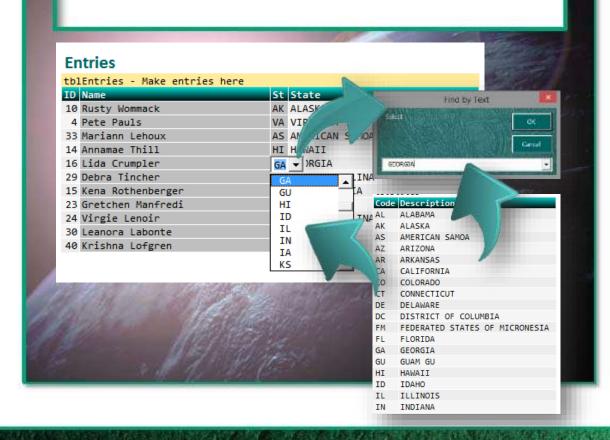
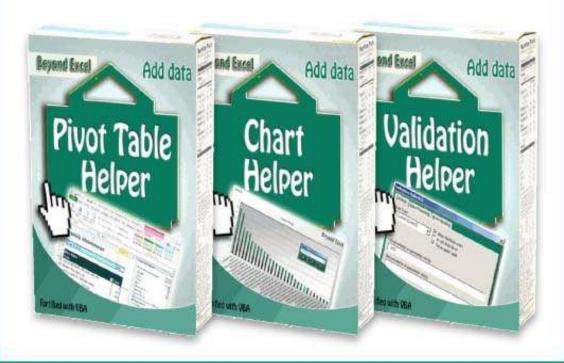
Beyond Excel

ADD-IN COMBOBOX WITH SEARCH BY DESCRIPTION



WHAT IS BEYOND EXCEL?

Beyond Excel is a free "cookbook" approach to extending Excel with VBA. Practical solutions are offered instead of abstract theory. Those desiring more theory and/or a VBA language reference are encouraged to seek out the many superior resources available for purchase or free on the internet. Links to some of those resources are provided inside.



"Cookbook approach" is an analogy to recipes that provide instructions on how to prepare a final product, such as a cake or casserole, instead of theory on how to cook in general.



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Beyond Excel

Why Read This?

Make data entry easier.

Problem

Data validation's dropdown lists do a good job of preventing bad entries and for small lists they help find the right code. Dropdowns, however, fall short for larger lists or longer codes. We need what dropdowns lack. We need autocomplete. We need lists positioned by partial entries. We need to search for codes by description.

Autocomplete

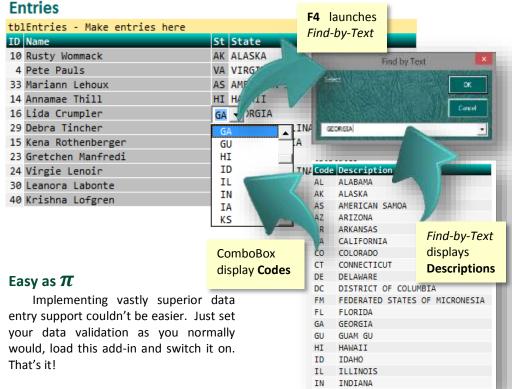
ComboBoxes find matching entries as we type and they often autocomplete with the correct entry after just a few keystrokes. This greatly improves data entry efficiency if we know the correct spelling. What if we don't?

Position by Partial Entry

Like dropdowns we can scroll through ComboBoxes' value list to pick a code that looks right. This helps if we have some idea of what the code is. What if we don't?

Search for Code by Description

This add-in provides another very useful feature, *find-by-text*. With the ComboBox displayed, press **F4** to display and search by code descriptions.



Making the Magic Happen

The add-in finds all cells with data validation set to *list*. When users select one of those cells, the add-in loads a ComboBox from the cell's validation formula and displays the ComboBox over the cell. When the user exits the ComboBox the add-in hides It keeping our data entry area clean.

