

# Personalizing Excel for Your Workflow

Excel is far more useful when it's set up the way you work. This chapter covers how to tailor the Excel environment to fit your needs, including restoring commands from earlier versions of Excel that may no longer appear by default and adding them to the Quick Access Toolbar. For accounting and tax professionals who rely on specific tools day after day, these customizations can save meaningful time and reduce frustration when switching between Excel versions or devices.

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## LEARNING ASSIGNMENTS AND OBJECTIVES

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### Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

### Course Objectives

- Identify how to change Excel program settings.

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## Chapter 1: CUSTOMIZING EXCEL

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### *Chapter Objective*

**After completing this chapter, you should be able to:**

- Identify how to change Excel program settings.

Chances are good that Excel, as it comes when first installed, is not always the best fit for the way you use the program. For that reason, Excel offers a variety of ways to customize and configure the program's settings so that they better suit your needs and the way you like to work.

This chapter covers the most important methods for customizing Excel settings and features. The chapter looks at three basic areas where you can tailor the program to your individual needs:

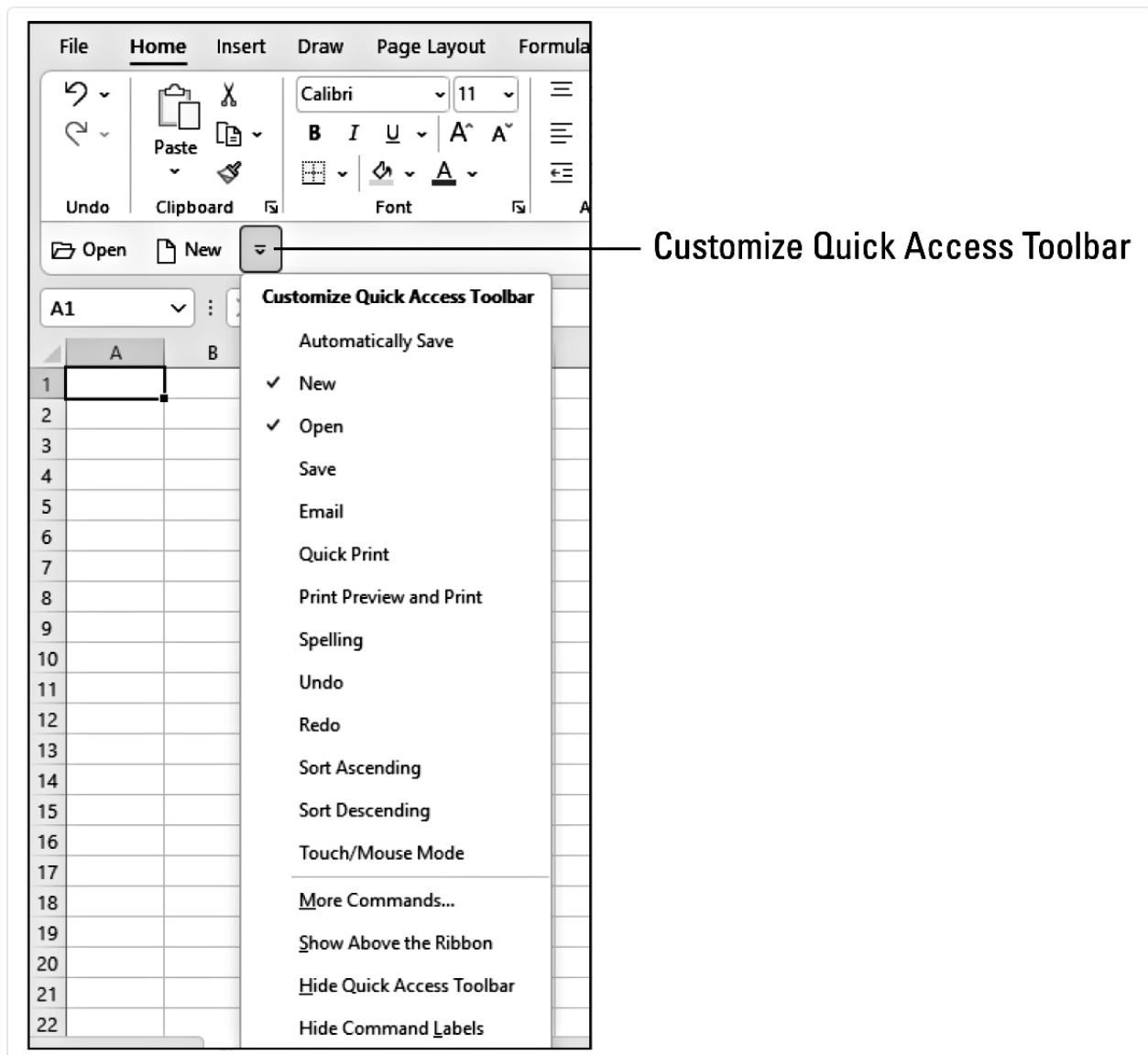
- The first place ripe for customization is the Quick Access toolbar (assuming you elected to unhide it). Not only can you control which Excel command buttons appear on this toolbar, but you can also assign macros you create to this toolbar, making those macros instantly accessible.
- The *second* place where you may want to make extensive modifications is to the default settings (also referred to as options) that control any number of program assumptions and basic behaviors.
- The third place where you can customize Excel is in the world of add-ins, those small, specialized utilities that extend the built-in Excel features by attaching themselves to the main Excel program. Excel Add-ins provide a wide variety of functions and are available from a wide variety of sources, including the original Excel program, the Microsoft Office website, and third-party vendors.

