

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.

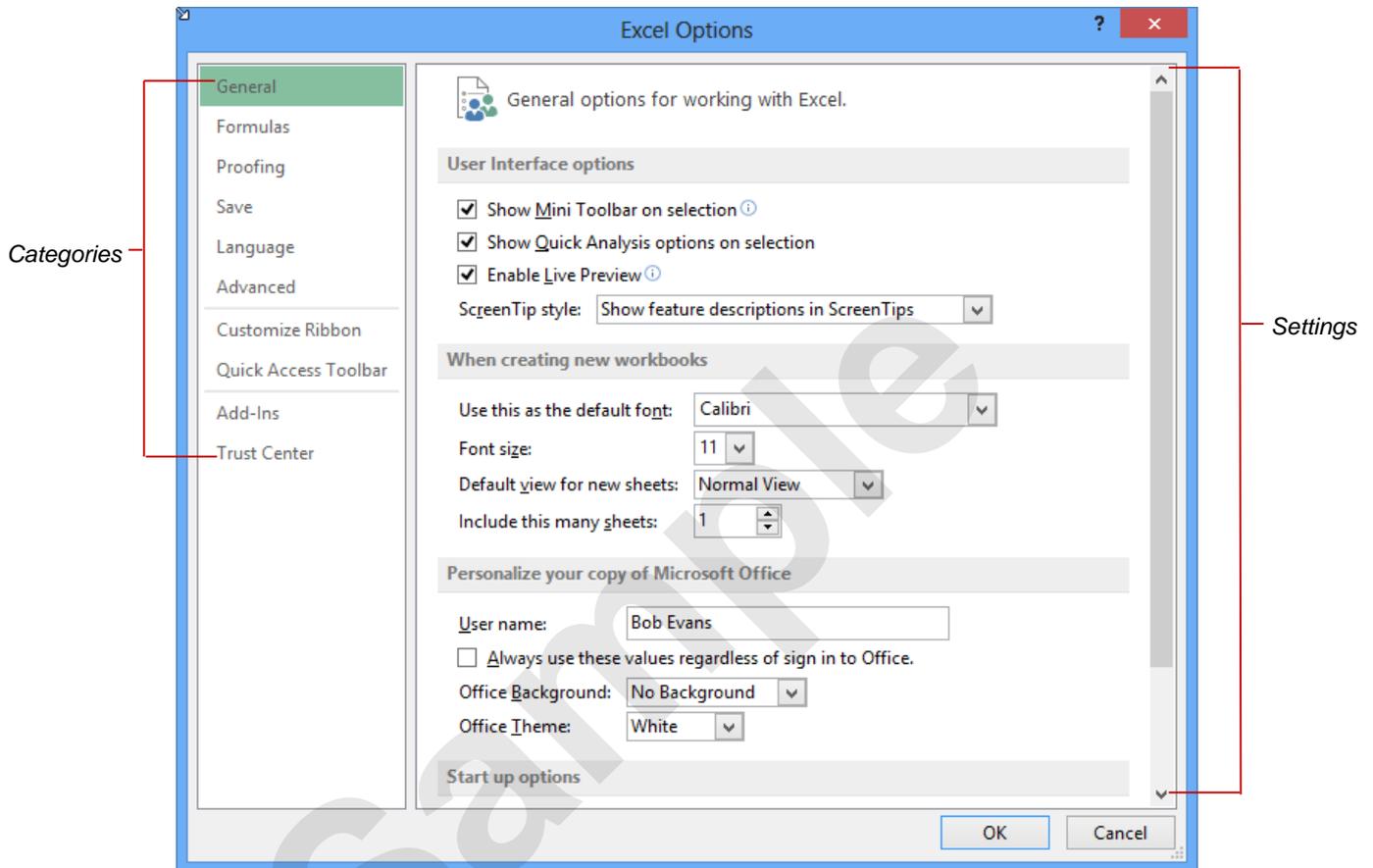
**In this session you will:**

- ✓ 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

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>General</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 ribbon.  |
| <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 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:

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

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

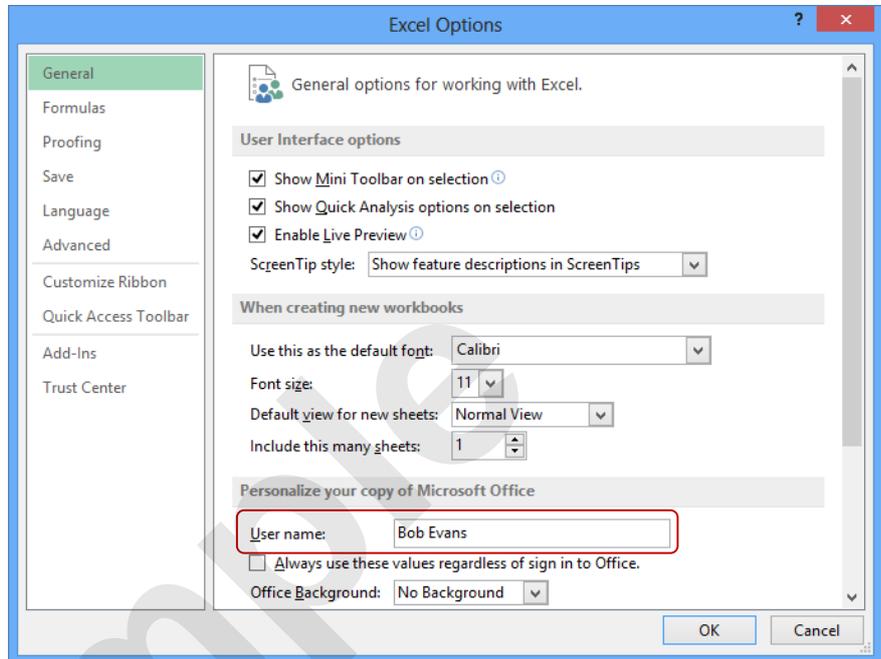
*Notice the 'General' category is selected by default in the left pane...*

- 2 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*



## 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 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 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 **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 and click on **Options** to display the **Excel Options** dialog box

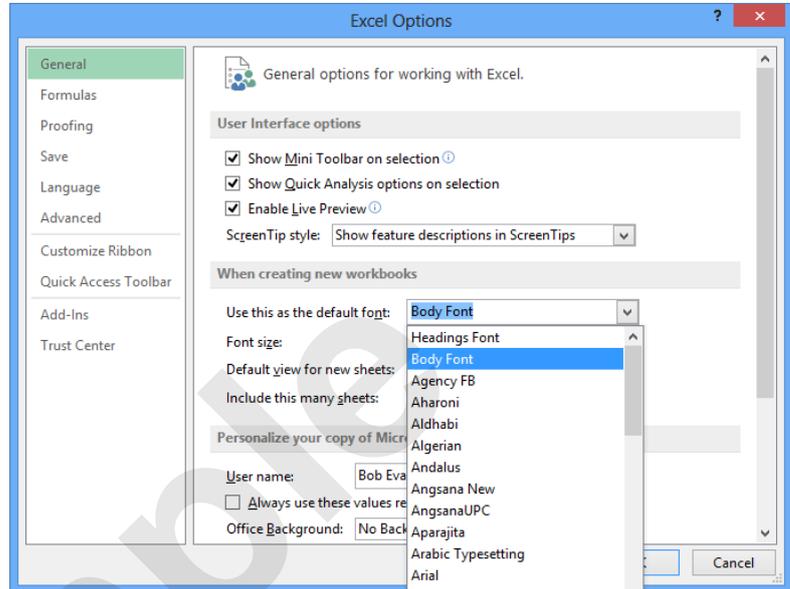
2 Under **When creating new workbooks**, click on the drop arrow for **Use this as the default font** to display a long list of available fonts  
The default is **Body Font** which is taken from the default theme and is **Calibri**...

3 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 and open a blank worksheet  
The new workbook will display **Arial Black** column and row headers...