Seeing is believing

Install the demo. Try it out. See how easy data entry can be. And if you like coding, open the VBE, examine the code, and use this guide to understand how to add feature rich ComboBoxes to your own projects without the add-in.



Installing the Demo

Requirements

This demo requires **MS Excel 2007®** or later. VBA (macros) must be enabled.

Installing

IMPORTANT! Follow these steps. Don't skip any.

- 1. Download ComboBox.Zip
- 2. Open your **Downloads** folder, NOT the zip file.
- 3. Right click <u>ComboBox.Zip</u> and select *Extract All*.
- 4. Make sure *Show extracted files when complete* is checked.
- 5. Make note of the extracted folder's path.

Running

- 1. Open the extracted folder
- Double click AddInDemo.xls
- 3. If *Protected View* displays click *Enable Editing*.





4. If Security Warning displays click Enable Content.





Find the ComboBox tab in the Ribbon and check ComboBox checkbox



ComboBox.zip's URL is:

https://dl.dropboxusercontent.com/u/13737137/Projects/ComboBox/ComboBox.zip

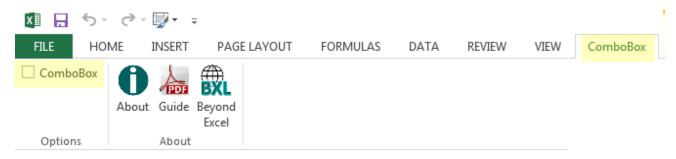


Demo Walkthrough

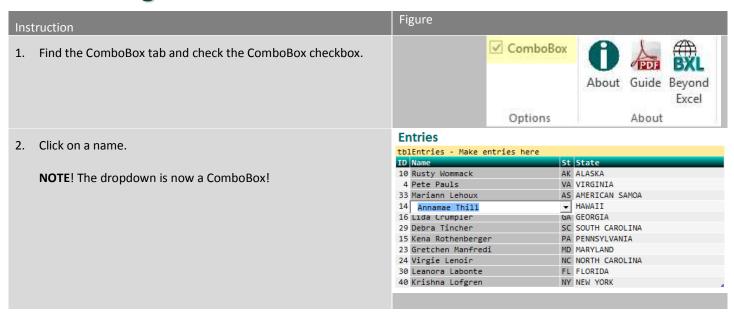
This section walks us through the demo so we can see what this app does.

Basic Concept

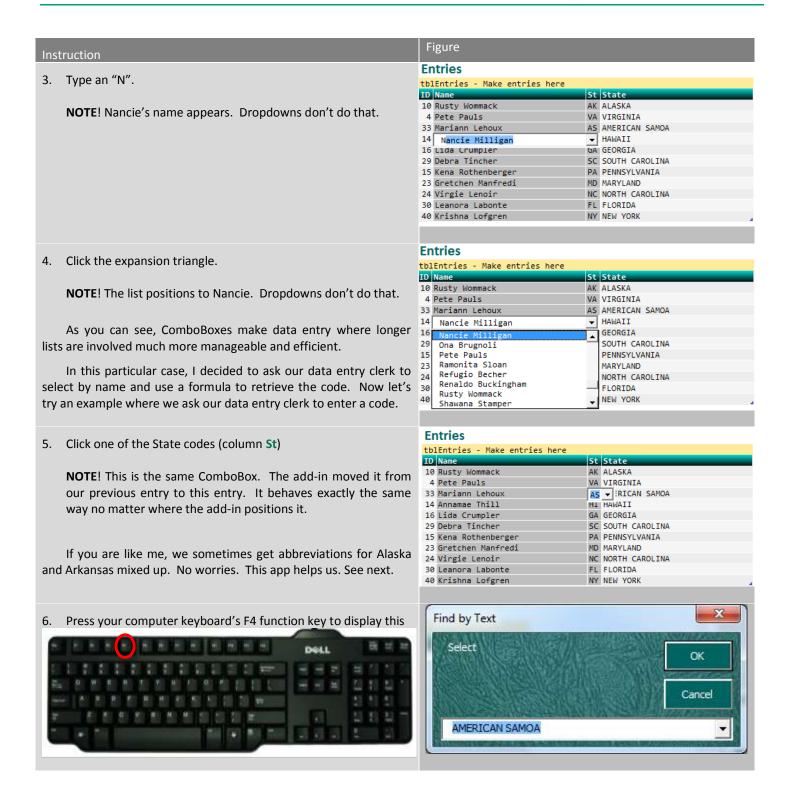
Set up data validation as we would normally (see <u>Data Validation Tips</u> for more on setting Excel's data validate) then check the Ribbon's ComboBox. At that point, all dropdown data validation uses a ComboBox instead of a dropdown listbox and a form to search for codes by description is accessible using function key F4.



