

Proicere, Inc.

MS Excel: Customizing the Work Area

Lesson Notes

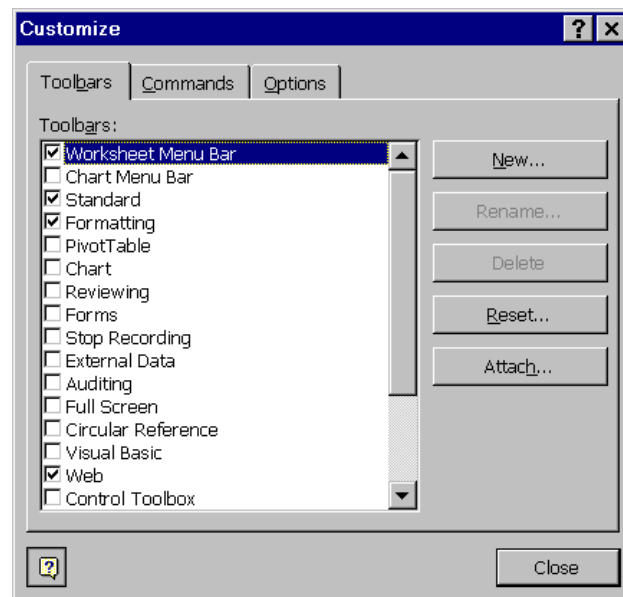
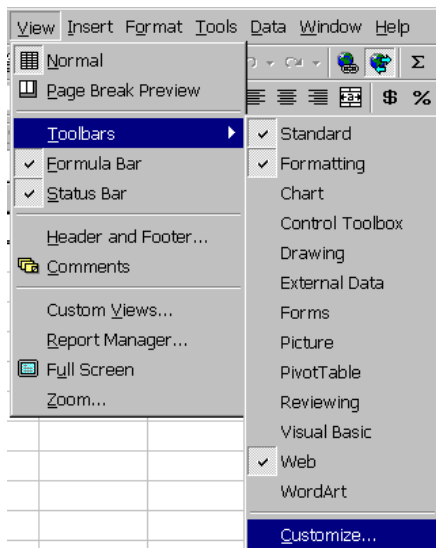
Author: Pamela Schmidt

Toolbars

Creating a Toolbar

From the menu choose:

View, Toolbars, Customize

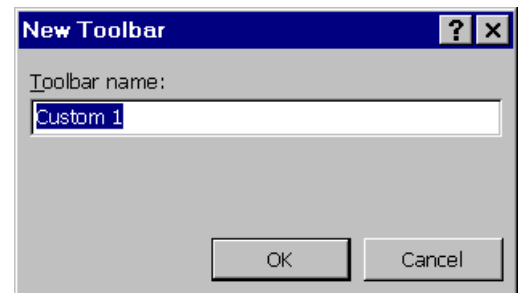


A dialog box will appear. Choose the New button

In the dialog box that appears type in a name for your new toolbar.

Note: The name can be 255 characters with spaces.

The new empty toolbar should appear.



Add Buttons to a Toolbar

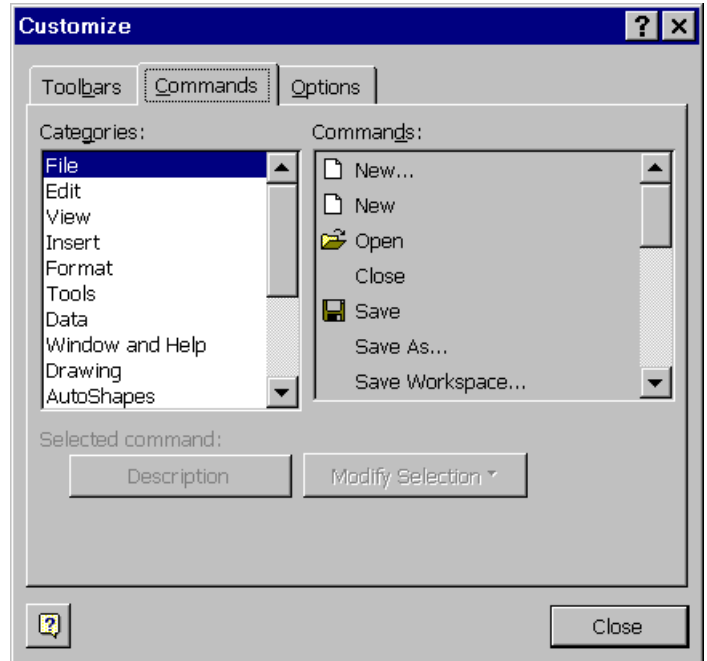
In the Customize dialog box, choose the Commands tab.

On the left, click on the desired category.

The commands for that category will appear on the right.