5 Type **Heading** in cell **A1** and press **Enter**  
The text, too, is in **Arial Black**...

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



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|   | A       | B | C | D | E |
|---|---------|---|---|---|---|
| 1 | Heading |   |   |   |   |
| 2 |         |   |   |   |   |
| 3 |         |   |   |   |   |
| 4 |         |   |   |   |   |
| 5 |         |   |   |   |   |
| 6 |         |   |   |   |   |
| 7 |         |   |   |   |   |

## 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 as the default 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 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**

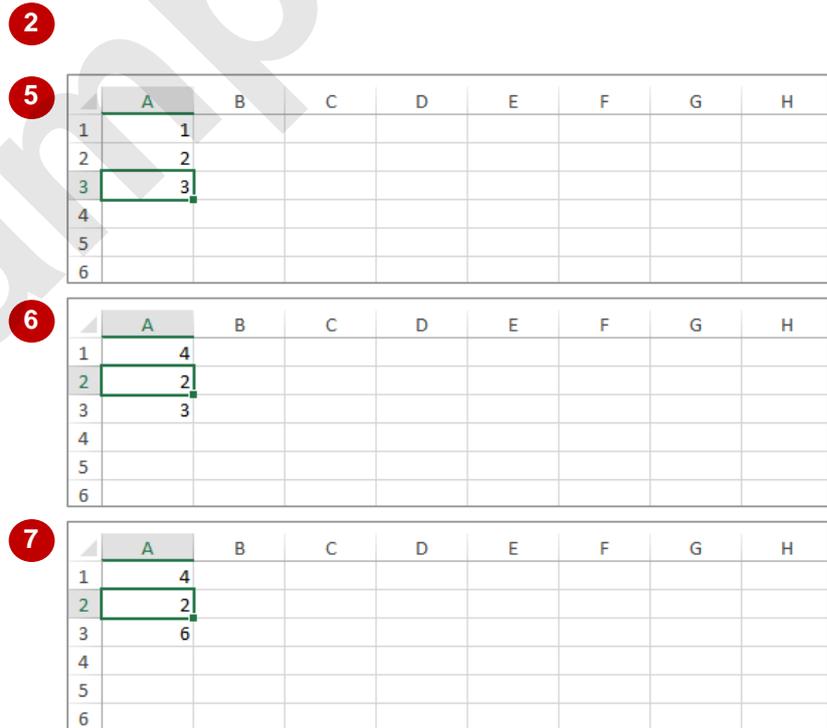
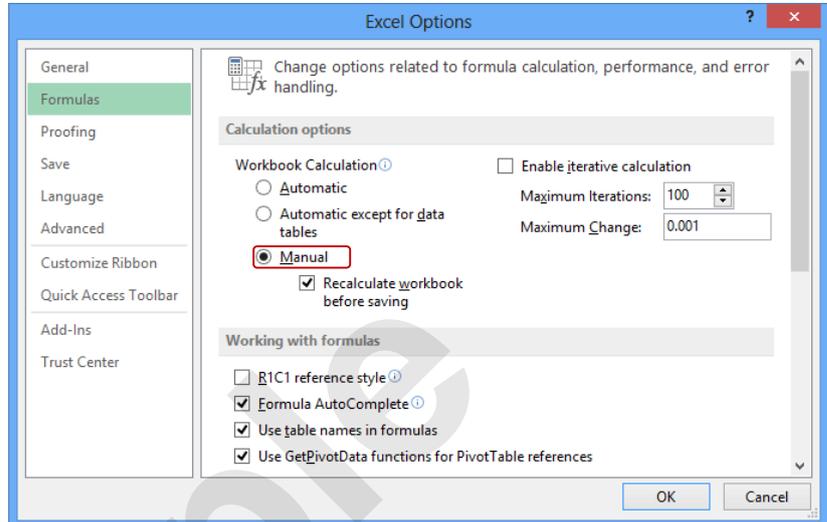
**formulas**, **Error Checking** and **Error checking rules**. To help you understand what the settings do, Excel includes information icons which display relevant help when you hover over them.

