

## CHAPTER 2

## 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.

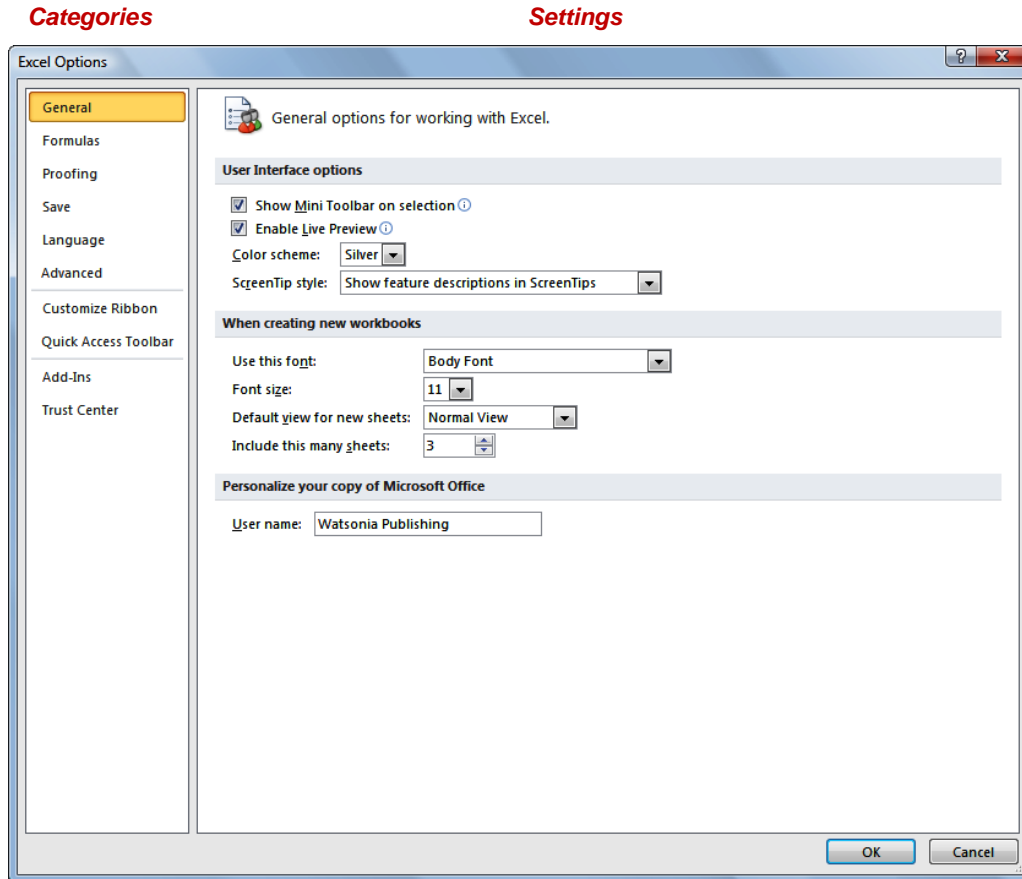
**In this session you will:**

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

# UNDERSTANDING EXCEL OPTIONS

All of Microsoft Excel's settings are accessible in the one dialog box, **Excel Options**. You can access this dialog box by clicking on the **File** tab and 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
<b>Popular</b>	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.
<b>Formulas</b>	The <b>Formulas</b> options allow you to control the calculation of formulas, the performance of the worksheet in terms of calculations, and error handling.
<b>Proofing</b>	<b>Proofing</b> options control the autocorrect and spelling settings.
<b>Save</b>	The location and format used when spreadsheets are saved are controlled by the <b>Save</b> settings.
<b>Language</b>	These settings control the language(s) used for spelling, help and screen tips.
<b>Advanced</b>	The <b>Advanced</b> settings control a wide range of options, many of which will be familiar to those who have used the <b>Tools &gt; Options</b> settings in earlier versions of Excel.
<b>Customise Ribbon</b>	These settings control the content of the <b>Ribbon</b> .
<b>Quick Access Toolbar</b>	These settings control the content of the <b>Quick Access Toolbar</b> .
<b>Add-Ins</b>	Add-ins are special programs that bring additional functionality to Microsoft Excel.
<b>Trust Centre</b>	The settings that protect your spreadsheets are stored in the <b>Trust Centre</b> .

