Standards of Professionalism

Spreadsheets can be used for many purposes. Oftentimes, other people will use or review your spreadsheet, so it's important that your work follows standards of professionalism.

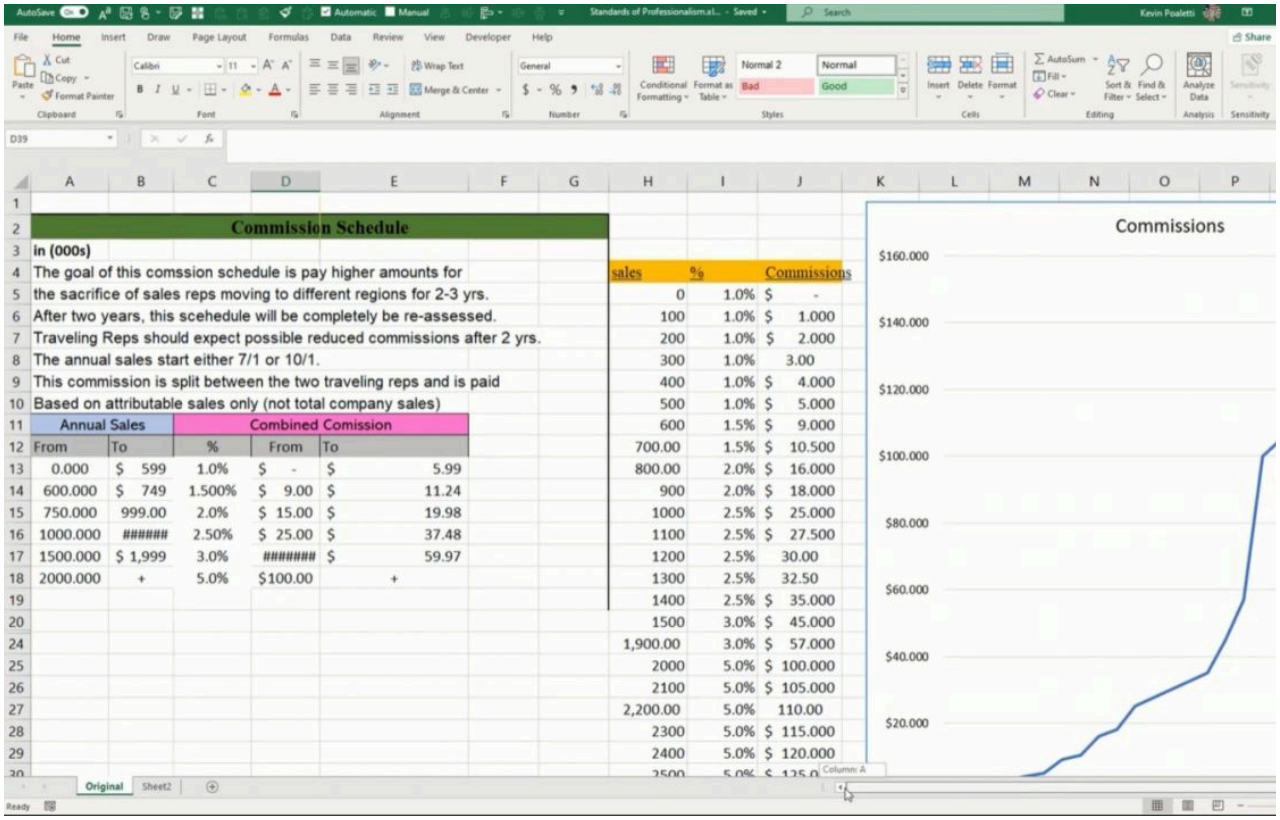
In this chapter, we'll work on making a confusing spreadsheet into a professional one. In the spreadsheet (**Figure 14.1**), we have textual notes, data tables, and a chart. However, there are many issues with it: the text and numbers are in varying formats, the sections are uneven, and the chart axes are not clearly labeled.

Standards of Professionalism

Review this document about the Standards of Professionalism.

Practice Spreadsheet

Use this workbook for the chapter.


File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Developer
Help
Share
D39
Commissions
$160.000
$140.000
$120.000
$100.000
$80.000
$60.000
$40.000
$20.000
Original
Sheet2
Ready

Commission Schedule

in (000s)

The goal of this comssion schedule is pay higher amounts for
the sacrifice of sales reps moving to different regions for 2-3 yrs.
After two years, this scehedule will be completely be re-assessed.
Traveling Reps should expect possible reduced commissions after 2 yrs.
The annual sales start either 7/1 or 10/1.
This commission is split between the two traveling reps and is paid
Based on attributable sales only (not total company sales)

Annual Sales		Combined Comission		
From	To	%	From	To
0.000	$ 599	1.0%	$ -	$ 5.99
600.000	$ 749	1.500%	$ 9.00	$ 11.24
750.000	999.00	2.0%	$ 15.00	$ 19.98
1000.000	#######	2.50%	$ 25.00	$ 37.48
1500.000	$ 1,999	3.0%	########	$ 59.97
2000.000	+	5.0%	$100.00	+

sales	%	Commissions
0	1.0%	$ -
100	1.0%	$ 1.000
200	1.0%	$ 2.000
300	1.0%	3.00
400	1.0%	$ 4.000
500	1.0%	$ 5.000
600	1.5%	$ 9.000
700.00	1.5%	$ 10.500
800.00	2.0%	$ 16.000
900	2.0%	$ 18.000
1000	2.5%	$ 25.000
1100	2.5%	$ 27.500
1200	2.5%	30.00
1300	2.5%	32.50
1400	2.5%	$ 35.000
1500	3.0%	$ 45.000
1,900.00	3.0%	$ 57.000
2000	5.0%	$ 100.000
2100	5.0%	$ 105.000
2,200.00	5.0%	110.00
2300	5.0%	$ 115.000
2400	5.0%	$ 120.000

Figure 14.1

First, the font style needs to be consistent across the spreadsheet.

1. Select the whole spreadsheet by pressing the arrow in the top-left corner above the first row's number.
2. Go to the **Page Layout** tab.
3. Press the **Fonts** button in the ribbon toolbar.
4. Select the desired font style (Arial). (See **Figure 14.2**)

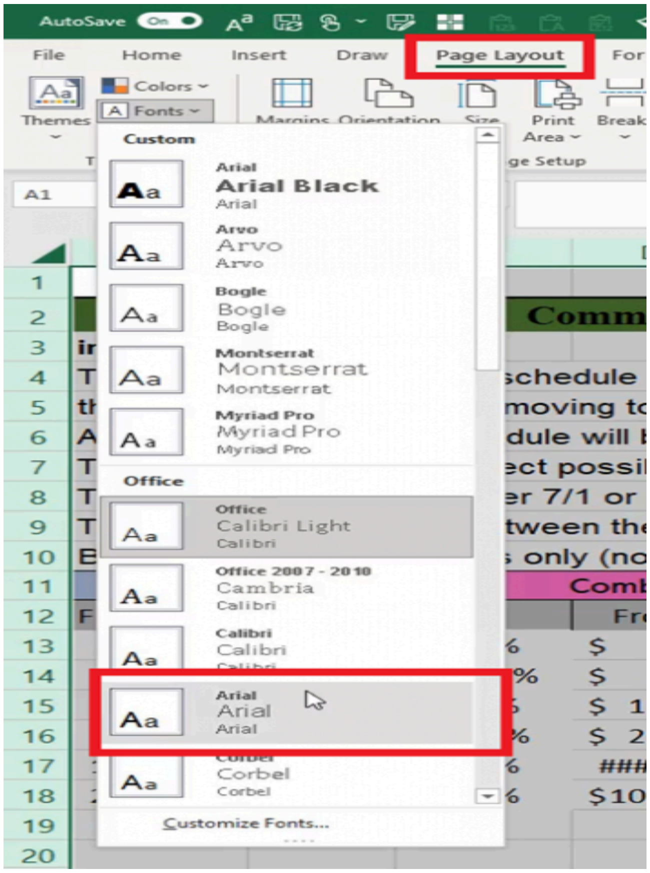

AutoSave
On
File
Home
Insert
Draw
Page Layout
For
Themes
Colors
Fonts
Margins
Orientation
Size
Print Area
Break
Custom
Arial Black
Arvo
Bogle
Montserrat
Myriad Pro
Office
Calibri Light
Office 2007 - 2010
Cambria
Calibri
Arial
Corbel
Customize Fonts...

