



UNIT: 07

Customizing the Excel Environment

Learning Outcomes

By the end of this unit the learner will be able to:

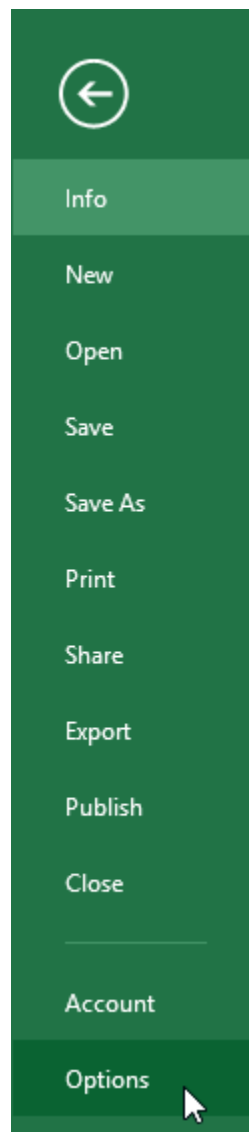
- ✓ **Customize general, language, formula, proofing, and saving options**
- ✓ **Use Excel's version control features**
- ✓ **Customize the ribbon and the Quick Access toolbar**

UNIT 07 CUSTOMIZING THE EXCEL ENVIRONMENT

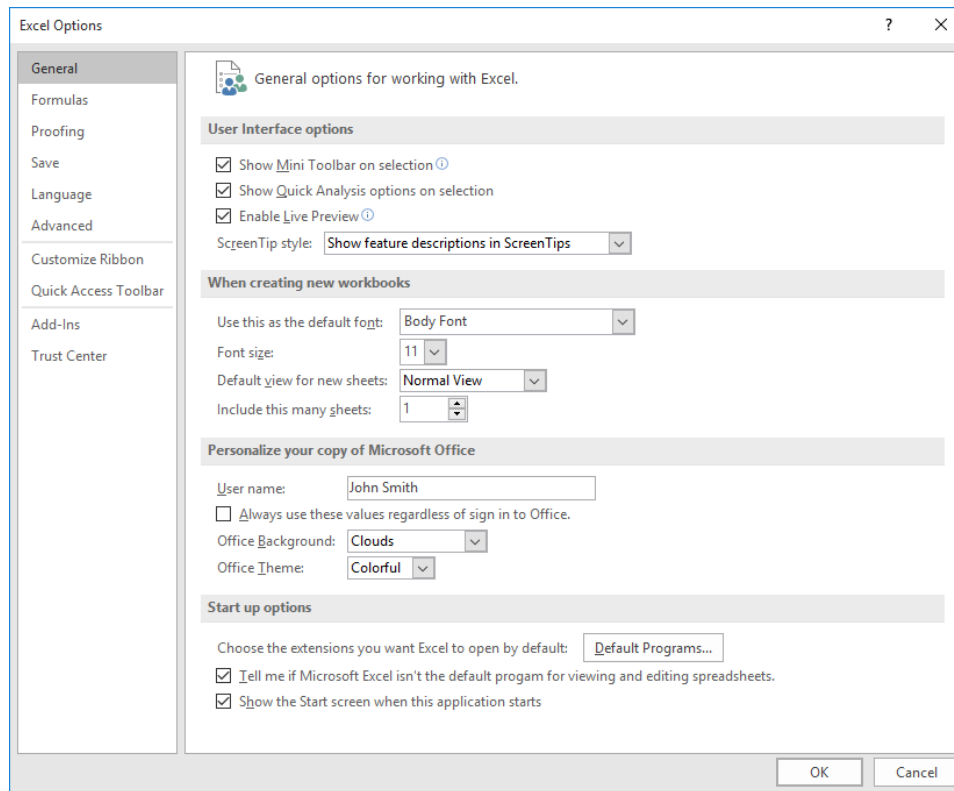
Customize General and Language Options

THE EXCEL OPTIONS DIALOG BOX

The Excel Options dialog box is the central hub where you can find many of Excel's custom settings. These options are divided into ten categories, each with its own set of tools. To open the Excel Options dialog box, click File → Options:



Once open, you will see the ten categories listed on the left side of the dialog box with the General category already displayed:



Below is a breakdown of what kind of settings you can find in each category:

General	This category includes several settings that change the general appearance of Excel. This includes changing the color scheme, font type, and your user name.
Formulas	Specify how formulas are calculated, set error handling options, and more.
Proofing	Customize how Excel find and corrects spelling errors.
Save	Customize how workbooks are saved.

Language	Specify the language that you would like to use for Excel and Microsoft Office as a whole.
Advanced	The settings in this category control some of the more complex aspects of Excel. This includes things like image size and quality, editing options, and more.
Customize Ribbon	Customize what controls appear on the ribbon and where.
Quick Access toolbar	Customize what controls appear on the Quick Access Toolbar and where.
Add-Ins	Add and manage Office add-ins.
Trust Center	This category allows you to access the Trust Center, which controls a variety of privacy and security settings.

Excel Options and Microsoft Office

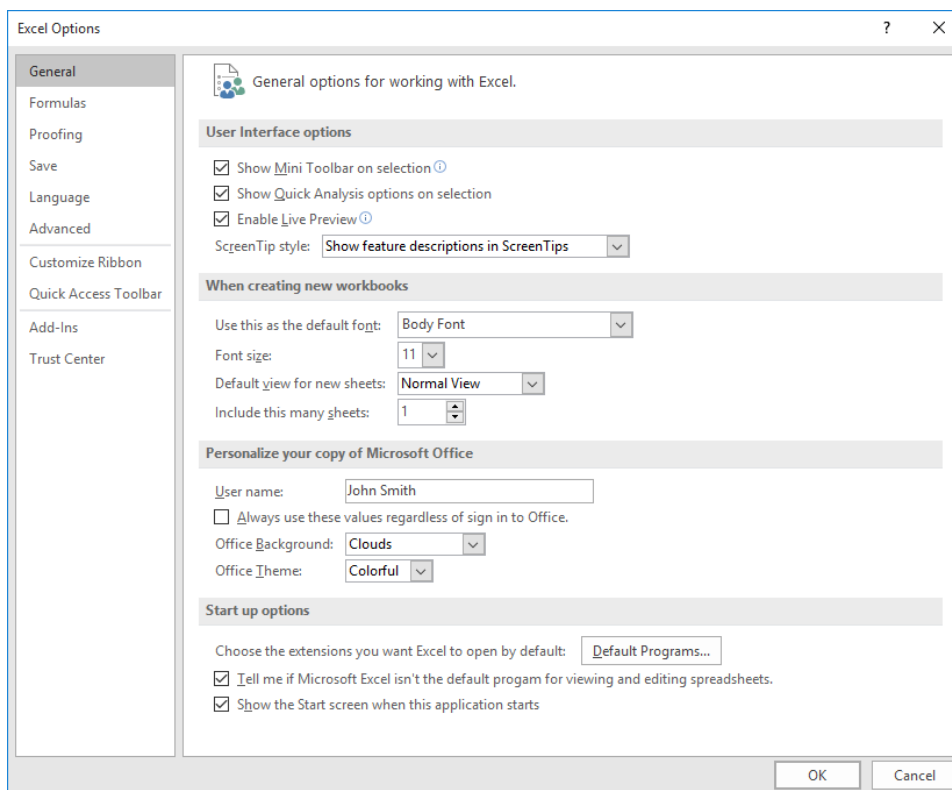
When changing the settings in the Excel Options dialog, keep in mind that many of the changes that you make will affect other Microsoft Office applications. Be sure to check that any changes you make in the Excel Options dialog do not adversely affect other applications.

Customizing Excel in the Workplace

If you are using Microsoft Excel 2016 individually or in a small office environment, you can typically customize it as needed. However, many larger organizations have policies in place to prevent you from making customizations. If this is the case you may find that some of the options in the Excel Options dialog will appear grayed out.

THE GENERAL CATEGORY

Displayed by default, the General category of the Excel Options dialog box allows you to personalize the overall appearance of Excel:



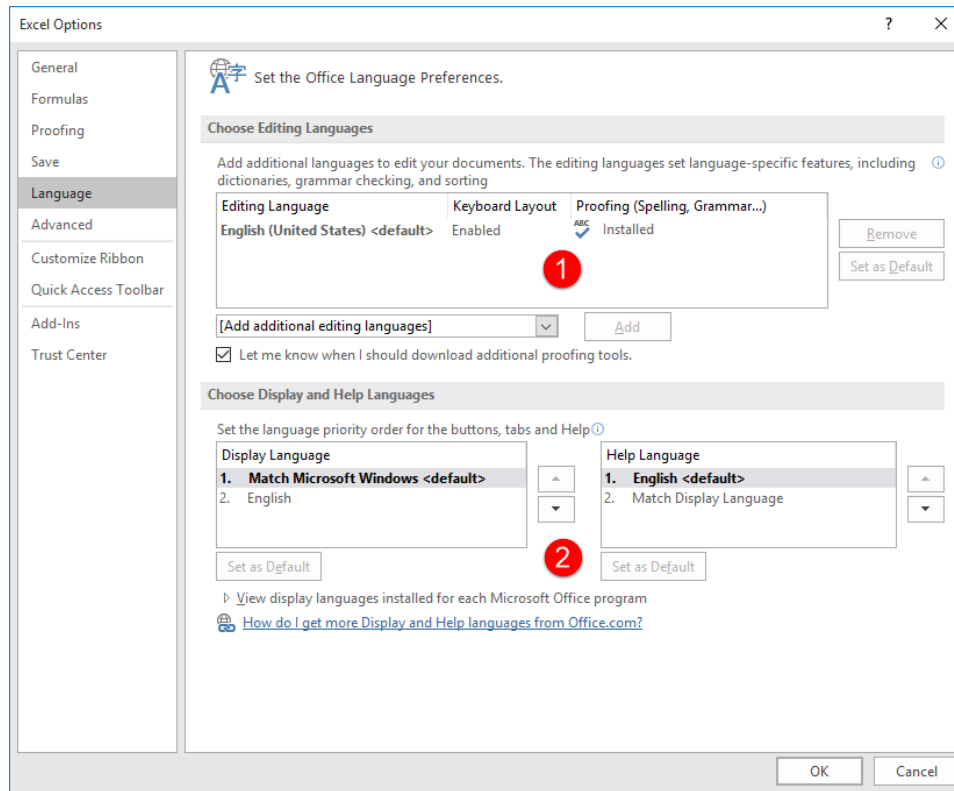
Below is a brief breakdown of some of the options that are available in the General category of the Excel Options dialog box:

<p>Show Mini Toolbar on selection</p>	<p>Selected by default, this option will ensure that the mini toolbar is displayed when you select text or objects within your workbook.</p>
<p>Show Quick Analysis options on selection</p>	<p>Checked by default, this option toggles the Quick Analysis buttons on and off.</p>

Enable Live Preview	Checked by default, this option toggles the Live Preview feature on and off.
ScreenTip style	Using this drop-down menu you can choose how ScreenTips are displayed. Options include showing or hiding control descriptions, as well as disabling them altogether.
Use this as the default font	This control allows you to choose the font face that will automatically be used when new workbooks are created.
Font size	This control allows you to choose the font size that will automatically be used when new workbooks are created.
Default view for new sheets	This control allows you to choose the view that will automatically be used when new workbooks are created.
Include this many sheets	This increment box allows you to choose how many sheets will be automatically included in a workbook when they are created. By default, this is set to 1.
User name	This text box is used to enter the name that you would like to associate with your copy of Microsoft Office. You can also choose to always use this value regardless of your Microsoft Account sign-in.
Office theme	Using this drop-down menu you can choose from a few different themes for Microsoft Office applications: Colorful, Dark Gray, and White. The default setting is Colorful.
Show the Start screen when this application starts	This checkbox allows you to choose between having the Start screen shown when you first launch Excel 2016, or not.

THE LANGUAGE CATEGORY

The Language category in the Excel Options dialog box will display the following options:



These controls are used to choose the **editing language (1)** (the language that the spell checker will use), as well as **display and help languages (2)**.

ACTIVITY 7-1

Customizing General and Language Options

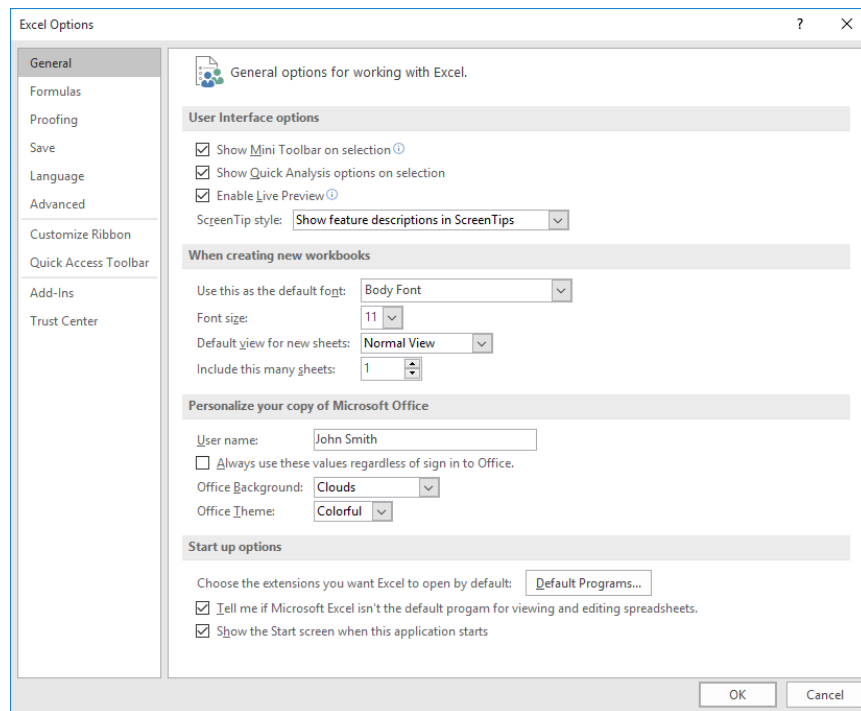
Now that you are more comfortable using Microsoft Excel 2016, you would like to customize a few of its general and language settings.

