

CHAPTER 1

InFocus

SETTING EXCEL OPTIONS

All of Microsoft Excel's settings are located in the **Excel Options** dialog box. The **Excel Options** control the behaviour and appearance of Excel, enabling you to adjust the operation of the spreadsheet package to suit the way you work.

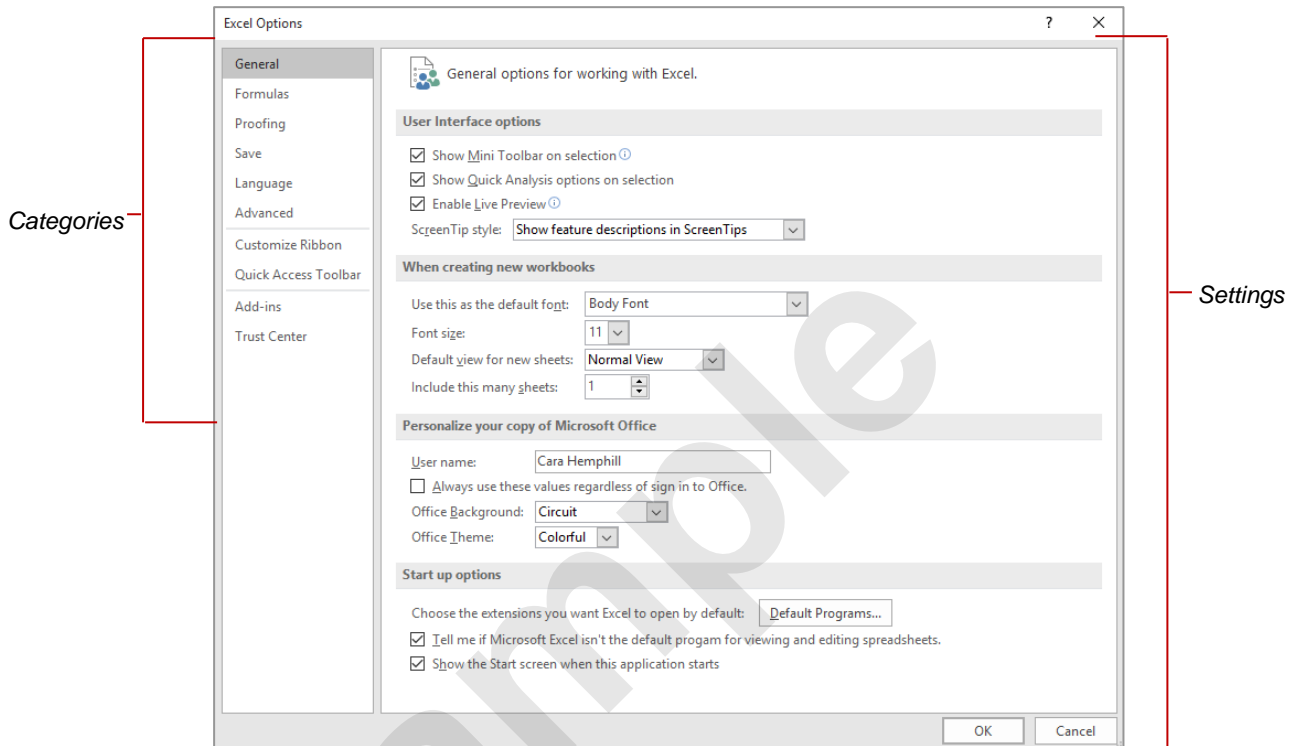
In this session you will:

- ✓ gain an understanding of **Excel Options**
- ✓ learn how to personalise **Excel**
- ✓ learn how to set the default font
- ✓ learn how to set formula options
- ✓ learn how to set file locations
- ✓ learn how to set **Save** options
- ✓ learn how to set file locations
- ✓ learn how to set the display options.

UNDERSTANDING EXCEL OPTIONS

You can access all of Excel's settings from the **Excel Options** dialog box. You can access this dialog box by clicking on the **File** tab, then clicking on **Options**. The **Excel Options** dialog

box provides a list of setting categories (down the left-hand side) that you can click on to access the related settings.



| Category | Description |
|-----------------------------|--|
| General | These settings control some of the most popular options, including the display and enabling of the Mini toolbar and Live Preview, as well as options for personalising Microsoft Office. Some settings in this category affect all applications in Microsoft Office. |
| Formulas | The Formulas options allow you to control the calculation of formulas, the performance of the worksheet in terms of calculations, and error handling. |
| Proofing | Proofing options control the autocorrect and spelling settings. |
| Save | The location and format used when spreadsheets are saved are controlled by the Save settings. |
| Language | These settings control the language(s) used for spelling, help and screen tips. |
| Advanced | The Advanced settings control a wide range of options, many of which will be familiar to those who have used the Tools > Options settings in earlier versions of Excel. |
| Customise Ribbon | These settings control the content of the ribbon. |
| Quick Access Toolbar | These settings control the content of the Quick Access Toolbar . |
| Add-Ins | Add-ins are special programs that bring additional functionality to Microsoft Excel. |
| Trust Centre | The settings that protect your spreadsheets are stored in the Trust Centre . |