Figure 14.2

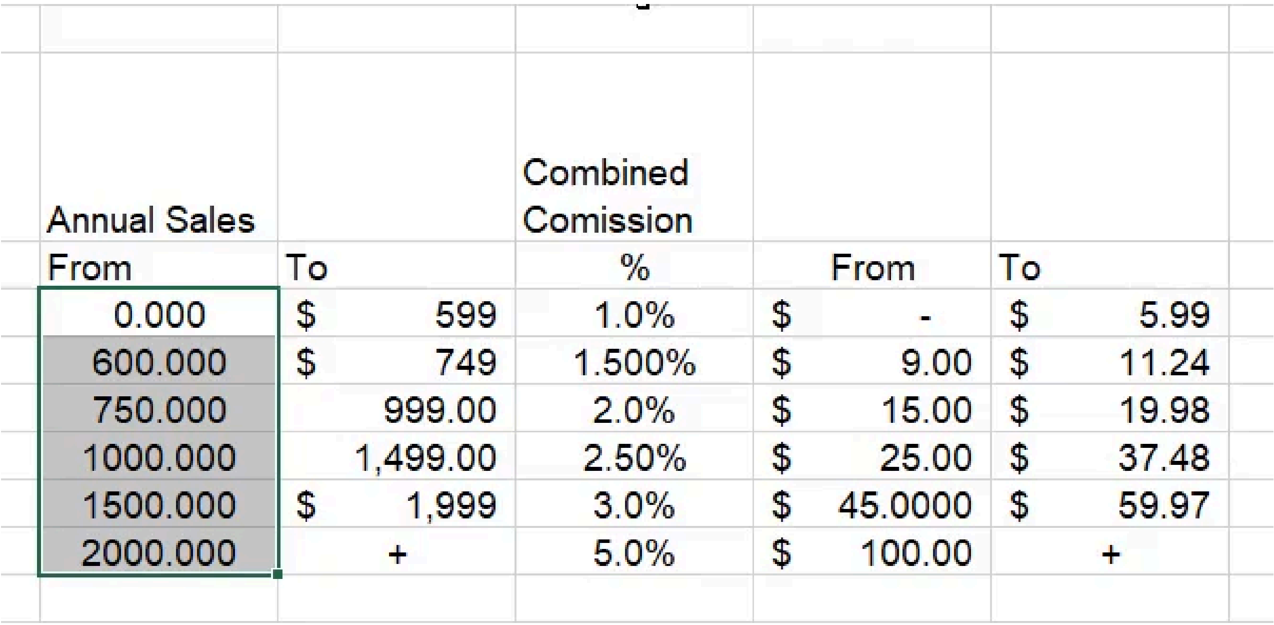
Borders and fill colors may also be removed while cells are rearranged.

1. Select the whole spreadsheet by pressing the arrow in the top-left corner above the first row's number.
2. Press the down arrow on the **Borders** button on the **Home** tab and select **No border**.
3. Press the down arrow on the **Fill color** button on the **Home** tab and select **No Fill**.

Data Input Table

The data input table needs to be formatted to clearly identify cells the user can modify, and it includes cells containing values that depend on the user's input. The dependent cells need formulas referencing the user's input to prevent manual data input for all cells each time. First, we will format the data values as currency and percentage respectively.

1. Select the cells containing currency values in the **From** and **To** columns.
2. Select the **Number Format** drop-down list from the **Home** tab and select **Currency**.
3. Press the **Increase Decimal** or **Decrease Decimal** buttons if needed to adjust the decimal places to show two digits after the decimal.
4. Select the cells containing percentage values in the **%** (percent) column.
5. Select the **Number Format** drop-down list from the **Home** tab and select **Percentage**.
6. Press the **Increase Decimal** or **Decrease Decimal** buttons to adjust the decimal places to show one digit after the decimal.
7. Select all cells (including the **From**, **To**, and **%** headers).
8. Press the **Align Right** button on the **Home** tab to align cells according to standards of professionalism.



Annual Sales From	To	Combined Comission %	From	To
0.000	$ 599	1.0%	$ -	$ 5.99
600.000	$ 749	1.500%	$ 9.00	$ 11.24
750.000	999.00	2.0%	$ 15.00	$ 19.98
1000.000	1,499.00	2.50%	$ 25.00	$ 37.48
1500.000	$ 1,999	3.0%	$ 45.0000	$ 59.97
2000.000	+	5.0%	$ 100.00	+

Figure 14.3

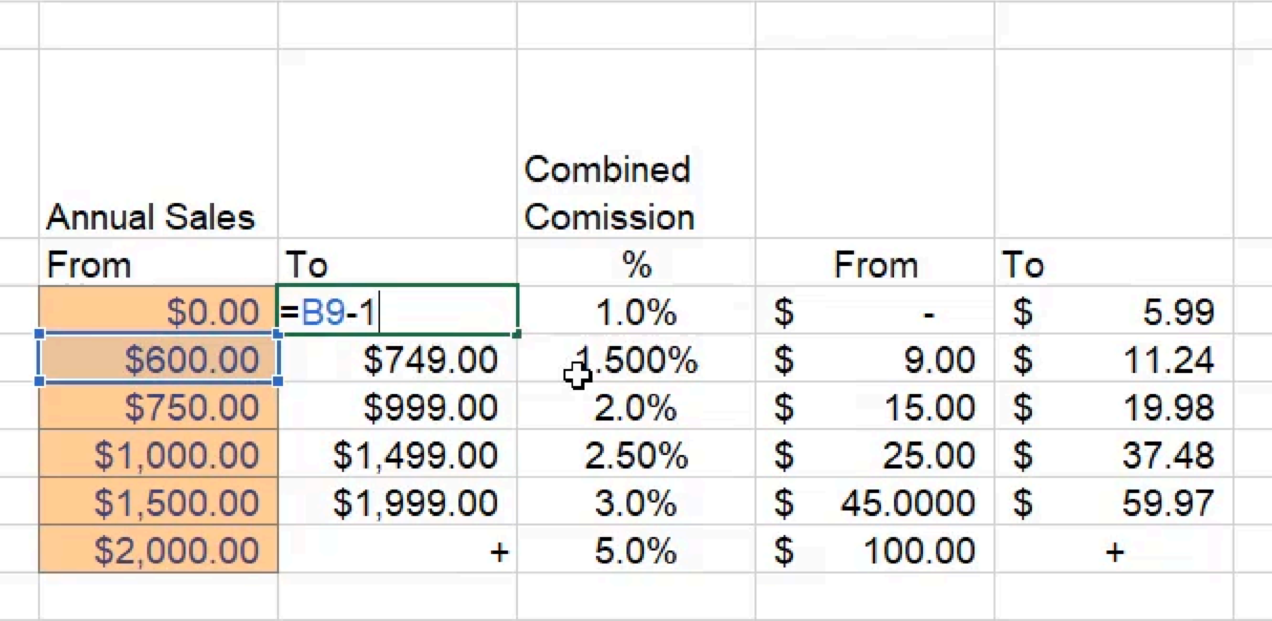
Format Input Data

The **Annual Sales** and **Combined Comission** cells should be formatted with a fill color to signify user input. Excel provides a convenient preset input format for this situation.

