# Linked Excel Best Practices

Check out our pro tips for getting the most out of RDG's powerful Excel linking tools.

**Saving and Updating the Excel File**

When making updates in Excel:

- Save without changing the file name. ThunderDome will not recognize a newly named file and will not update the linked data in your project.
- Move and rename Excel tabs according to your preference or document presentation.
- Use any standard Excel functionality to add formulas, create checks, connect single values between tabs, and make shortcuts that help you use your data effectively and efficiently.

**Table Structure in Excel**

If you need to adjust a range of cells, do so in Excel's **Name Manager**. Do not change the names of defined ranges (table names). Changing the names will result in broken links and dropped XBRL tagging.

**Narrative Tables in Excel**

To seamlessly update facts in the narrative, use the defined **narrative tables** to create single facts and link them within the document text. When using narrative tables:

- Leave placeholder values in the table so there are no blank rows or columns.
- Each row label must be unique.
- Number scaling can be done in Excel or in the Editor.

**Font and Table Format in Excel**

Underlines, line indents, and font properties such as italics and bold do not carry over from Excel to ThunderDome; the uploads are meant to recognize content and table structure.

- Use *Excel* to control numbers, text, and all symbols such as $, %, or ( ).
- Use the *Editor* to apply visual properties to tables after they have been embedded from Excel.

**Opening and Updating the Editor Document**

Once an upload is completed, open the main **Project Document** to finalize Excel updates in the Editor. Opening a section of the document will not apply the update.

Typing over a linked value in the Editor will temporarily change the value in the document. However, the values will change to match the Excel file the next time it is uploaded.

Avoid changing table structure or content in the Editor, including rows, columns, dollar signs or other symbols, as this can cause the HTML document and Excel file to become out-of-sync. Instead, add or remove columns and rows in the Excel file, within the named range, and then upload the Excel to ThunderDome. The new rows or columns will be included when the file is uploaded.