1. To begin, open Microsoft Excel 2016 to a blank workbook.

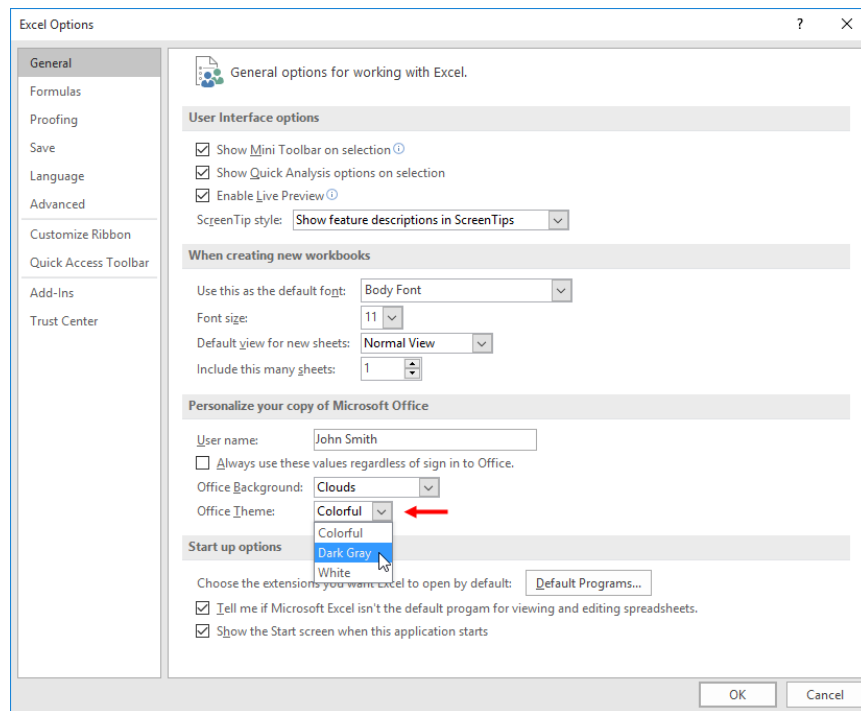
2. Click File → Options:



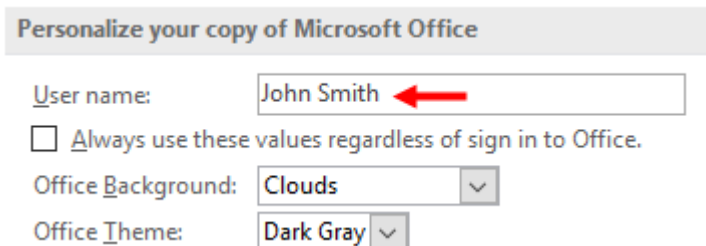
3. The Excel Options dialog will open to the General category:



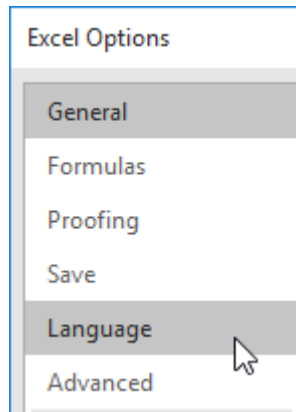
- Click the Office Theme drop-down menu and click one of the options provided:



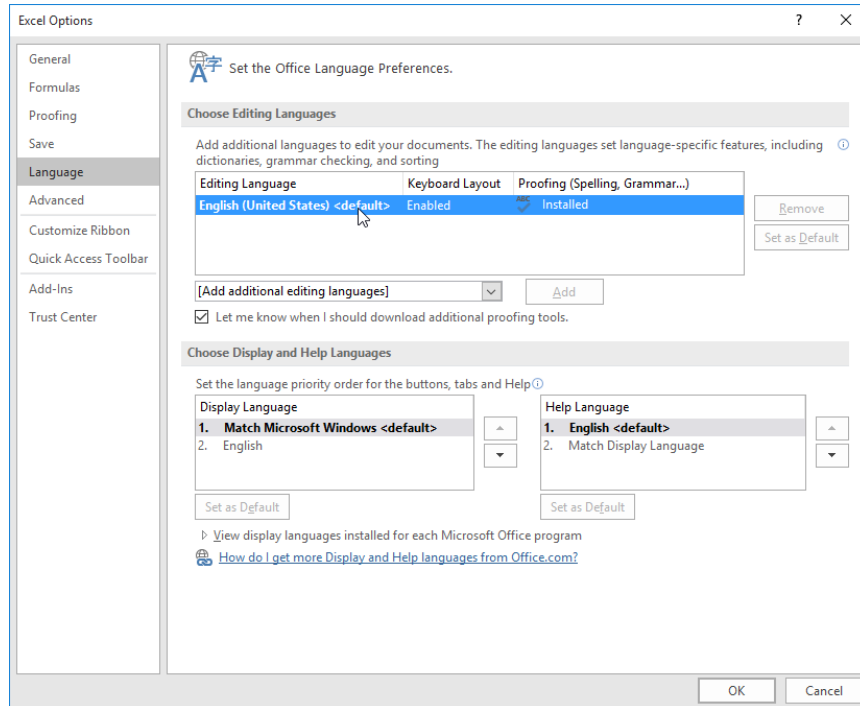
- Next, type your own name into the "User name" text box if it isn't there already:



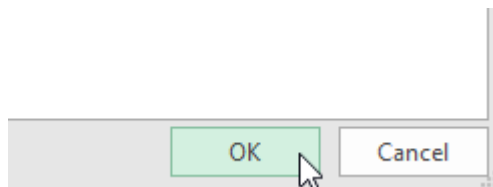
- Click the Language category:



- Review the settings in this category and ensure that they match the language you will be using in your day-to-day work:



- Click OK to apply all of the new settings that you selected:

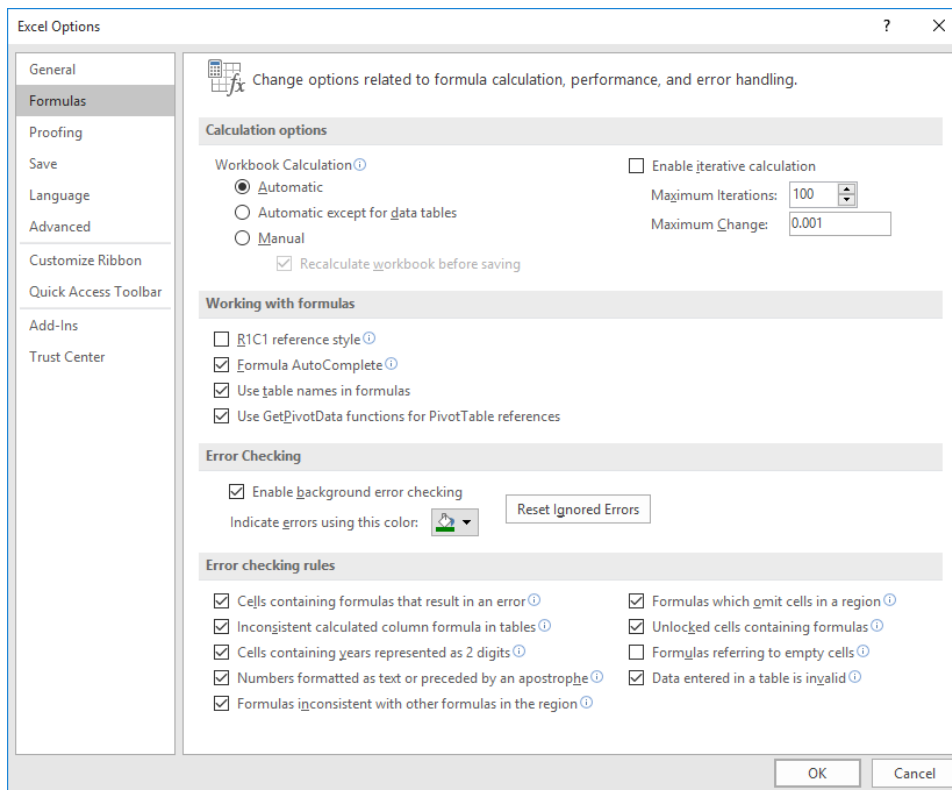


- Close Microsoft Excel 2016.

Customize Formula Options

THE FORMULAS CATEGORY

The Formulas category contains options to customize calculations, formulas, and how errors are handled:



The options in this category are divided into four sections. Below is a breakdown of each section and the type of controls that they contain:

Calculation options	Using the controls in this section, you can choose when calculations are made.
Working with formulas	The controls within this section allow you to set the reference type for cells, use the Formula AutoComplete feature, enable table names, and use GetPivotData functions for PivotTable references.
Error Checking	The first option in this section is used to enable or disable background error checking. You can also change the color of the error indicator here.
Error checking rules	This section includes checkbox controls that you can use to choose exactly what kind of errors will be looked for by Excel.

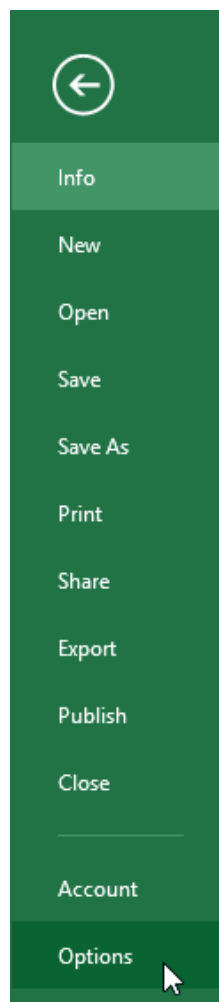
ACTIVITY 7-2

Customizing Formula Options

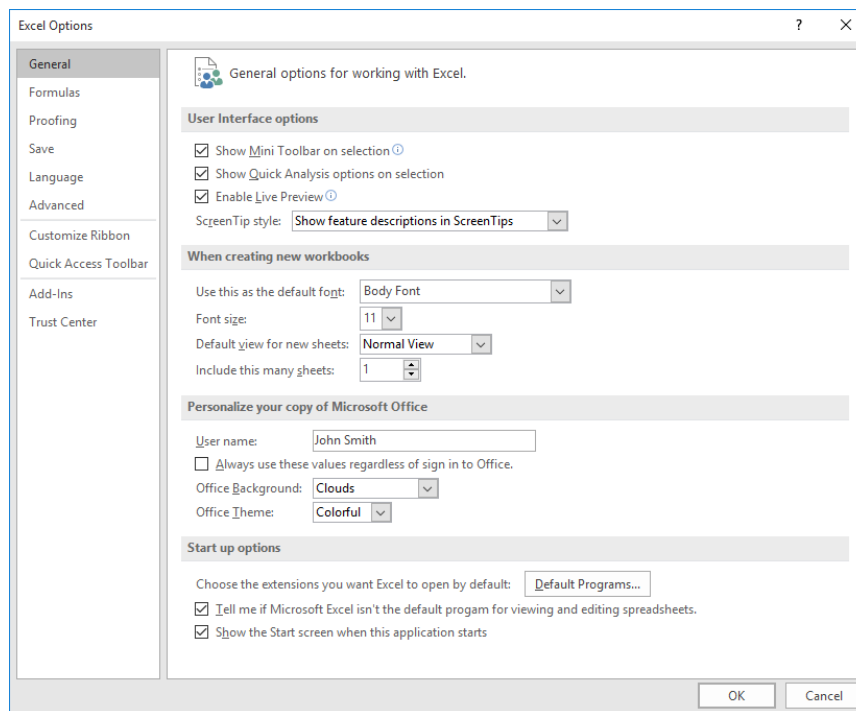
You have found that the default color which is used to identify formula errors is too hard to see. You need to change this color by modifying some of the settings in the Formulas category of the Excel Options dialog box.

