



## UNIT: 07

# Customizing the Excel Environment

## Learning Outcomes

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

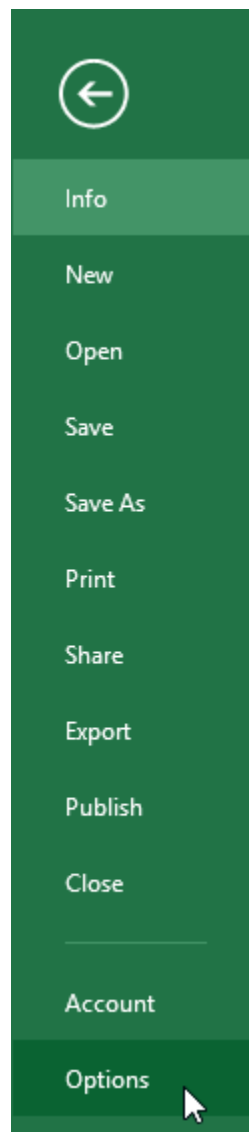
- ✓ **Customize general, language, formula, proofing, and saving options**
- ✓ **Use Excel's version control features**
- ✓ **Customize the ribbon and the Quick Access toolbar**

## UNIT 07 CUSTOMIZING THE EXCEL ENVIRONMENT

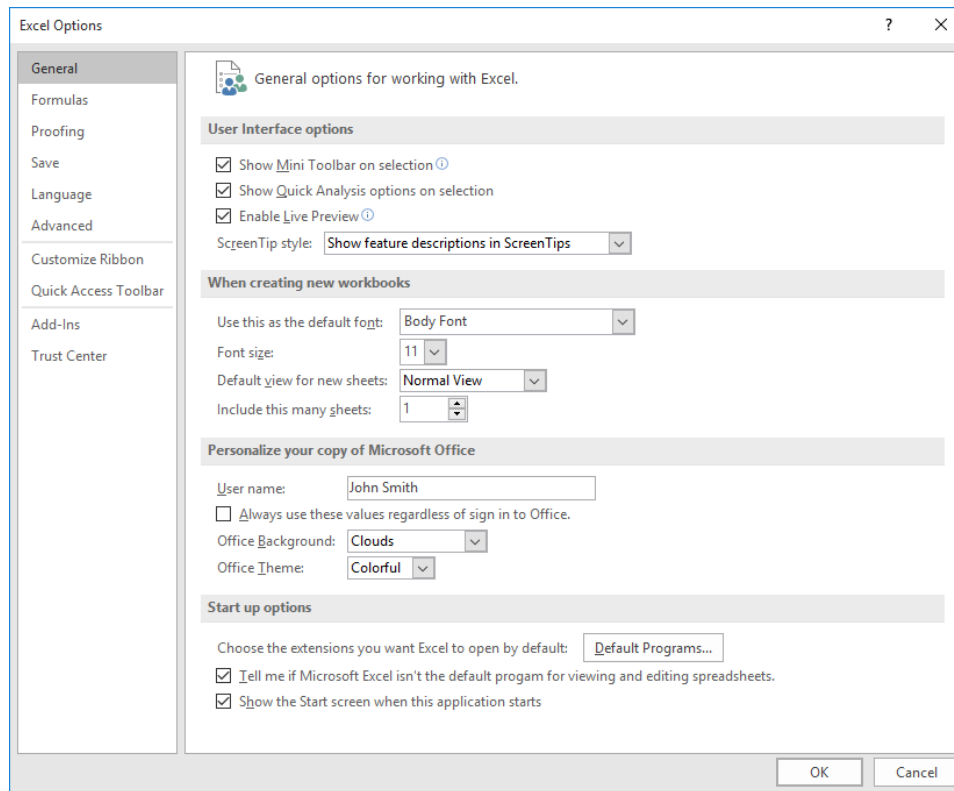
### Customize General and Language Options

#### 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:

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

<b>Language</b>	Specify the language that you would like to use for Excel and Microsoft Office as a whole.
<b>Advanced</b>	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.
<b>Customize Ribbon</b>	Customize what controls appear on the ribbon and where.
<b>Quick Access toolbar</b>	Customize what controls appear on the Quick Access Toolbar and where.
<b>Add-Ins</b>	Add and manage Office add-ins.
<b>Trust Center</b>	This category allows you to access the Trust Center, which controls a variety of privacy and security settings.

### **Excel Options and Microsoft Office**

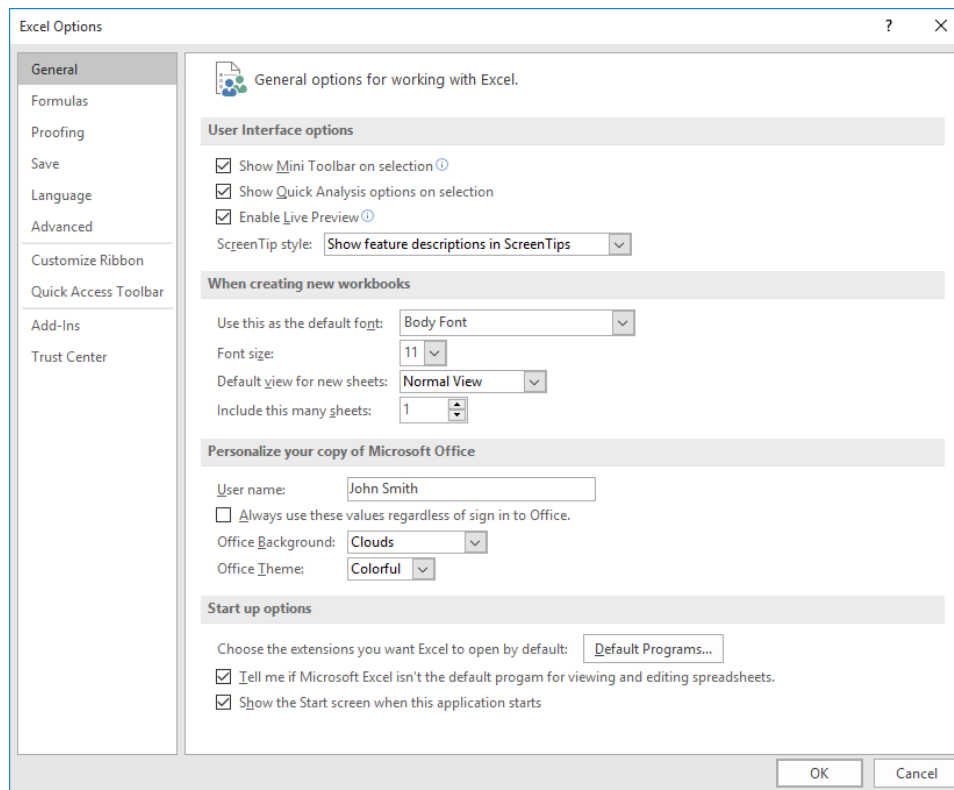
When changing the settings in the Excel Options dialog, keep in mind that many of the changes that you make will affect other Microsoft Office applications. Be sure to check that any changes you make in the Excel Options dialog do not adversely affect other applications.

