

Handout – Manage Workbooks and Their Design

Manage workbooks

Save a workbook as a template

To create a “cookie cutter” for future spreadsheets

Procedure:

Click: File > Save as

Change Type to Excel Template (*.xlt)

Hide or display ribbon tabs

Hide the tabs to provide more viewing space

Procedure:

Right-click any of the tabs (e.g., Home or Insert)

Choose: Collapse the Ribbon

Manage workbook review

Protect a workbook

You can:

Protect from opening

Protect the workbook structure

Protect from editing

Procedure:

Click: File > Info

Click: Protect Workbook

Choose the type of protection desired

Manage workbook versions

OneDrive and SharePoint automatically save versions of your Office files

To Recover a Previous Version of a File:

Click: File > Info to enter the Backstage View

Click: View and restore previous versions

Select the version you want to restore

Configure formula calculation options

In large spreadsheets, automatic recalculation may take too long. You can switch to manual recalculation:

Procedure:

Click: File > Options > Formulas

Under Workbook Calculation, click Manual

Themes

Change the Theme

Themes are collections of fonts and colors. By changing a workbook's theme, you can quickly change its look.

Procedure:

Examine the Cell Styles of the current theme

Click: Home > Cell Styles, or click More in Styles

Note the different colors and fonts

Click: Design > Theme

Choose a desired theme

Examine the Cell Styles of the new theme

Change a Theme Color

This will create a new Custom Color Scheme

Procedure:

Click: Page Layout > Colors > Customize Colors

Change the color of one of the elements

At the bottom, type a name

Click: OK

Shapes, Gradients, and Pictures

Insert a Shape

There are about 100 shapes to choose from

Procedure:

Click: Insert > [Illustrations] > Shapes

Choose the desired shape

With mouse, click & drag opposite corners of the shape

Adjust the size with the sizing handles

Adjust the position with the mouse

Adjust the color of the shape:

Click the shape

In Format tab, click More button in the Shape Styles group

Choose a desired color

Apply a Gradient

Gradients make shapes stand out

Procedure:

Right-click the shape and choose Format Shape...

In Format Shape task pane, adjust the gradient as desired

Apply a Shadow

A shadow helps to lift a shape above the screen

Procedure:

Click the shape to reveal the Format tab

Click: Format > Shape Effects > Shadow

Choose shadow (e.g., Outer > Offset: Bottom Right)

Insert an Online Picture

There are many online icons you can use. (Note: some graphic elements are protected by copyright.)

Procedure:

Click: Insert > [Illustrations] > Online Pictures

In search box, enter a search phrase (e.g., clipart birds)

Double-click the desired image

Adjust the size and position of the image

Group Graphic Elements

This makes it easy to move elements around

Procedure:

Select two or more graphic elements

Click: Format > Group Objects > Group