# 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 on the **Popular** page of 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:

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

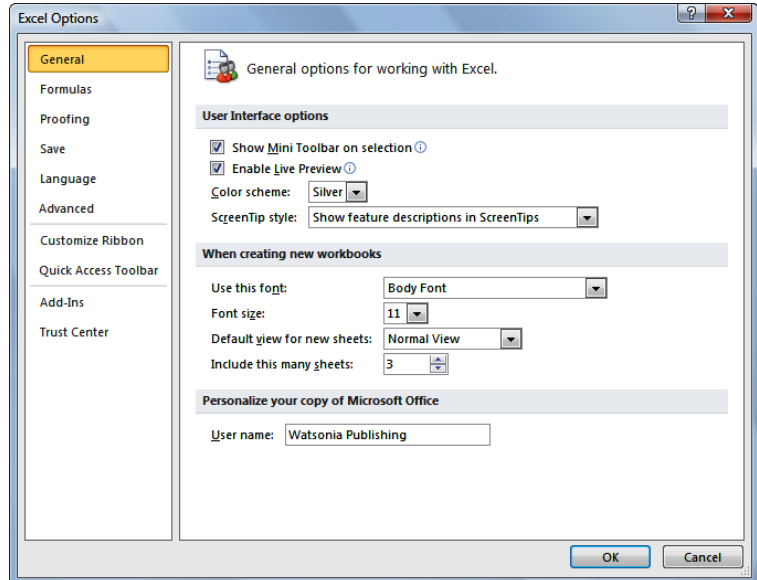
**1** Click on the **File** tab of the **Ribbon**, then click on **Options** to display the **General** page of the **Excel Options** dialog box

**2** Click in **User name** and type your name

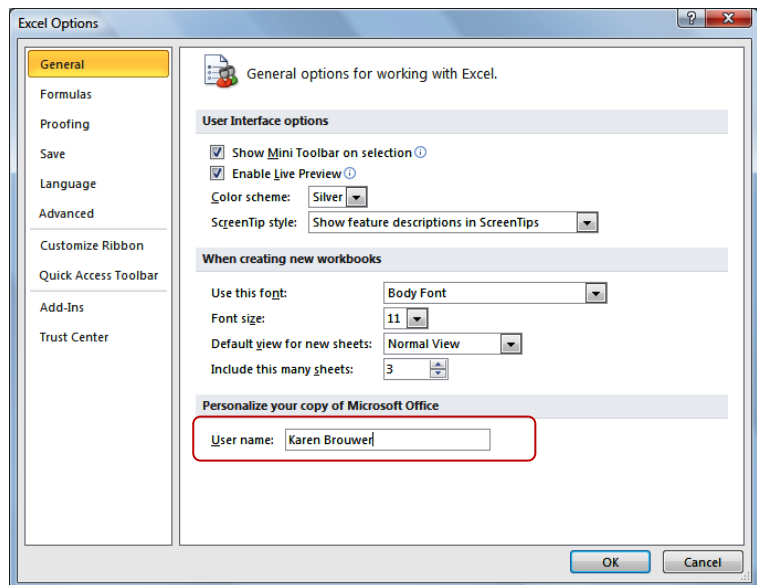
*If text already appears in the field, triple-click in the field to select it, then type your name...*

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

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



**1**



**2**

## For Your Reference...

To **personalise Excel**:

1. Click on the **File** tab of the **Ribbon**
2. Click on **Options**
3. Enter relevant details in **User name**

## Handy to Know...

- In situations where workbooks are shared, the information that you enter in **User name** will be used by Microsoft Excel to show others who has a 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 Microsoft Excel 2010 is Calibri, 11pt, but you can select an alternative

font if you need to. The font settings are located on the **Popular** page of the **Options** dialog box and affect only new workbooks.

