

Tip Sheet: Best Practices for Spreadsheets

Charity Insights Canada Project (CICP)

Community Education Centre (CEC): <https://carleton.ca/cicp-pcpob/cec/>

Use consistent cell styles

Use cell formatting (for example: background color, text color, font and bold text) to clearly distinguish input, calculation, and output cells. This ensures users can immediately tell what they should edit and what they shouldn't.

Include an "Introduction" or "About" sheet

For shared spreadsheets, add a front sheet that explains the purpose of the spreadsheet, how to use it, and what your cell styles or color codes mean. This helps new users get oriented quickly and reduces confusion.

Use table formatting for data

Convert your data ranges into tables. Tables automatically expand when you add new rows or columns and ensures formulas, calculations, and references update correctly without extra work.

Separate raw data from analysis

Keep raw data in its own sheet, with one table per sheet. Do calculations, summaries, pivot tables, and charts in separate sheets. This protects your original data and makes your spreadsheet easier to update.

Color-code related sheet tabs

Use tab colors to visually group related sheets (for example, raw data, calculations, reports). This makes navigation easier, especially in larger spreadsheets.

Match protection and validation to user skill levels

- Consider who will be using the spreadsheet and their experience level. For shared spreadsheets, apply data validation (dropdowns, allowed values, date or number limits) to input cells. This guides users toward correct data entry and reduces mistakes.
- Use Protected sheets and ranges to control what others can edit. Lock formulas and structure, and only allow editing where input is required.
- Google Sheets is built for sharing, so think about who will access the file, and set permission levels (Viewer, Commenter, Editor) accordingly.