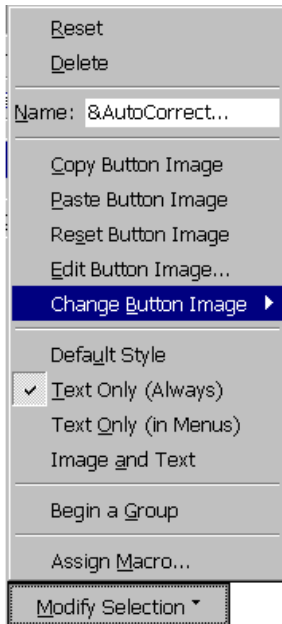
Note: Any command with an ellipse will bring up a dialog box when selected.

Drag the desired command to the new toolbar.



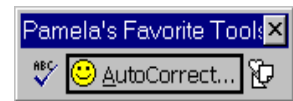
Add a Button Image

Not all commands have assigned buttons. These commands may still be placed on the toolbar. They will appear without a picture.



To add a picture, select the newly added command, choose the Modify Selection button, Change Button Image, then choose an icon.

The icon will then appear as an icon in the button.



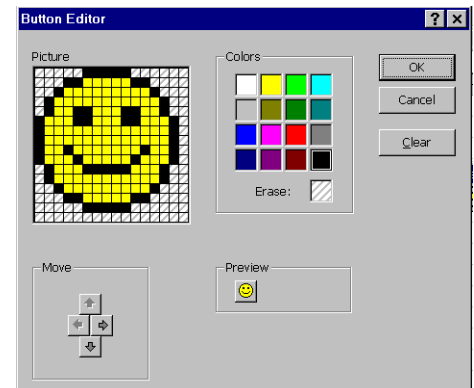
To turn off the text, select the newly added command, choose the Modify Selection button, Default Style. This changes the button to match the style of the other buttons.



Edit a Button Image

To edit the icon image, select the newly added command, choose the Modify Selection button, Edit Button Image. A dialog box will appear.

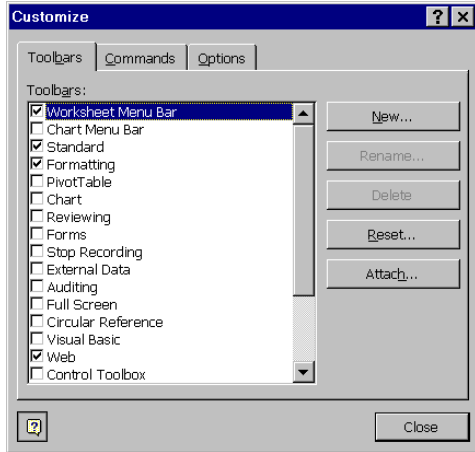
Click on a color, and then click on the picture to change the color of each pixel.



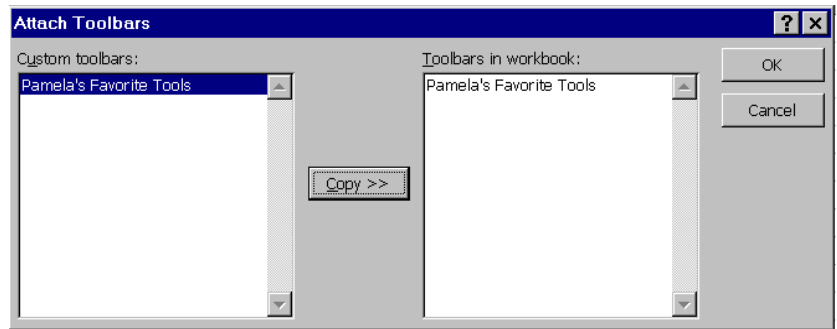
Attaching a Custom Toolbar to a Workbook

A custom toolbar can be attached to a workbook. When the workbook is copied to another system, the toolbar goes with it. Once the workbook is brought up in the new system, the toolbar is then available to all the workbooks on that system.

From the Customize dialog box choose the Attach button.



A dialog box will appear with a list of all the custom toolbars on the current system. Click on the desired toolbar, and then click on the copy button to attach the toolbar to the current workbook.



Note: Be sure to save the workbook after attaching the toolbar.