PERSONALISING EXCEL

Every time you work in a Microsoft Office application, user information is added to the file behind the scenes. Some of this information is found under **General** in the **Excel Options** dialog

box. The entries in these fields are used in various functions in Excel such as tracking changes and comments. **User name** is also used as the **Author** in **Document Properties**.

Try This Yourself:

Open
File

Before starting this exercise ensure that you have a blank spreadsheet open...

1 Click on the **File** tab, then click on **Options** to display the **Excel Options** dialog box

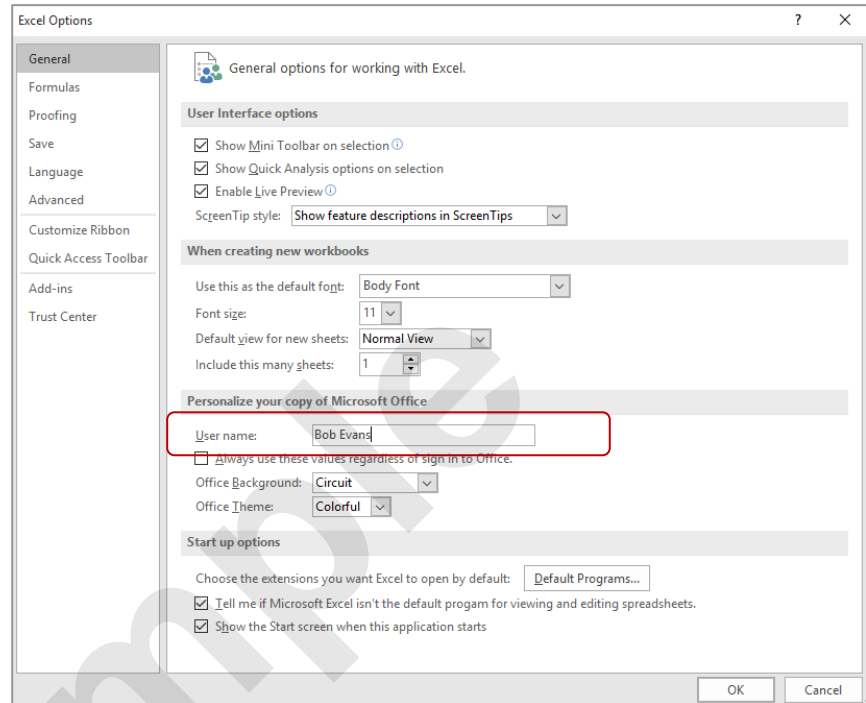
Notice the 'General' category is selected by default in the left pane...

2 Under **Personalise your copy of Microsoft Office**, click in **User name**, then type your name

If text already appears in the field, triple-click in the field to select it, then type your name...

3 Click on **[OK]** to save the settings

Any new spreadsheet you create from now on will display your name as the Author



For Your Reference...

To **personalise Excel**:

1. Click on the **File** tab
2. Click on **Options**
3. Enter your name in **User name**

Handy to Know...

- In situations where workbooks are shared, the information that you enter in **User name** will be used by Excel to show others that you have a shared workbook open.
- The **User name** also appears in pre-set header and footer options.

SETTING THE DEFAULT FONT

The **default font** is the font used for all text and values displayed or entered into a spreadsheet. The standard font used in Excel is Calibri, 11pt, but you can select an alternative font if you need

to. The font settings are located under the **General** category in the **Excel Options** dialog box and affect only new workbooks.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open a blank workbook...

- 1 Click on the **File** tab, then click on **Options** to display the **Excel Options** dialog box

- 2 Under **When creating new workbooks**, click on the drop arrow for **Use this as the default font** to display a long list of available fonts

The default is **Body Font** which is taken from the default theme and is Calibri...

- 3 Select **Arial Black**, then click on **[OK]**

A message box will indicate that you must restart Excel for the changes to take effect...