### **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:



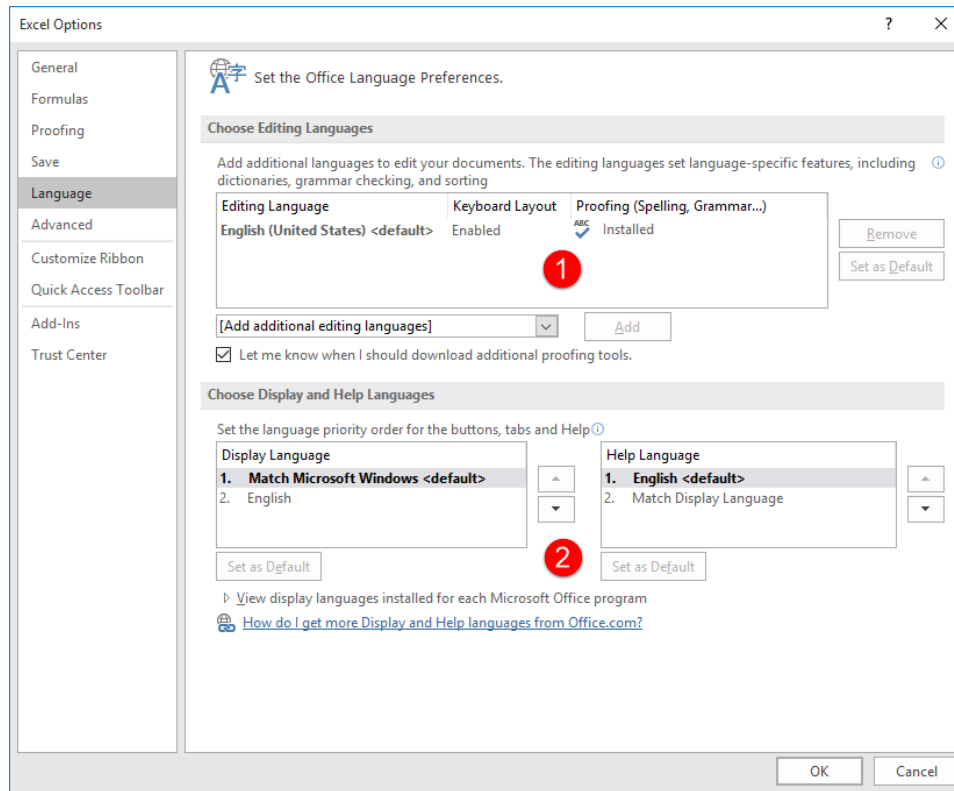
Below is a brief breakdown of some of the options that are available in the General category of the Excel Options dialog box:

<p><b>Show Mini Toolbar on selection</b></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><b>Show Quick Analysis options on selection</b></p>	<p>Checked by default, this option toggles the Quick Analysis buttons on and off.</p>

<b>Enable Live Preview</b>	Checked by default, this option toggles the Live Preview feature on and off.
<b>ScreenTip style</b>	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.
<b>Use this as the default font</b>	This control allows you to choose the font face that will automatically be used when new workbooks are created.
<b>Font size</b>	This control allows you to choose the font size that will automatically be used when new workbooks are created.
<b>Default view for new sheets</b>	This control allows you to choose the view that will automatically be used when new workbooks are created.
<b>Include this many sheets</b>	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.
<b>User name</b>	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.
<b>Office theme</b>	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.
<b>Show the Start screen when this application starts</b>	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:

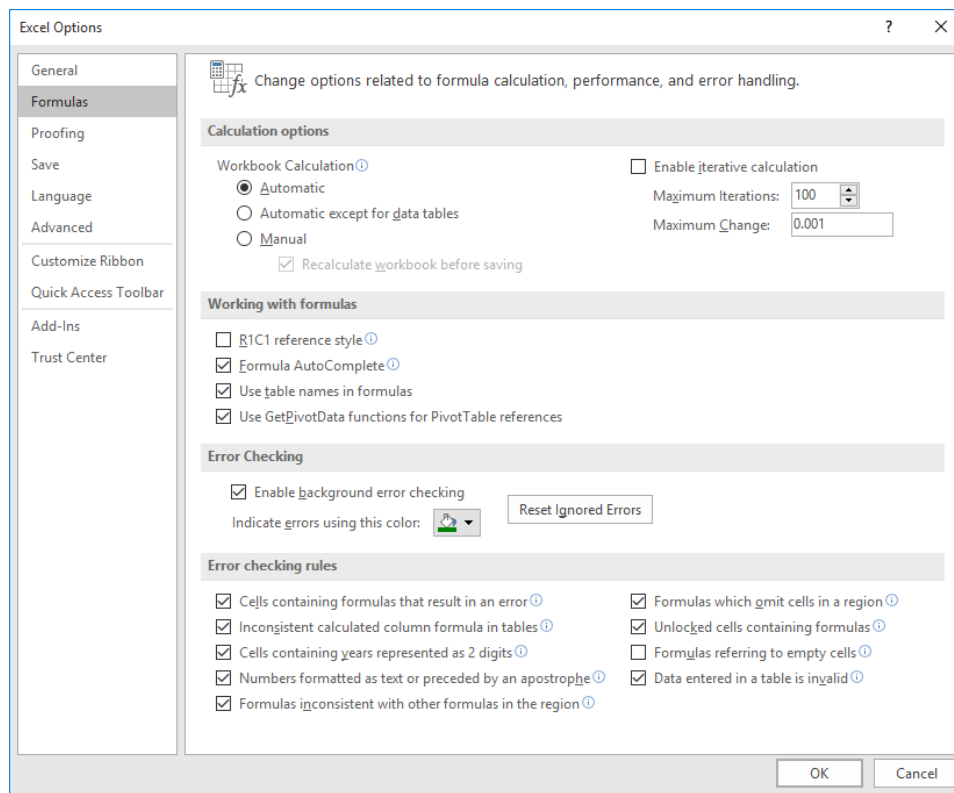


These controls are used to choose the **editing language (1)** (the language that the spell checker will use), as well as **display and help languages (2)**.

## 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:

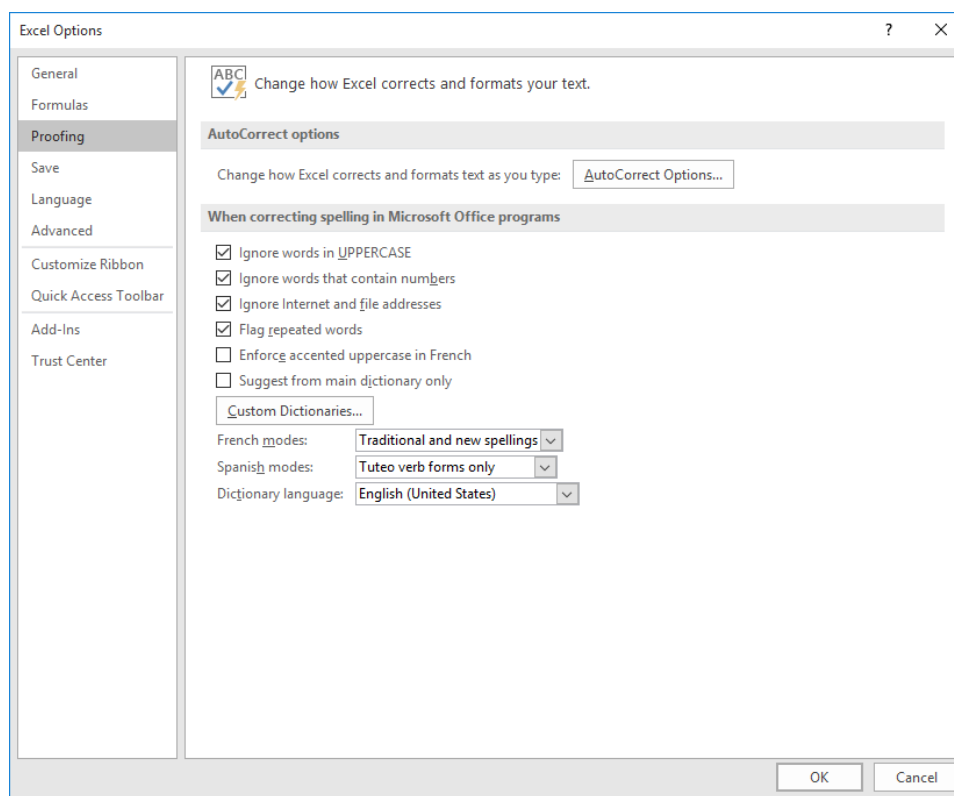
<b>Calculation options</b>	Using the controls in this section, you can choose when calculations are made.
<b>Working with formulas</b>	The controls within this section allow you to set the reference type for cells, use the Formula AutoComplete feature, enable table names, and use GetPivotData functions for PivotTable references.
<b>Error Checking</b>	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.
<b>Error checking</b>	This section includes checkbox controls that you can use to choose exactly what kind of errors

