



Office of Training and Development
On-the-Job Solutions Series - Job-Aid

Best Practices for Excel Spreadsheets

As part of regular work assignments, CDFW staff may be asked to create and produce Excel spreadsheets for internal and external customers. Sometimes (and often unknowingly to the author of the spreadsheet) a spreadsheet may be forwarded to other staff and higher levels in state service, for example, our Director, the Fish and Game Commission, Department of Finance, Legislative Analyst Office, Resources Agency, etc. Therefore, it is important to ensure that the spreadsheet is always completed in the most professional and complete format. Below are some suggested best practices for creating a spreadsheet that is easy to read and understandable. A sample spreadsheet is provided that incorporates many of the best practices listed below.

Excel Spreadsheet Best Practices

- Be concise and include only what is important. More is not always better.
- Know your audience--technical and detailed vs. a high level overview.
- Use headers and footers. Do not put a main header on Row 1.
- Use larger fonts for headers, medium fonts for column heading and totals, smaller fonts for data, etc.
- Use bold, at times, to emphasize text or numbers.
- Use the center, left, and right justify functions for columns when appropriate (Please note the spreadsheet example is all centered except the "Child" column which is left justified).
- Use headings and sub-heading accordingly: On the spreadsheet example, notice "Lifetime Licenses" is centered to column D and E, etc.
- Use the "\$" symbols for dollars. Please note that by default, dollar amount columns are usually right justified.
- Use formulas when appropriate. This way, the viewer can easily see if the calculations are correct.
- Use appropriate vertical and horizontal centering for page set-up. (The spreadsheet example is both vertically and horizontally centered.)
- Use indents when appropriate. On the example, notice how the "Total" line is indented to show clarity.
- If possible, keep the spreadsheet to one page. If it is more than one page, adjust or change the page break to prevent it from shifting onto the next page.
- To make it fit on one page, sometimes you need to shorten your columns to make it fit. Be creative – you may need to eliminate non-essential data, reduce the font size, expand the margins, abbreviate, etc.
- Always assume the customer might print your spreadsheet. Print your finished spreadsheet to look for any errors (text getting cut off, numbers show as ##### because there isn't enough column space, etc.).

Excel Best Practices Sample
Department of Fish and Wildlife
Lifetime Licenses for Six Children
February 26, 2010

Child**	Date of Birth	Age	Lifetime Licenses		Privilege Packages			Total Cost
			Sport Fishing	Hunting	Big Game	Game Bird	Sport Fishing	
Ron Smith	4/15/1997	12	\$761.25	\$761.25	\$564.75	\$266.75	\$311.25	\$2,665.25
Jamie Smith	5/24/2000	9	\$463.25	\$463.25	\$564.75	\$266.75	\$311.25	\$2,069.25
Maureen Chandler	9/7/1999	10	\$761.25	\$761.25	\$564.75	\$266.75	\$311.25	\$2,665.25
Kalin Jones	1/5/1999	11	\$761.25	\$761.25	\$564.75	\$266.75	\$311.25	\$2,665.25
McKenzie Jones	4/24/2001	8	\$463.25	\$463.25	\$564.75	\$266.75	\$311.25	\$2,069.25
Edward Jones	2/20/2004	6	\$463.25	\$463.25	\$564.75	\$266.75	\$311.25	\$2,069.25
Total								\$14,203.50
Note: If the purchase occurs after May 23, 2010, add \$596.00 to the total costs; Jamie Smith would turn 10 years old changing total costs.								
**Fictitious names were used, they are not real customers.								