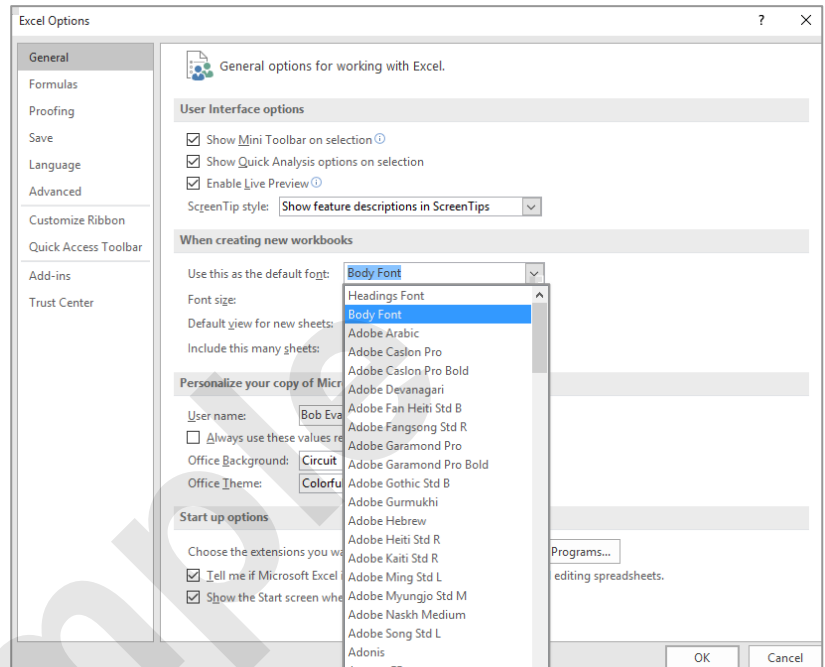
- 4 Click on **[OK]**, close and restart Excel, then open a blank worksheet

The new workbook will display **Arial Black** column and row headers...

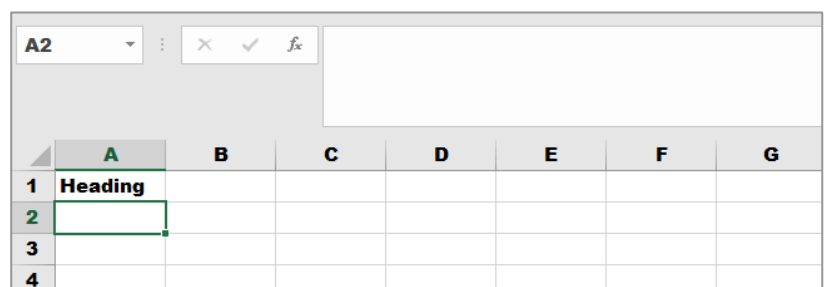
- 5 Type **Heading** in cell **A1**, then press **Enter**

The text, too, is in **Arial Black**...

- 6 Repeat steps 1 to 4 to restore the default setting to **Body Font**



2



5

For Your Reference...

To **set** the **default font**:

1. Click on the **File** tab, then click on **Options**
2. Click on the drop arrow for **Use this as the default font**, then select the desired font
3. Click on **[OK]**
4. Click on **[OK]**, then close and restart Excel

Handy to Know...

- The font that appears in the column and row headings and in the spreadsheet itself can be changed by applying an alternative **theme** or **theme font**. The **Themes** group of commands appears in the **Themes** group on the **Page Layout** tab.

SETTING FORMULA OPTIONS

Formulas are such a big part of using spreadsheets that Excel has devoted an entire **Options** category to formula settings. They include **Calculation options**, **Working with**

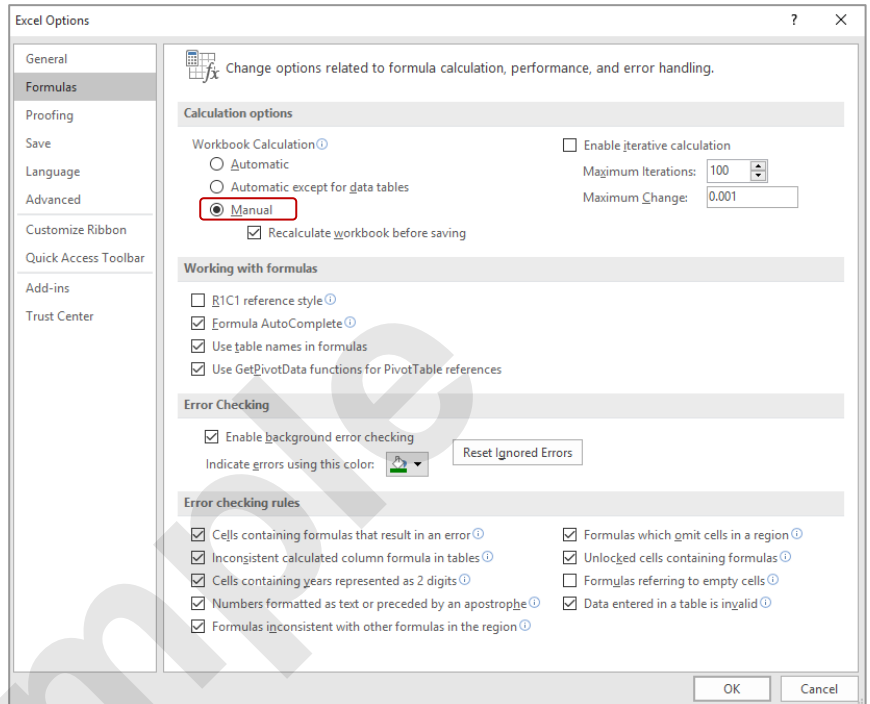
formulas, **Error Checking** and **Error checking rules**. To help you understand what the settings do, Excel includes information icons which display relevant help when you point to them.