## Try This Yourself:

Same File

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

- 1 Click on the **FILE** tab and 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 Calculations** to select it
- 3 Click on **[OK]** to apply these settings
- 4 Type **1** in cell **A1** and **2** in cell **A2**, then click on cell **A3**
- 5 Click on the **HOME** tab and double-click on **AutoSum** in the **Editing** group to create and insert a **SUM** formula  
*The total of 1 and 2 is 3...*
- 6 Click on cell **A1** and 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 and click on **Options**
2. Click on **Formulas**
3. Make the required changes
4. Click on **[OK]**

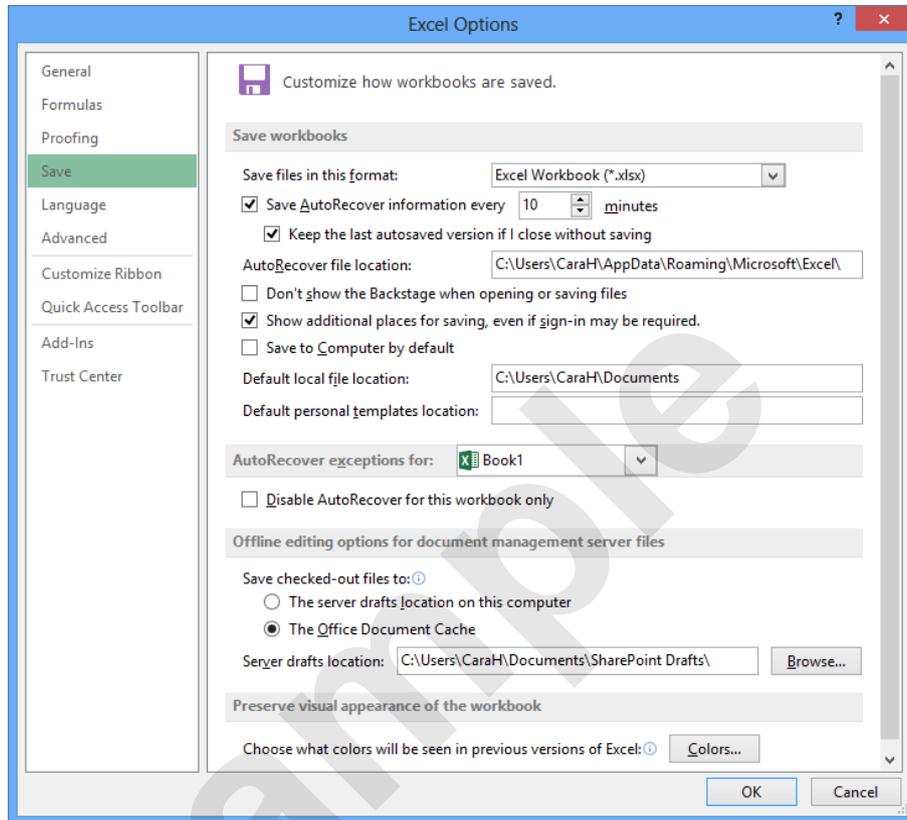
## Handy to Know...

- 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 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

### **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**.

### **Save date and time values using ISO 8601 date format**

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.

