

Proicere, Inc.

MS Excel: Templates

Lesson Notes

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Overview

Templates are used for spreadsheets that are used on a regular basis using all or some of the same formatting, styles, labels, formulas, etc. When a template is used, the original workbook is not modified.

Creating Templates

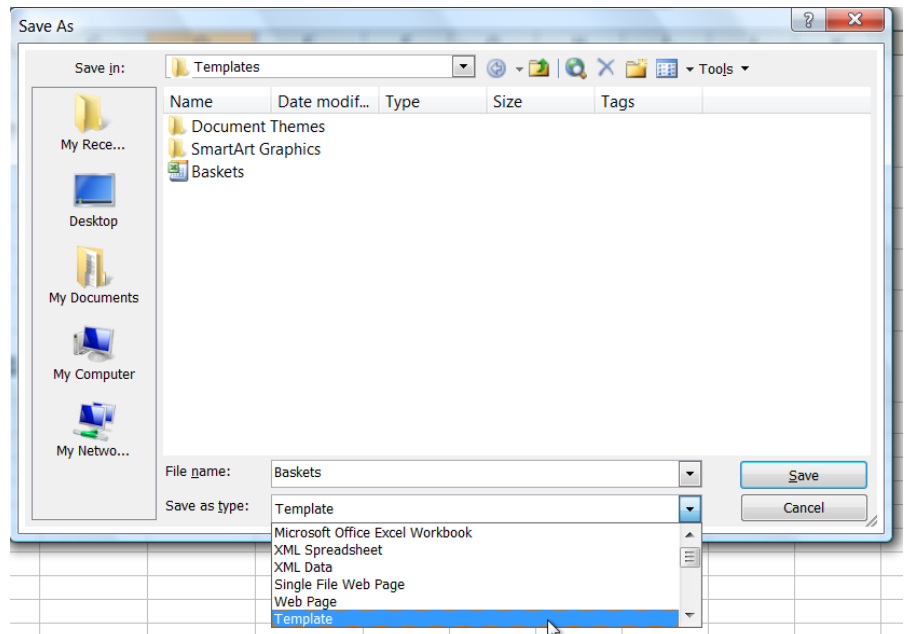
Create a spreadsheet containing all the features to be saved with the template.

ie labels, formatting, styles, formulas, cell protection, etc.

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

It should automatically change
the Save in: directory to
Templates

Give the template a name and
save.



Using a Template

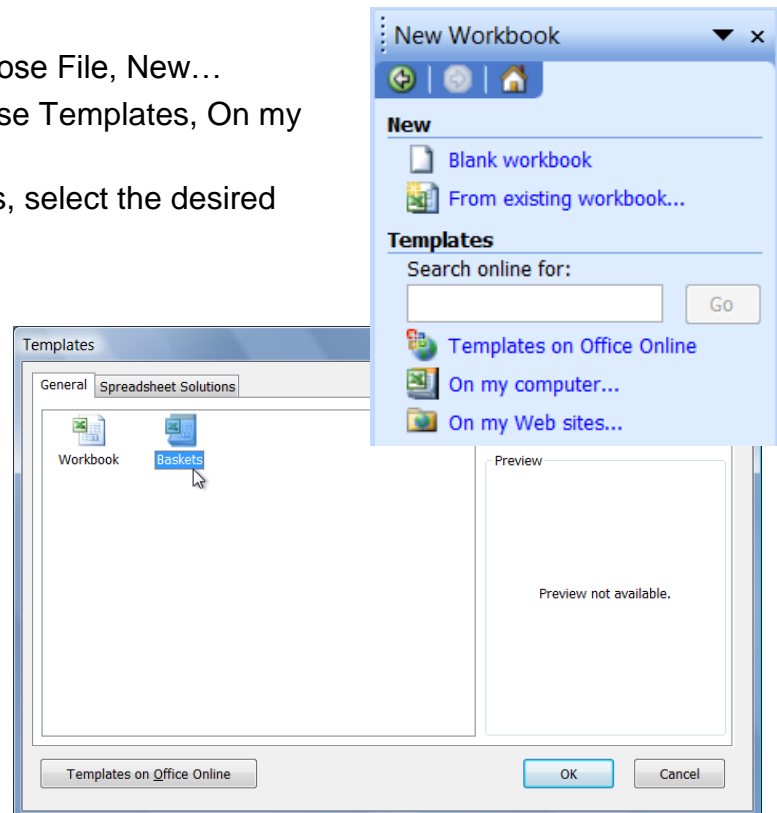
To use a template, from the menu choose File, New...

In the New Workbook task pane, choose Templates, On my computer...

In the Templates dialog box that opens, select the desired template, then click the "OK" button.

The new book will open with a number one after the template name.

When the book is saved, the Save As dialog box will appear for the naming of the book.



Modify a Template

The easiest way to modify a template is to create a book based on the template, make the desired changes, then save the book as a template with the same name as the template to be changed. The original template will be replaced by the new template.