Try This Yourself:

Same File

Before starting this exercise ensure that a blank spreadsheet is open...

- 1 Click on the **File** tab, click on **Options** to display the **Excel Options** dialog box, then click on **Formulas** in the left pane
- 2 Under **Calculation options**, click on **Manual** in **Workbook Calculation** to select it
- 3 Click on [OK] to apply these settings
- 4 Type 1 in cell A1 and 2 in cell A2, then click in cell A3
- 5 On the **Home** tab, click on **AutoSum** in the **Editing** group to create and insert a **SUM** formula, then press **Enter**
The total of 1 and 2 is 3...
- 6 Click in cell A1, type 4, then press **Enter**
- 7 Press **F9** to update the total
- 8 Repeat steps 1 to 3, clicking on **Automatic** under **Workbook Calculation** to restore the calculation settings



For Your Reference...

To **set formula options**:

1. Click on the **File** tab, then click on **Options**
2. Click on **Formulas**
3. Make the required changes
4. Click on [OK]

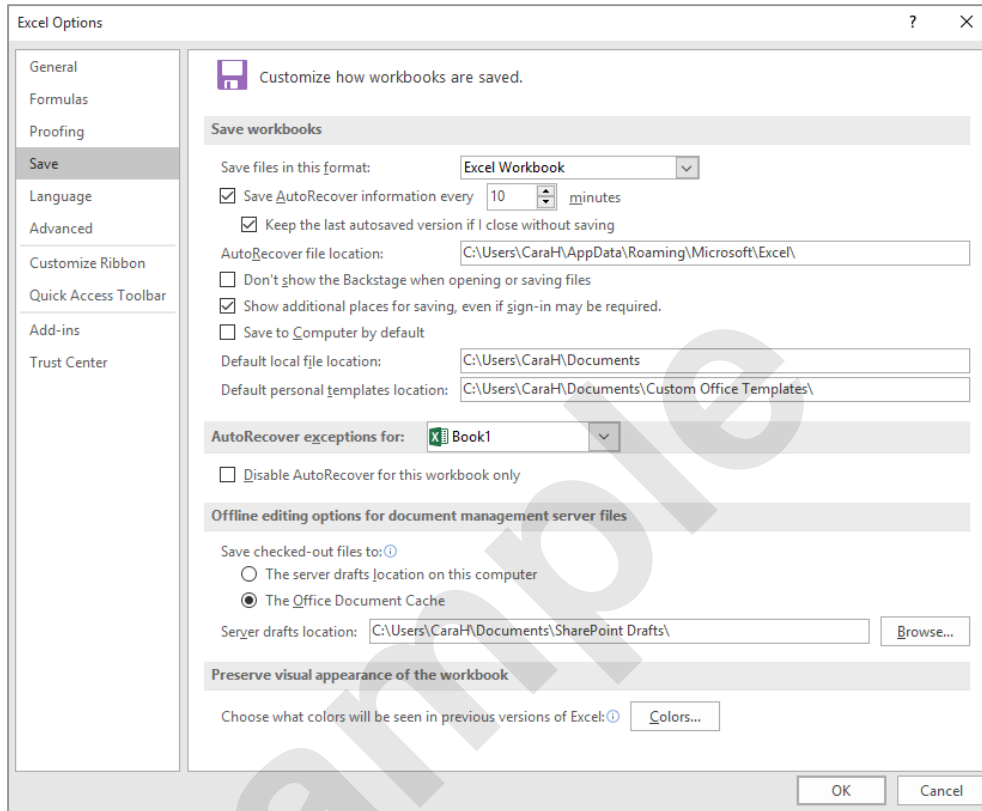
Handy to Know...

- Ensure **Formula AutoComplete** is selected in the **Formula** category of the **Excel Options** dialog box as this automatically displays help when you build a formula, especially where functions are involved, helping you to complete functions accurately.