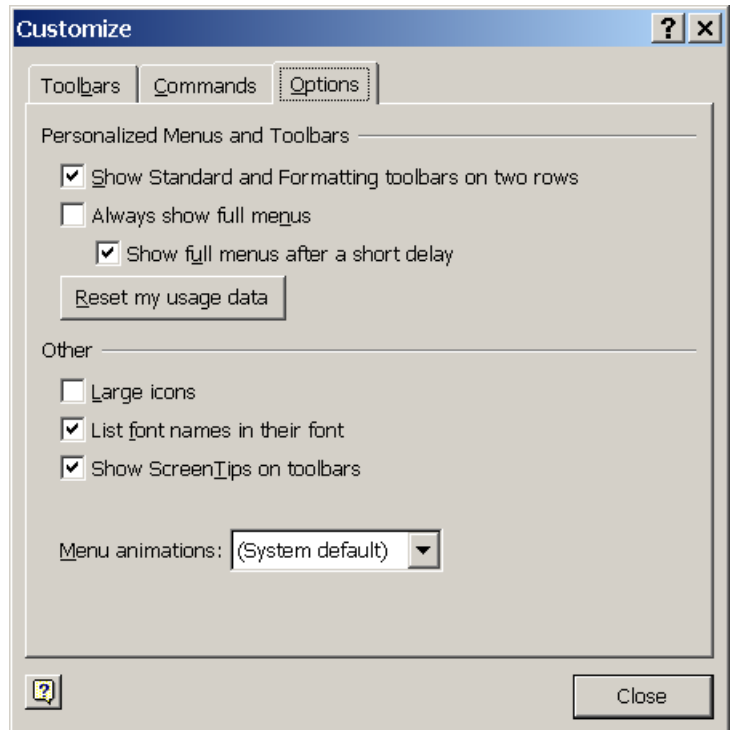
Changing Toolbar and Menu Options

In the Customize dialog box, choose the Options tab.

The default Personalized Menus and Toolbars options can be turned on and off.

As items are selected off long menus, the item is added to the short menu list. As hidden tools on wide toolbars are selected, they are added to the area of the toolbar that can be seen. The internally stored list of most used menu items and tool can be reset by clicking the “Reset my usage data” button. This button does not move toolbars, nor remove/add buttons.

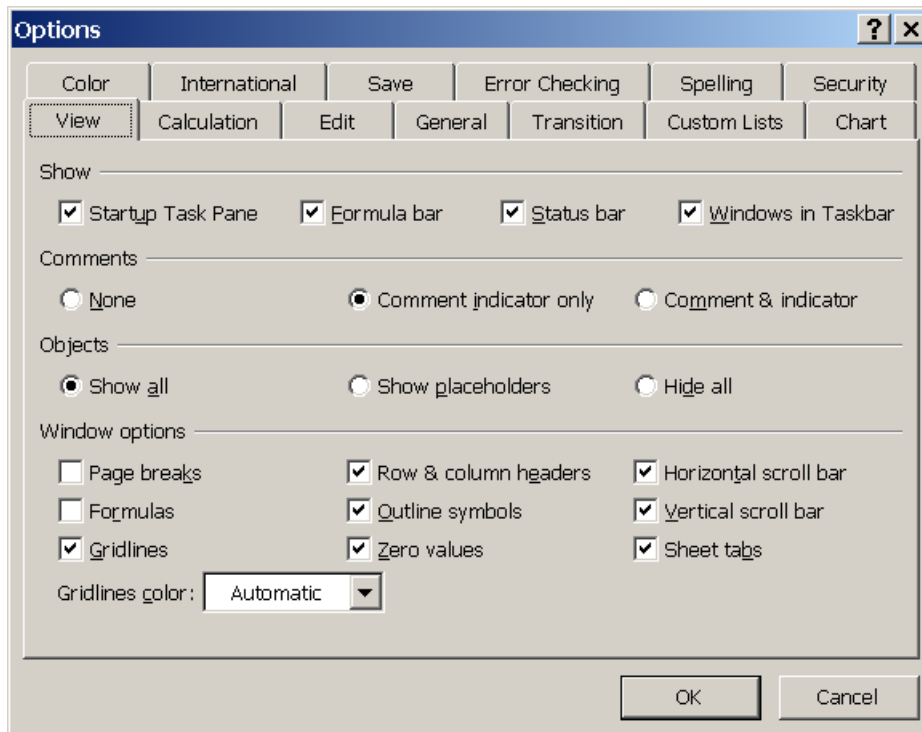
Note: Changing the toolbars to be “Large icons” can cause some of the buttons to be hidden. If this happens, create your own toolbar with just the tools needed.



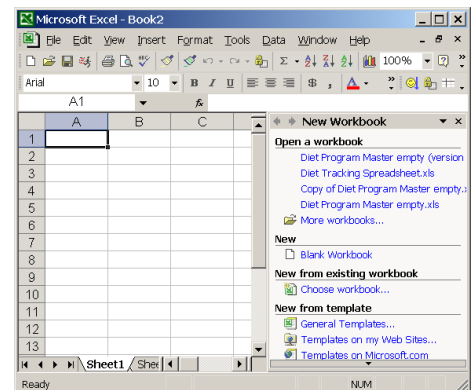
Changing MS Excel Options

From the menu choose, Tools, Options

View



Startup Task Pane - was a new feature in version 2002. The Startup Task Pane is the window that opens up listing most recent files. It usually appears on the right but can be moved.



Objects – show placeholders will display and print gray boxes for pictures and graphs. Hide all will not show or print the pictures and graphs.

Window Options – zero values – 0's will not show, but formatting can override this feature.

Calculation Options

Calculation – defaults to automatic. On systems with limited memory and speed, changing the Calculation to Manual can speed up the workbook response to data entry. Make sure to recalculate before printing or total may be wrong.