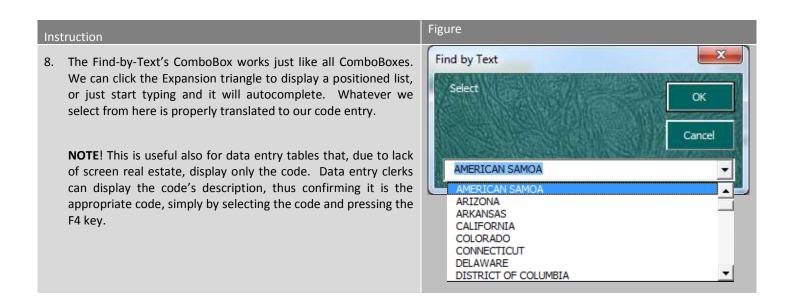
Walkthrough













User Instructions

Using ComboBox is automatic. Simply select any cell with **Data Validation** set to **Allow** *List* and the add-in instantly swaps out the dropdown listbox for a ComboBox.

If we want the old dropdown's to return, simply uncheck the ComboBox checkbox in the ComboBox tab.

User Interface Elements

This add in installs its own tab on Excel's Ribbon. This is only automatic with the add-in (there is no menu tab when incorporating the modules directly into your project).



Ribbon Buttons

Button	Description
ComboBox On/Off Checkbox	Turn ComboBox feature on or off. When checked all data validation dropdown lists are replaced with ComboBoxes for the current worksheet.
About	About this add in.
PDF Guide	Guide (this document) display
BXL Website	Beyond Excel Website display

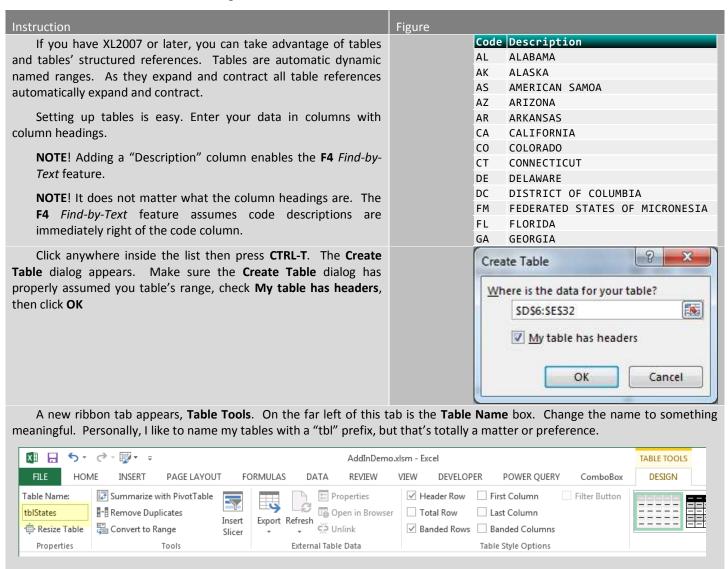


Data Validation Tips

Here are some tips for setting up data validation for lists.