10. To begin, open Microsoft Excel 2016 to a blank workbook.

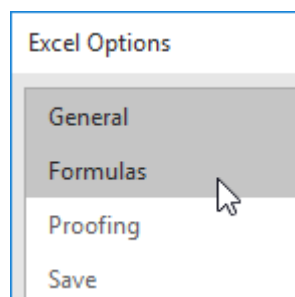
11. Next, click File → Options:



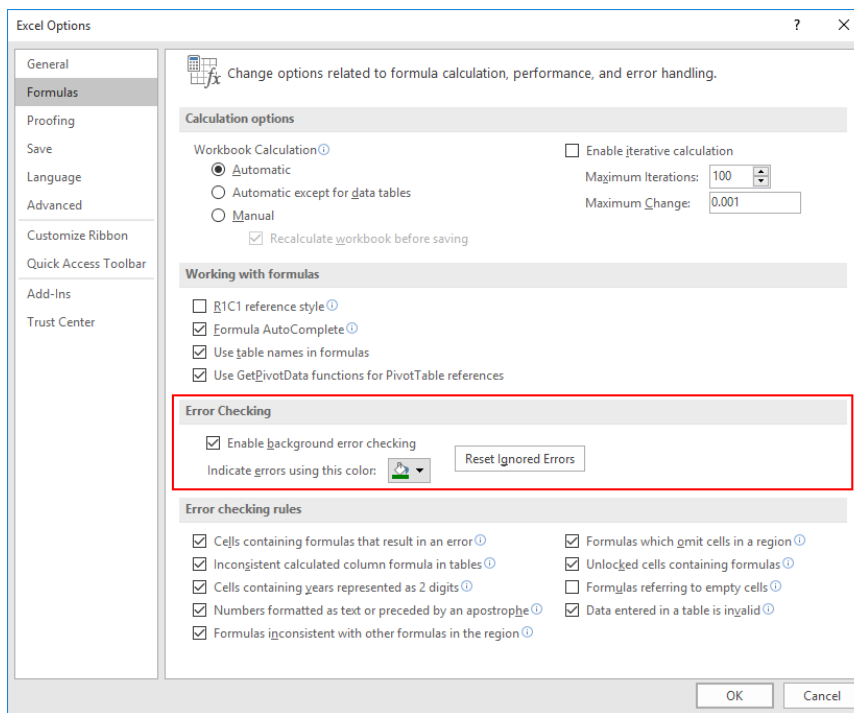
12. The Excel Options dialog will open to the General category:



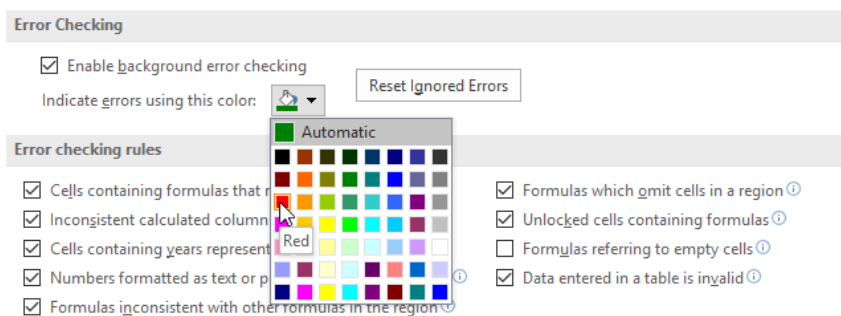
13. Click the Formulas category:



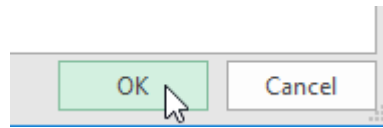
14. With the Formulas category now open, examine the Error Checking section. Here, you will see that the default error indicator color is a shade of green:



15. Click the "Indicate errors using this color" drop-down command and click Red:



16. With the new error indicator color now selected, click OK to apply this new setting:

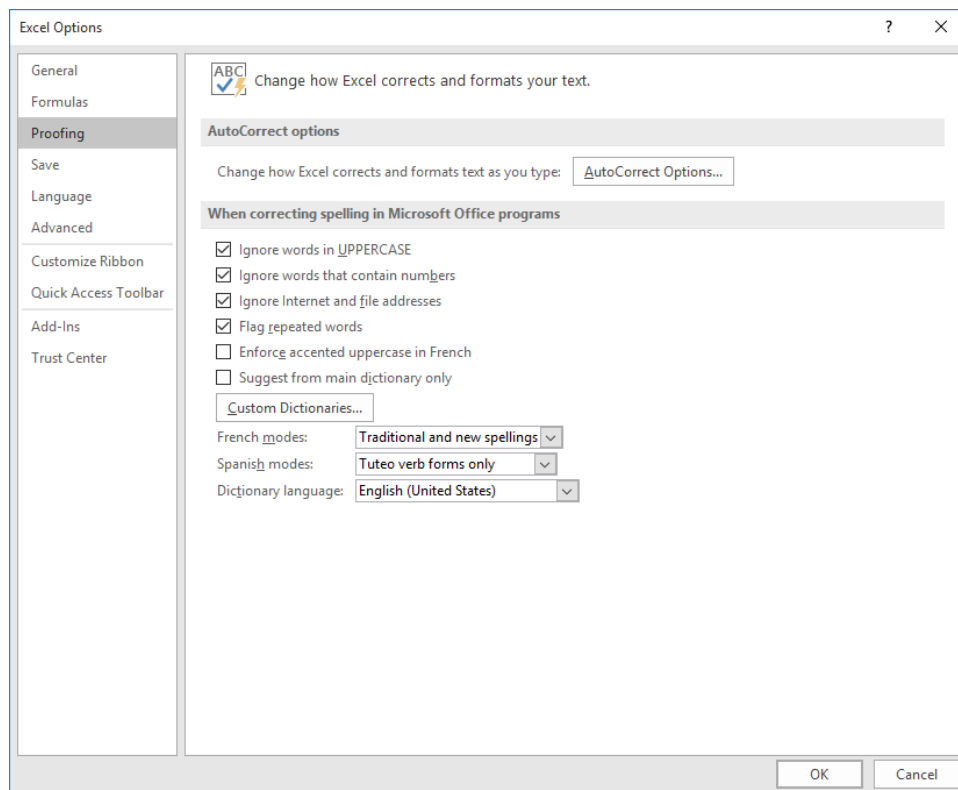


17. Close Microsoft Excel 2016.

Customize Proofing and Save Options

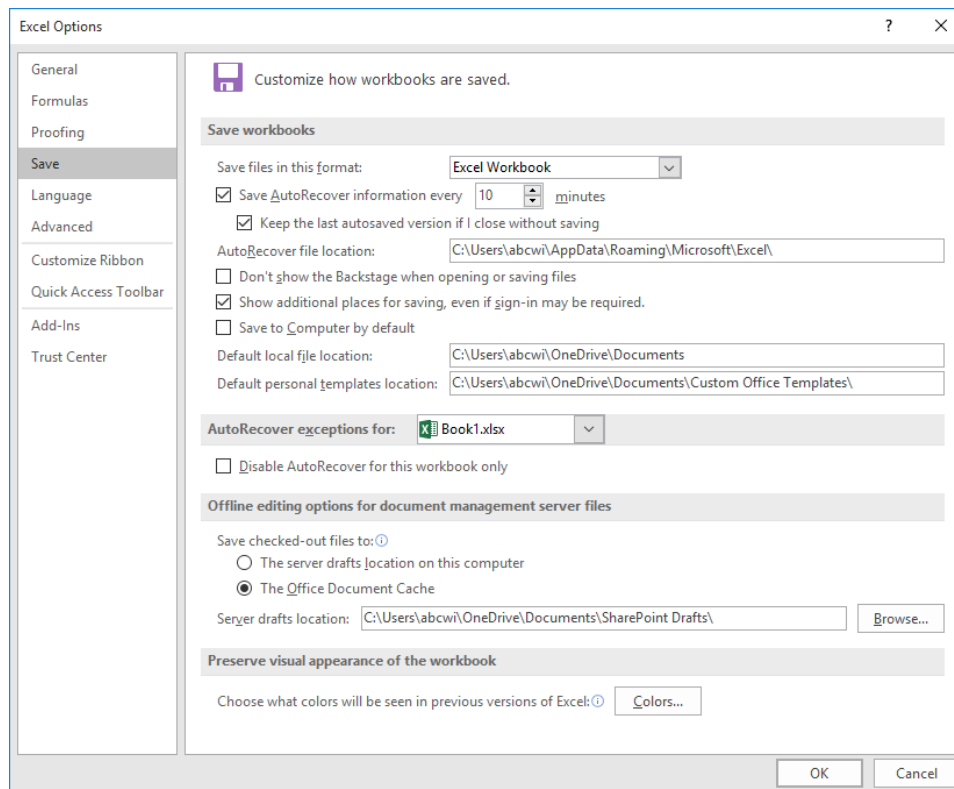
THE PROOFING CATEGORY

The Proofing category includes options to control what items the spell checker looks for and ignores. Additionally, you can find controls to change how AutoCorrect behaves:



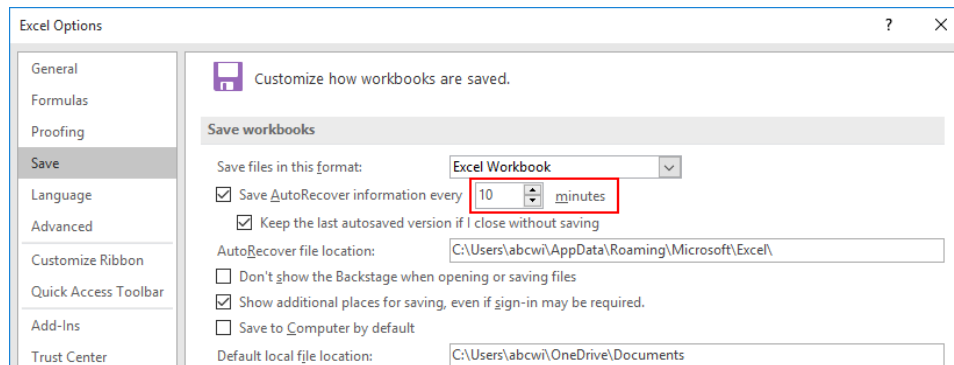
THE SAVE CATEGORY

The Save category contains a number of different controls that can be used to choose how workbooks are saved, what format they are saved in, and what their default file location will be. Additionally, this category also includes controls to handle AutoRecover settings and offline editing options when working with non-local files:

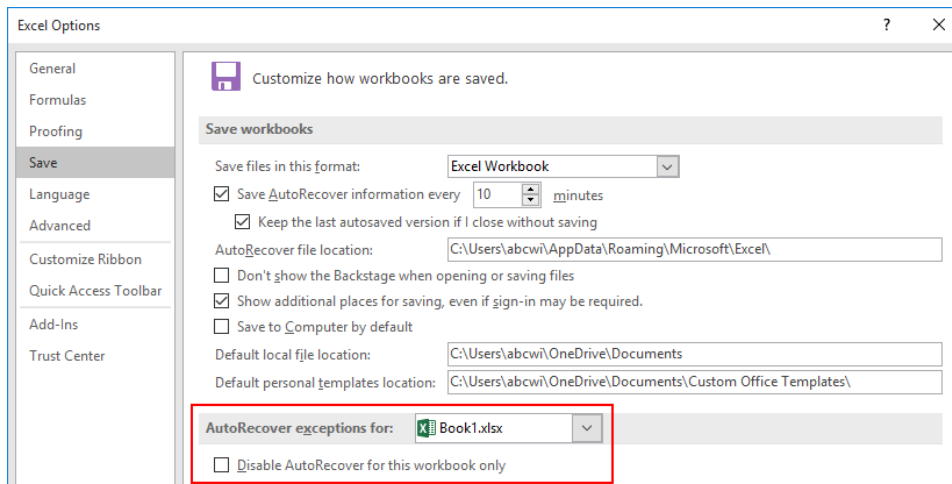


The AutoRecover Feature

The AutoRecover feature can be a lifesaver if you experience a computer malfunction or power loss while working on a file, as it will automatically save the file that you are working on at regular intervals. These intervals can be modified using the “SaveAutoRecover information every” increment box:



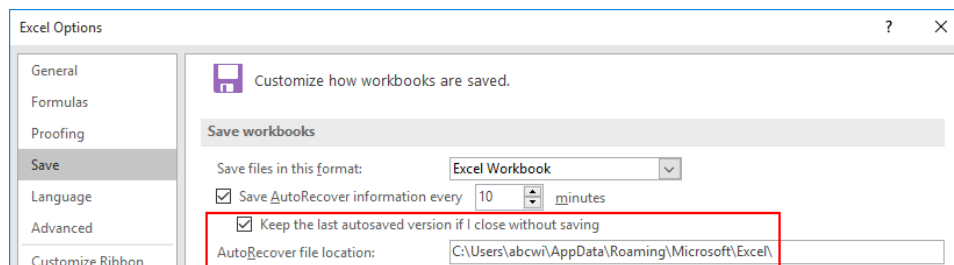
By default this is set to ten minutes, but it can be changed to shorter or longer intervals if you wish. You can also disable this feature entirely by unchecking the box, or disable the feature for just this workbook using the “AutoRecover exceptions for” set of commands:



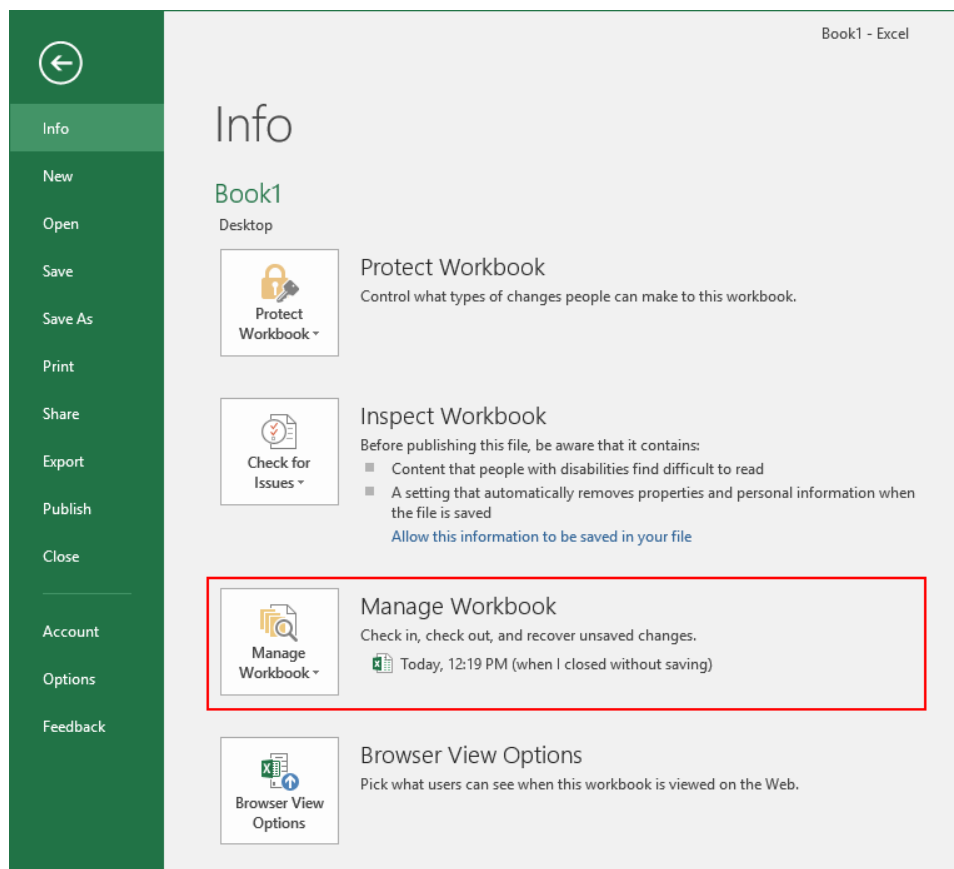
VERSION CONTROL

In addition to the AutoRecover feature, Excel also has built-in version control. This protects your work if you accidentally close a file without saving it, as well as in a few other scenarios.