UNDERSTANDING SAVE OPTIONS

From your perspective, saving a spreadsheet is as simple as clicking on **Save** or pressing **Ctrl** + **S**. From Excel's perspective, however, there is a whole lot more that goes on when you save a

spreadsheet. The operation is controlled by the save settings that appear in the **Excel Options** dialog box.



Save Settings

Save files in this format

Excel allows you to save spreadsheets in a wide range of formats. Whatever format you select here will be the default format that Excel uses to save files unless you specify a different format when you save.

Save AutoRecover information every 10 minutes

Excel automatically creates a spreadsheet recovery file at the interval that you specify in **minutes**. You can specify a time from 1 to 120 minutes. If Excel crashes for any reason, the latest AutoRecover file will open when you next start Excel. You can then save the changes.

AutoRecover file location

This is the folder that the AutoRecover files are stored in.

Default file location

This is the folder that spreadsheets are automatically stored in. It is also the folder that is opened when you click on the **FILE** tab and click on **Open**. This is the same folder as that shown in **File Locations**.

AutoRecover exceptions

Allows you disable AutoRecover for a specific file.

Save checked-out files to

This specifies whether or not to save checked-out files to your computer or to the server. It is used for sharing spreadsheets.

Server drafts location

This specifies the local server drafts location that is used if your checked-out files are stored locally.

Visual appearance

Controls the colours that will be used when a file is opened in an earlier version of Excel.

SETTING SAVE OPTIONS

The **Save** settings in Excel reside in the **Excel Options** dialog box. They can be used to modify the way Excel saves spreadsheets, enabling you to create backup copies automatically or specify

a different default save format. This is useful if you need to save all of your spreadsheets in **Excel 97-2003 Spreadsheet** format for compatibility reasons.

Try This Yourself:

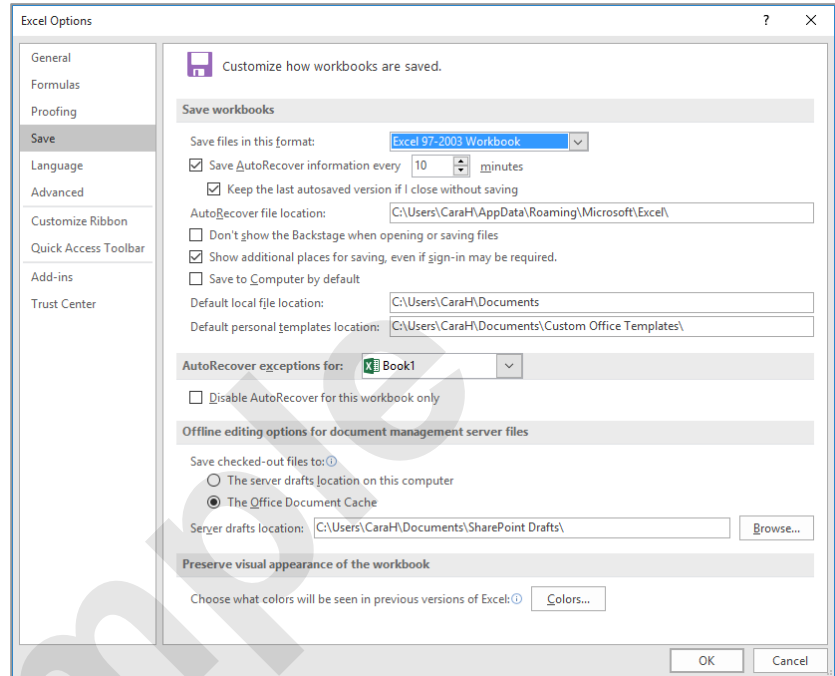
Same File

Continue using the previous file with this exercise, or open a blank workbook...

- 1 Click on the **File** tab, click on **Options** to display the **Excel Options** dialog box, then click on **Save** in the left pane
- 2 Click on the drop arrow for **Save files in this format**, then select **Excel 97-2003 Workbook (*.xls)**
- 3 Click on **[OK]** to save the changes
- 4 Open a new blank workbook
- 5 Click on the **File** tab, click on **Save**, then click on **[Browse]** to open the **Save As** dialog box