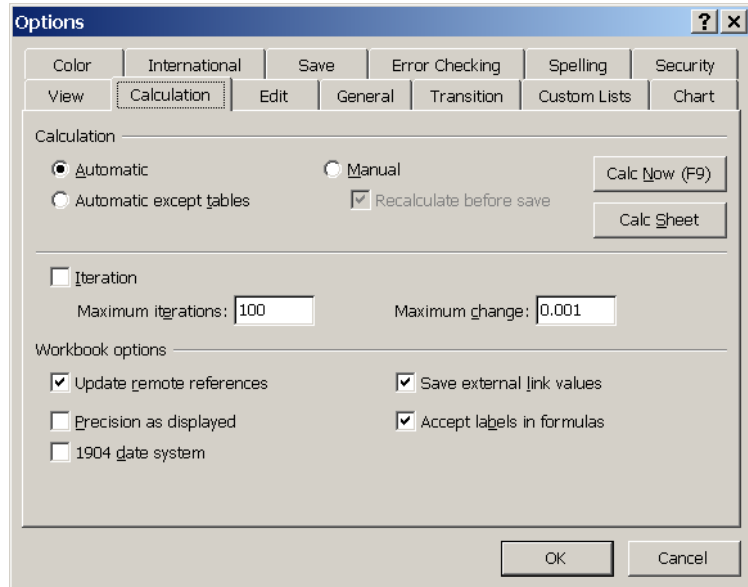
Iteration – “the repetition of a sequence of computer instructions a specified number of times or until a condition is met”

Precision as displayed – changes the actual value to what is displayed.

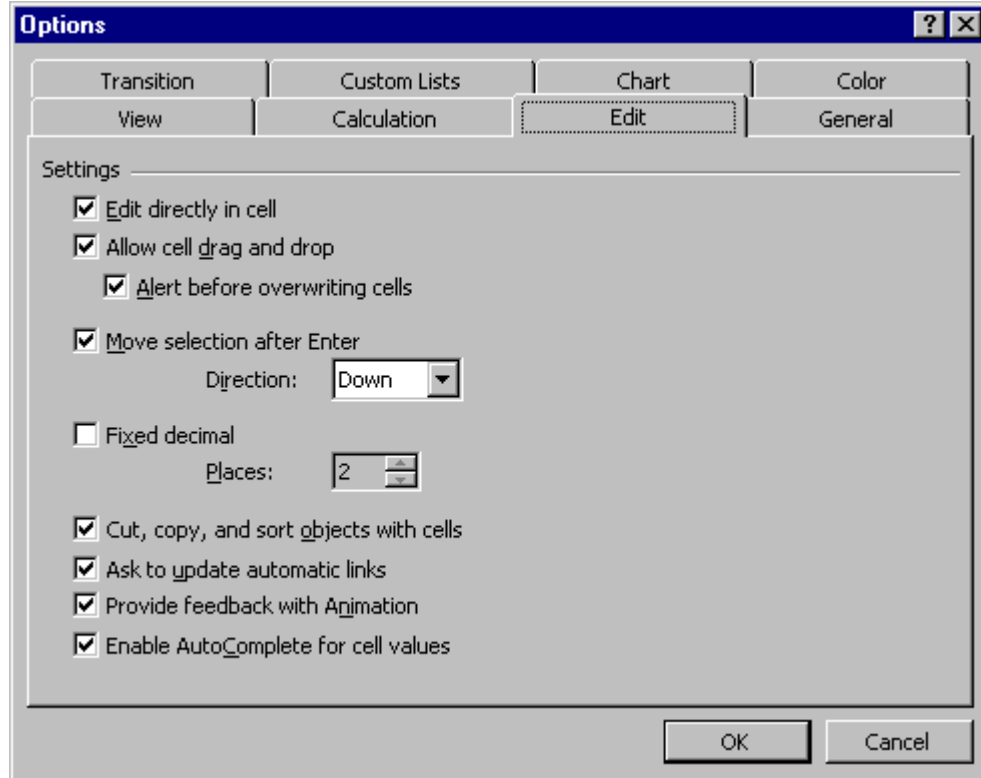
Note: Turning the Precision as displayed off again will not get back the original number.

Update remote references – if another document is linked back to the spreadsheet, this feature allows the other document to be automatically updated when the spreadsheet is changed.

1904 date system – Macintosh systems use the 1904 date system.