You can change how version control operates using the Save category of the Excel Options dialog box. For example, you can choose the default file location where versions are stored and toggle this feature on or off:



To access previous versions of your workbook, click File → Info and then examine the Manage Workbook group:



You can then click on any of the previous versions of this file listed (if any are present) to open them.

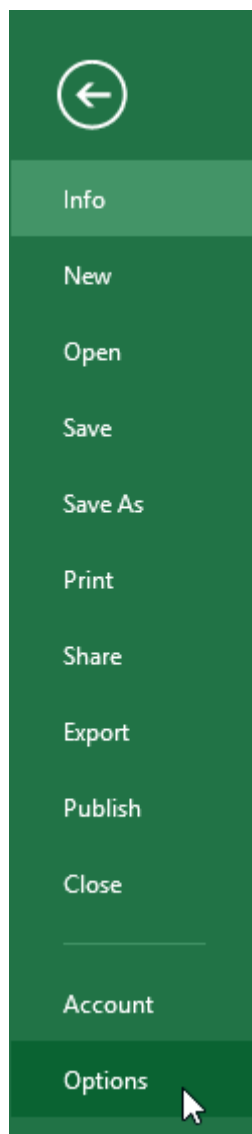
ACTIVITY 7-3

Customizing Proofing and Save Options

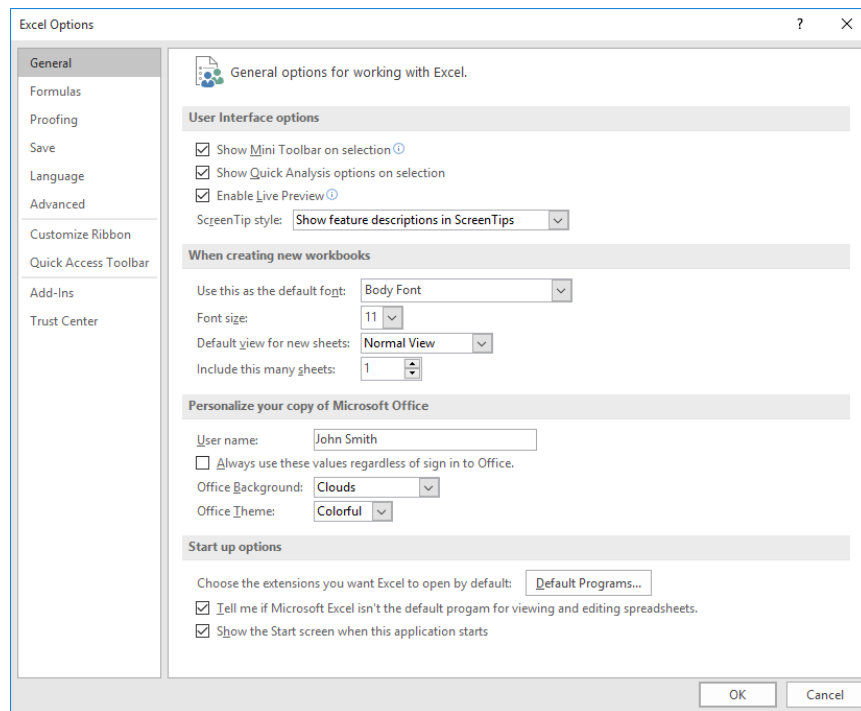
To make sure that your copy of Microsoft Excel 2016 is properly configured, you need to review its proofing and save options.

- 18.** To begin, open Microsoft Excel 2016 to a blank workbook.

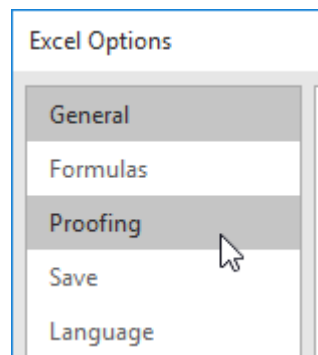
19. Next, click File → Options:



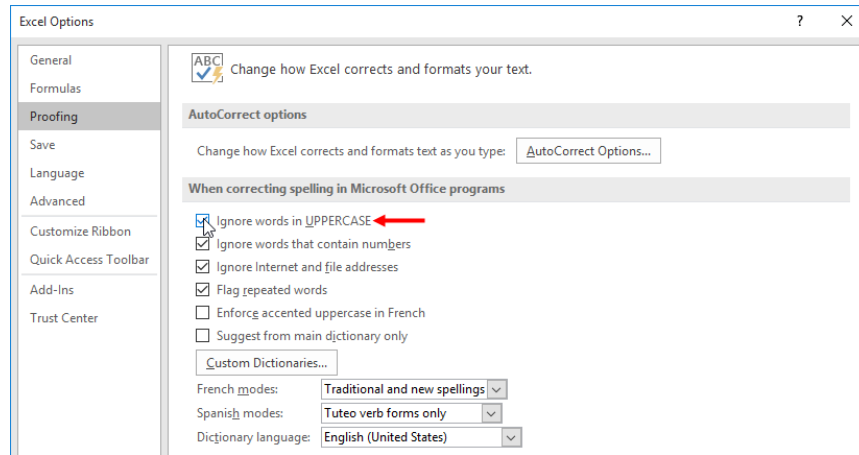
20. The Excel Options dialog will open to the General category:



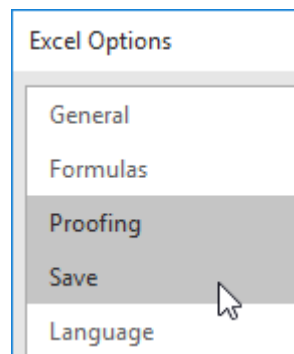
21. Click the Proofing category:



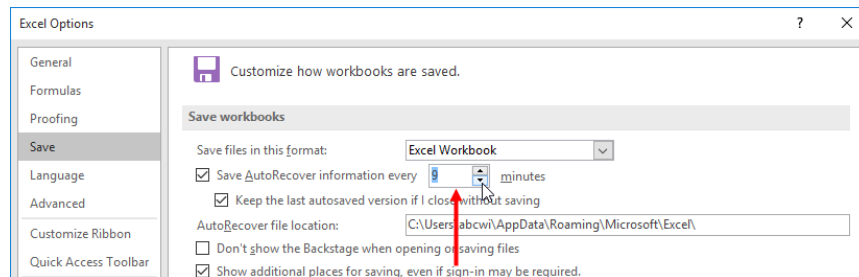
22. For this example, uncheck the “Ignore Words in UPPERCASE” checkbox as you want the spell checker to examine words in this format:



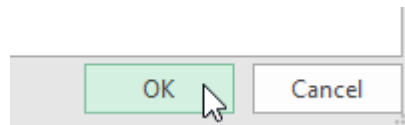
23. Next, click the Save category:



24. Within the “Save workbooks” section, change the “Save AutoRecover information every” value in the increment box from 10 to 8 minutes:



25. Click OK to apply the new changes:

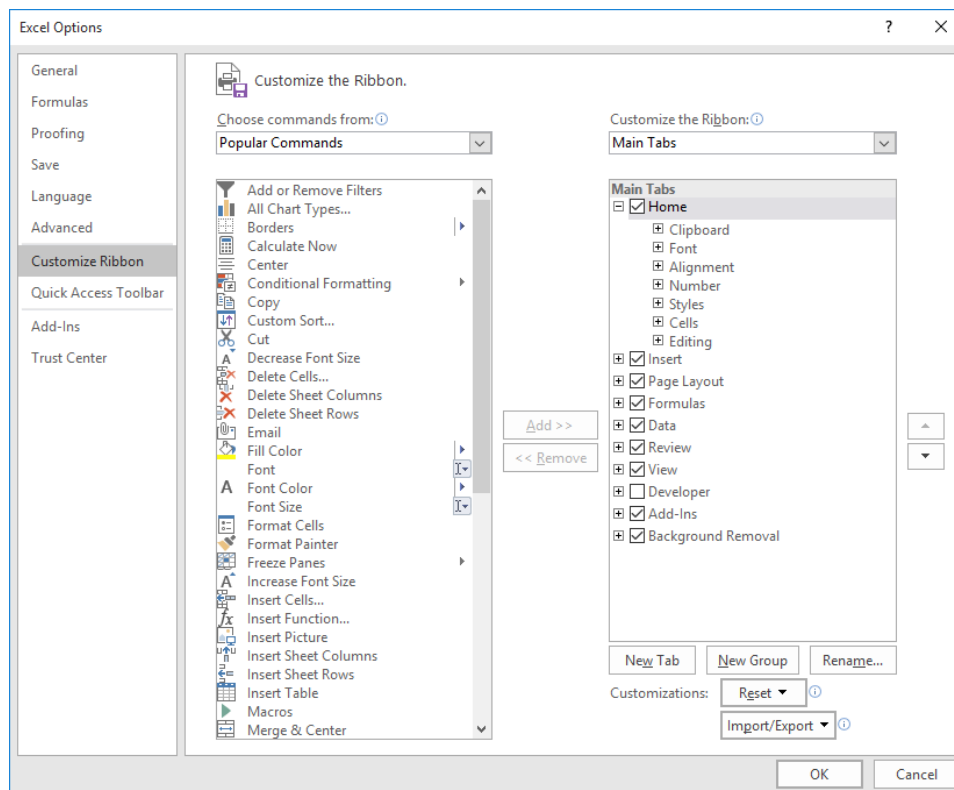


26. Close Microsoft Excel 2016.

Customize the Ribbon and Quick Access Toolbar

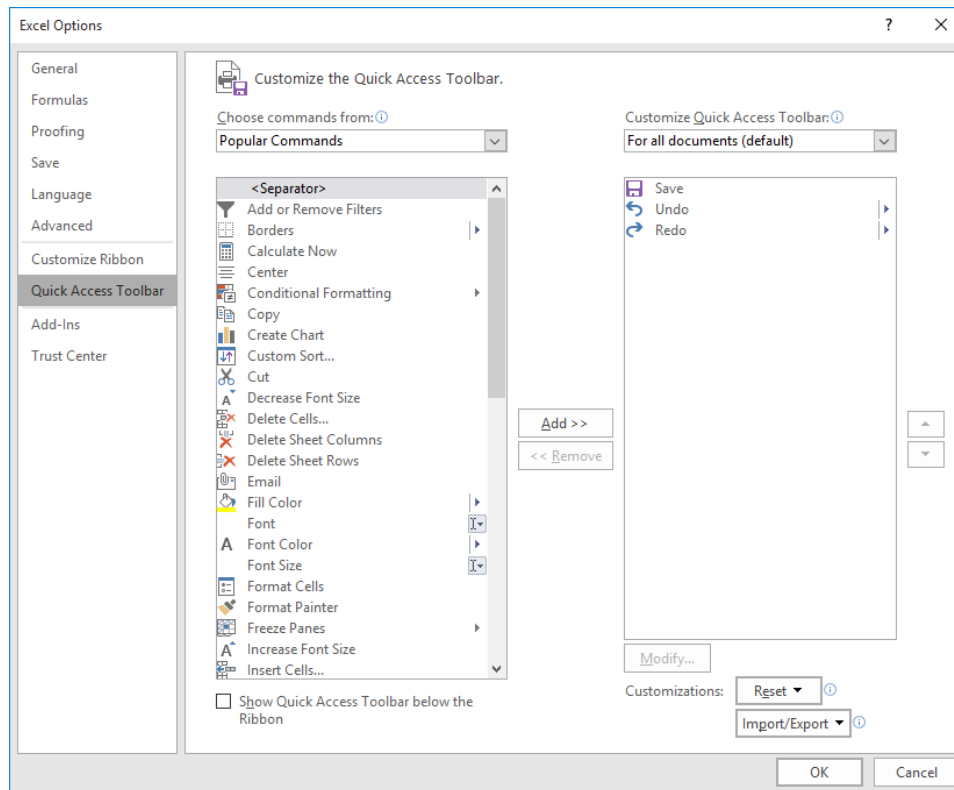
THE CUSTOMIZE RIBBON CATEGORY

The Customize Ribbon category gives you controls to customize the tabs, groups, and commands on the ribbon. As well as creating your own tabs and groups, you can also import pre-customized ribbons as well as reset the ribbon back to its default state. You can also export your own customizations so that you can import them into other installations of Excel:



THE QUICK ACCESS TOOLBAR CATEGORY

Similar in look and function to the Customize Ribbon category, the Quick Access Toolbar category allows you to pick and choose what controls appear on the Quick Access toolbar. In addition to adding and removing commands, you can also import previously created Quick Access toolbar customizations, as well as export your own. Finally, you can also reset all Quick Access toolbar settings:



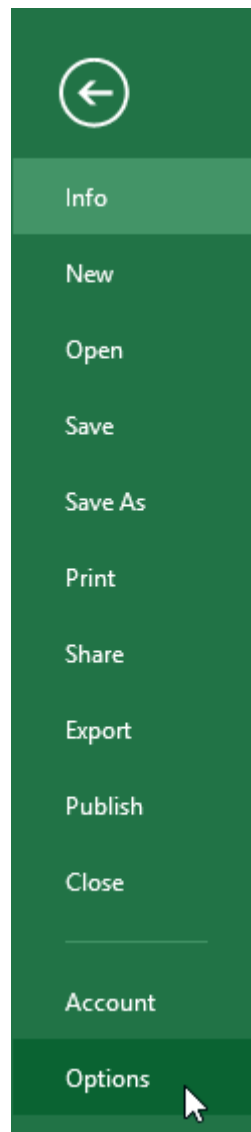
ACTIVITY 7-4

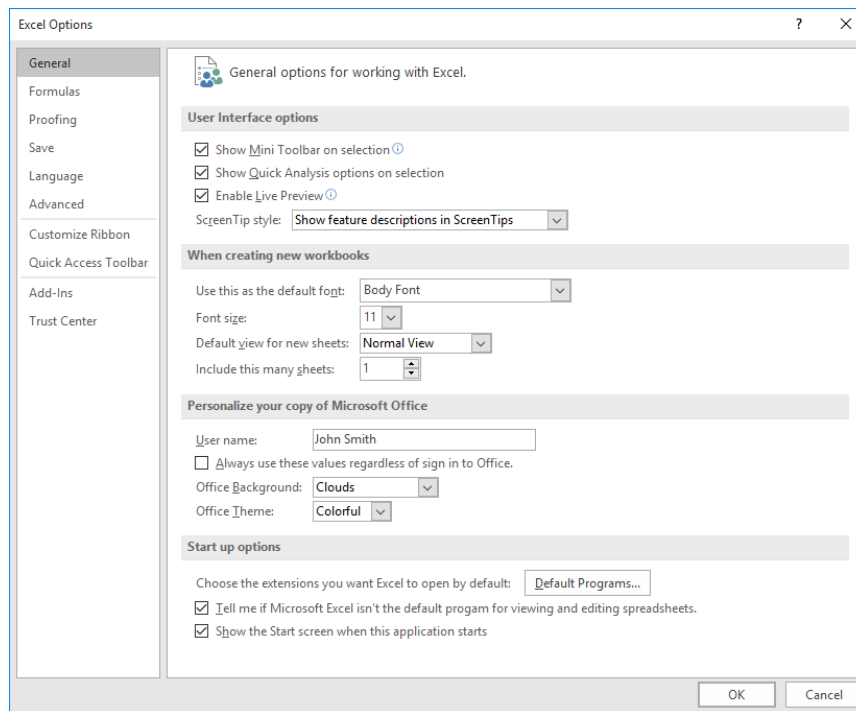
Customizing the Quick Access Toolbar

In order to improve your workflow, you would like to add some of your most frequently used commands to the Quick Access toolbar.

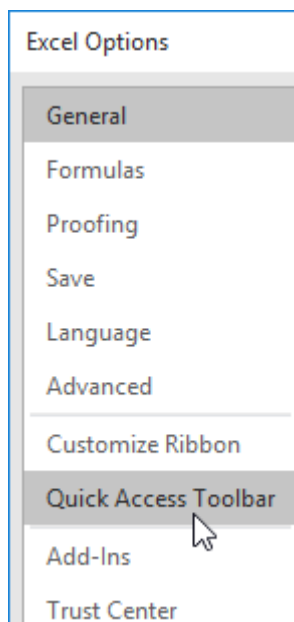
27. To begin, open Microsoft Excel 2016 to a blank workbook.

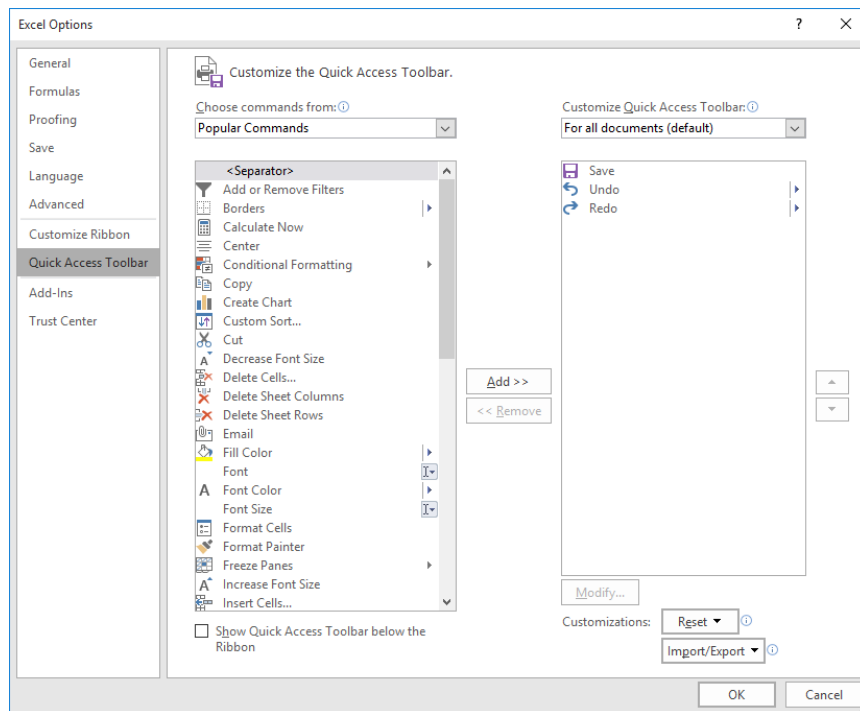
28. Next, click File → Options:



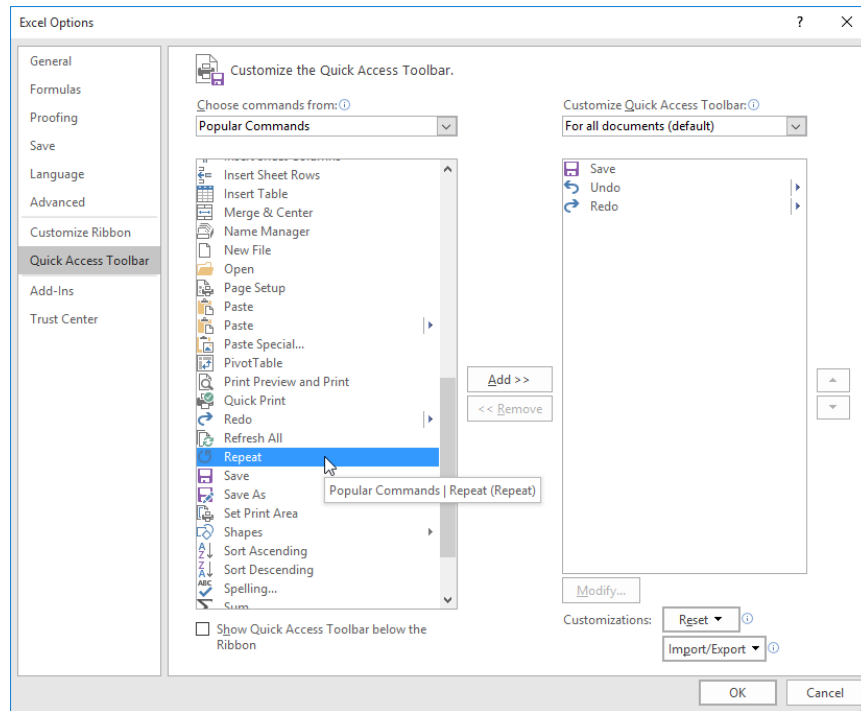
29. The Excel Options dialog will open to the General category:

30. Click the Quick Access Toolbar category:

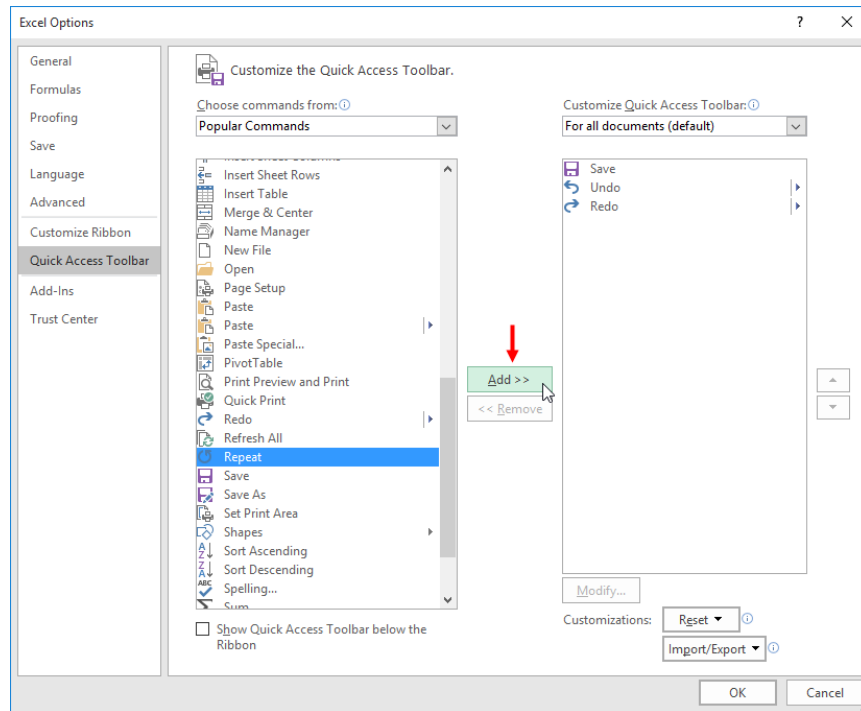


31. The Quick Access Toolbar category will now be displayed:

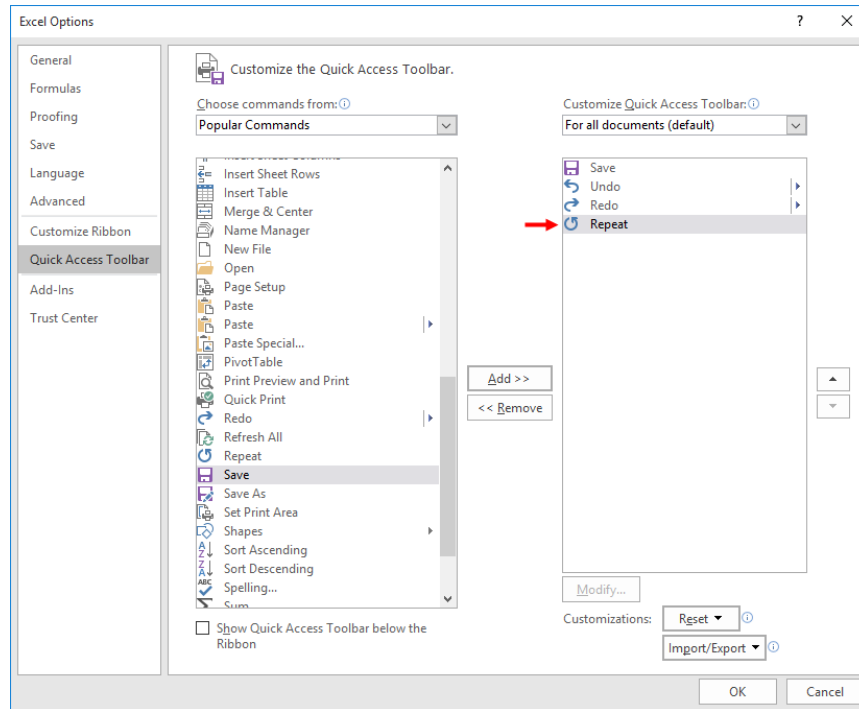
32. In the left-hand list box, scroll down and click to select the Repeat command:



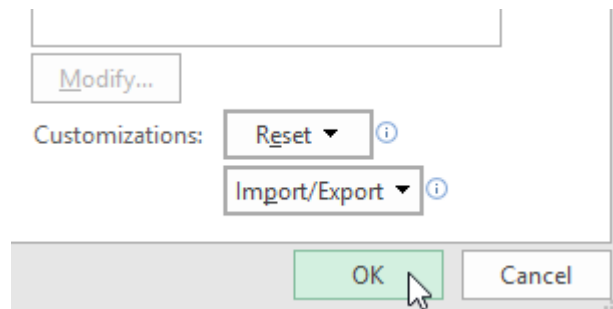
33. Click the Add command between the two lists:



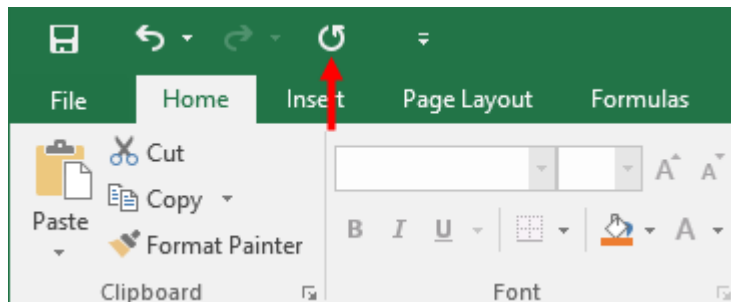
34. The Repeat command will now appear in the right-hand list box, meaning it has been added to the Quick Access toolbar:



35. Click OK to apply these new settings:



36. Returning to the Excel window, you will see that the Repeat command now appears on the Quick Access toolbar:



(Note that this command may be grayed out as it is currently unavailable.)