1. Select the cells intended for input in the **Annual Sales** and **Combined Comission** columns.
2. Select the preset **Input** format from the list of styles on the **Home** tab of the ribbon toolbar.

Next, the dependent cells need to be rewritten with formulas based on the input cells. In this case, the values under the Annual Sales's **To** column are one less than the **From** input value on the next row. We want the To column's cells to reference the input on the next row and subtract one.

1. Select the first cell and type an equal sign (**=**) to begin a formula.
2. Select the cell to the left on the next row.
3. Type a hyphen (**-**) for subtraction and a **1**.
4. Press **Enter** to complete the formula (**=B9-1**). (See **Figure 14.4**)
5. Select the completed cell and double click the small square in the bottom-right corner to duplicate the formula down the table's remaining cells in the column.

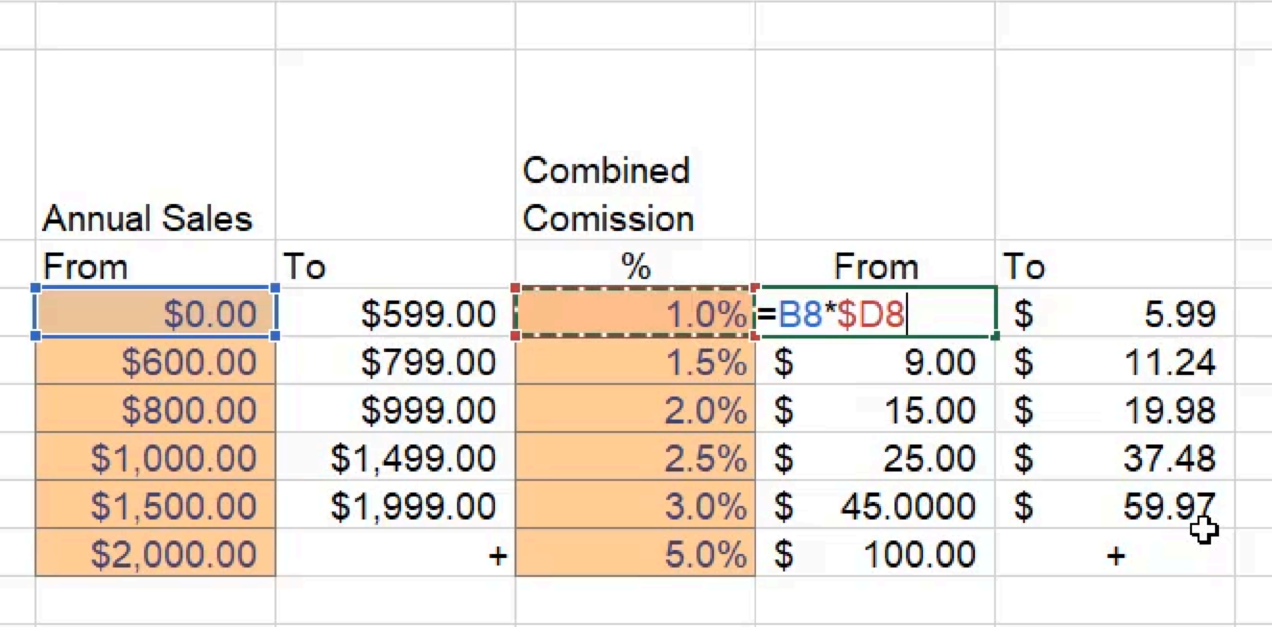


Annual Sales		Combined Comission				
From	To	%		From	To	
$0.00	=B9-1	1.0%	$	-	$	5.99
$600.00	$749.00	1.500%	$	9.00	$	11.24
$750.00	$999.00	2.0%	$	15.00	$	19.98
$1,000.00	$1,499.00	2.50%	$	25.00	$	37.48
$1,500.00	$1,999.00	3.0%	$	45.0000	$	59.97
$2,000.00	+	5.0%	$	100.00		+

Figure 14.4

The Combined Comission dependent cells will need a formula to calculate the input percentage of the Annual Sales values. To do it, the formula multiplies the associated Annual Sales' **From** or **To** cell by the percentage input on the same row.

1. Select the first cell in the table under **From** and type an equal sign (**=**) to begin a formula.
2. Select the related From cell in the Annual Sales table.
3. Type an asterisk for multiplication.
4. Select the percentage input cell.
5. Press the **F4** key three times to anchor the designated column but not the row.
6. Press **Enter** to complete the formula (**=B8*$D8**). (See **Figure 14.5**)
7. Select the completed cell and press the small square in the bottom-right corner and drag it across the other relevant From and To cells to copy the formula.



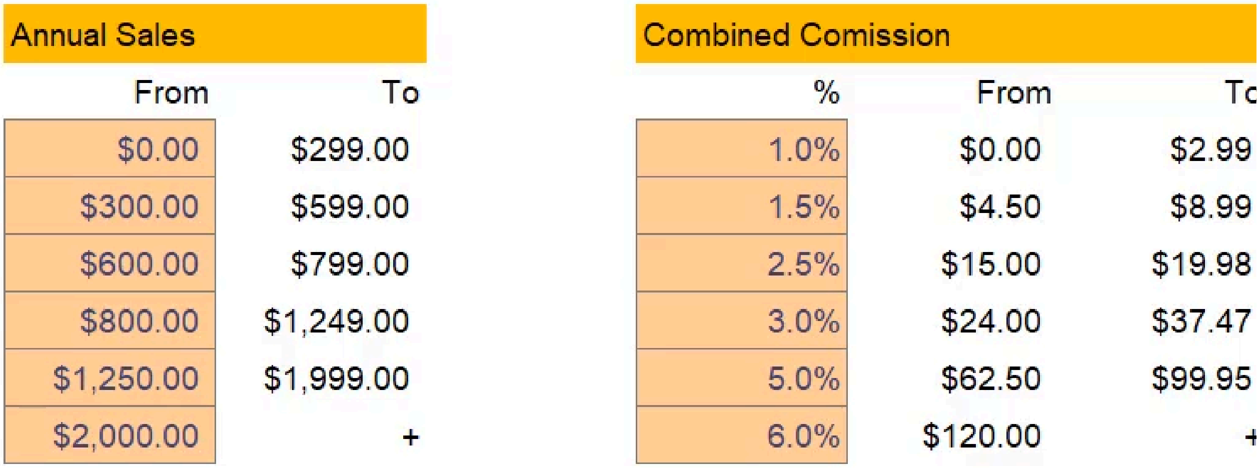
Annual Sales From	To	Combined Comission %	From	To
$0.00	$599.00	1.0%	=B8*$D8	$ 5.99
$600.00	$799.00	1.5%	$ 9.00	$ 11.24
$800.00	$999.00	2.0%	$ 15.00	$ 19.98
$1,000.00	$1,499.00	2.5%	$ 25.00	$ 37.48
$1,500.00	$1,999.00	3.0%	$ 45.0000	$ 59.97
$2,000.00	+	5.0%	$ 100.00	+

Figure 14.5

Format Headings

A space can be added between the tables for better readability. The headings may also need formatting to clearly label the tables for other users. In this case, a light fill color can be added to the heading and neighboring cells equal to the table's width. The revised data input table should look like **Figure 14.6**.

Note: The heading cells do not need to be merged but should be aligned left and text wrapping removed for professionalism.