### TAILORING THE QUICK ACCESS TOOLBAR TO YOUR TASTES

Excel enables you to easily make modifications to the Quick Access toolbar, the sole toolbar of the program. When you unhide the Quick Access toolbar (by, for example, right-clicking the Ribbon and then clicking Show Quick Access Toolbar), it appears right below the Ribbon.

To add some commonly used commands to the Quick Access toolbar, such as New, Open, Email, Quick Print, and the like, click the Customize Quick Access Toolbar button (pointed out in Figure 2-1) and click the command to be added from the drop-down menu. Notice that Excel adds a check mark to the left of each command that's been added to the Quick Access Toolbar. To remove one of these commands, click Customize Quick Access Toolbar and then click the command to remove its check mark.

FIGURE 2-1: CLICK CUSTOMIZE QUICK ACCESS TOOLBAR TO SEE A FEW USEFUL COMMANDS THAT YOU CAN TACK ON TO THE TOOLBAR.



**Tip**

If you use Excel on a touchscreen device, you'll want to add the Touch/Mouse Mode button to the Quick Access toolbar by selecting the Touch/Mouse Mode option on the Customize Quick Access Toolbar menu. Touch/Mouse Mode enables you to switch Excel in and out of touch spacing (engaged by default). Touch spacing puts more space between the command buttons on each tab of the Excel Ribbon, thus making it a whole lot easier to select the correct command with either your finger or stylus. Even when running Excel on a computer without any touch capabilities, you can still add the Touch/Mouse Mode button to the Quick Access toolbar and use touch spacing to make it easier to select Tab commands with your mouse.