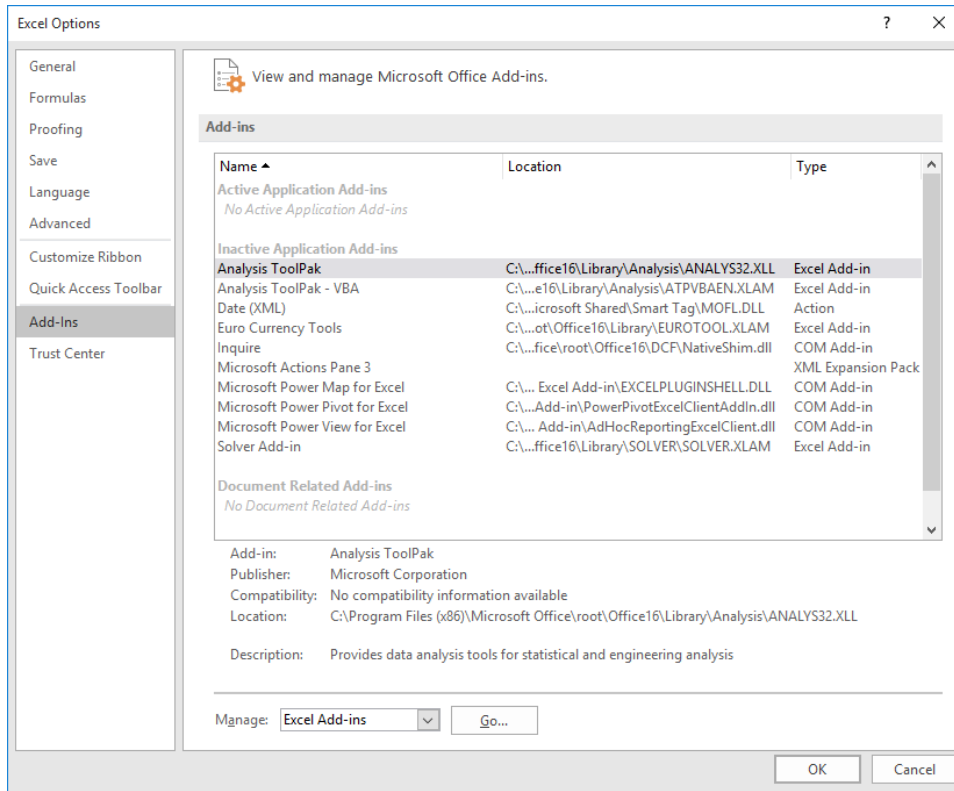
37. Close Microsoft Excel 2016.

Customize the Functionality of Excel by Enabling Add-Ins

WHAT ARE ADD-INS?

Add-ins can come in the form of a single task-oriented tool, or they can consist of several tools combined in a pack, like Excel's Analysis ToolPak (which provides an assortment of tools for analyzing scientific, statistical, or engineering related data). Some add-ins come packaged with the Microsoft Office system, while others may be provided by third party vendors.

No matter where an add-in comes from, it is managed using the Add-Ins category of the Excel Options dialog box:

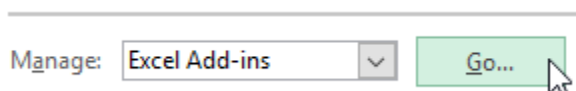


THE ADD-INS CATEGORY

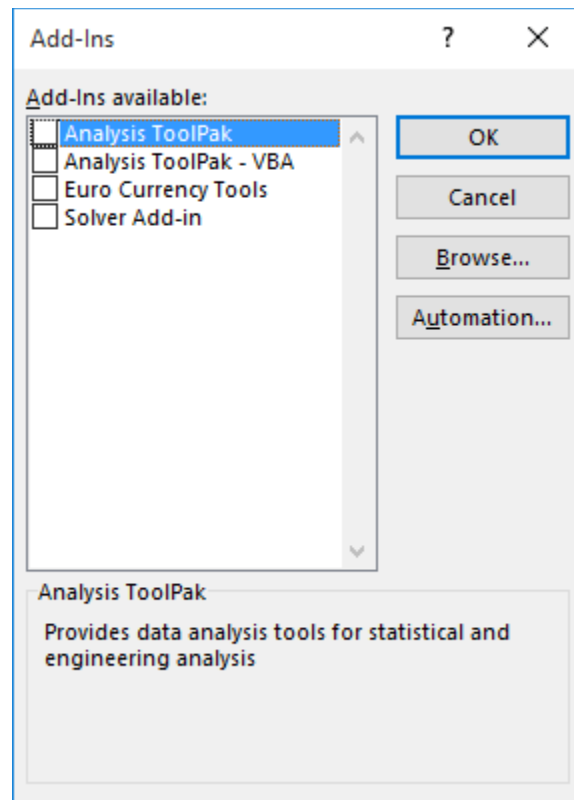
The Add-Ins category is used to manage any add-ins that you have access to. By clicking on an add-in in the list box, you will see information about it, including its publisher, location, and description:

Name ▲	Location	Type
Active Application Add-ins		
<i>No Active Application Add-ins</i>		
Inactive Application Add-ins		
Analysis ToolPak	C:\...ffice16\Library\Analysis\ANALYS32.XLL	Excel Add-in
Analysis ToolPak - VBA	C:\...e16\Library\Analysis\ATPVBAEN.XLAM	Excel Add-in
Date (XML)	C:\...icrosoft Shared\Smart Tag\MOFL.DLL	Action
Euro Currency Tools	C:\...ot\Office16\Library\EUROTOOL.XLAM	Excel Add-in
Inquire	C:\...fice\root\Office16\DCF\NativeShim.dll	COM Add-in
Microsoft Actions Pane 3		XML Expansion Pack
Microsoft Power Map for Excel	C:\... Excel Add-in\EXCELPLUGINSHELL.DLL	COM Add-in
Microsoft Power Pivot for Excel	C:\...Add-in\PowerPivotExcelClientAddIn.dll	COM Add-in
Microsoft Power View for Excel	C:\... Add-in\AdHocReportingExcelClient.dll	COM Add-in
Solver Add-in	C:\...ffice16\Library\SOLVER\SOLVER.XLAM	Excel Add-in
Document Related Add-ins		
<i>No Document Related Add-ins</i>		
Add-in:	Analysis ToolPak	
Publisher:	Microsoft Corporation	
Compatibility:	No compatibility information available	
Location:	C:\Program Files (x86)\Microsoft Office\root\Office16\Library\Analysis\ANALYS32.XLL	
Description:	Provides data analysis tools for statistical and engineering analysis	

To start managing the add-ins, click the Manage drop-down menu, choose the add-in type that you would like to manage, and click Go:



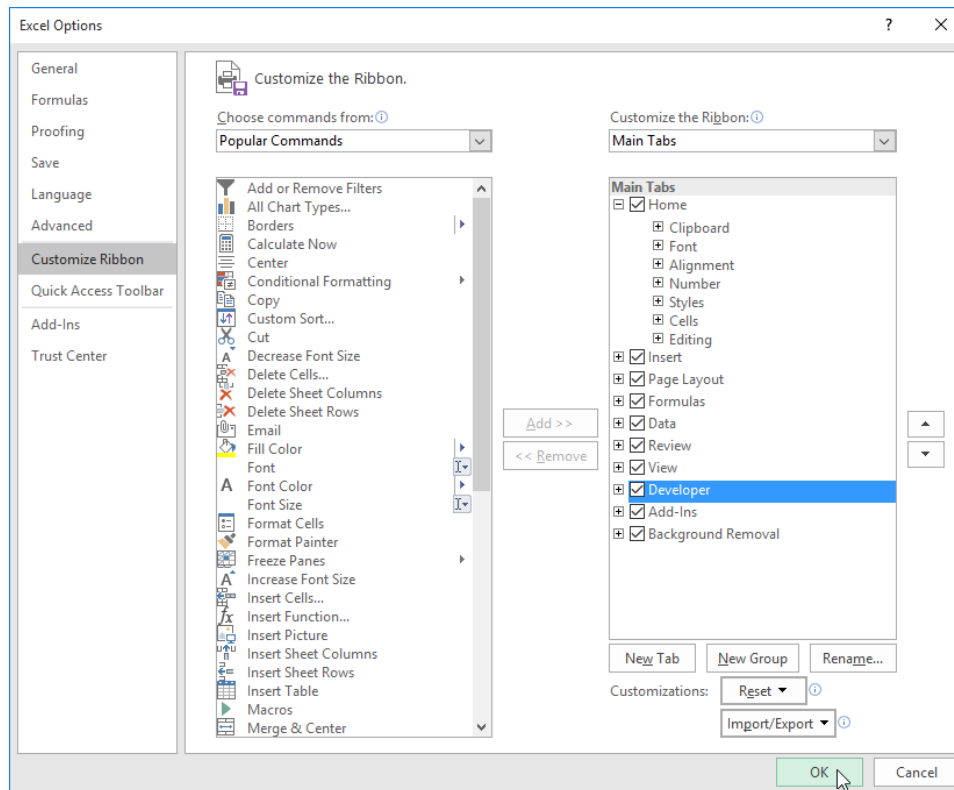
This action will open the appropriate dialog box, listing any available add-ins of that type:



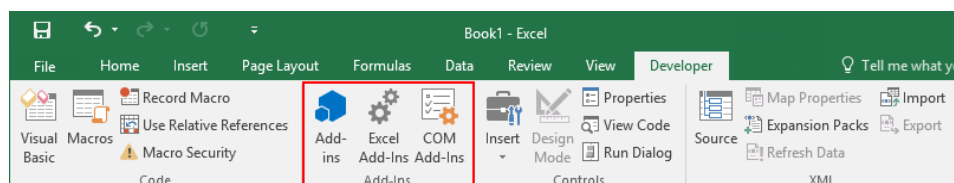
To activate or de-activate an add-in, just check or uncheck its corresponding checkbox. To find an add-in that you downloaded and you would like to add to Microsoft Excel, click the Browse button.

THE DEVELOPER TAB

The Developer tab includes lots of different commands that you can use to manage add-ins, as well as modify VB code, work with XML, and manage form controls. Due to its commands being more technical in nature, this tab is hidden by default. To make it visible, first open the Excel Options dialog box to the Customize Ribbon category. Next, check the Developer checkbox in the Customize the Ribbon list on the right and then click OK:



When visible, the Developer tab will appear next to the View tab by default. It divides its commands into four groups; however, all of the add-in related commands are found in the Add-Ins group:



Clicking the Add-ins command allows you to manage Office add-ins, while clicking the Excel Add-Ins button is used to let you modify Excel add-ins. COM add-ins are modified by clicking the command of the same name.

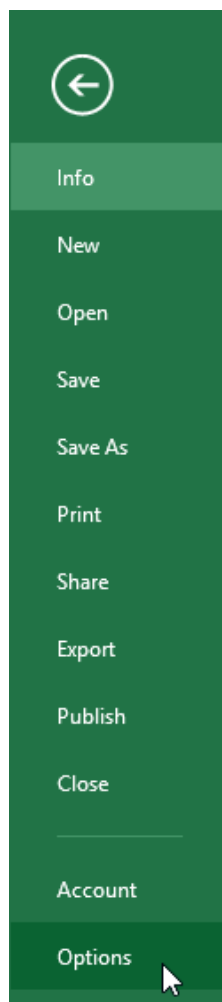
ACTIVITY 7-5

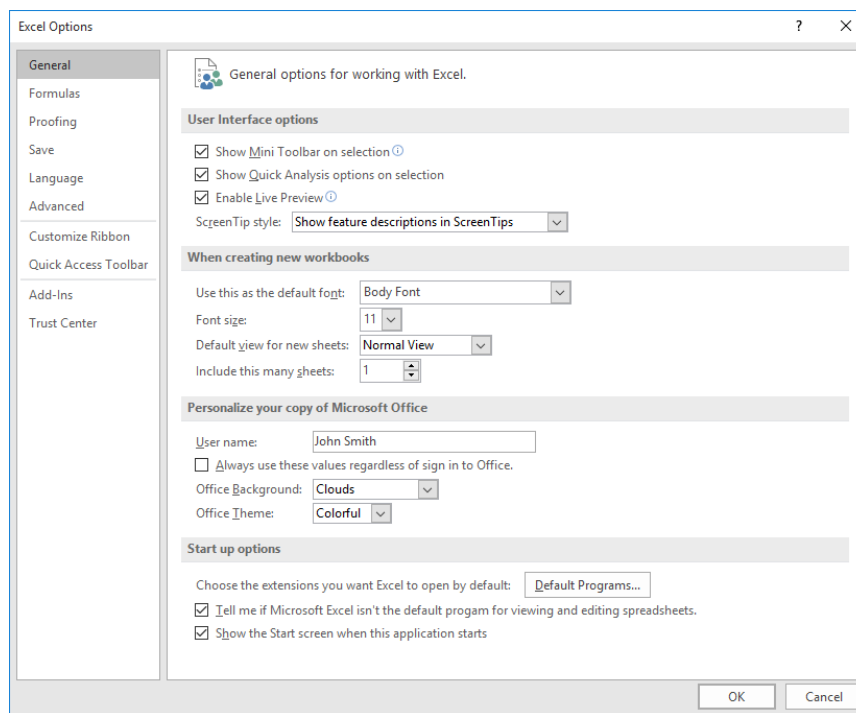
Customizing the Functionality of Excel

You need to create a workbook that uses the Euro currency. To facilitate this task, you should enable the Euro Currency Tools add-in.