Tables - Glorious Tables!

Tables are not required; but, if you have not started using tables yet, you are in for a treat. They are marvelous. I particularly like them for **Data Validation** even though **Data Validation** is a bit clueless when it comes to tables.





We can now use our **Table** in **Data Validation** without having to know precisely where it is, or how large it is, and never having to worry about changes to either position or size. There is just one drawback.

Excel's **Tables** feature is newer than Excel's **Data Validation** feature and, so, Excel's **Data Validation** needs some assistance from us to use tables and tables' <u>structured references</u>. All we need to do is surround our table reference with the old Excel function **INDIRECT. INDIRECT** converts our table reference to a reference **Data Validation** understands.



Sort Carefully

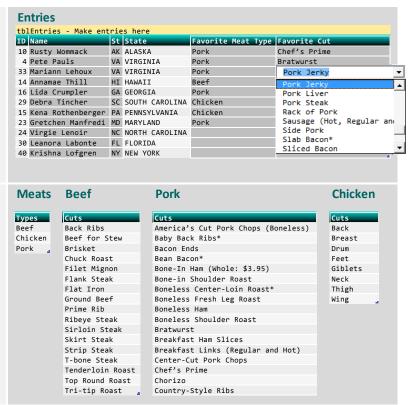
Sort by how people search. I sorted **tblNames** by the **Name** column because data entry clerks will search by **Name**. They won't search by **ID**. I sorted the **tblStates** by **Code** because people who use such tables expect them sorted that way.

Dependent Lists

We often find data element choices depends on earlier choices. As an example **AddInDemo.xlsm** has two columns: **Favorite Meat Type**, and **Favorite Cut**. If users select **Pork**, under **Favorite Meat Type** we want to display only Pork cuts in **Favorite Cut**.

The easiest way to address dependent lists is to name dependent lists using the primary list's values. At right we have a primary list, **Meats**. **Meats** contains three values: *Beef, Chicken* and *Pork*. We also have three corresponding dependent lists: **Beef, Pork**, and **Chicken**.

NOTE! I like to name tables with the prefix "tbl". Thus these tables are named: **tblMeats**, **tblBeef**, **tblPork**, and **tblChicken**

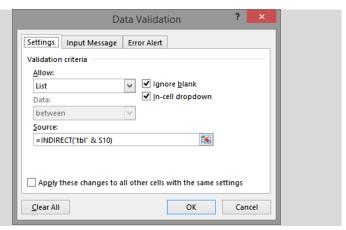




To set data validation to display dependent dropdowns we use **INDIRECT** as shown at right. In English, the Source formula says:

Add *tbl* to the value in cell **\$10** and convert that name to an address.

If cell **\$10** contains *Pork*, the formula will read **=INDIRECT("tblPork")**. **tblPork** contains our Pork Cuts list and that will be loaded into our dropdown.



NOTE! In this example I opened the Data Validation dialog with cell T10 selected; thus, S10 is the cell immediately left of cell T10.

NOTE! The absence of \$ make **\$10** a <u>relative reference</u> instead of an <u>absolute reference</u>. As a relative reference Excel knows we don't mean cell **\$10**, we mean the cell left of **T10**. If we then copy this validation rule to other cells, the **Source** formula will always point to the cell immediately left of the cell containing this validation rule.

NOTE! I normally don't use cell references. I normally use structured references. Instead of cell address **\$10** we could use the structured reference **tblEntries[@[Favorite Meat Type]]** except there is a problem with Excel's **Evaluate** function in VBA and this specific type of structured reference. The **ComboBox Add-in** uses Excel's **Evaluate** function and so we cannot use table row structured references with this add-in at this time.



Technical Documentation



The following section is for VBA Developers only. It is mind-numbing to all others.