### **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

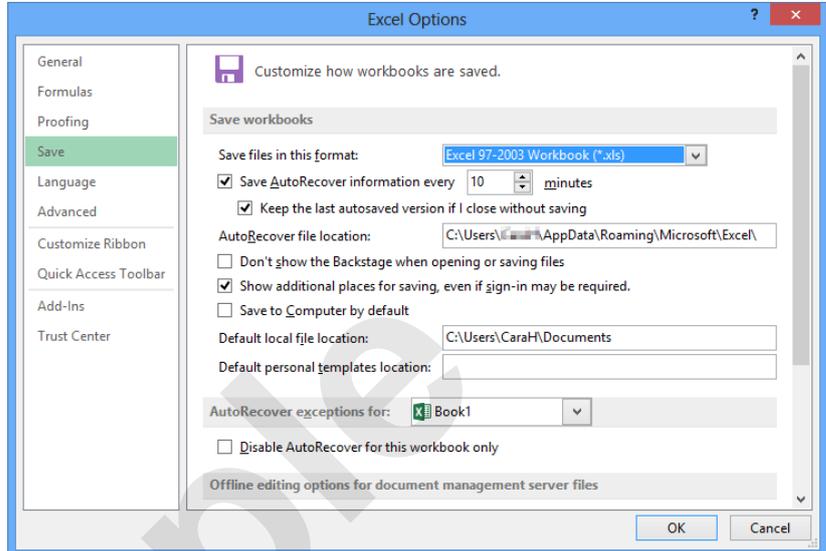
a different default save format. This is great if you need to save all of your spreadsheets in **Excel 97-2003 Spreadsheet** format for compatibility reasons.

## Try This Yourself:

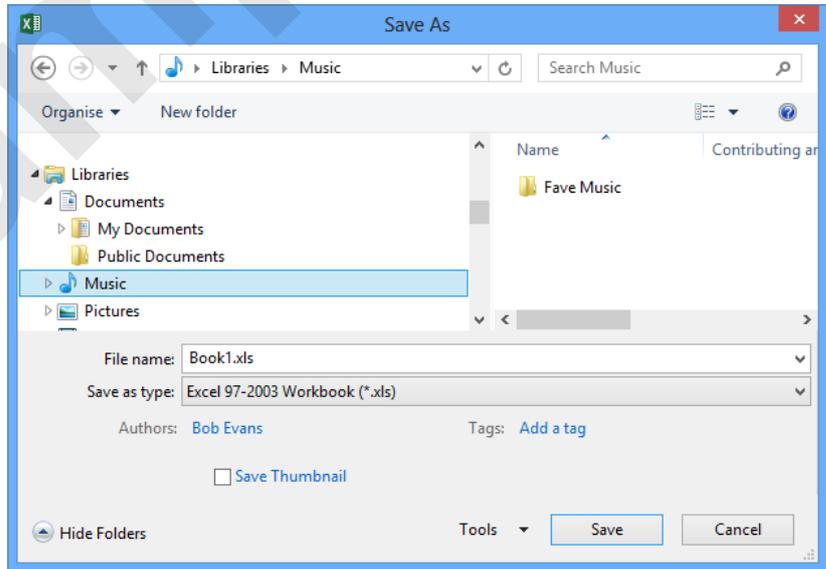
Same File

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

- 1 Click on the **FILE** tab and 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** and click on **Excel 97-2003 Workbook (\*.xls)**
- 3 Click on **[OK]** to save the changes
- 4 Open a blank workbook
- 5 Click on the **FILE** tab, click on **Save**, click on **Computer** in the middle pane 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)**



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## For Your Reference...

To **set save options**:

1. Click on the **FILE** tab and click on **Options**
2. 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

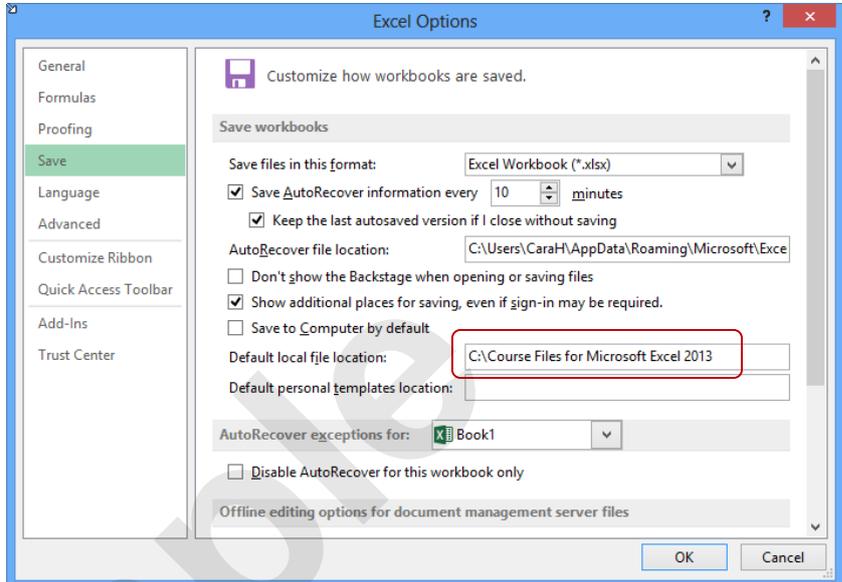
the predefined folder called **Pictures** under your user name. The only location that you can change is where Excel looks for your spreadsheet files. This is known as the **Default file location**.