## Try This Yourself:

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

- 1 Click on the **File** tab and click on **Options**
- 2 Click on the drop arrow  for **Use this 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 Click on **Arial Black** then click on **[OK]**

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

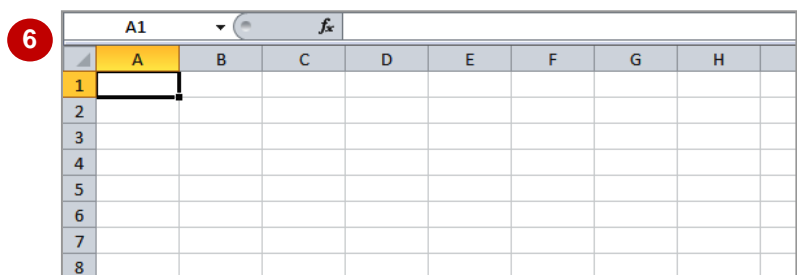
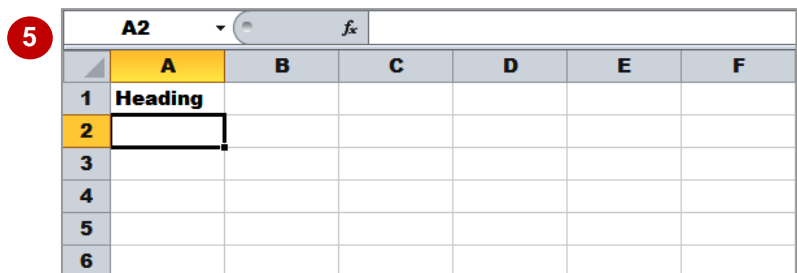
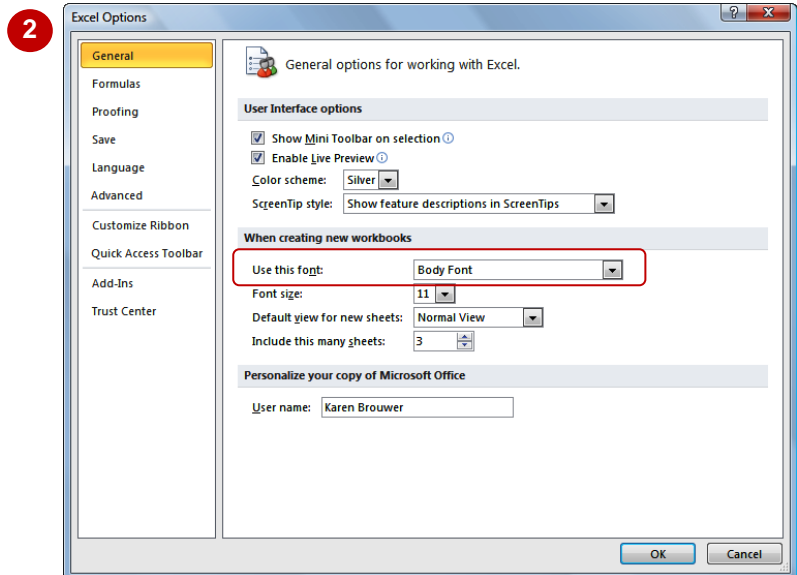
- 4 Click on **[OK]** then close and restart Excel

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

- 5 Type **Heading** in the first cell and press **Enter**


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

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



## For Your Reference...

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

1. Click on the **File** tab and click on **Options**
2. Click on the drop arrow  for **Use this font** and select the 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 on the **Page Layout** tab on the **Ribbon**.

# SETTING FORMULA OPTIONS

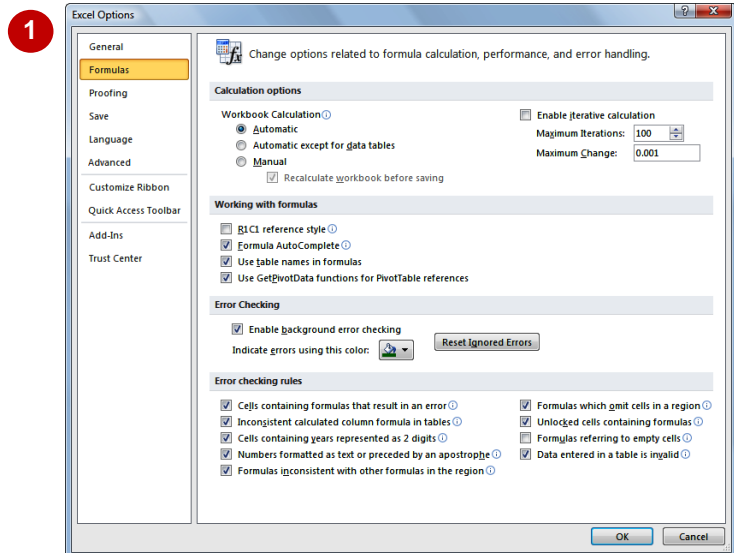
Formulas are such a big part of using spreadsheets that Excel has devoted an entire **Options** category to formula settings. They include **Calculation options**, **Working with**