You do not need to read ANY of this section if you just want to use this feature. If you are not interested in how the code works, skip this.

Adding ComboBox to Workbooks

Load and play with AddInDemo.xls. This automatically installs the add-in into your PC and adds it to the Add-Ins dialog box (see below right). From this point on, you can add it to your projects by following these simple

steps:

Use the Add-Ins dialog and place a check next to ComboBox (see right).

Add the following code to your ThisWorkbook module to automatically load and unload ComboBox with your project.

```
Private Sub Workbook_Open()
   Application.AddIns("ComboBox").Installed = True
End Sub

Private Sub Workbook_BeforeClose(Cancel As Boolean)
   Application.AddIns("ComboBox").Installed = False
End Sub
```

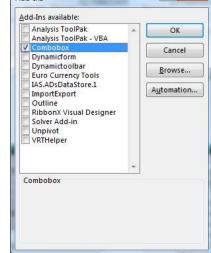
-OR-

 Drag and drop modules clsCBO, modGeneral, clsSettings and modAddIn from ComboBox.xlam to your project

When either of these options is completed, **ComboBox** is ready for use with your XL apps.

Bypassing the Add-In

clsCBO (the main class module) is NOT limited to replacing data validation dropdown list boxes. clsCBO was created as part of a package to make custom data validation possible, custom data validation that far exceeds the limits of Excel's data validation. This add-in is merely a means to provide clsCBO's functionality as easily as possible. To get the most out of clsCBO we should incorporate this apps components directly into our projects.





Components

We can incorporate this functionality directly into our projects to simplify distribution by packaging everything into a single workbook requiring no external add-ins. The components we must include are:

modGeneral BXL's general purpose function library

frmInputBox BXL's InputBox replacement used for Find-by-Text functionality

clsForm BXL's Userform formatting class (for frmInputBox)

<u>clsCBO</u> BXL's ComboBox class used to setup, fill, and display the ComboBox

The other add-in components are only used by the add-in. With the components listed above loaded into our workbook, we need to write just a few lines of code to implement the class.

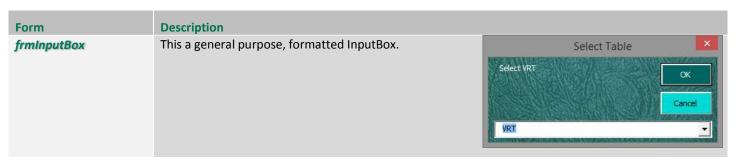
Description	Code
Create a variable to hold the class	Dim oMyClass As clsCBO
Create a new instance of the class	Set oMyClass = New clsCbo
Set the class's worksheet	Set oMyClass.Worksheet = ActiveSheet
Save the class to the class server. The class server will keep the class instance in memory so it can respond to events.	<pre>modGeneral.SavCls _ sSaveAs:="ComboBox:" & Thisworkbook.Name & "!" & ActiveSheet.Name, _ oClass:=oMyClass</pre>

NOTE! Each component's coding contains its own documentation. See the source for a more detailed description of what is happening within each routine. I believe documenting the <u>intent</u> of each block of code to be beneficial. I believe documenting each line of a code's <u>function</u> is of no value. It clutters code making it harder to understand. If a coder runs across an XL object or a VBA function they do not understand, Googling the XL object or VBA function with the added keyword "MSDN" will provide a much better and complete understanding than anything I could write.

Modules

Component	Description
modGeneral	This is BXL's general purpose library of routines common to all BXL apps. Because this is a general purpose library, please see the module for documentation on each routine. Not all are used in this project.