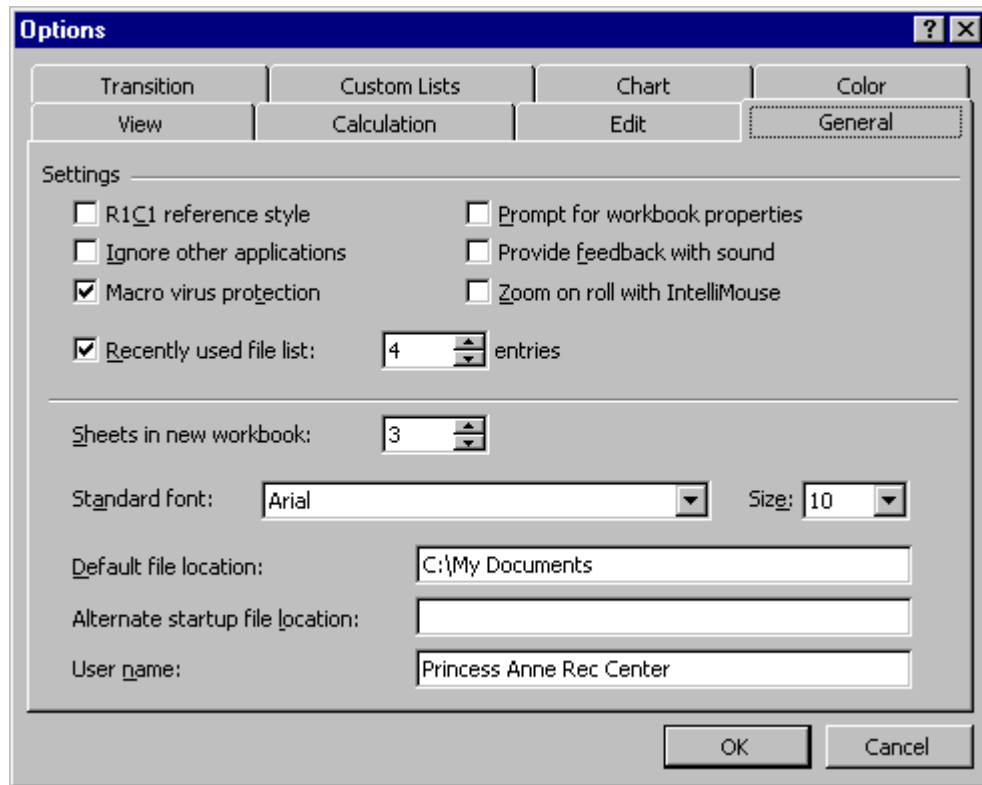
Edit Options



Alert before overwriting cells – this is only for the dragging of cells. If a cell is copied and pasted, there will be no alert.

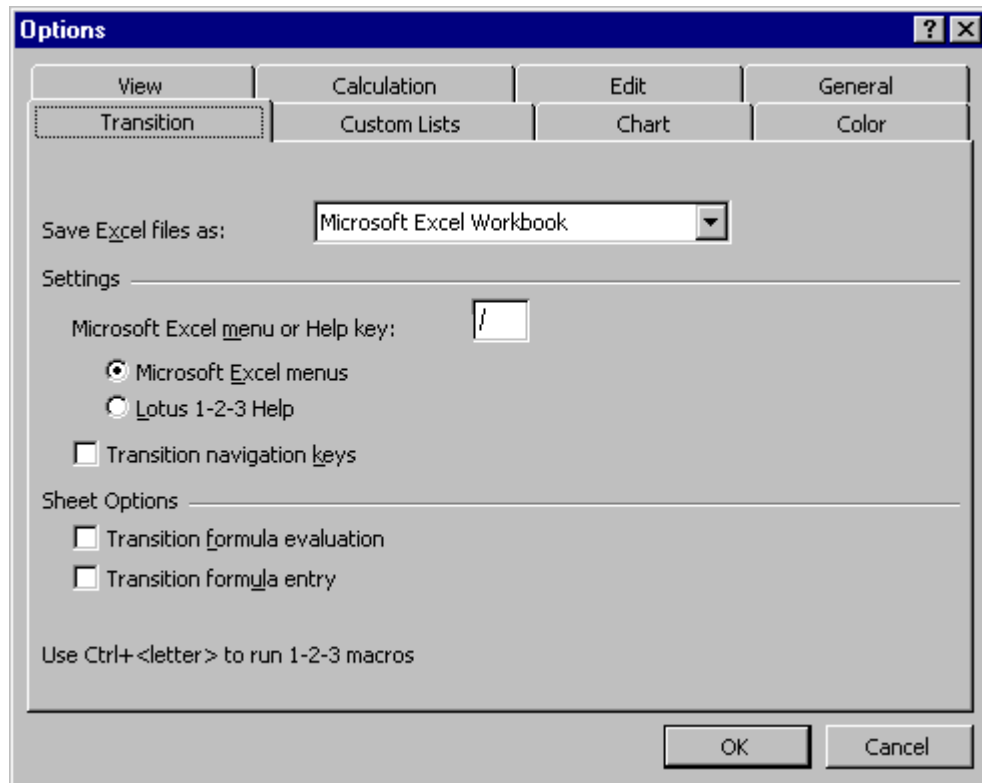
Move selection after entry – the default is down, but if most of the data entry being done in the spreadsheet is normally across, the direction can be changed to across.