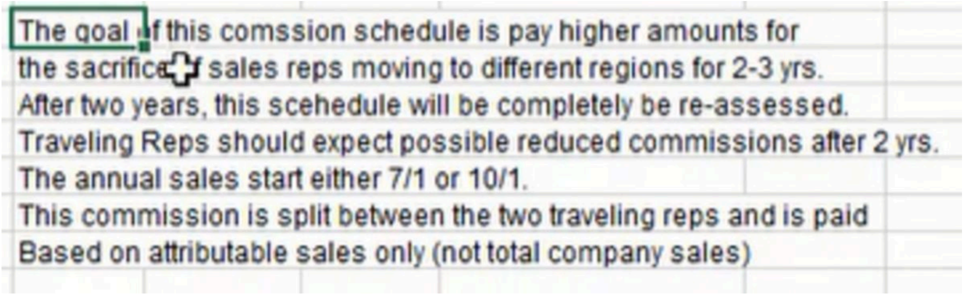
Annual Sales	
From	To
$0.00	$299.00
$300.00	$599.00
$600.00	$799.00
$800.00	$1,249.00
$1,250.00	$1,999.00
$2,000.00	+

Combined Comission		
%	From	To
1.0%	$0.00	$2.99
1.5%	$4.50	$8.99
2.5%	$15.00	$19.98
3.0%	$24.00	$37.47
5.0%	$62.50	$99.95
6.0%	$120.00	+

Figure 14.6

Explanatory Text

The spreadsheet also contains some text that appears to provide information related to the data. In **Figure 14.7**, we can see *commission* and *schedule* are spelled wrong, numbers are interchangeably spelled out and in numeral form, and some words are abbreviated. For the standards of professionalism, be sure words are spelled correctly, punctuation is used appropriately, and style is consistent.



The goal of this comssion schedule is pay higher amounts for
the sacrifice of sales reps moving to different regions for 2-3 yrs.
After two years, this scehedule will be completely be re-assessed.
Traveling Reps should expect possible reduced commissions after 2 yrs.
The annual sales start either 7/1 or 10/1.
This commission is split between the two traveling reps and is paid
Based on attributable sales only (not total company sales)

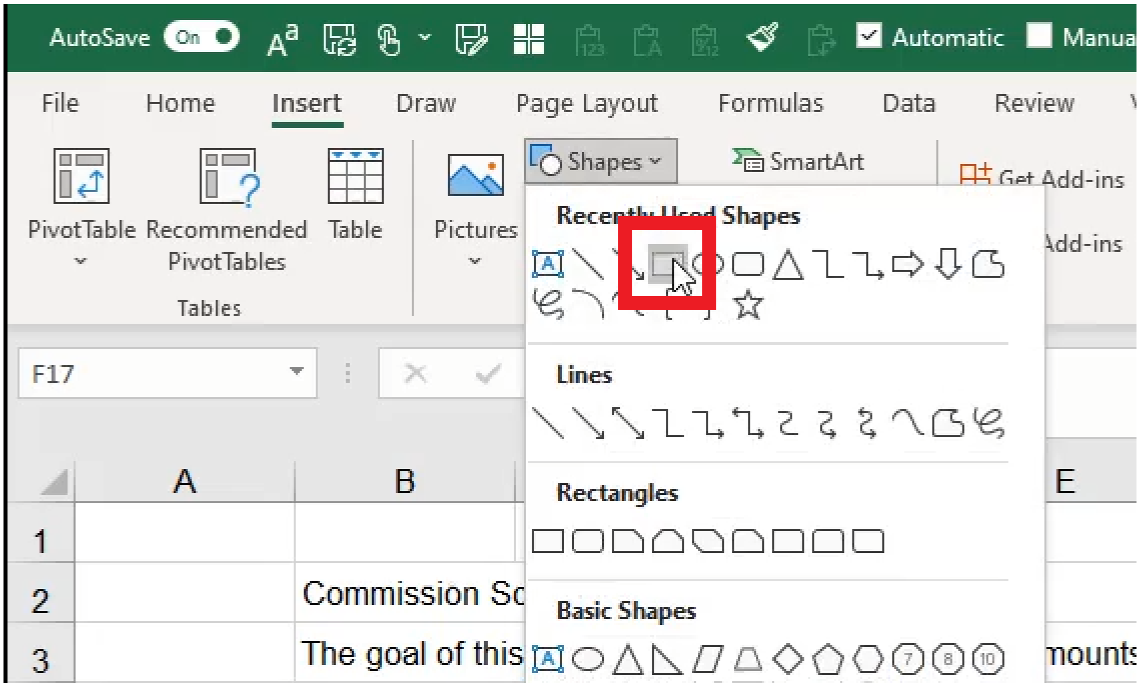
Figure 14.7

The first and second items in the list appear to describe the goal of the spreadsheet, so they could be consolidated to a single line and relocated underneath the spreadsheet's title. Additionally, we may want to present the information in a text box with a bulleted list instead of individual cells.

Text Boxes

A text box can be placed on top of the spreadsheet cells, and it can be resized and moved around freely.

1. Go to the **Insert** tab on the ribbon toolbar.
2. Press the **Shapes** button.
3. Select the **Rectangle**.
4. Move the cursor to an empty space of the spreadsheet, press the left mouse button and drag the cursor until the shape's desired size is achieved.
5. Type or paste the textual content into the box.


AutoSave
On
Automatic
Manua
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
PivotTable
Recommended PivotTables
Table
Tables
Pictures
Shapes
SmartArt
Get Add-ins
Add-ins
Recently Used Shapes
Lines
Rectangles
Basic Shapes
F17
A
B
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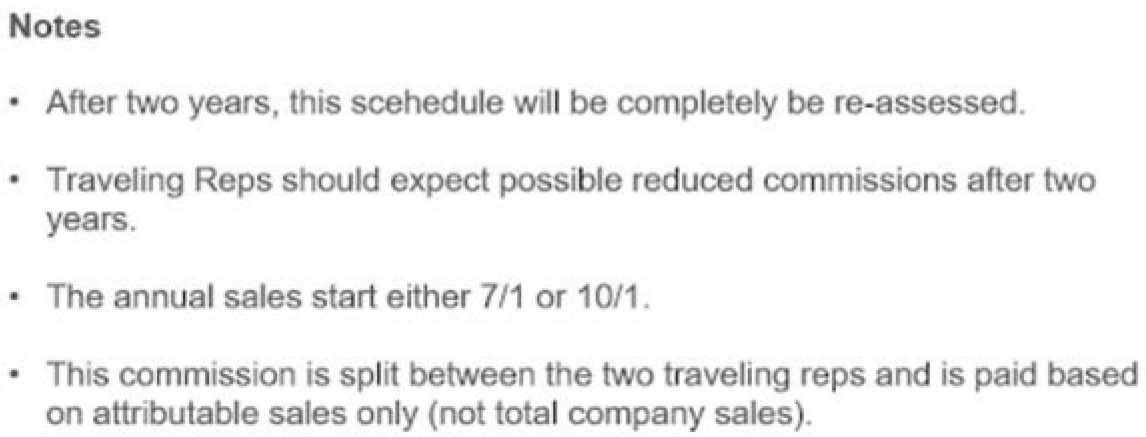
1
2
3
Commission Sc
The goal of this
mounts

Figure 14.8

The fill and font colors will need to be adjusted to have a white background, dark-gray/black text, and an optional dark-gray border; dark gray is an effective softer option to help it blend in. Extra spacing can be added between bulleted items for better readability. We may even add a "Notes" header to identify the content in the box. The result should look like **Figure 14.9**.



Notes

- After two years, this scehedule will be completely be re-assessed.
- Traveling Reps should expect possible reduced commissions after two years.
- The annual sales start either 7/1 or 10/1.
- This commission is split between the two traveling reps and is paid based on attributable sales only (not total company sales).