rules	will be looked for by Excel.
-------	------------------------------

## Customize Proofing and Save Options

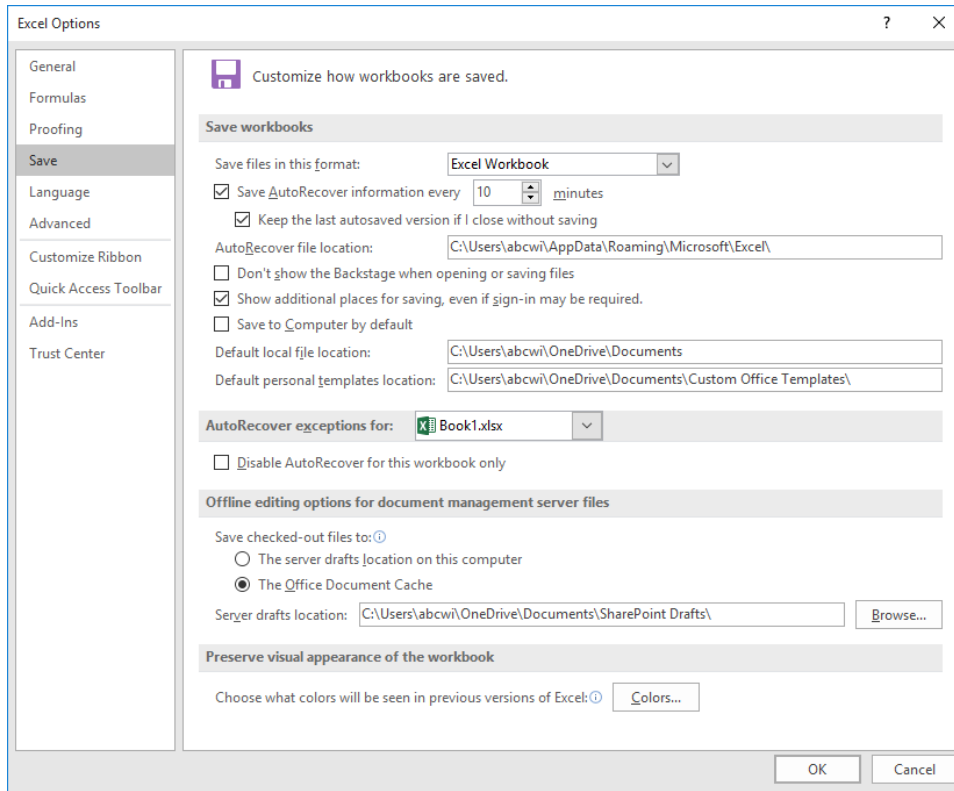
### THE PROOFING CATEGORY

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:



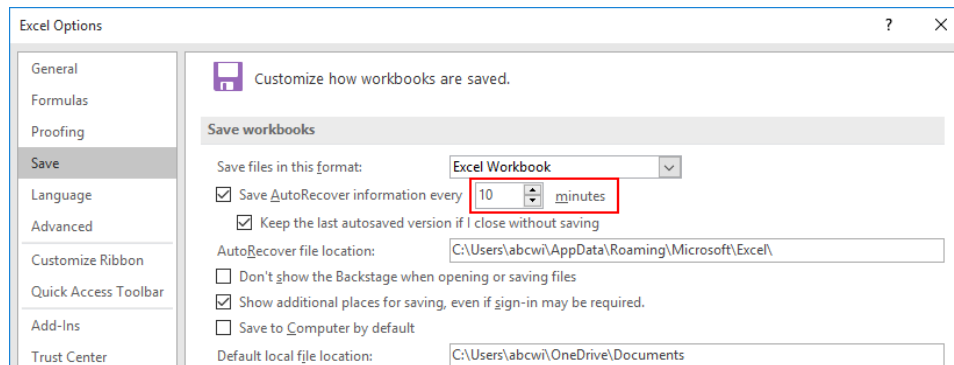
### THE SAVE CATEGORY

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:

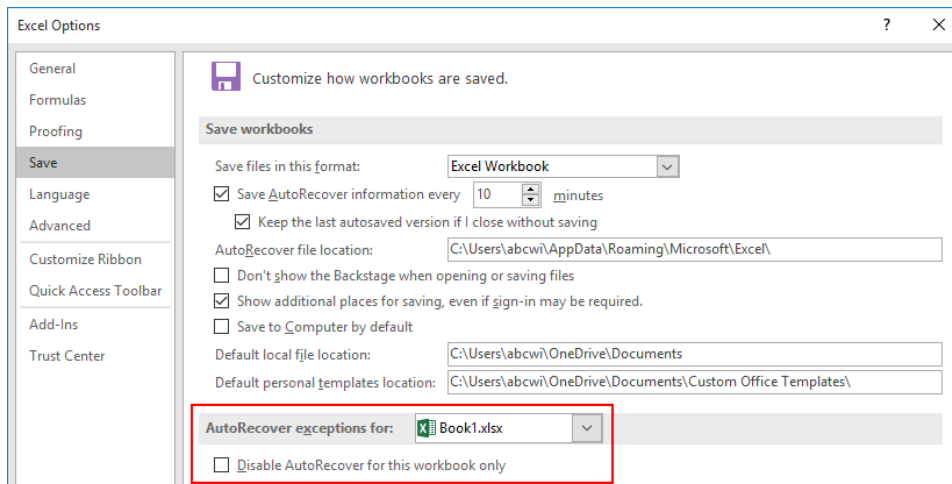


## The AutoRecover Feature

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:



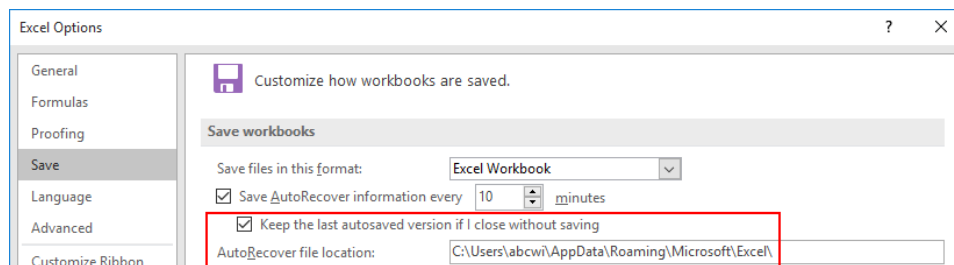
By default this is set to ten minutes, but it can be changed to shorter or longer intervals if you wish. You can also disable this feature entirely by unchecking the box, or disable the feature for just this workbook using the “AutoRecover exceptions for” set of commands:



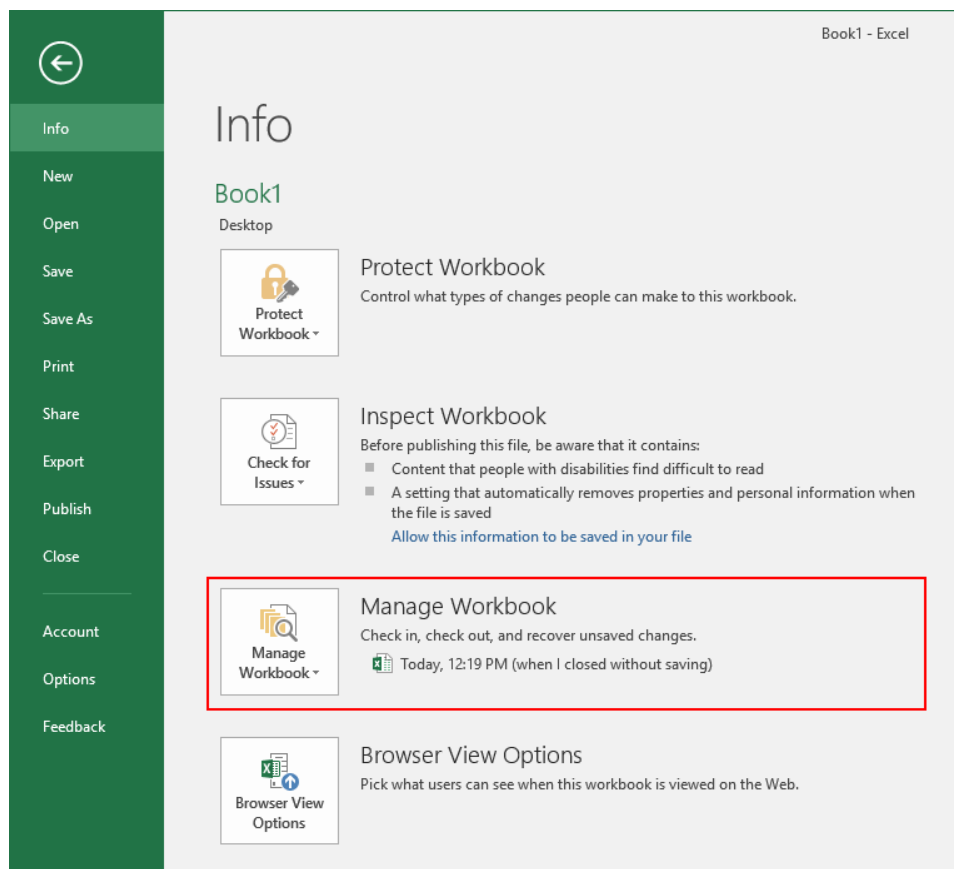
## VERSION CONTROL

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:

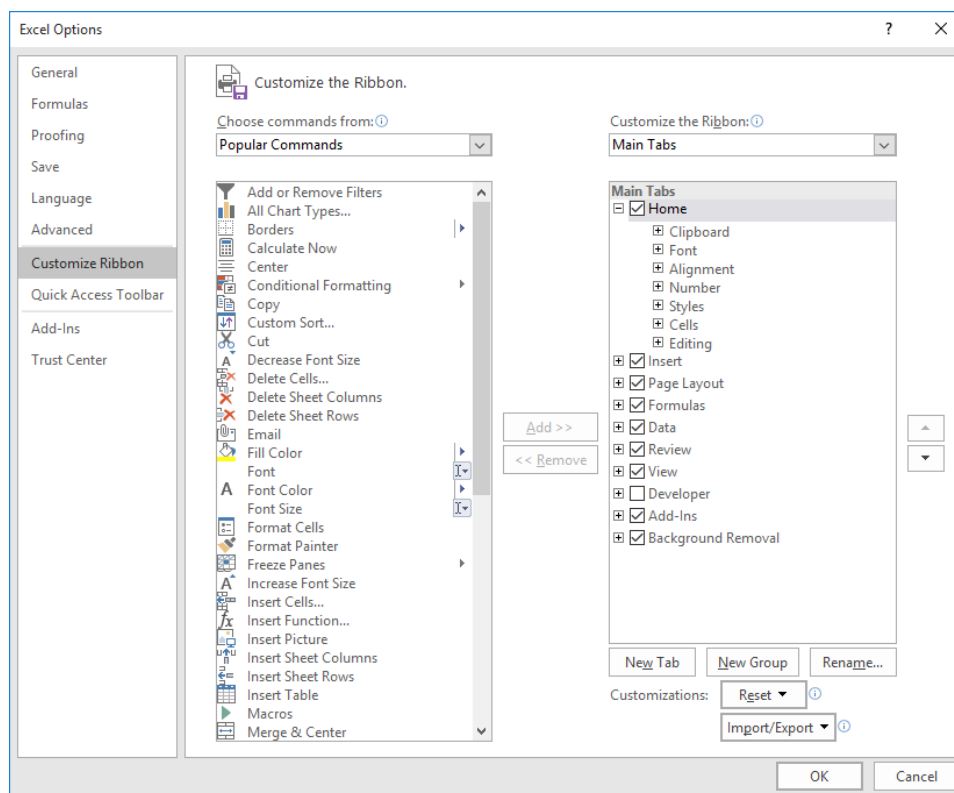


You can then click on any of the previous versions of this file listed (if any are present) to open them.