## Try This Yourself:

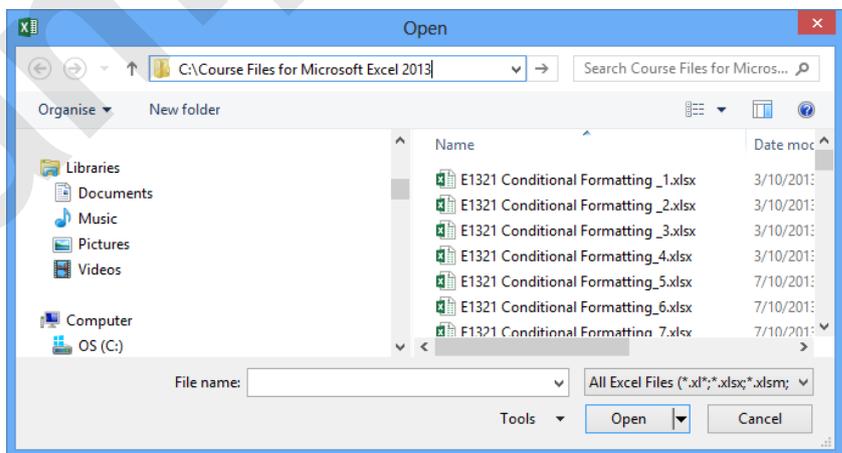
Open File

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 file location** and write the path down so that you can restore it later
- 3 Type **C:\Course Files for Microsoft Excel 2013**
- 4 Click on **[OK]** to apply the setting
- 5 Click on the **FILE** tab click on **Open**, click on **Computer** 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



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## For Your Reference...

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

1. Click on the **FILE** tab and 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**.





# PIVOTTABLE FEATURES

PivotTables provide a very easy and convenient way of analysing data in lists and external databases. Once you have mastered the basics of how they work and how they are created, you are ready to begin a journey into some of the more intricate and advanced aspects of PivotTable design, operation, and even formatting.

## In this session you will:

- ✓ learn how to use more than just the two standard field variables in a **PivotTable**
- ✓ learn how to count the values in a **PivotTable** and perform other summary operations
- ✓ learn how to format the values in a **PivotTable**
- ✓ learn how to hide and show grand totals in a **PivotTable**
- ✓ learn how to switch **PivotTable** report subtotals on and off
- ✓ learn how to show values in a **PivotTable** as a percentage of total
- ✓ learn how to find the difference between specific values in a **PivotTable**
- ✓ learn how to group fields in a **PivotTable**
- ✓ learn how to create a running total in a **PivotTable**
- ✓ learn how to create calculated fields in a **PivotTable**
- ✓ learn how to create custom names for **PivotTable** fields
- ✓ learn how to create calculated items in a **PivotTable**
- ✓ learn how to make changes to **PivotTable** options
- ✓ learn how to sort values in a **PivotTable**.