Figure 14.9

Data Chart Presentation

The data chart references a separate table for its data. The table is recommended to be located on a separate spreadsheet because it is a background function not relevant to the dashboard.

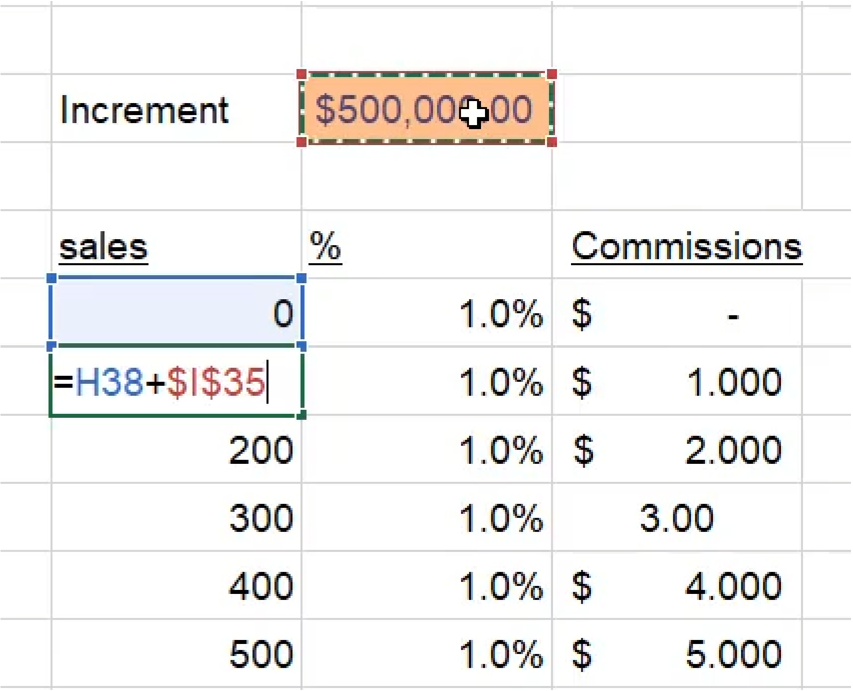
The chart's data table contains sales, percentages, and commissions numbers. The sales numbers show a steady increment, but we want it to use a formula to automatically update the increment range from a single cell. We will need a new input cell denoted as **Increment**, and formatted as currency.

Formatting Reference Data

Next, the **Sales** column values need to use a formula referencing the **Increment** cell and adding its value.

Note: The first cell in the table must begin with a zero and not a formula.

1. Select the second cell in the Sales column.
2. Type an equals sign (**=**).
3. Select the cell above (the first cell containing a value of zero).
4. Type a plus sign (**+**).
5. Select the **Increment** input cell.
6. Press **Enter** to complete the formula.
7. Select the completed cell again and double-click the small square in the bottom-right corner of the cell to duplicate the formula down the table's remaining **Sales** column cells.

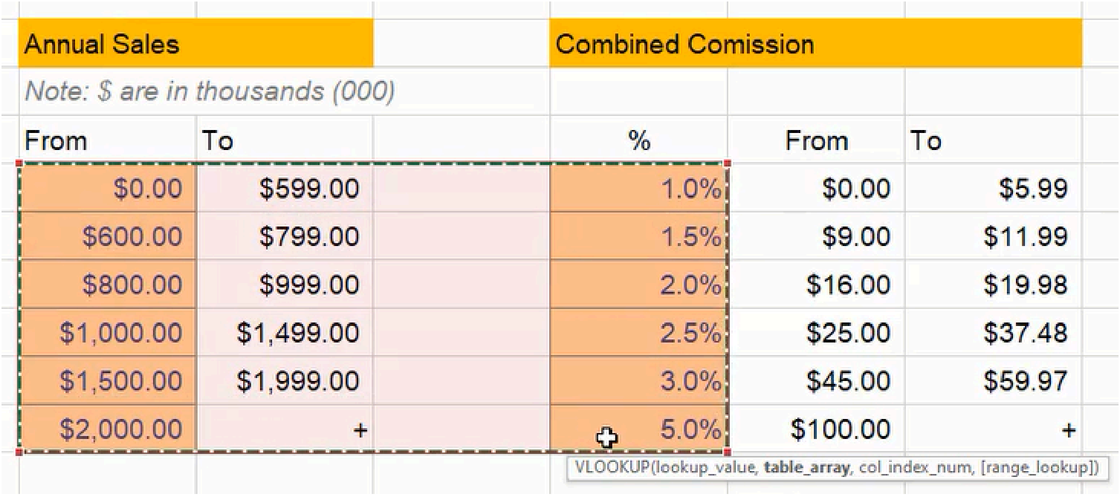


Increment	$500,000.00	
sales	%	Commissions
0	1.0%	$ -
=H38+$I$35	1.0%	$ 1.000
200	1.0%	$ 2.000
300	1.0%	3.00
400	1.0%	$ 4.000
500	1.0%	$ 5.000

Figure 14.10

The **Percent** column can use the VLOOKUP function; this function will be taught in more detail in a later chapter. The VLOOKUP function will reference a specific array (or selection) of cells in the previous input data table. Then, it will identify a specific value from the previous table based on the Sales column value and copy the correlating percentage.

1. Replace the first cell in the Percent column by typing an equals sign (**=**).
2. Type VLOOKUP and a left parenthesis (**(**).
3. Select the cell in the Sales column on the left.
4. Type a comma (**,**).
5. Select the Annual Sales' **From** and **To** cells, and the Combined Commission's percent range of cells. (See **Figure 14.11**)

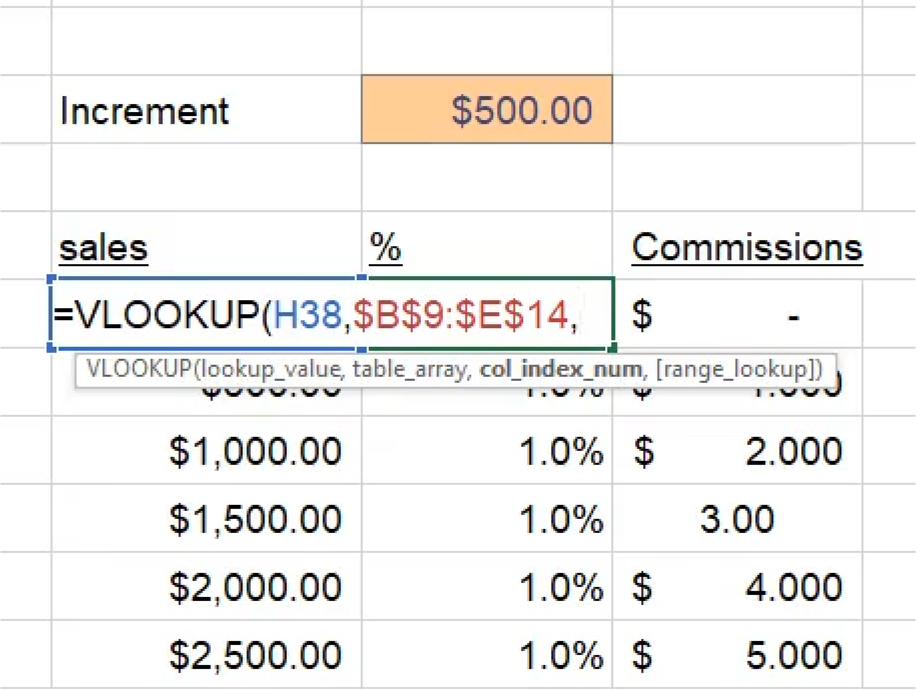


Annual Sales			Combined Comission		
Note: $ are in thousands (000)					
From	To		%	From	To
$0.00	$599.00		1.0%	$0.00	$5.99
$600.00	$799.00		1.5%	$9.00	$11.99
$800.00	$999.00		2.0%	$16.00	$19.98
$1,000.00	$1,499.00		2.5%	$25.00	$37.48
$1,500.00	$1,999.00		3.0%	$45.00	$59.97
$2,000.00	+		5.0%	$100.00	+

VLOOKUP(lookup_value, **table_array**, col_index_num, [range_lookup])

Figure 14.11

6. Type a comma (**,**).
7. Type a four (**4**) to indicate the column from the array that a value will be sourced.
8. Type a comma (**,**).
9. Type **TRUE** to find the closest value.
10. Type a right parenthesis (**)**) and press **Enter** to complete the formula.
11. Select the completed cell again and double-click the small square in the bottom-right corner to copy the cell down the table's remaining cells in the column.