## Customize the Ribbon and Quick Access Toolbar

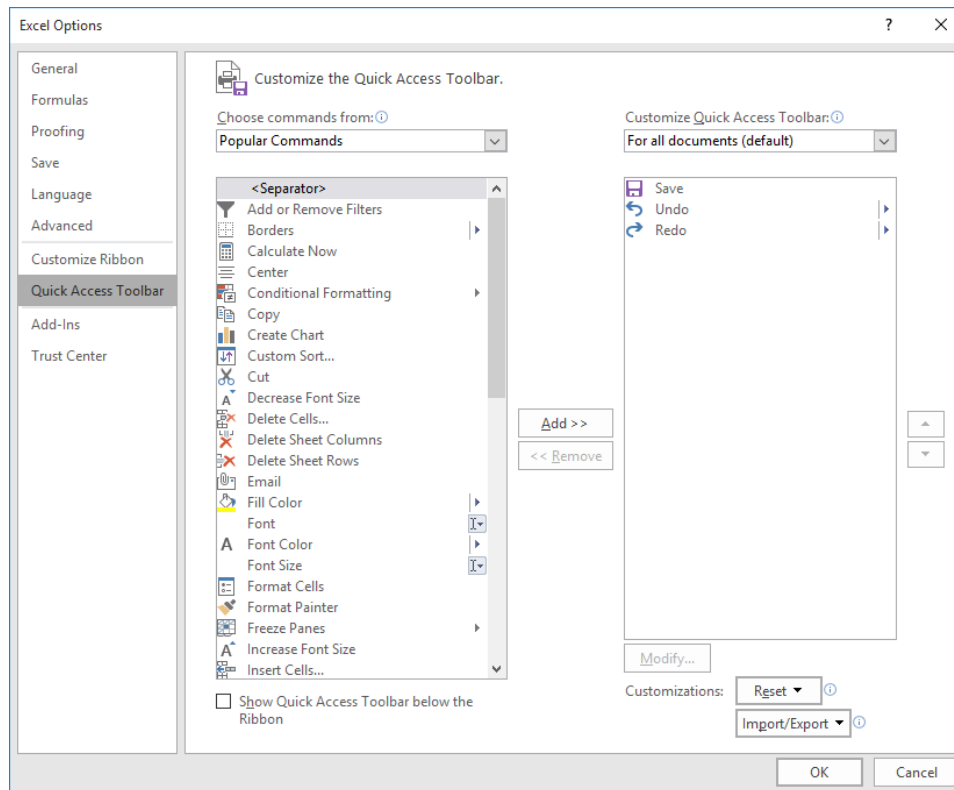
### THE CUSTOMIZE RIBBON CATEGORY

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:

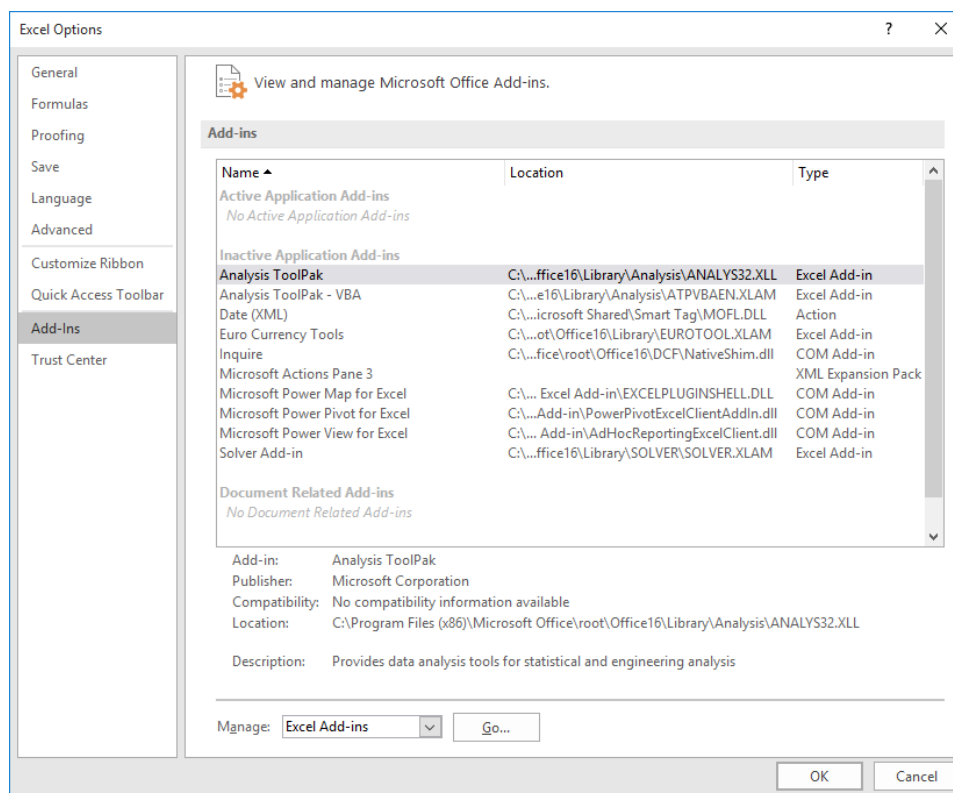


## Customize the Functionality of Excel by Enabling Add-Ins

### 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

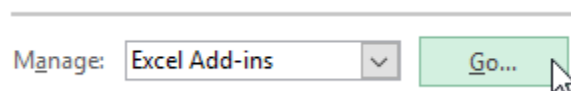
The Add-Ins category is used to manage any add-ins that you have access to. By clicking on an add-in in the list box, you will see information about it, including its publisher, location, and description:

**Add-ins**

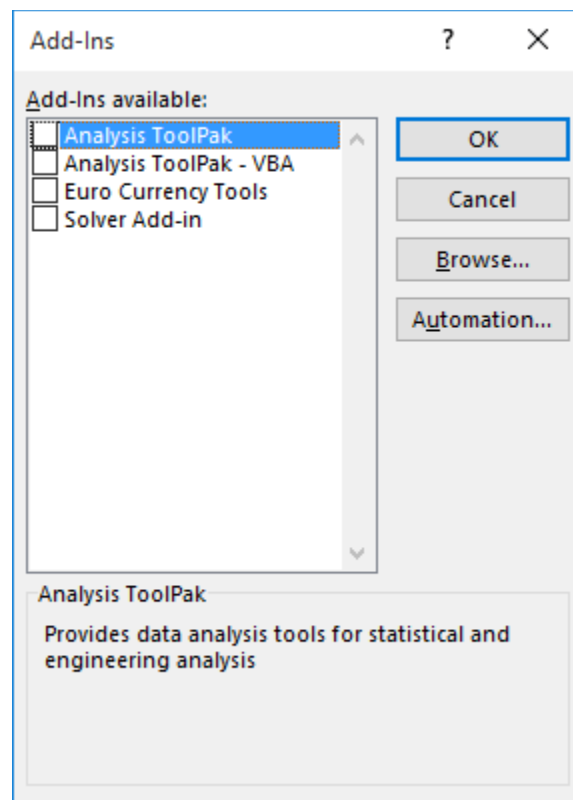
Name ▲	Location	Type
<b>Active Application Add-ins</b>		
<i>No Active Application Add-ins</i>		
<b>Inactive Application Add-ins</b>		
<b>Analysis ToolPak</b>	C:\...ffice16\Library\Analysis\ANALYS32.XLL	Excel Add-in
Analysis ToolPak - VBA	C:\...e16\Library\Analysis\ATPVBAEN.XLAM	Excel Add-in
Date (XML)	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
<b>Document Related Add-ins</b>		
<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:



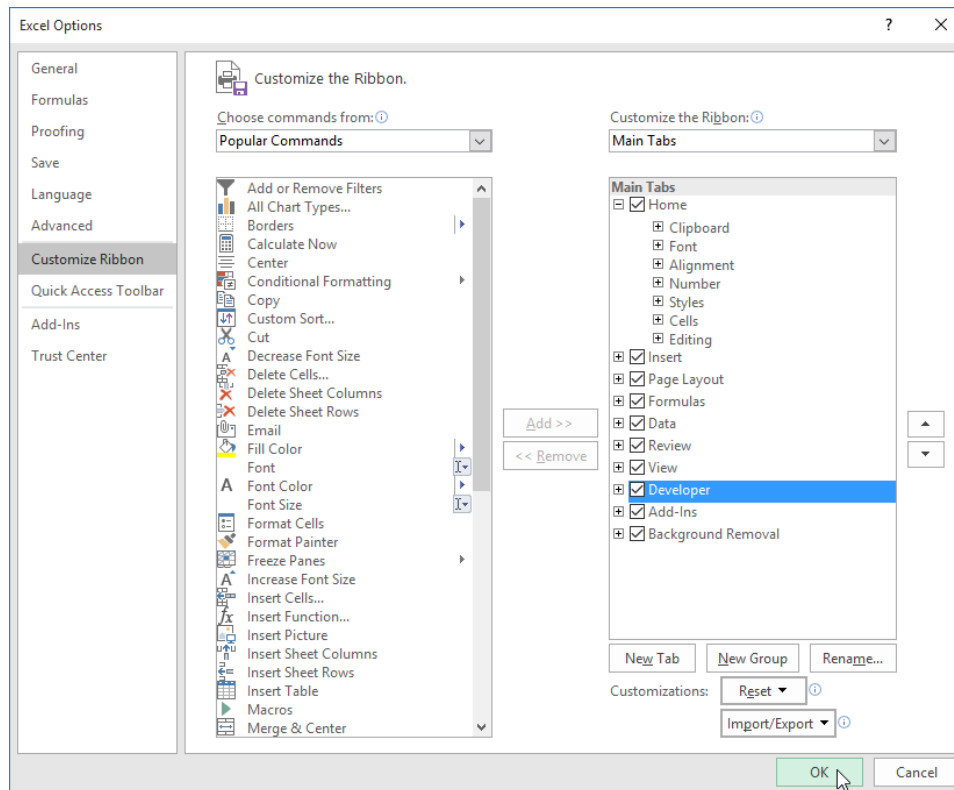
This action will open the appropriate dialog box, listing any available add-ins of that type:



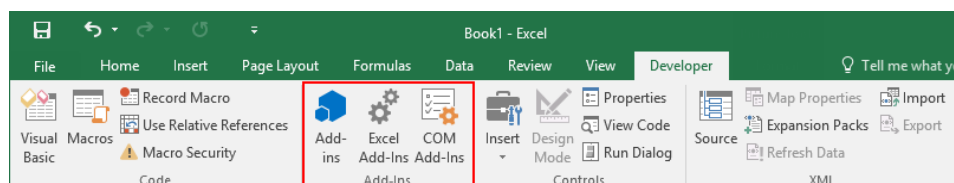
To activate or de-activate an add-in, just check or uncheck its corresponding checkbox. To find an add-in that you downloaded and you would like to add to Microsoft Excel, click the Browse button.

## 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:

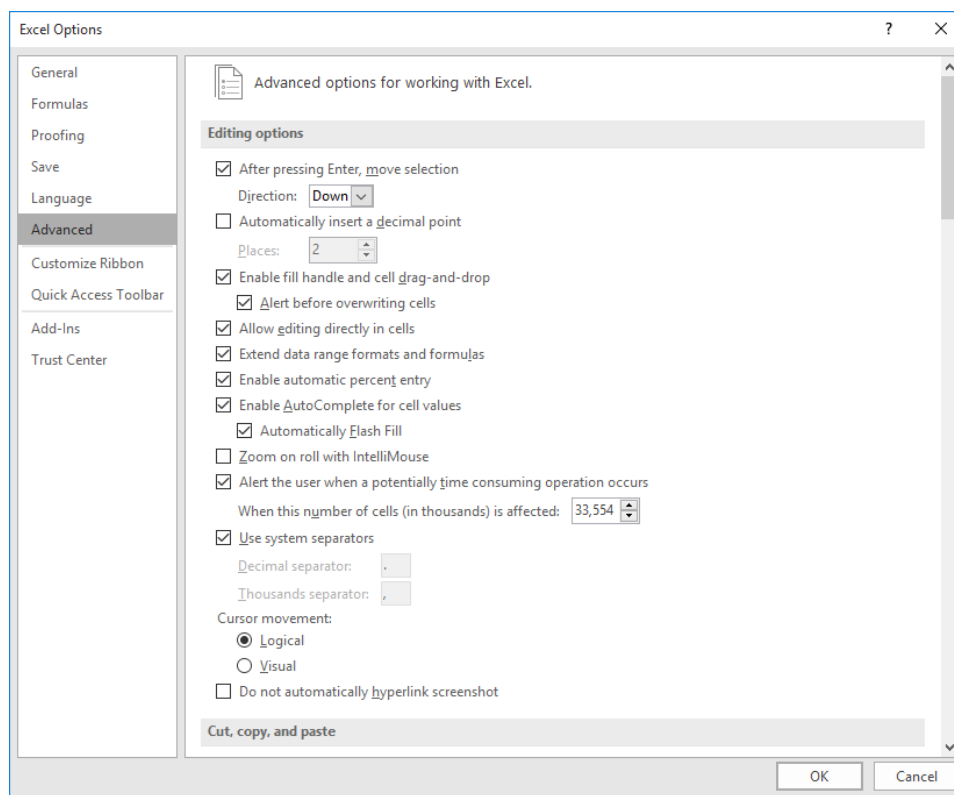


Clicking the Add-ins command allows you to manage Office add-ins, while clicking the Excel Add-Ins button is used to let you modify Excel add-ins. COM add-ins are modified by clicking the command of the same name.

