

# Launch Excel Boot Camp

## **MODULE 1**

Making Great Spreadsheets

### **HANDOUT**

Spreadsheet Design Checklist

Welcome to the Launch Excel Boot Camp course on "How to Create Great Spreadsheets".

### What makes a great spreadsheet?

A great spreadsheet is EASY TO USE, ACCURATE and EASY TO CHANGE. Before you start making a spreadsheet, I strongly recommend you print out this checklist and use it the next time you need to make a great spreadsheet.

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*Knowledge is a Treasure,  
But Practice is the Key to It.*

*Lao Tzu*

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### Web References for more ideas

Check out these links for further information and ideas on how to make great spreadsheets. (Note: these links were checked to work on 17 Feb 2017, they are clickable from inside the PDF file)

<b>Arch Smarter</b>	<a href="http://archsmarter.com/9-steps-beautiful-spreadsheets/">http://archsmarter.com/9-steps-beautiful-spreadsheets/</a>
<b>Chandoo</b>	<a href="http://chandoo.org/wp/2009/11/03/make-better-excel-sheets/">http://chandoo.org/wp/2009/11/03/make-better-excel-sheets/</a>
<b>Design Shack</b>	<a href="https://designshack.net/articles/graphics/how-to-make-your-spreadsheets-less-lame/">https://designshack.net/articles/graphics/how-to-make-your-spreadsheets-less-lame/</a>
<b>EntreResource</b>	<a href="http://entresource.com/how-to-make-your-excel-spreadsheets-look-professional-in-just-12-steps/">http://entresource.com/how-to-make-your-excel-spreadsheets-look-professional-in-just-12-steps/</a>
<b>Hub Spot</b>	<a href="https://blog.hubspot.com/marketing/excel-graph-tricks-list#sm.000hvnxa118ydhbsmp1tz8blztdf">https://blog.hubspot.com/marketing/excel-graph-tricks-list#sm.000hvnxa118ydhbsmp1tz8blztdf</a>
<b>Mead In Kent</b>	<a href="http://www.meadinkent.co.uk/xltestingandmapping.htm">http://www.meadinkent.co.uk/xltestingandmapping.htm</a>
<b>Tech Republic</b>	<a href="http://www.techrepublic.com/blog/windows-and-office/20-excel-tips-for-creating-stylish-spreadsheets/">http://www.techrepublic.com/blog/windows-and-office/20-excel-tips-for-creating-stylish-spreadsheets/</a>

## Step 1 – Designing Your Spreadsheet

### Who is the user?

- Who is going to use the spreadsheet?
- What is their experience level with Excel?
- Will the same users continue to use this or will the users be different?
- What will they use it for?
- Is it for one-off use or ongoing use?
- Will they view it onscreen or printed out or both?
- What information do I need?
- Do I need to add security for sensitive data?

### How should I structure it?

- How will I make sure there is a Logical Flow of Information?
- Are there existing familiar layouts I should follow? (e.g. Financial Statements)
- How will I keep Inputs / Calculations / Outputs separate?

### How should I format it?

- What colors will I pick? (Good contrast between foreground and background, no glaring colors)
- What fonts will I use? (Suggest pick two of these: Arial, Calibri, Cambria, Segoe UI)
- How big do my fonts need to be?
- What cell borders would be helpful for grouping data and calculations and output?

## Step 2 – Building Your Spreadsheet

### Be Consistent

- Have I been consistent with layout, formatting, labels, headers, calculations?
- Is my cell alignment good? (Left align text, right align numbers, center headings)
- Are my charts aligned with cells? (Quick Tip: Hold "ALT" while moving a chart to snap to cells)

### Be Helpful

- Are my worksheet tabs suitably named?
- Are my worksheet tabs grouped together in a sensible order?
- Have I documented using brief comments or more detailed documentation?
- Are my formulas simple enough to read and understand?
- Have I shown intermediate working steps?
- Are my headers easy to separate from everything else?
- Have I chosen suitable chart types?

### Give Yourself Space

- Have I left some whitespace at the top and left?
- Have I left some whitespace between tables?

## Step 3 – Testing Your Spreadsheet

- Does everything fit onscreen and/or print?
- What happens when I put in test values? Does it do what I expect?
- Are there any formula errors that I need to fix?
- Did I include formulas to cross-check results?
- Is it easy for someone new to the spreadsheet to find what they need?
- Did I use suitable spreadsheet protection?