Increment	$500.00	
sales	%	Commissions
=VLOOKUP(H38,$B$9:$E$14,		$ -
$1,000.00	1.0%	$ 2.000
$1,500.00	1.0%	3.00
$2,000.00	1.0%	$ 4.000
$2,500.00	1.0%	$ 5.000

VLOOKUP(lookup_value, table_array, **col_index_num**, [range_lookup])

Figure 14.12

Lastly, the Commissions column needs a formula to multiply the Sales value by the percentage.

1. Replace the first cell in the Commissions column by typing an equals sign (**=**).
2. Select the Sales cell on the left in the same row.
3. Type an asterisk (*****).
4. Select the **Percent** cell on the left in the same row.
5. Press **Enter** to complete the formula.
6. Reselect the completed cell and double-click the small square in the bottom-right corner to copy the formula down the table's remaining cells in the column.

Note: The cells in this table will need to be formatted similarly to the data input table with currency and percent formats.

Notice the chart's data table includes numbers above the previous data input table's $2,000. To make the table and the chart more effective, we may use an increment of $250 in the increment input cell. The excess data beyond $2,000 can be deleted and the chart's references updated to the shorter table. Additionally, we can reduce the number of decimal places to show none and simplify the chart.

Chart Design

Now the chart itself needs a small update. In particular, the axes need clear labels.

1. Select the chart.
2. Go to the **Chart Design** tab.
3. Press the **Add Chart Element** button and select **Axis Titles**.
4. Select **Primary Horizontal**.
5. Repeat step 2 and step 3 to add **Primary Vertical**.

The horizontal (bottom) axis needs to be labeled as Sales, and the vertical (left side) axis needs to be labeled Commissions. The chart's border and title need to be removed because we'll add a heading in the spreadsheet's cells and format it similar to the data input table headings; the chart's heading will read **Potential commissions by sales bracket**. (See **Figure 14.13**)

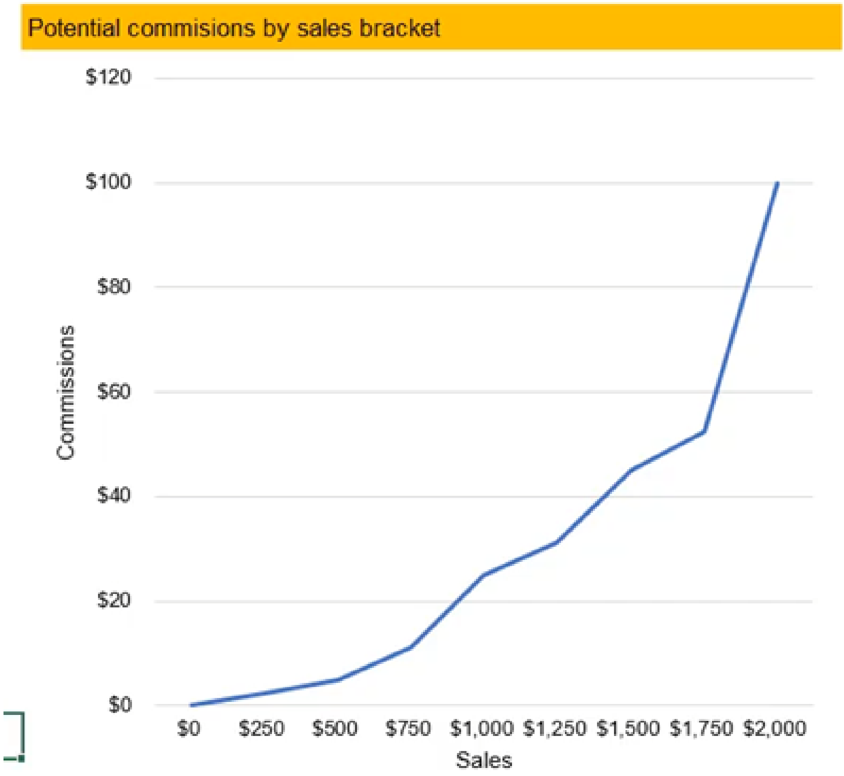


Figure 14.13

Highlighting Data Gaps

The chart's purpose could be to identify gaps or leaps in increase. To present the data effectively, we might want to direct attention to the gaps and add an explanatory note. First, the data line should be replaced with marker points to show individual data placement.

1. Select the data line.
2. Go to the **Format** tab.
3. Press the **Format Selection** button on the left side of the toolbar to open the Format Data Series side menu.
4. Select the **Marker** button on the side menu's **Fill & Line** tab. (See **Figure 14.14**)

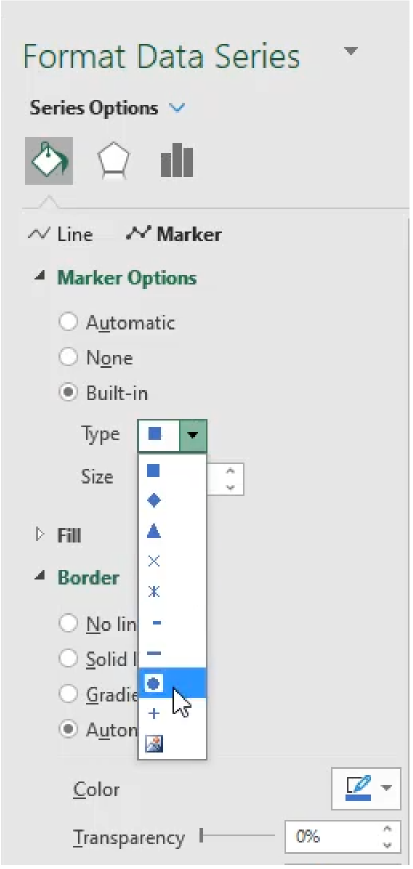

Format Data Series
Series Options
Line
Marker
Marker Options
Automatic
None
Built-in
Type
Size
Fill
Border
No lin
Solid l
Gradie
Auton
Color
Transparency
0%

Figure 14.14

5. Select **Built-in** and choose a circular marker type.
6. Format the marker for professionalism and readability as needed.
7. Select the **Line** button and choose **No line**.

Then, brackets can be added to emphasize the gap and a text box can be added to briefly explain the increase.

1. Go to the **Insert** tab.
2. Press the **Shapes** button and select a brace style shape from the **Basic Shapes** category.
3. Draw the brace by pressing the mouse button at the starting point and dragging the cursor to the desired size.
4. Use the rotate button on the selected brace to rotate the shape.
5. Move the brace near the data gap to emphasize it.
6. Press the **Shapes** button and select a text box from the **Basic Shapes** category.
7. Draw the box by pressing the mouse button at the starting point and dragging the cursor to the desired size.
8. Type the data explanation into the box.
9. Move the text box near the previously drawn brace and resize the box if needed.
10. Go to the **Shape Format** tab on the toolbar.
11. Press the **Shape Fill** button and select **No Fill**.
12. Press the **Shape Outline** button and select **No Outline**.