# USING COMPOUND FIELDS

Simple PivotTables use only one field for **Column Labels** or **Row Labels**. In an Excel PivotTable you can use more than one field for either the **Column Labels** or **Row Labels** to

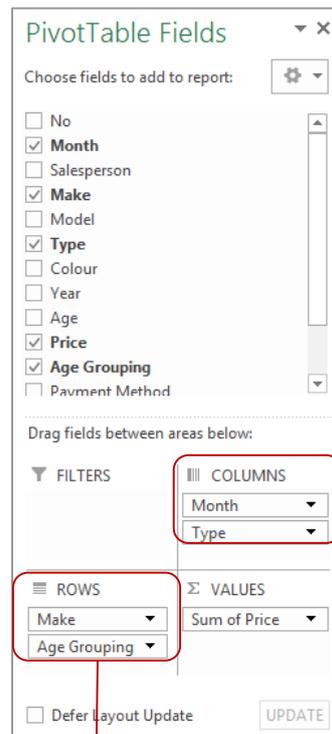
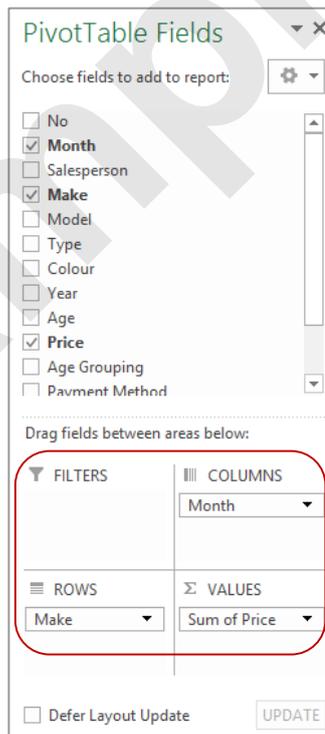
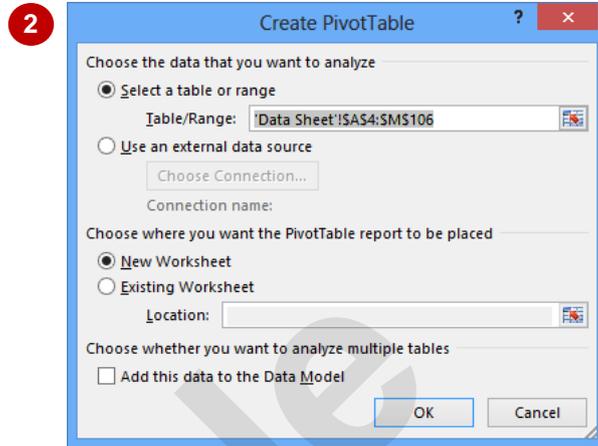
create more complex analysis of the data. Once you have chosen a second field for analysis that field in effect becomes a **sub-group** of the field above it in the area.

## Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *E1340 PivotTable Features\_1.xlsx...*

- 1 Click anywhere in the list of car sales
- 2 Click on the **INSERT** tab and click on **PivotTable** in the **Tables** group to display the **Create PivotTable** dialog box
- 3 Ensure that **Select a table or range** and **New Worksheet** are both selected, then click on **[OK]** to create a PivotTable  
*Notice the PivotTable Fields pane displays automatically...*
- 4 In the **PivotTable Fields** pane, click on and drag the **Month**, **Make** and **Price** fields into the **COLUMNS**, **ROWS** and **VALUES** areas, as shown
- 5 Repeat step 4 to position the **Age Grouping** field below **Make** in the **ROWS** area  
*This will create an Age Grouping sub-total for each vehicle Make in the table...*
- 6 Repeat step 4 to position the **Type** field below **Month** in the **COLUMNS** area to see monthly sales by **Make** and **Age Grouping** for vehicle **Types**



## For Your Reference...

To **use compound fields**:

1. Construct a PivotTable and insert fields in the normal way
2. In the **PivotTable Fields** pane, click on and drag additional fields to the areas under **Drag fields between areas below**

## Handy to Know...

- You can change how the fields are displayed in the **PivotTable Fields** pane by clicking on **Tools** and selecting an option. For instance, if you select **Fields Section and Areas Section Side-By-Side**, the pane will display the areas section to the right of the fields list rather than below it.