General Options



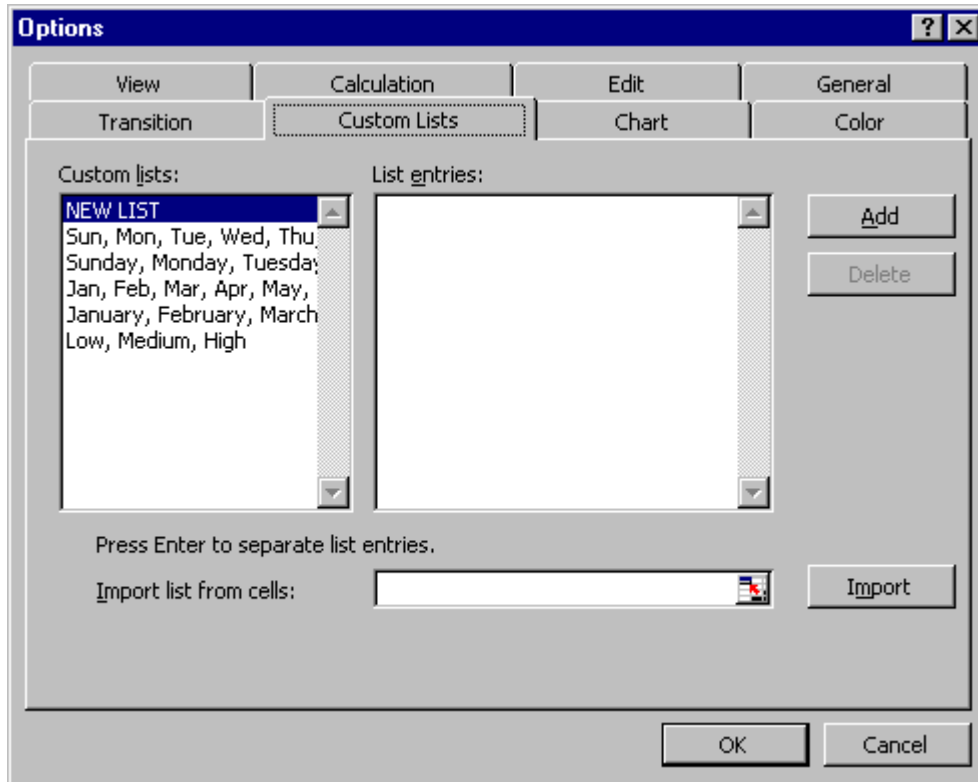
R1C1 reference style - In R1C1 reference style, Microsoft Excel indicates the location of a cell with an "R" followed by a row number and a "C" followed by a column number. ie \$A\$1 would be R1C1 \$B\$5 would be R5C2

Transition Options



Custom Lists

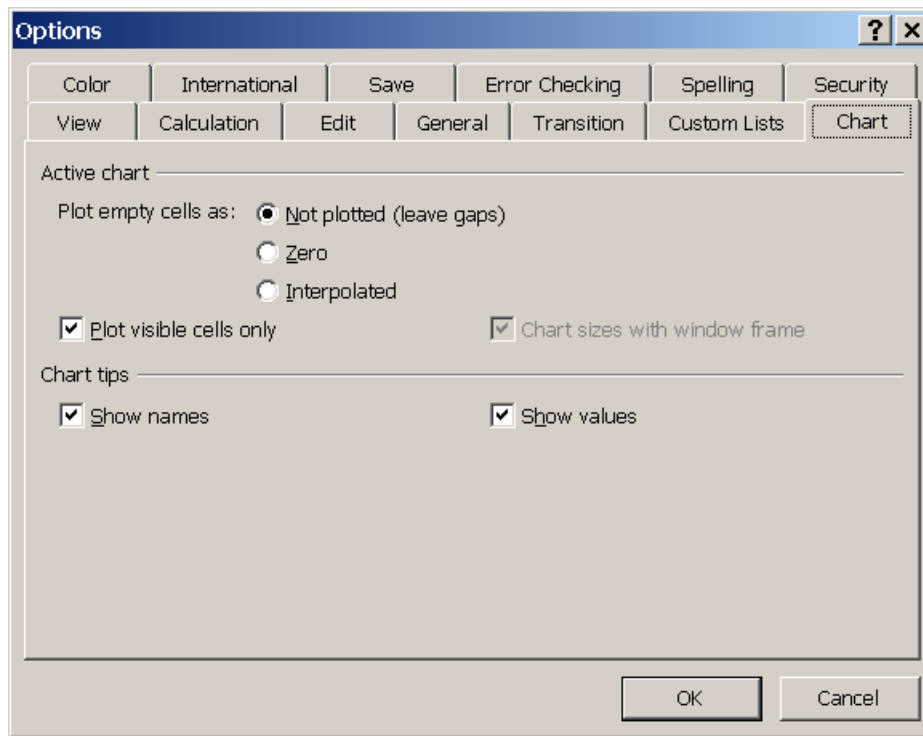
A custom list can be typed into using the List Entries box hitting enter after each entry.



Import - If a list already exists in the workbook, the list can be pulled in using the "Import" button.