**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 hover over them.

## Try This Yourself:

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

- 1 Click on the **File** tab of the **Ribbon** and click on **Options**, then click on **Formulas**
- 2 Click on **Manual** in **Workbook Calculations**, under **Calculation options**, so that it appears selected
- 3 Click on **[OK]**
- 4 Type 1 in cell **A1** and 2 in cell **A2**, then click on **A3** and double-click on **AutoSum**  $\Sigma$  on the **Home** tab to create and insert a SUM formula  
*The total of 1 and 2 is 3...*
- 5 Click on **A1** and type 4, then press **[Enter]**  
*With manual recalculation, the total will not change until you tell Excel to recalculate...*
- 6 Press **[F9]** to update the total
- 7 Repeat steps 1 to 3, clicking on **Automatic** under **Workbook Calculation** to restore the calculation settings



4

	A	B	C	D	E	F
1	1					
2	2					
3	3					
4						
5						
6						

5

	A	B	C	D	E	F
1	4					
2	2					
3	3					
4						
5						
6						

6

	A	B	C	D	E	F
1	4					
2	2					
3	6					
4						
5						
6						

## For Your Reference...


To **set formula options**:

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

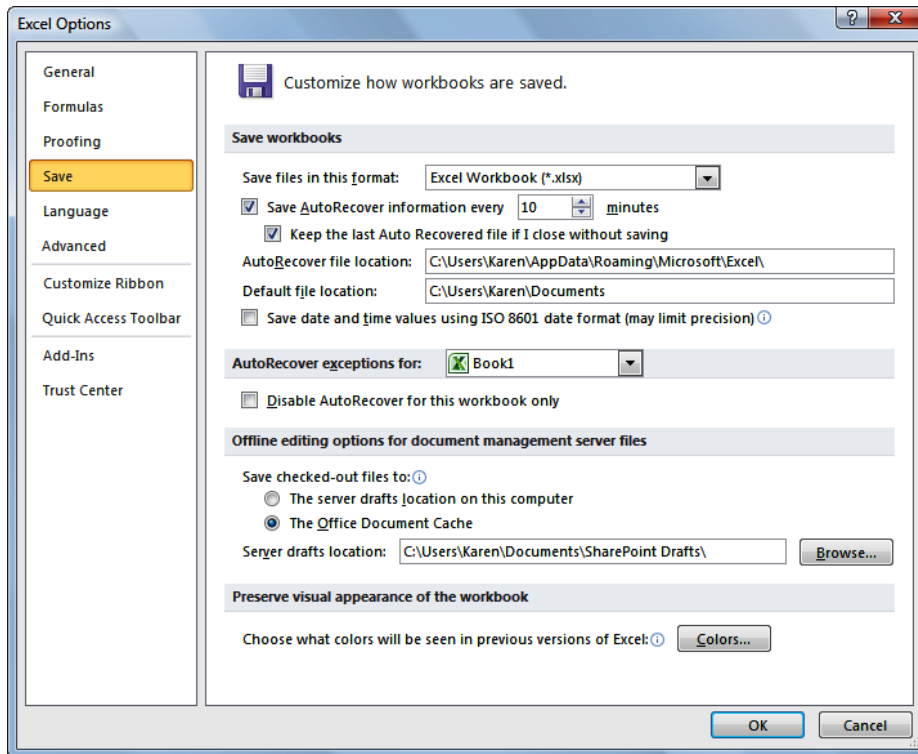
## Handy to Know...

