Document Your Work with Excel's "Comments" Function

NEVER LOSE TRACK OF A SPREADSHEET AGAIN

By Nate Moore, CPA, MBA, CMPE

If you've ever built a complex spreadsheet, set it aside, and then gone back to it several weeks later only to find you can't remember how the spreadsheet works or what assumptions were built into the logic, comments may be just the thing you're looking for. Excel makes it easy to document the contents of any cell by adding a comment. Here's how to do it.

Working with Comments

To add a comment to any cell, right-click the cell and choose "Insert Comment." Excel will bring up a small text box that includes the name that the Excel software is registered to and space to make a comment. When you're through entering a comment, click outside of the text box and Excel will enter the comment in the cell and add a comment indicator to the upper-right corner of the cell, as shown in Figure 1.

To see an existing comment, hover over the cell with the comment indicator. Excel will temporarily show the comment. To make the comment show when you aren't hovering over it, right-click the cell with the comment and choose "Show/Hide Comments." Excel will leave that comment visible on the screen until you right-click the cell again and choose "Hide Comment."

To edit an existing comment, right-click the cell with the comment and choose "Edit Comment." Just like adding a comment, you can click outside of the comment text box to exit the comment. You can also use the eight sizing boxes to change the shape of the comment text box. To delete a comment, right-click the cell and choose "Delete Comment."

Similar functionality is found on the "Review" tab in the Comments section, as shown in Figure 2. The Comments section includes buttons to move to the next or previous comment, an easy way to cycle through all of the cells with comments in a spreadsheet. The Comments section also includes a button to "Show All Comments" on the worksheet. To hide all of the comments, click "Show All Comments" again. Finally, to select all cells with comments, from the "Home" tab, choose "Find & Select" and then "Go To Special." The first option is Comments, as shown in Figure 3. Click OK to select all cells with comments.

Comments make it easy to **document the spreadsheet** without cluttering your printed final product.

When to Use Comments

Comments are a great way to document spreadsheet elements to make it easier for you and for others to understand your spreadsheet at a later date. For example, you can use comments to:

- Document where a specific number came from with a comment like "Per 2015 budget Rev. 2."
- Explain logic or a formula, as in "This cell adds the salary, bonus, and taxable benefit cells to get gross compensation."
- Remind yourself to do something, such as "Remember to update the FICA limit each year."
- Post notes to other users who share the spreadsheet, as in "Nate, add your department here."

One helpful feature of comments is that even if you use "Show/Hide Comments" to display comments, they typically don't print when the spreadsheet is printed. Comments make it easy to

FIGURE 1

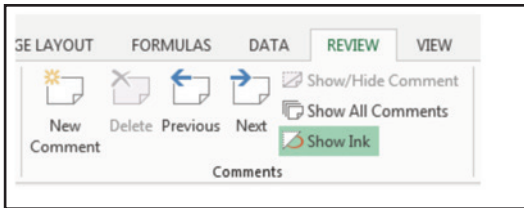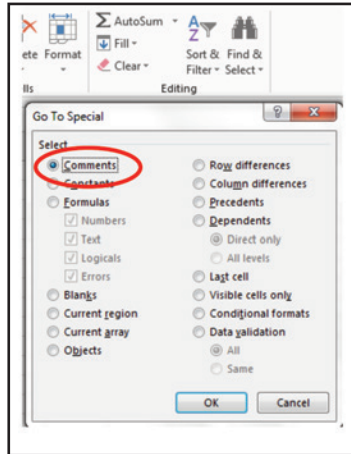| G	H	I
	In Excel 2013, cells with comments look like this	

FIGURE 2

FIGURE 3

FIGURE 4

FIGURE 5

Cell: B2
Comment: Nate:
This is what comments look like
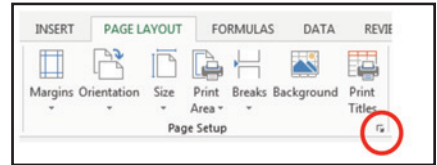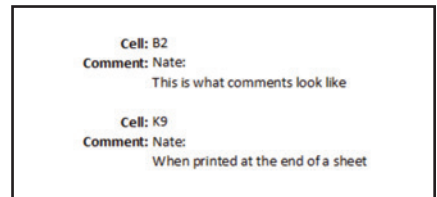
Cell: K9
Comment: Nate:
When printed at the end of a sheet

document the spreadsheet without cluttering your printed final product. If you want to print comments, go to the "Page Layout" tab and click the small button at the bottom-right corner of the Page Setup area, as shown in Figure 4. There is an area for comments on the "Sheet" tab of the Page Setup window. The default is "None," but you can choose "At end of sheet" to print all comments at the end of a printed document or "As displayed on sheet" to print the comments as they appear on the worksheet. An example of comments printed at the end of a sheet is shown in Figure 5.

Be sure to get in the habit of using comments, particularly in complex spreadsheets, spreadsheets you don't use very often, or in spreadsheets you collaborate on. A few minutes spent docu-menting with comments now can make your spreadsheets more accurate and save hours of confusion down the road. ■

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