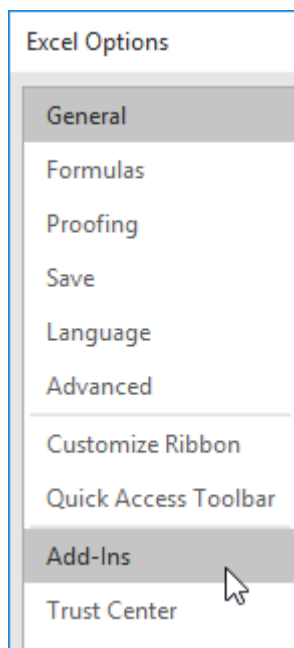
- 38.** To begin, open Microsoft Excel 2016 to a blank workbook.

39. Next, click File → Options:

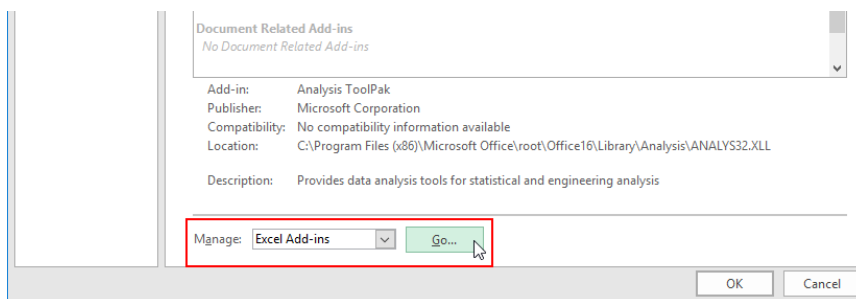


40. The Excel Options dialog will open to the General category:

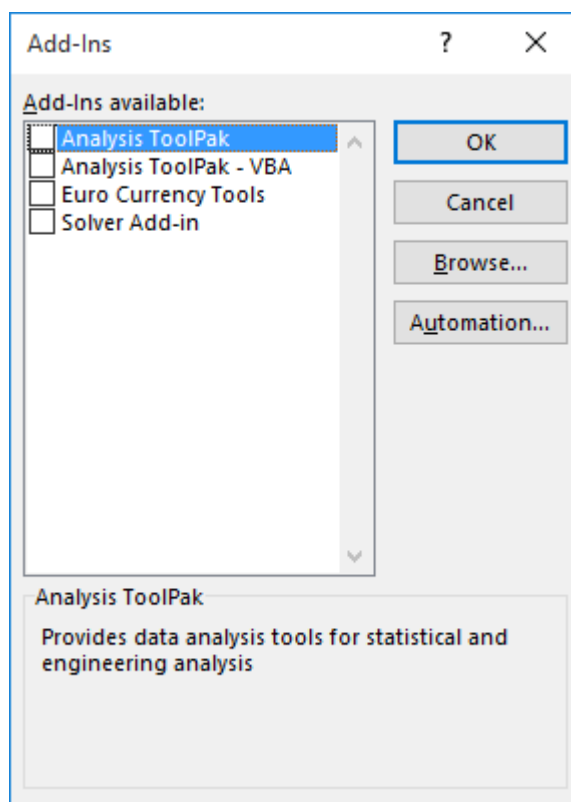
41. Click the Add-Ins category:



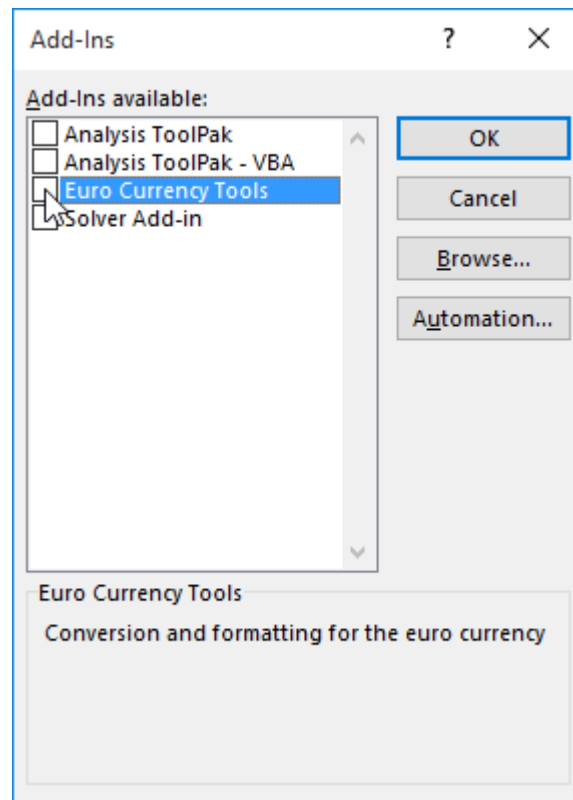
42. Ensure that the Manage drop-down menu displays Excel Add-Ins and then click Go:



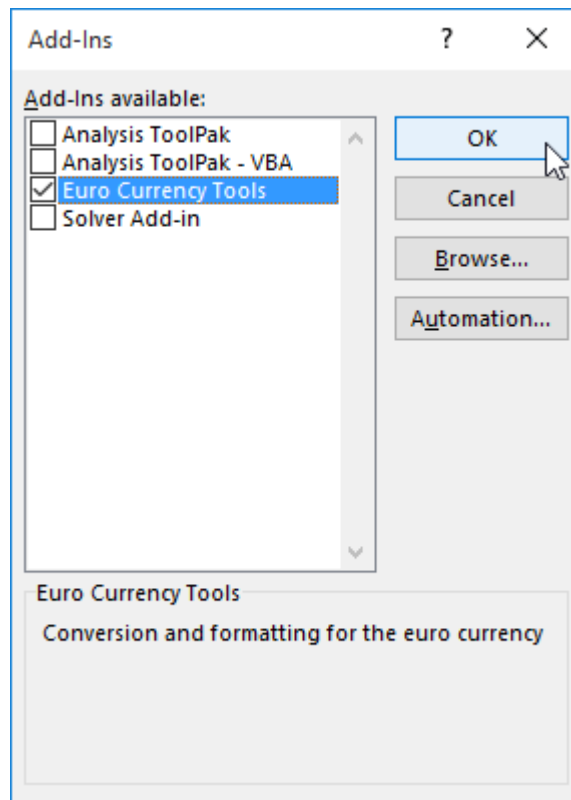
43. The Add-Ins dialog box will now be displayed:



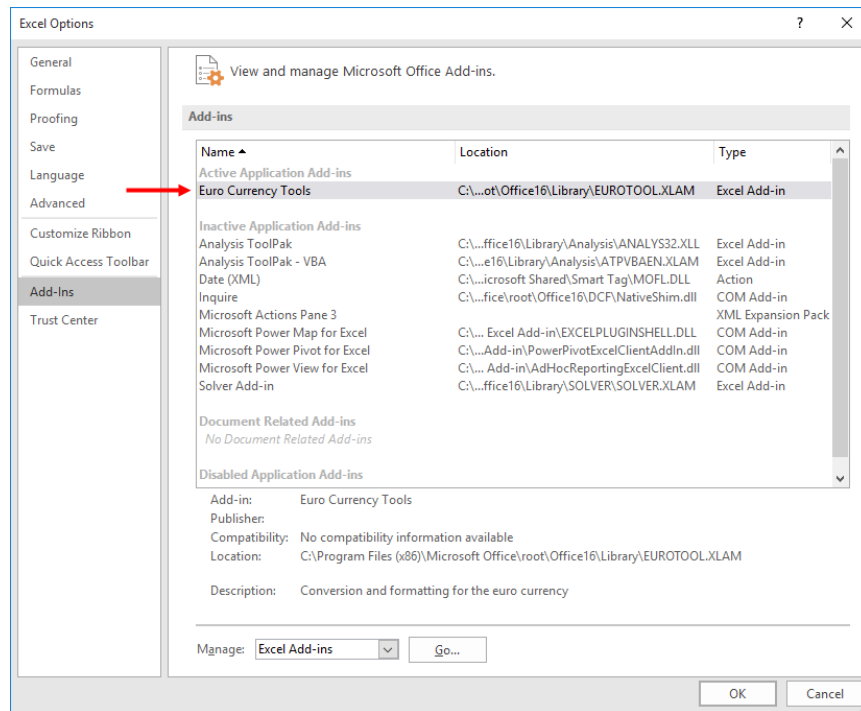
44. Check the Euro Currency Tools checkbox:



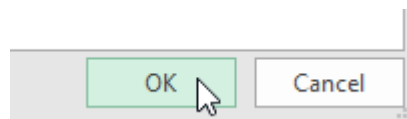
45. Click OK:



46. The add-in should now be enabled. To confirm this, open the Add-Ins category of the Excel Options dialog box again. You will see the Euro Currency Tools add-in displayed in the Active Application Add-ins section:



47. Click OK to Close the Excel Options dialog box:

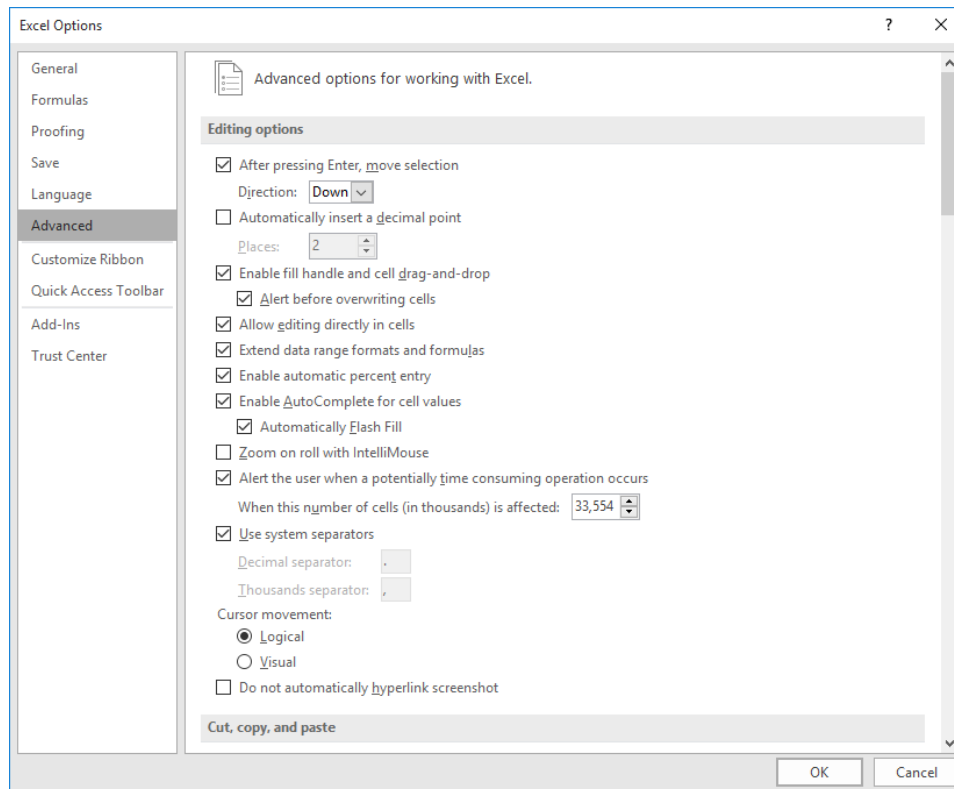


48. Close Microsoft Excel 2016.

Customize Advanced and Trust Center Options

THE ADVANCED CATEGORY

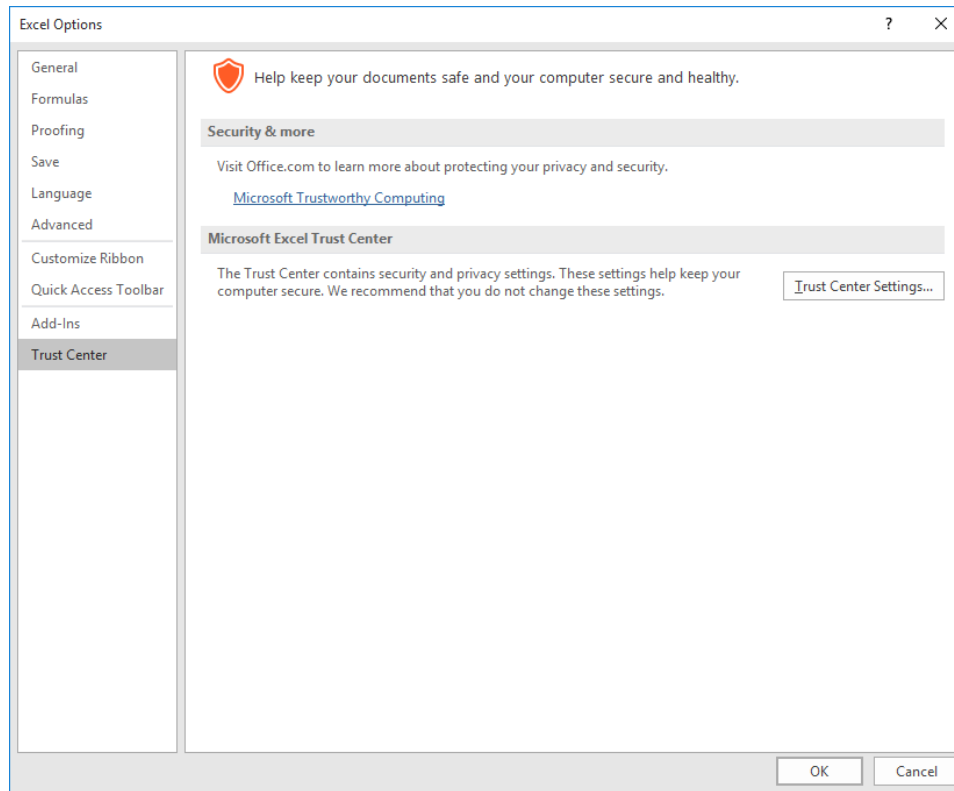
There are dozens of controls in the Advanced category that allow you to modify everything from how cut, copy, and paste work to compatibility settings:



While these settings can be intimidating, it is worthwhile to take the time to review the commands shown here.