- A great innovation is the inclusion of **Formula AutoComplete**. This automatically displays help when you build a formula, especially where functions are involved, helping you complete functions accurately.

# UNDERSTANDING SAVE OPTIONS

If you thought that saving a spreadsheet was as simple as clicking on the **Save** tool  or pressing **Ctrl** + **S**, you'd be right – from your perspective. 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

<b>Save files in this format</b>	Excel allows you to save your spreadsheets in a wide range of formats. Whatever you select here will be the format that Excel uses automatically to save the file unless you specify a different format when you save.
<b>Save AutoRecover information every 10 minutes</b>	Excel automatically creates a spreadsheet recovery file at the interval that you specify in <b>minutes</b> . 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.
<b>AutoRecover file location</b>	This is the folder that the AutoRecover files are stored in.
<b>Default file location</b>	This is the folder that spreadsheets are automatically stored in. It is also the folder that is opened when you click on the <b>File</b> tab of the <b>Ribbon</b> and select <b>Open</b> . This is the same folder as that shown in <b>File Locations</b> .
<b>Save date and time values using ISO 8601 date format</b>	Saves dates and times in Open XML files using the ISO 8601 format. Times are rounded to the nearest ISO 8601 time value supported by Excel. Excel 2007 requires a converter to open Open XML files with data saved in the ISO 8601 format.
<b>AutoRecover exceptions</b>	Allows you disable AutoRecover for a specific file.
<b>Save checked-out files to</b>	This specifies whether or not to save checked-out files to your computer or to the server. It is used for sharing spreadsheets.
<b>Server drafts location</b>	This specifies the local server drafts location that is used if your checked-out files are stored locally.
<b>Visual appearance</b>	Controls the colours that will be used when a file is opened in an earlier version of Excel.

# SETTING SAVE OPTIONS

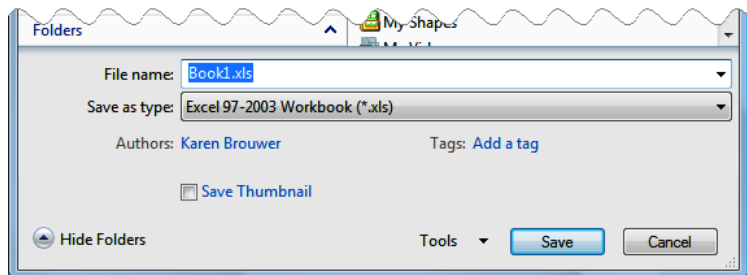
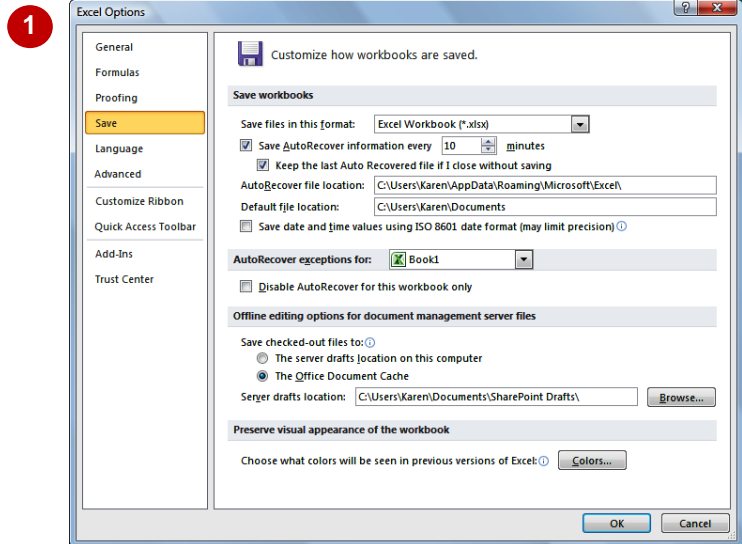
The **Save** settings in Excel reside in the **Excel Options** dialog box. They can be used to modify the way Excel saves spreadsheets, enabling you to create backup copies automatically or specify