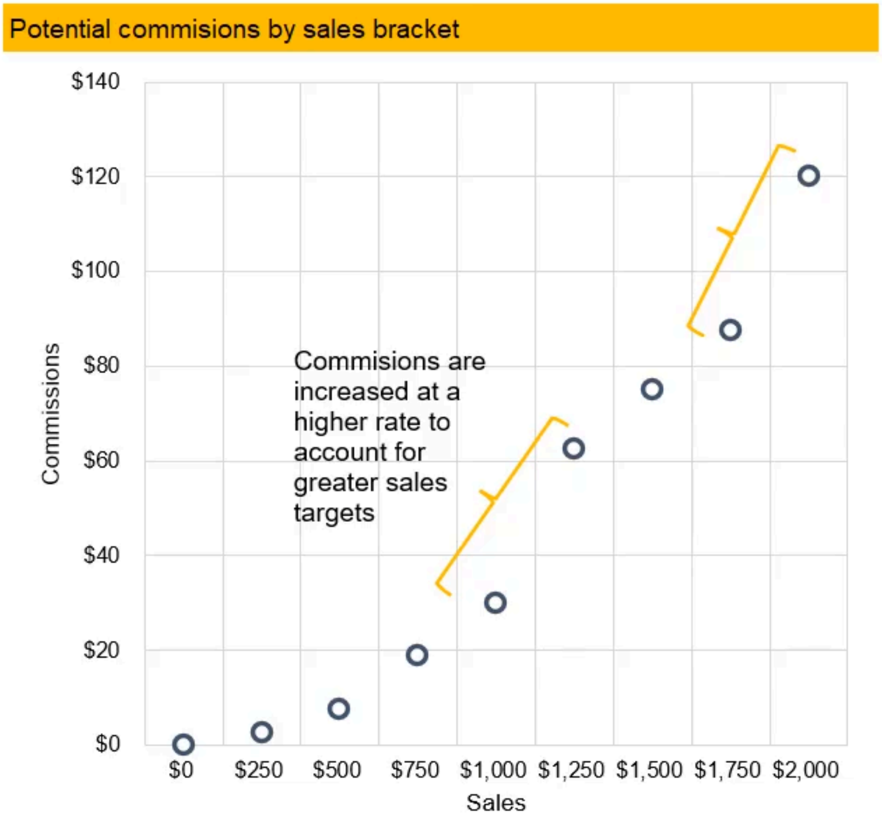


Figure 14.15

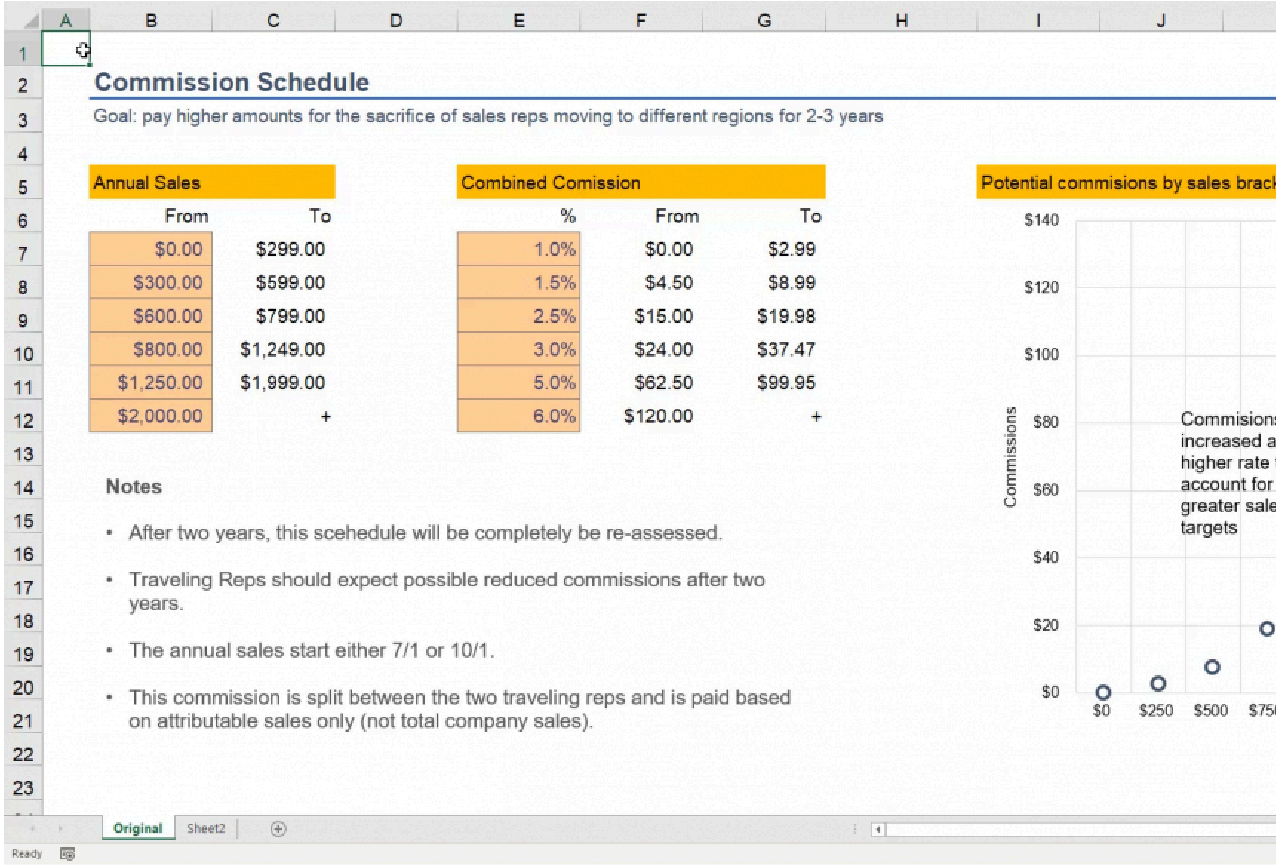
Professional Summary

Hide Columns

Extra columns and rows can be hidden to improve a dashboard's design.

1. Select the first column that needs to be hidden.
2. Press **Ctrl + Shift + Right arrow** keys to select all columns to the end of the spreadsheet.
3. Right-click a selected column's label designation and select **Hide**.
    a. Alternatively, press the **Format** button on the toolbar's **Home** tab and select **Hide & Unhide**, then **Hide Columns**.
4. Repeat step 1, step 2, and step 3 for rows.

It takes deliberate thought to layout a dashboard in a way that makes sense. All of the standards of professionalism practices in this chapter can be used in other worksheets to make them legible and usable. As you design your own dashboards and worksheets, you should design with the intent to make it easy to read and understand. The final result might look like **Figure 14.16** below.



Commission Schedule

Goal: pay higher amounts for the sacrifice of sales reps moving to different regions for 2-3 years

Annual Sales	
From	To
$0.00	$299.00
$300.00	$599.00
$600.00	$799.00
$800.00	$1,249.00
$1,250.00	$1,999.00
$2,000.00	+

Combined Comission		
%	From	To
1.0%	$0.00	$2.99
1.5%	$4.50	$8.99
2.5%	$15.00	$19.98
3.0%	$24.00	$37.47
5.0%	$62.50	$99.95
6.0%	$120.00	+

Notes

- After two years, this scehedule will be completely be re-assessed.
- Traveling Reps should expect possible reduced commissions after two years.
- The annual sales start either 7/1 or 10/1.
- This commission is split between the two traveling reps and is paid based on attributable sales only (not total company sales).