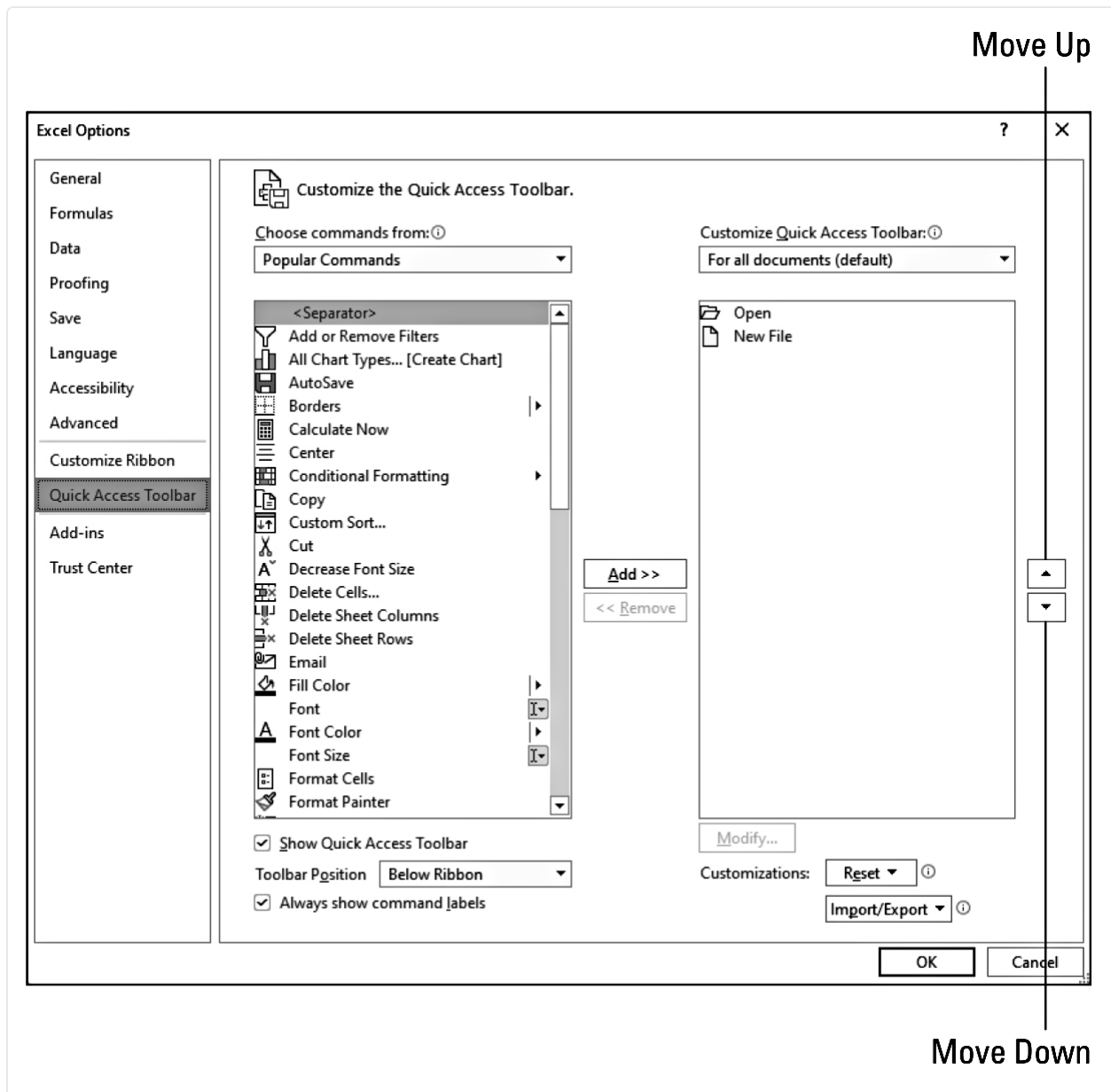
**Adding Ribbon commands to the Quick Access toolbar**

Excel makes it super-easy to add a command from any tab on the Ribbon to the Quick Access toolbar. To add a Ribbon command, right-click its command button on the Ribbon and then click Add to Quick Access Toolbar. Excel adds the command button to the very end of the Quick Access toolbar, immediately to the left of the Customize Quick Access Toolbar button.

If you want to move the command button to a new location on the Quick Access toolbar or group it with other buttons on the toolbar, you need to click the Customize Quick Access Toolbar button and then click More Commands.

Excel then opens the Excel Options dialog box with the Quick Access Toolbar tab selected (similar to the one shown in Figure 2-2). Here, Excel shows all the buttons currently added to the Quick Access toolbar in the order in which they appear from left to right on the toolbar corresponding to their top-down order in the list box on the right side of the dialog box.

**FIGURE 2-2: USE THE BUTTONS ON THE QUICK ACCESS TOOLBAR TAB OF THE EXCEL OPTIONS DIALOG BOX TO CUSTOMIZE THE APPEARANCE OF THE QUICK ACCESS TOOLBAR.**



To reposition a particular button on the bar, click it in the list box on the right and then click either the Move Up button or the Move Down button (pointed out in Figure 2-2) until the button is promoted or demoted to the desired position on the toolbar.