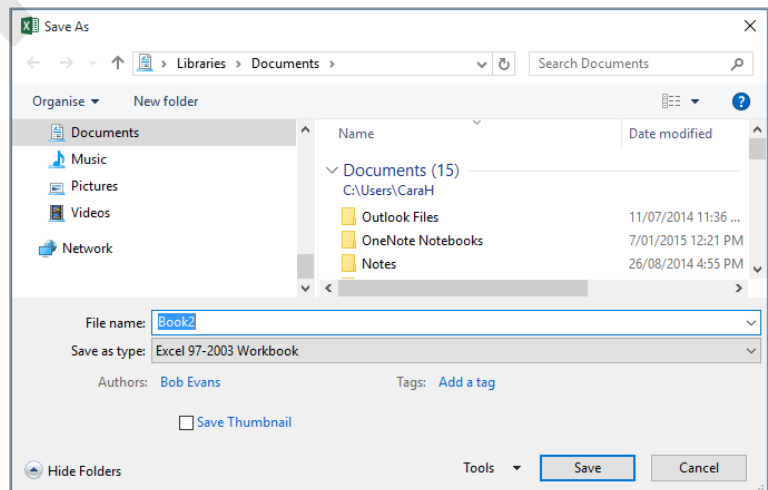
Notice that **Save as type** is automatically set to **Excel 97-2003 Workbook (*.xls)**...

- 6 Click on **[Cancel]** to return to the **Backstage**, then click on **Options**
- 7 Repeat steps 2 to 4 and change **Save files in this format** back to **Excel Workbook (*.xlsx)**



2

5



For Your Reference...

To **set save options**:

1. Click on the **File** tab, then click on **Options**
2. Change the settings as required, then click on **[OK]**

Handy to Know...

- The **Save as type** setting can be changed at the time that you save a file; however, if you make the change in **Excel Options** the format you need will appear automatically, saving you time and reducing the likelihood that you'll use the wrong format accidentally.

SETTING THE DEFAULT FILE LOCATION

By default, Excel records the location of different types of files so that it can find them when you need them. For example, Excel will automatically look for your pictures and other graphic files in

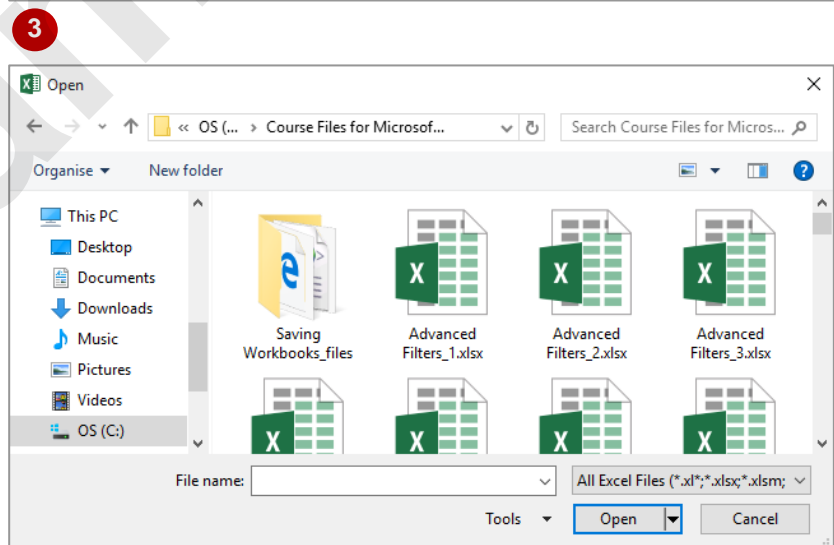
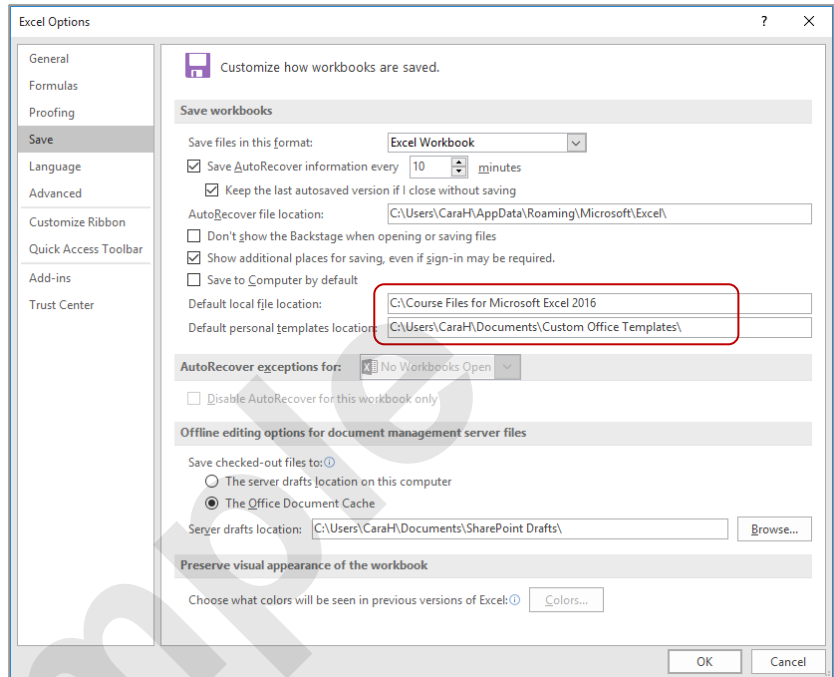
the predefined folder called **Pictures** under your user name. The only location that you can change is where Excel looks for your spreadsheet files. This is known as the **Default file location**.