A
B
C
D
E
F
G
H
I
J
Potential commisions by sales brack
$140
$120
$100
$80
$60
$40
$20
$0
Commissions
$0
$250
$500
$75
Commision increased a higher rate account for greater sale targets
Original
Sheet2
Ready

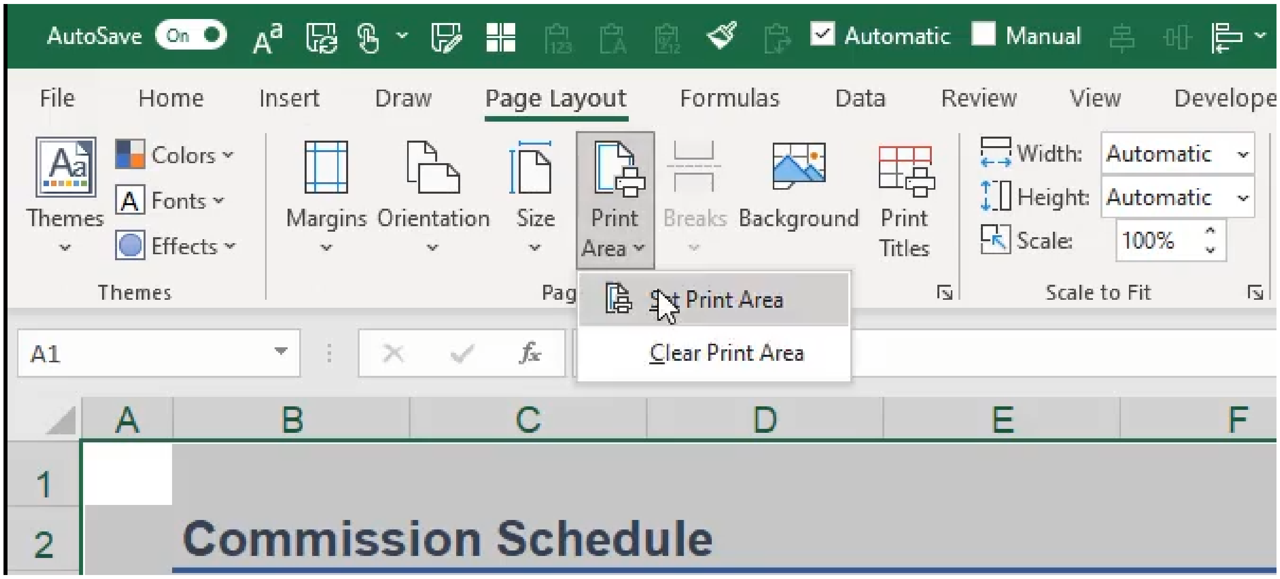
Figure 14.16

Print Layout Setup

Finally, the new dashboard may need to be printed out for handing out to others for review.

1. Select the relevant area of the dashboard to be printed.
2. Go to the **Page Layout** tab.
3. Press the **Print Area** button and select **Set Print Area**.
4. Select the **Width** and **Height** scales on the toolbar to one page.
5. Press the **Orientation** button and select **Landscape** if needed.

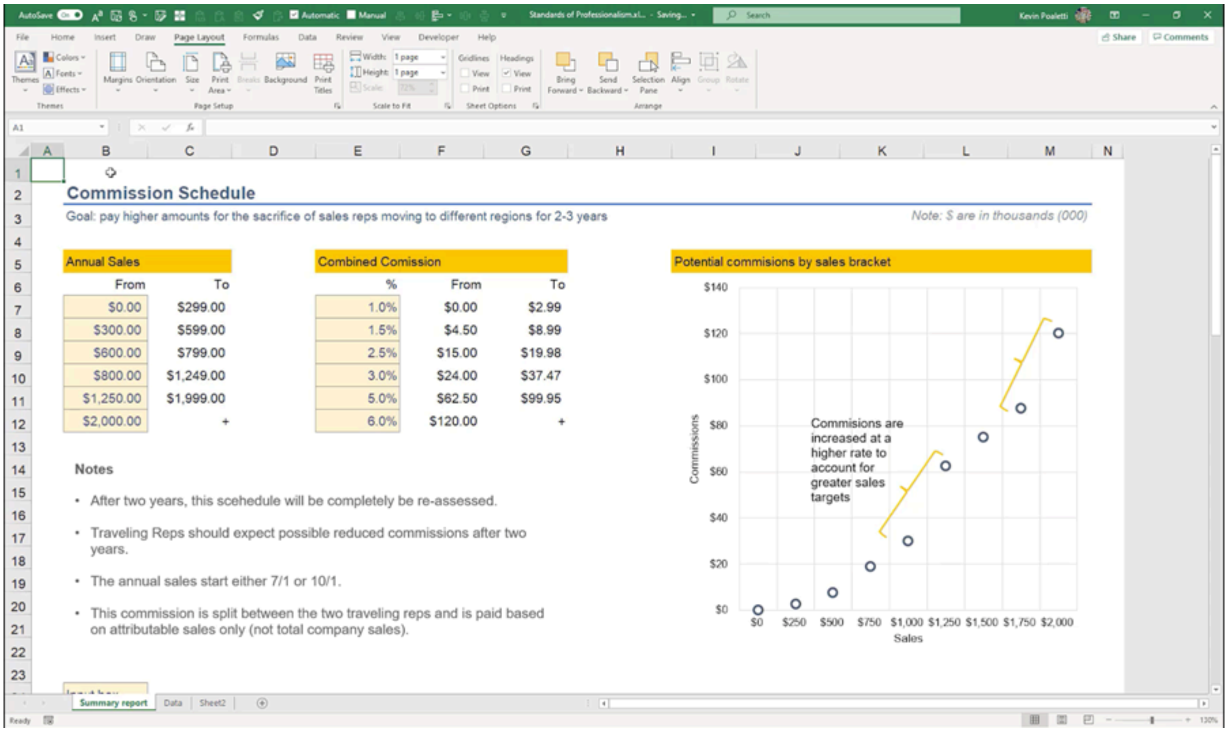
The dashboard will be ready to print.


AutoSave On
☑ Automatic
☐ Manual
File
Home
Insert
Draw
Page Layout
Formulas
Data
Review
View
Develope
Themes
Colors
Fonts
Effects
Margins
Orientation
Size
Print Area
Breaks
Background
Print Titles
Width: Automatic
Height: Automatic
Scale: 100%
Pag
Scale to Fit
Set Print Area
Clear Print Area
A1
A
B
C
D
E
F
1
2

Commission Schedule

Figure 14.17

When completed, your practice worksheet should look like the following:



Commission Schedule

Goal: pay higher amounts for the sacrifice of sales reps moving to different regions for 2-3 years

Note: $ are in thousands (000)

Annual Sales	
From	To
$0.00	$299.00
$300.00	$599.00
$600.00	$799.00
$800.00	$1,249.00
$1,250.00	$1,999.00
$2,000.00	+

Combined Comission		
%	From	To
1.0%	$0.00	$2.99
1.5%	$4.50	$8.99
2.5%	$15.00	$19.98
3.0%	$24.00	$37.47
5.0%	$62.50	$99.95
6.0%	$120.00	+

Notes

- After two years, this scehedule will be completely be re-assessed.
- Traveling Reps should expect possible reduced commissions after two years.
- The annual sales start either 7/1 or 10/1.
- This commission is split between the two traveling reps and is paid based on attributable sales only (not total company sales).

Potential commisions by sales bracket
$140
$120
$100
$80
$60
$40
$20
$0
Commissions
$0
$250
$500
$750
$1,000
$1,250
$1,500
$1,750
$2,000
Sales
Commisions are increased at a higher rate to account for greater sales targets
Summary report
Data
Sheet2
Ready

Figure 14.18

Supplemental Resource

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