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

## Try This Yourself:

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

- 1 Click on the **File** tab of the **Ribbon** and select **Options**, to display the **Excel Options** dialog box, then click on **Save**
- 2 Click on the drop arrow ▾ for **Save files in this format** and click on **Excel 97-2003 Workbook (\*.xls)**
- 3 Click on **[OK]** to save the changes
- 4 Click on the **File** tab of the **Ribbon** and select **Save**  
*Notice that Save as type is automatically set to Excel 97-2003 Workbook (\*.xls)...*
- 5 Click on **[Cancel]**
- 6 Repeat steps 1 to 4 and change **Save files in this format** back to **Excel Workbook (\*.xlsx)**



## For Your Reference...

To **set save options**:

1. Click on the **File** tab and select **Options**
2. Click on **Save**
3. Change the settings as required and click on **[OK]**

## Handy to Know...

- The **Save as type** setting can be changed at the time that you save a file, but by making 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, Microsoft Excel records the location of different types of files so that it can find them when you need them. For example, Excel knows to 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**.

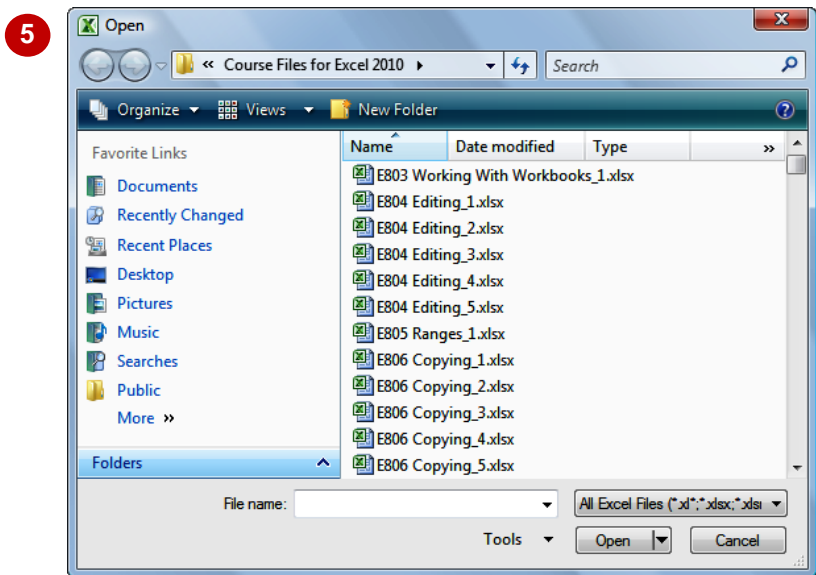
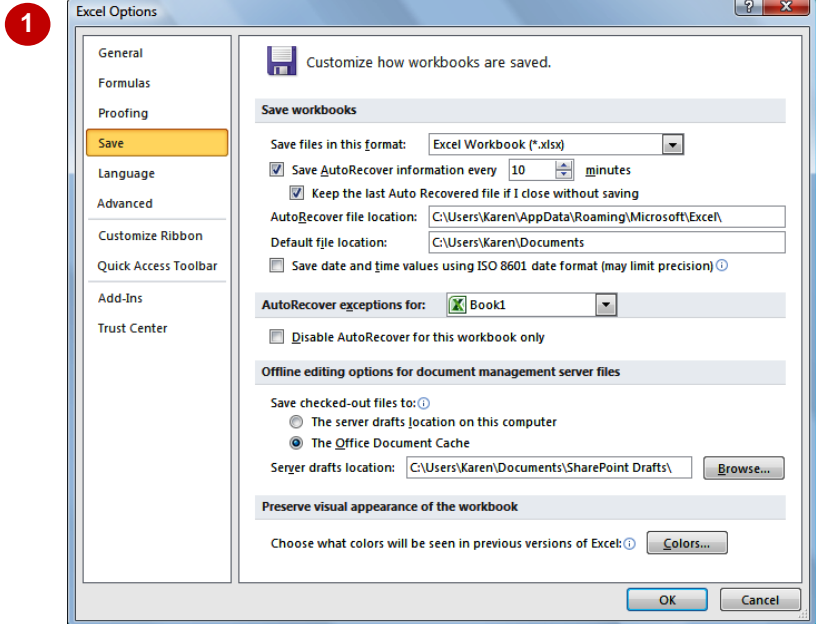
## Try This Yourself:

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

- 1 Click on the **File** tab of the **Ribbon** and click on **Options**, then click on **Save**
- 2 Select the text in the **Default file location** and write the path down so that you can restore it later
- 3 Type **C:\Course Files for Excel 2010**
- 4 Click on **[OK]** to apply the setting
- 5 Click on the **File** tab and select **Open** 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 Repeat steps 1 to 4 to restore the original path



## For Your Reference...

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

1. Click on the **File** tab and select **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 find useful the **Recent Places** link in **Favourite Links**, shown in the left panel of the **Open** dialog box. This lists folders that you have accessed recently so you can jump directly to them.



# 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:

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

- 1 Click on the **File** tab of the **Ribbon** and select **Options**
- 2 Click on **Advanced**, then scroll down until you can see the **Display** settings

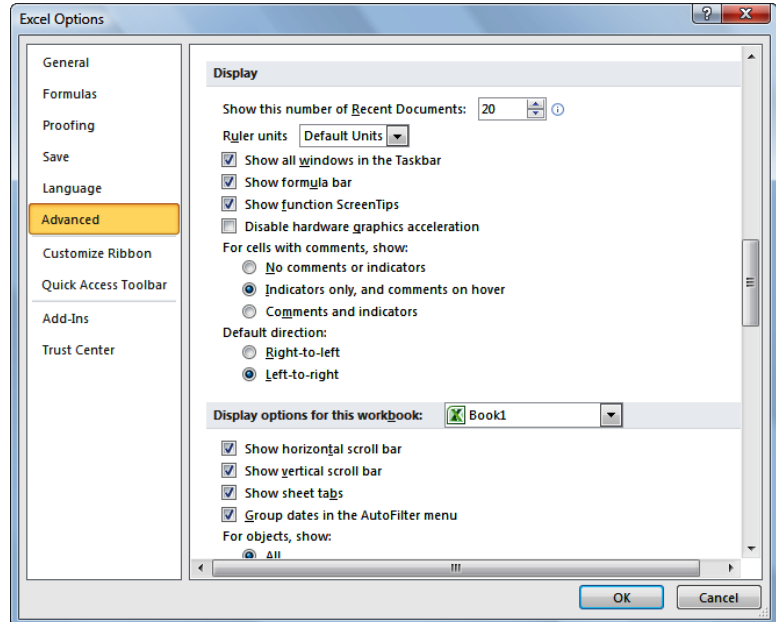
*There are general display settings as well as those for specific workbooks and worksheets...*

- 3 Scroll down to see **Display options for this worksheet**, then click on **Show page breaks** so that it appears with a tick

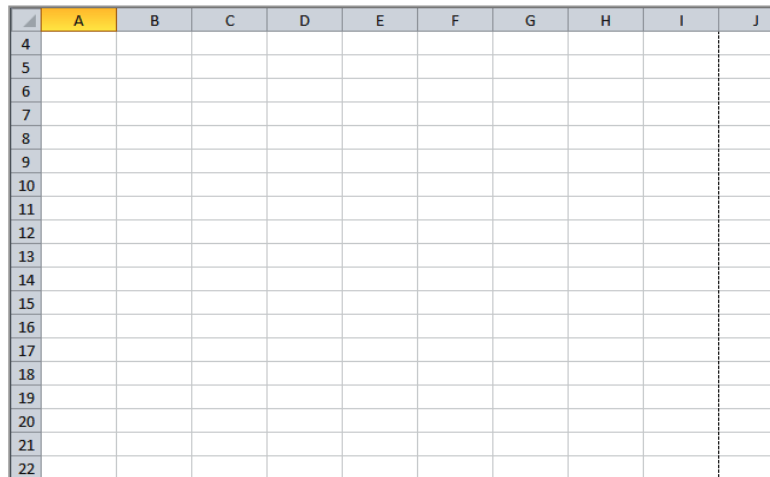
- 4 Click on **[OK]**

*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



2



4

The vertical page break can be seen here...

## For Your Reference...

To **set** the **advanced options**:

1. Click on the **File** tab and select **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.

# NOTES:

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