***Remember***

You can add separators to the toolbar to group related buttons. To do this, click the <Separator> selection at the top of the list box on the left and then click the Add button twice to add two. Then, click the Move Up or Move Down button to position one of the two separators at the beginning of the group and the other at the end. You can always return the Quick Access toolbar to its default button-free state by choosing Reset→Reset Only Quick Access Toolbar.

***Tip***

If you've added too many buttons to the Quick Access toolbar and can no longer read the workbook name, you can reposition the Quick Access toolbar so that it appears beneath the Ribbon immediately on top of the Formula bar. To do this, click the Customize Quick Access Toolbar button at the end of the toolbar and then click Show Below the Ribbon.

**Adding non-Ribbon commands to the Quick Access toolbar**

You can also use the options on the Quick Access Toolbar tab of the Excel Options dialog box (refer to Figure 2-2) to add a button for any Excel command even if it's not one of those displayed on the tabs of the Ribbon:

1. **Select the type of command you want to add to the Quick Access toolbar from the Choose Commands From drop-down list box.**

The types of commands include the default Popular Commands, Commands Not in the Ribbon, All Commands, and Macros, as well as each of the standard and contextual tabs that can appear on the Ribbon. To display only the commands not displayed on the Ribbon, click Commands Not in the Ribbon near the top of the drop-down list. To display a complete list of all the Excel commands, click All Commands.

2. **Click the command whose button you want to add to the Quick Access toolbar in the Choose Commands From list box on the left.**
3. **Click the Add button to add the command button to the bottom of the list box on the right.**
4. **(Optional) To reposition the newly added command button so that it's not the last one on the toolbar, click the Move Up button until it's in the desired position.**
5. **(Optional) Repeat Steps 1 through 4 to add as many commands to the Quick Access toolbar as you feel like.**
6. **Click OK to close the Excel Options dialog box.**

## Adding Commands Lost From Earlier Excel Versions to the Quick Access Toolbar

### Tip

Although certain commands from earlier versions of Excel, such as Data→Form and View→Web Page Preview, did not make it to the Ribbon in Excel, this does not mean that they were entirely eliminated from the program. The only way, however, to revive these commands is to add their buttons to either the Quick Access toolbar or to the Ribbon after clicking the Commands Not in the Ribbon category from the Choose Commands From drop-down list on the Customization tab of the Excel Options dialog box.

## EXERCISING YOUR OPTIONS

Each time you open a new workbook, Excel makes a whole bunch of assumptions about how you want to interact with the program, how your worksheet data appears, how Excel calculates formula results, and much more. These assumptions may or may not fit the way you work and the kinds of worksheets you need to create.

In the following five sections, you get a quick rundown on how to change the most important default or *preference* settings in the Excel Options dialog box. This dialog box is the biggest Excel has, with a billion tabs (12 actually). From the Excel Options dialog box, you can control what things appear onscreen and how they appear, as well as when and how Excel calculates worksheets.