Try This Yourself:

Open File

Before starting this exercise ensure that a blank workbook is open...

- 1 Click on the **File** tab, click on **Options**, then click on **Save** in the left pane
 - 2 Select the text in the **Default local file location**, then write the path down so that you can restore it later
 - 3 Type **C:\Course Files for Microsoft Excel 2016**
 - 4 Click on **[OK]** to apply the setting
 - 5 Click on the **File** tab, click on **Open**, then click on **[Browse]** to display the **Open** dialog box
- Excel now automatically looks in the course files folder. The list of files you see may vary from that shown here...*
- 6 Click on **[Cancel]** to close the dialog box and return to the **Backstage**
 - 7 Repeat steps 1 to 4 to restore the original path



For Your Reference...

To **set** the **file location**:

1. Click on the **File** tab, then click on **Options**
2. Click on **Save**
3. Change the **Default file location**
4. Click on **[OK]**

Handy to Know...

- If you use several different locations but don't want to change the default file location, you might want to pin your most accessed folders under **Recent Folders** in the **Open** place. This keeps the folders at the top of the list so you can access them easily. You can also pin workbooks under **Recent Workbooks**.

SETTING ADVANCED OPTIONS

The **Advanced** options found in the **Excel Options** dialog box allow you to change the way that Excel looks and behaves. They include editing, copy and paste, print, display calculation,

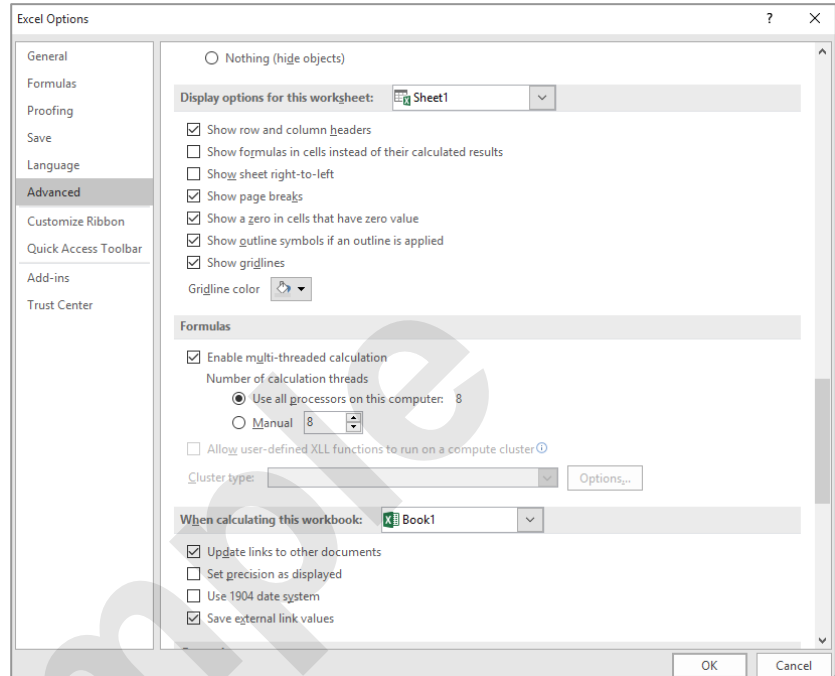
formulas, general and compatibility settings. For example, you can change the gridline colour, whether or not page breaks and sheet tabs appear, and the units of measure on the ruler.

Try This Yourself:

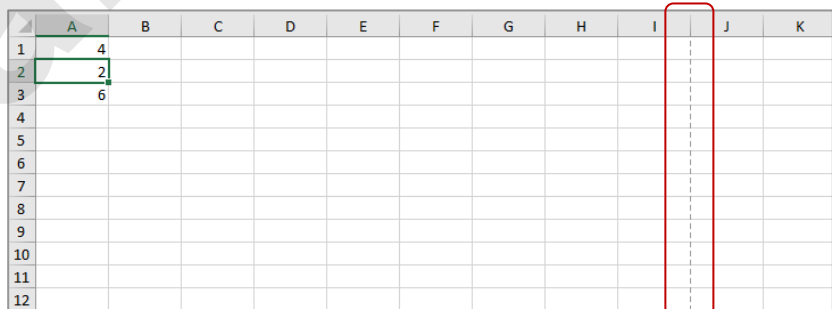
Open
File

Before starting this exercise ensure that a blank workbook is open...