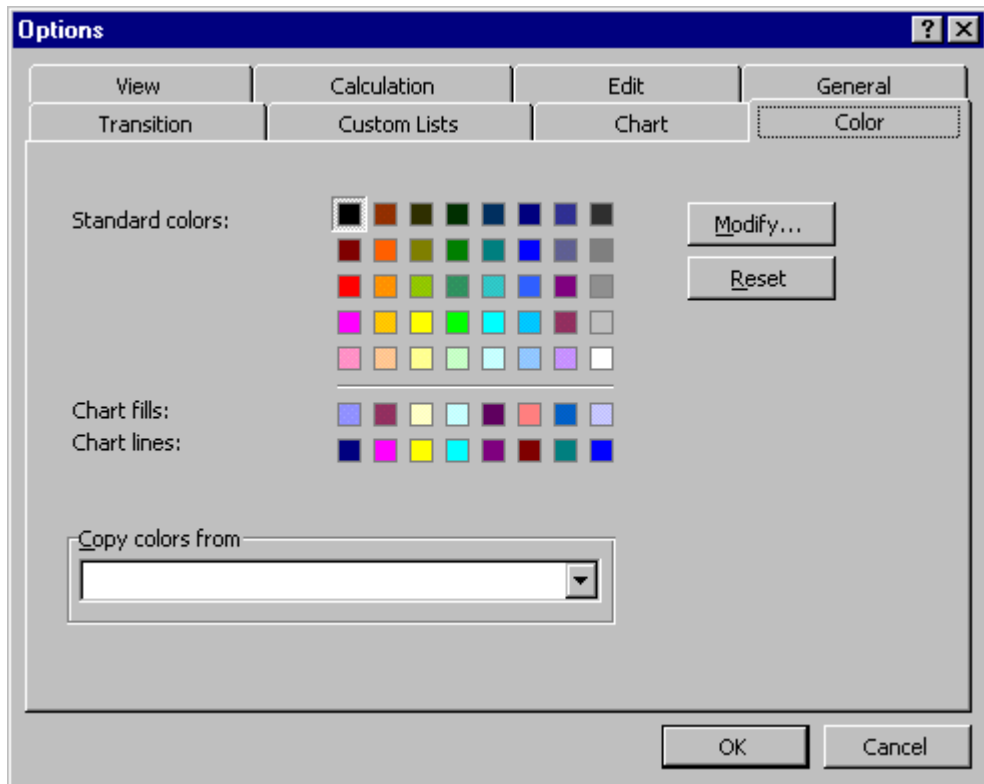
Note: the advantage of using this method is the ability to have other people proof the list and/or run spell check over the list.

Chart Options

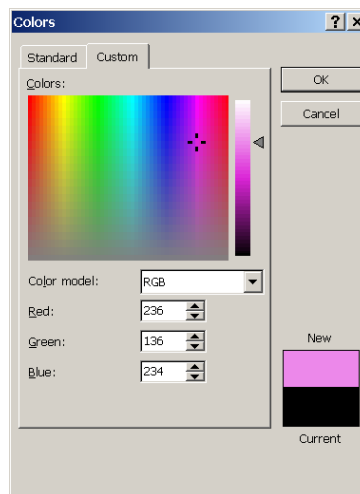
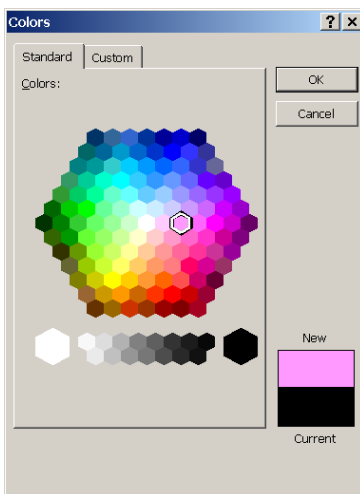


Plot empty cells as - dictates whether empty cells show up on the chart. If Interpolated is chosen on a line chart, the line will continue over the blank cells in a linear fashion.

Color Options



To change the color, choose the modify button.