## Customize Advanced and Trust Center Options

### THE ADVANCED CATEGORY

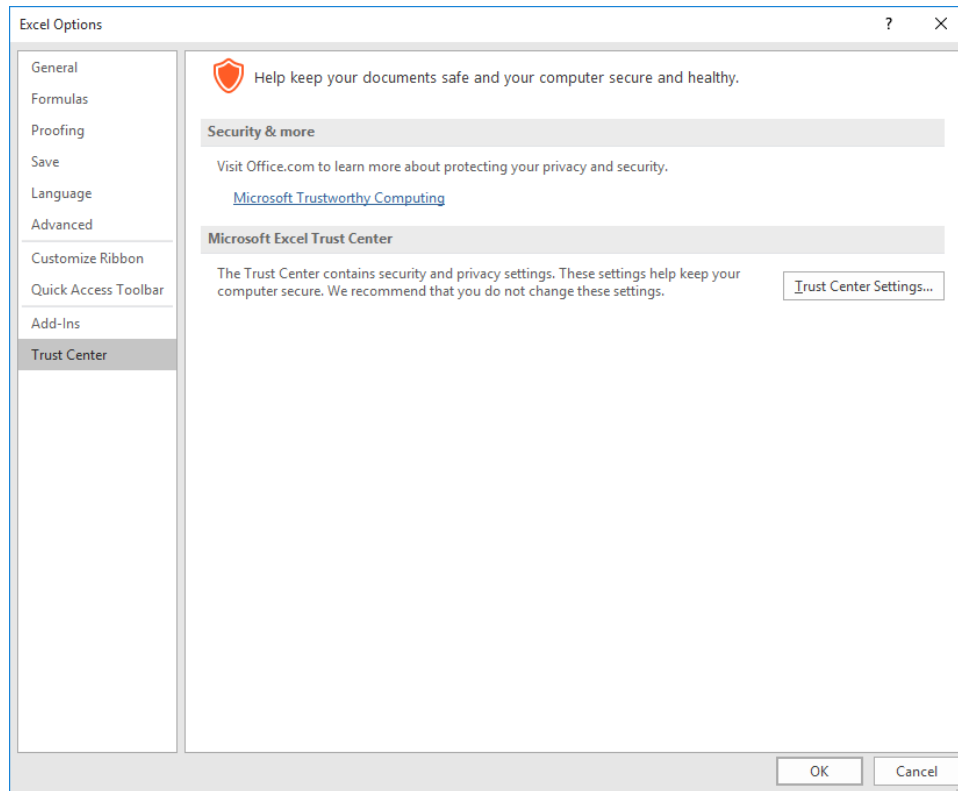
There are dozens of controls in the Advanced category that allow you to modify everything from how cut, copy, and paste work to compatibility settings:



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

## THE TRUST CENTER CATEGORY

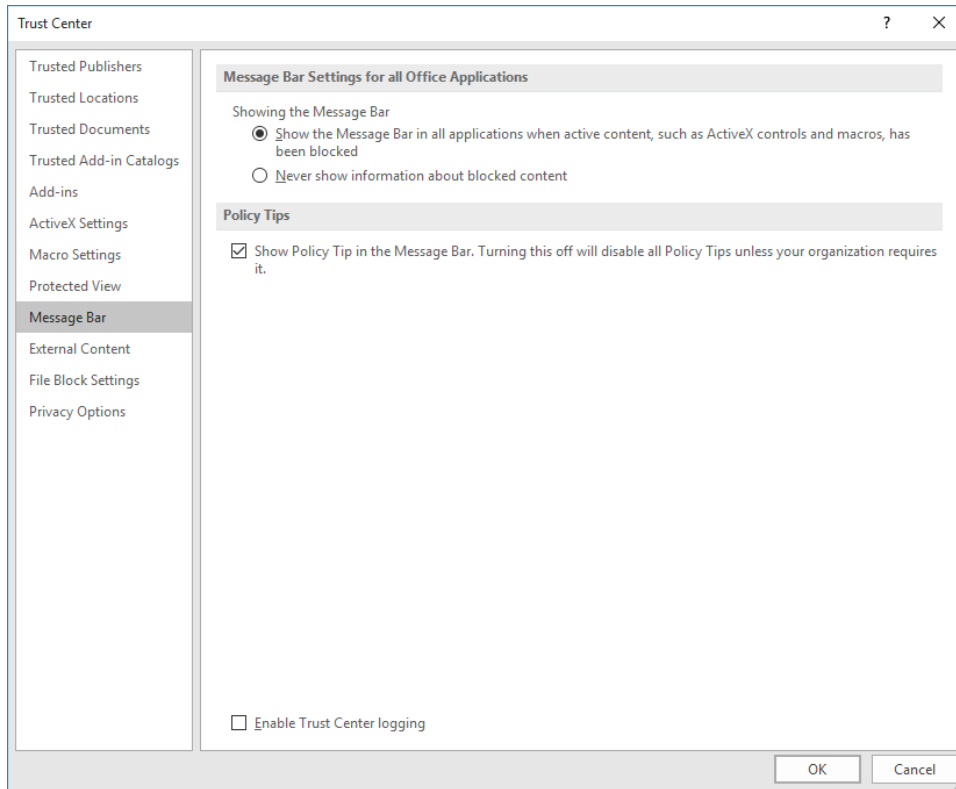
The Trust Center category, on the other hand, has fewer commands:



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.