- 1 Click on the **File** tab, then click on **Options**
- 2 Click on **Advanced** in the left pane, then scroll down until you can see the **Display options for this worksheet** heading
- 3 Click on **Show page breaks** so that it appears with a tick
- 4 Click on [OK]
The page breaks will appear as dashed lines on the worksheet...
- 5 Repeat steps 1 to 4 to remove the tick and hide the page breaks



3



4

For Your Reference...

To set the **advanced options**:

1. Click on the **File** tab, then click on **Options**
2. Click on **Advanced**
3. Make the required changes
4. Click on [OK]

Handy to Know...

- In the **Editing options** section, you'll find the setting **Zoom on roll with IntelliMouse**. With this turned on, Excel will zoom in or out of the spreadsheet when you roll the wheel on the mouse, rather than scrolling up and down as it would normally.

Sample

CHAPTER 2

InFocus

PROTECTING DATA

Data in worksheets can be protected. For instance, you may want to protect data to prevent accidental deletion or modification of key values or complex formulas, or to prevent users from entering data anywhere else in the worksheet or workbook other than specific input cells.

Protection is most often applied to worksheets that are used frequently or by multiple users, such as timesheets or expense reports.

In this session you will:

- ✓ understand data protection
- ✓ learn how to provide access to cells
- ✓ learn how to protect a worksheet
- ✓ learn how to work with a protected worksheet
- ✓ learn how to disable worksheet protection
- ✓ learn how to provide restricted access to cells with passwords
- ✓ learn how to password protect a workbook
- ✓ learn how to open a password protected workbook
- ✓ learn how to remove passwords from a workbook.

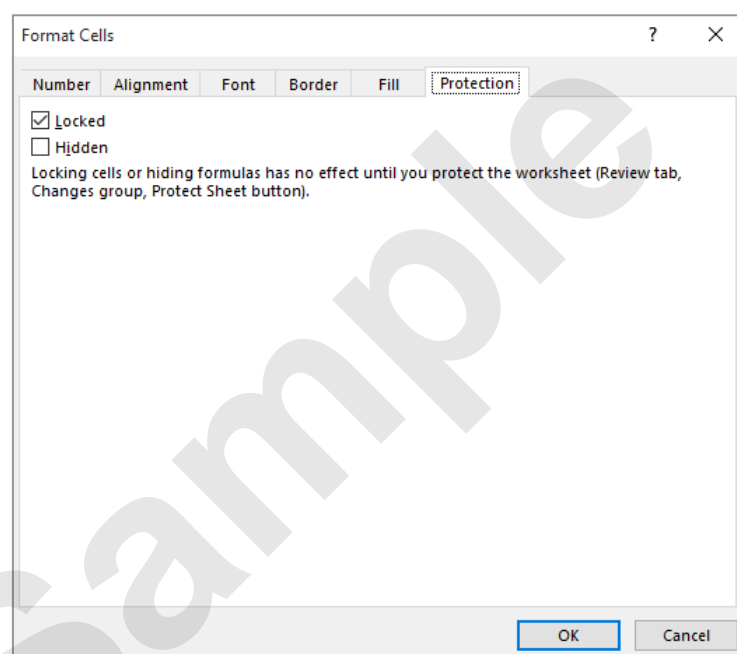
UNDERSTANDING DATA PROTECTION

By default, all cells in an Excel worksheet are **locked**. However, the worksheet is also **unprotected** by default and so the cells remain accessible. By unlocking cells and then applying

protection to a worksheet, you are able to limit a user's access to only the unlocked cells. You can also apply passwords when protecting a worksheet or a workbook.

Unlocking Cells

All cells in an Excel worksheet are locked. Prior to applying protection to the worksheet, these cells can still be edited. Once protection is applied, the cells will become inaccessible and you will no longer be able to edit them. You have the option of unlocking some cells prior to applying protection, so that users will still be able to access and edit these cells. To indicate whether a cell will be locked or unlocked, simply select an option in the **Format Cells** dialog box, as shown below.



Protecting A Worksheet

After specifying which cells are to be locked and unlocked, you need to protect the worksheet. You may choose to apply a password to the worksheet, in which case only users who know the password will be able to unprotect it and gain unrestricted access. You are also able to select which actions users will be able to perform, from the list of actions provided.

Protecting A Workbook

As well as the ability to apply protection to a worksheet, Excel also provides you with the ability to protect a workbook as a whole. You have the option of applying two passwords: one to *open* the workbook, and another to *modify* it. Users who have the **open** password but not the **modify** password will only be able to open the workbook in *Read-Only* mode and they will not be able to make any changes. You can set workbook protection using options on the **Review** tab or using the **Save As** dialog box.