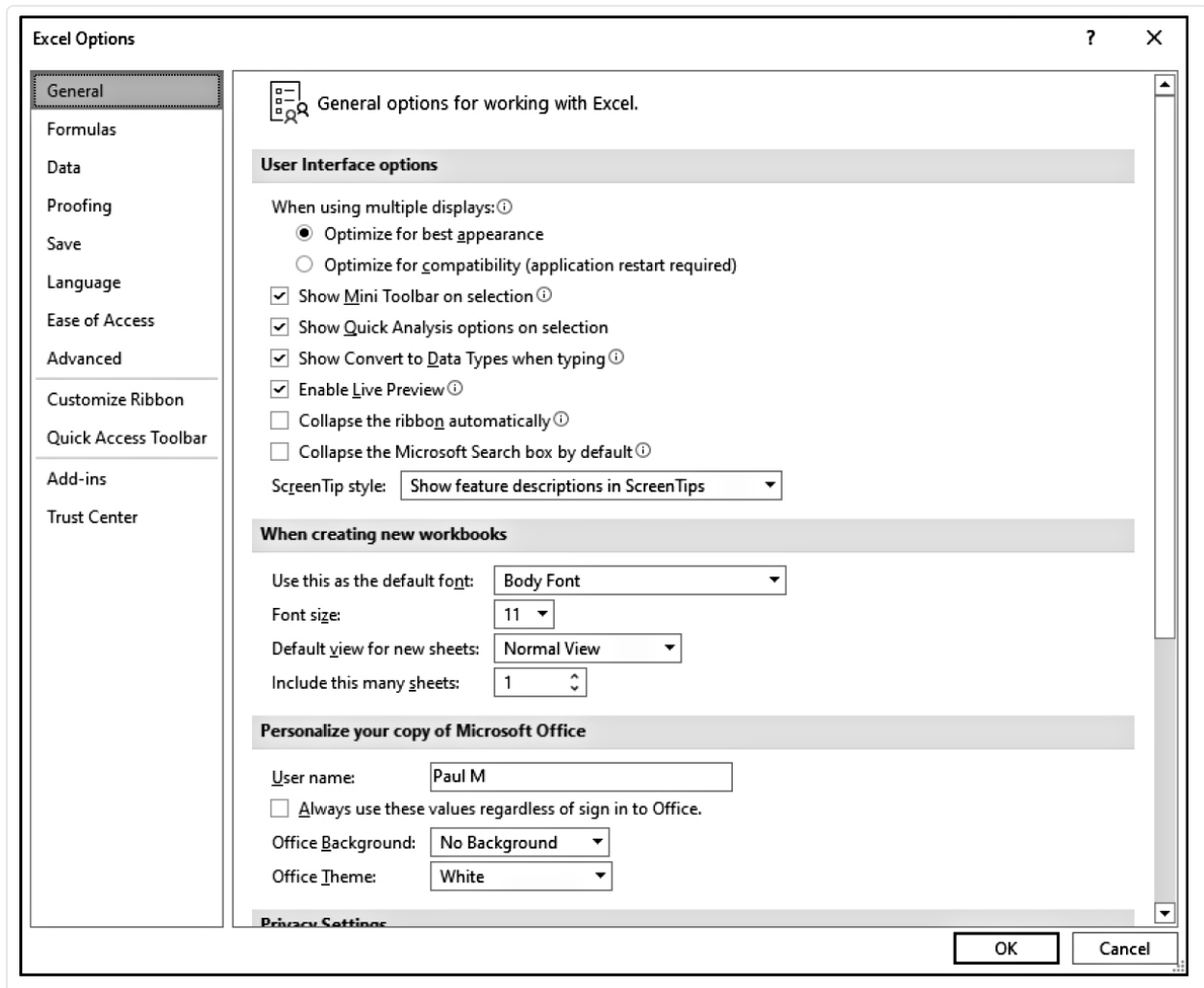
### Tip

Nothing discussed in the following five sections is critical to your being able to operate Excel. Just remember the Excel Options dialog box if you find yourself futzing with the same setting over and over again in most of the workbooks you create. In such a situation, it's high time to get into the Excel Options dialog box and modify that setting so that you won't waste any more time tinkering with the same setting in future workbooks.

## Changing some of the more universal settings on the General tab

The General tab (shown in Figure 2-3) is the first tab in the Excel Options dialog box. This tab is automatically selected whenever you first open this dialog box by choosing File→ Options or by pressing Alt+FT.

**FIGURE 2-3: THE GENERAL TAB'S OPTIONS ENABLE YOU TO CHANGE MANY GLOBAL EXCEL SETTINGS.**



The options on the General tab are arranged into six groups: User Interface Options, When Creating New Workbooks, Personalize Your Copy of Microsoft Office, Privacy Settings, LinkedIn Features, and Start Up Options.

### The User Interface Options group

The User Interface Options group contains the following check boxes and buttons:

- **When Using Multiple Displays:** Select the Optimize for Best Appearance setting to have the Excel program window plus whatever other windows you have open on the connected display screens look their very best. If you find that your Excel windows lose elements (such as scroll bars) when you drag them from one display to another, select the Optimize for Compatibility setting instead.