Forms





Classes (Event Handlers)

Component	Description	
clsForm	clsForm provides glowing effects and other user form formatting.	
	For more on this see:	
	https://dl.dropboxusercont	ent.com/u/13737137/Projects/Hover/FormColorClass.p
	<u>df</u>	
clsCBO		
	Public Properties	Description
	Worksheet	If we do not want to use <u>Setup</u> we can use this to tell the class which
	(Write Only)	worksheet to monitor. It also adds a ComboBox to the worksheet if one has not already been setup for it.
		Here is an example code snippet setting this property.
		Public Sub InstantiateClass() Set oMyClass = New clsCbo
		Set oMyClass.Worksheet = ActiveSheet
		End Sub
	ComboBox	If we do not want to use <u>Setup</u> or <u>Set Worksheet</u> we can use this to assign an existing ComboBox to the class.
	(Write Only)	
	AutoReplaceValidation Dropdowns	If we do not want to use <u>Setup</u> we can set this to TRUE to instruct the class to take over all dropdown data validation.
	1	Here is an example code snippet setting this property.
	(Write Only)	Public Sub InstantiateClass()
		<pre>Set oMyClass = New clsCbo Set oMyClass.Worksheet = ActiveSheet</pre>
		Set oMyClass.AutoReplaceValidationDropdowns = TRUE End Sub
	Value	Use this to manually retrieve the ComboBox's current value
	(Read Only)	
	Cell	Use this to manually set the cell that the ComboBox is for
	(Read Only)	
	Visible	Use this to manually make the ComboBox visible
	(Read Only)	



Private Event Handlers	Description
Class_Initialize	Turns on AutoReplaceValidationDropdown feature
Class_Terminate	Makes sure the ComboBox is hidden when the class terminates
oWks_SelectionChange	Monitors the worksheet for cell selection and sets up the ComboBox if the activecell uses Allow List Data Validation
oCbo_KeyDown	Monitors key presses within the ComboBox to determine if the user wants to exit the ComboBox, and in which direction, or if the user wants to use the <i>Find-By-Text</i> feature
Public Methods	Description
Setup	Fills a ComboBox with items and displays it over the target cell
	<pre>Public Sub InstantiateClass() Set oMyClass = New clsCbo oMyClass.Setup "A,B,C,D", Range("A1") End Sub</pre>
	NOTE! This method automatically sets the Worksheet property from the target cell. NOTE! If we omit the target range parameter, Setup defaults to ActiveCell. NOTE! See Fill(vList) for notes on vList.
Clear	Use this to manually clear the ComboBox list.
Fill	Use this to manually Fill the ComboBox list
	NOTE! vList can be a comma delimited list, an array, a range, or one of several special names:
	CHARTS NAMES All Charts in oTarget's workbook NAMES All Names (excludes table names) in oTarget's workbook PIVOTTABLES All Pivot Tables in oTarget's workbook QUERYTABLES All Query Tables in oTarget's workbook SHAPES All Shapes in oTarget's workbook STYLES All Styles in oTarget's workbook PIVOTTABLESTYLES Workbook TABLES AND NAMES All Names with Table Names in oTarget's workbook WORKBOOKS All currently open workbook WORKSHEETS All worksheets in oTarget's workbook
Show	Use this to manually display the ComboBox
Hide	Use this to manually hide the ComboBox



Component	Description	
	Private Functions AddOLEObject	Description Adds an ActiveX ComboBox to the worksheet in a way that does not reset the Visual Basic Project.
	FindByDesc	Displays the Find-by-Text feature



Appendix

Jargon and Terms

Topic	Description
Structured References	https://support.office.com/en-us/article/Using-structured-references-with-Excel-tables- f5ed2452-2337-4f71-bed3-c8ae6d2b276e

Additional References and Documentation

Subject	Description
BXL Error Handling	This explains how BXL apps handle errors including theory and best practices. Click image to download or go to: https://dl.dropboxusercontent.com/u/13737137/Starters/Error Handling.pdf Beyond Excellation Source Handling. Description: Description:
BXL Coding Best Practices	This explains some of BXL's philosophies regarding development in VBA. https://dl.dropboxusercontent.com/u/13737137/Starters/Coding%20Best %20Practices.pdf