THE TRUST CENTER CATEGORY

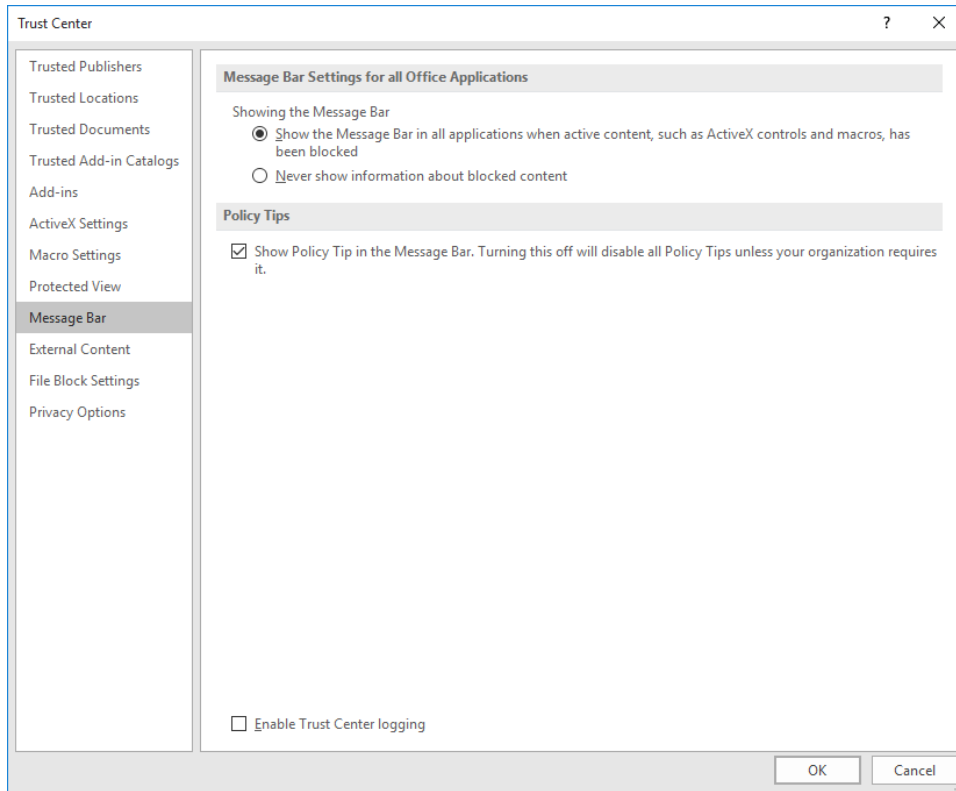
The Trust Center category, on the other hand, has fewer commands:



Within the “Protecting your privacy” section, you will find a variety of links to Microsoft’s privacy statements. The “Security & more” section provides you with a link to the Microsoft Trustworthy Computing page. Finally, the Microsoft Excel Trust Center section contains the Trust Center Settings button. This button is used to open and view the Trust Center.

Customizing Security Settings

The Trust Center Settings button will open the Trust Center dialog box:



This dialog is used to modify the privacy and security settings for Microsoft Office. It is generally recommended that you do not modify these settings due to the possible security risks.

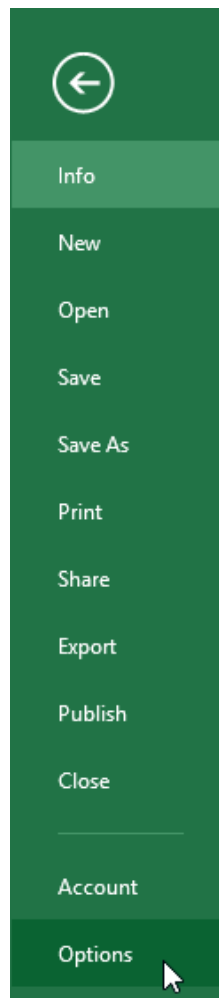
ACTIVITY 7-6

Customizing Advanced and Trust Center Options

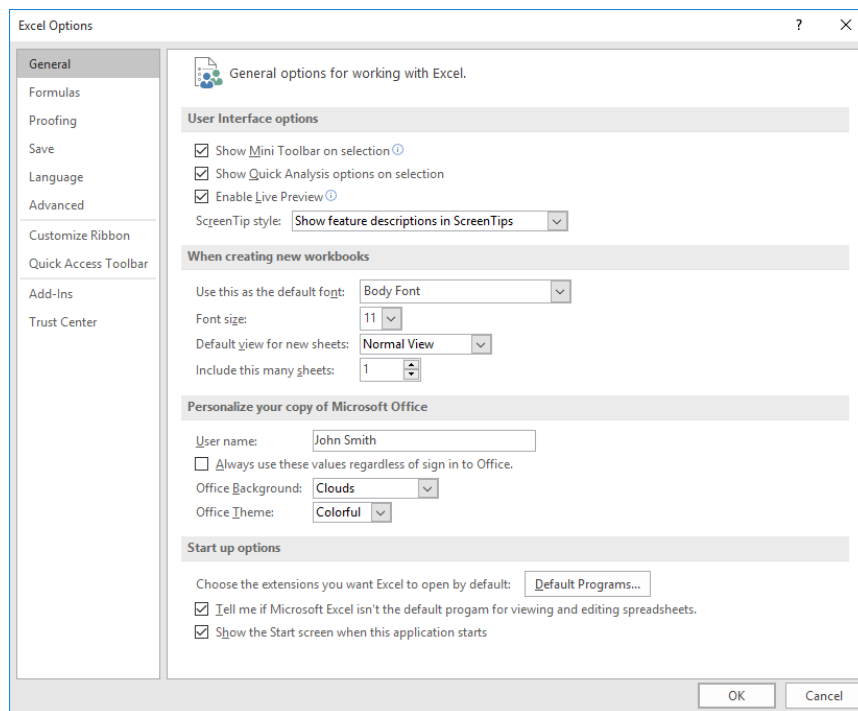
To familiarize yourself with some of the more advanced features in Excel, you would like to review the Advanced and Trust Center categories of the Excel Options dialog box.

49. To begin, open Microsoft Excel 2016 to a blank workbook.

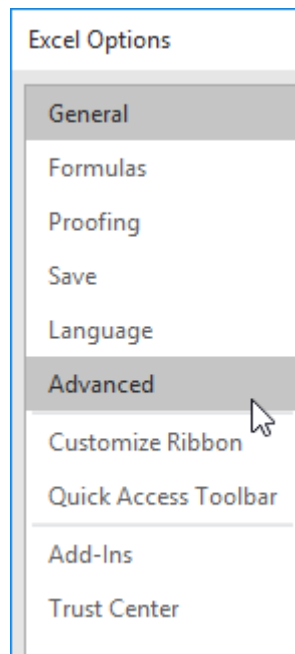
50. Next, click File → Options:



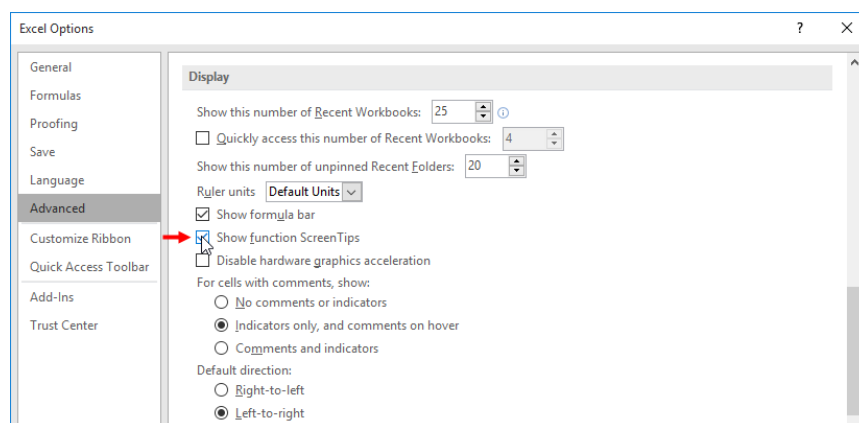
51. The Excel Options dialog will open to the General category:



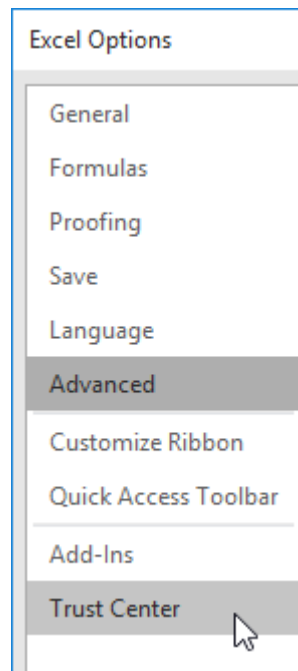
52. Click the Advanced category:



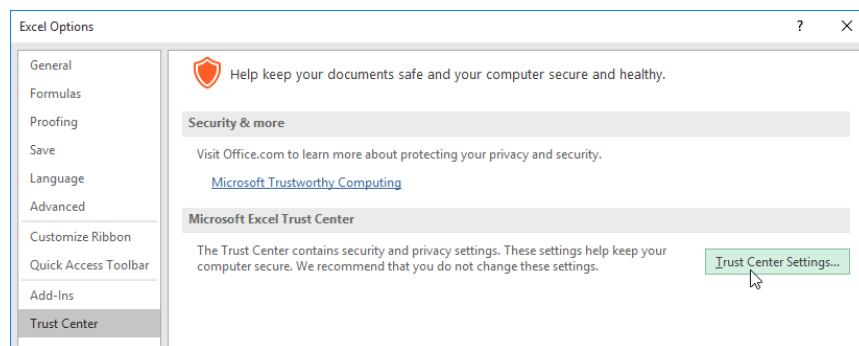
53. Scroll down through these options until you see the Display section. Clear the “Show function ScreenTips” checkbox when you see it:



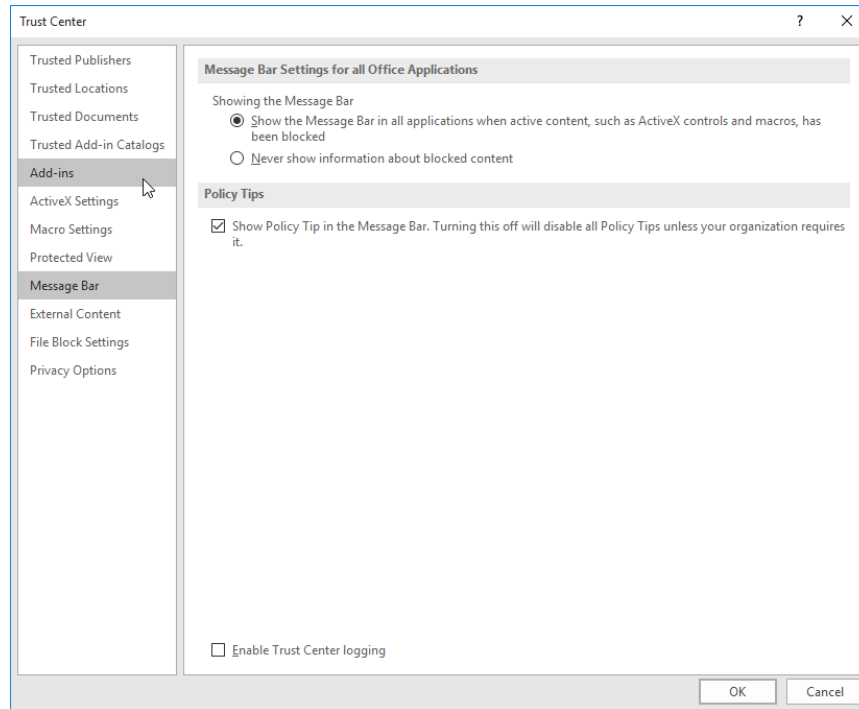
54. Click the Trust Center category:



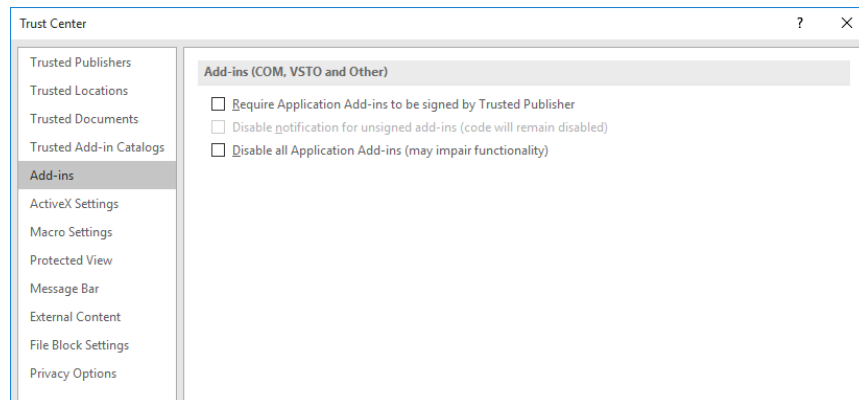
55. On the Trust Center screen, click the Trust Center Settings button:



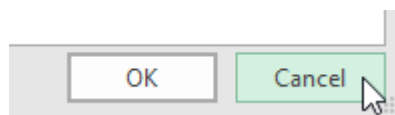
56. The Trust Center Settings dialog will now be displayed. On the left pane, click the Add-Ins category:



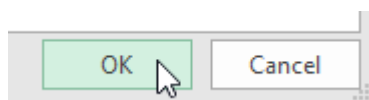
57. Review all of the settings that relate to add-ins in Microsoft Office:



58. Click Cancel:



59. Back at the Excel Options dialog, click OK to apply the new settings:



60. Close Microsoft Excel 2016.