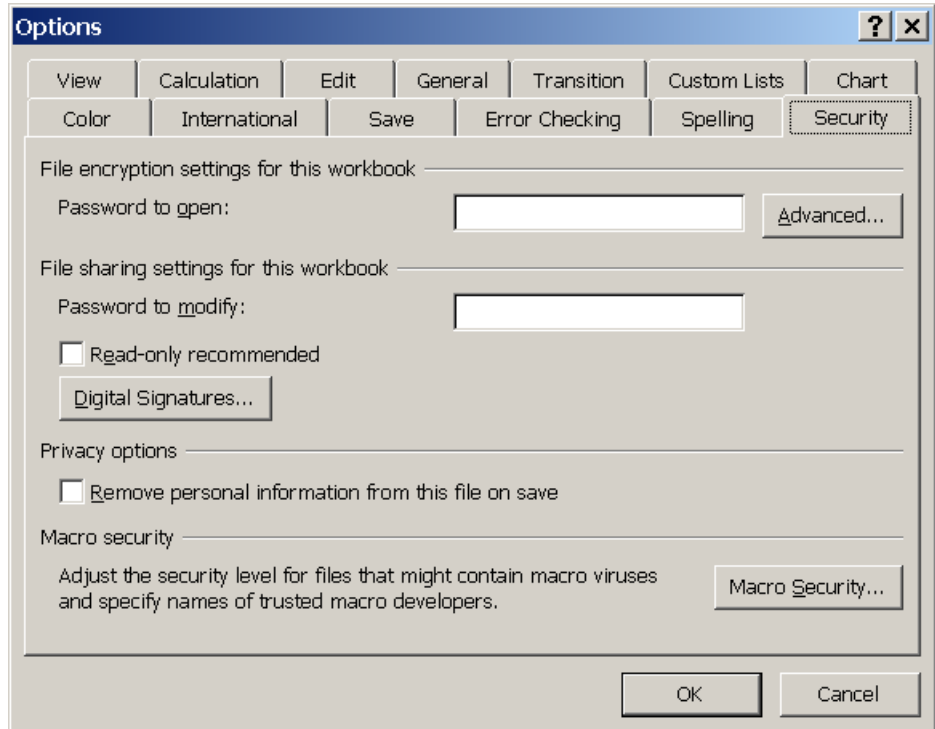
Copy colors from – pulls the color pallet from another workbook.

Security

This features was new in version 2000.

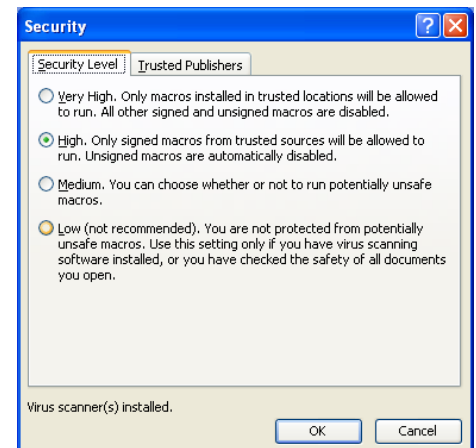
Parts of the Security are for the workbook, others for the whole system. A new document will have the document security turned off. Once a workbook is saved with security, the document security travels with the workbook.

Note: document security is saved with a template



A MS Excel document normally saves information such as the creator, with the document. The Privacy Options removes that information so it does not travel with the document.

Macro Security – opens a dialog box for setting the security level for allowing macros to run on your system.



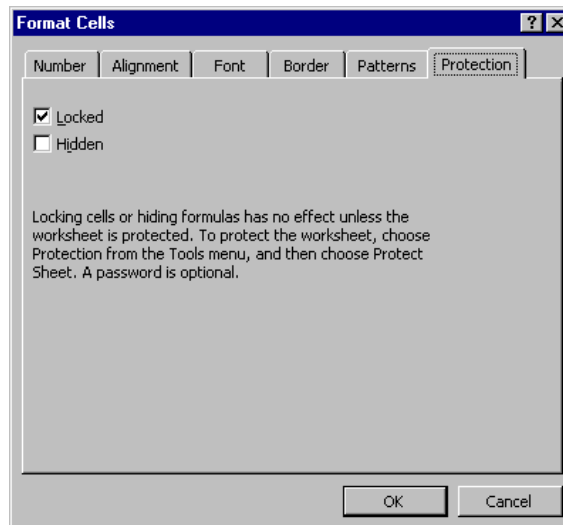
Protecting Cells

All cells have the ability to be protected. When protection is turned on, any cell that has the ability will be protected.

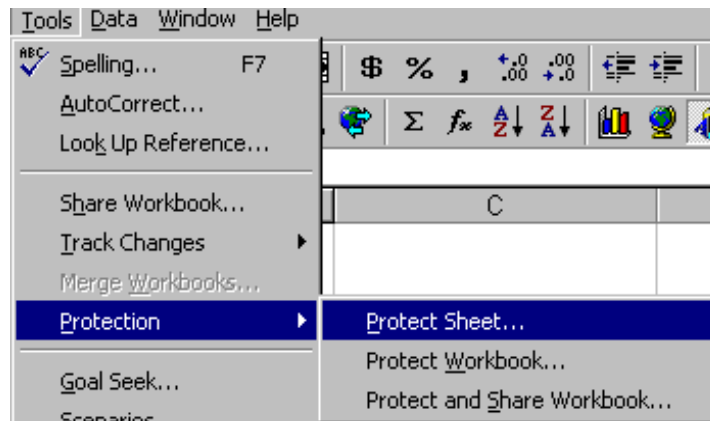
To turn off the protection on specific cells:

From the menu choose, Format, Cell, Protection

Uncheck the locked check box



To protect the sheet, from the menu choose Tools, Protection, Protect Sheet.



Creating Templates

Create the base spreadsheet

In the Save As dialog box change the Save as type: to Template

It should automatically change the Save in: directory to Templates

