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Microsoft Excel Inside **OUT**

(Office 2021 and Microsoft 365)

Bill Jelen

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(Office 2021 and Microsoft 365)

Bill Jelen

MrExcel

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To Tom Vansweden and Bill & Katie Cullen. Thanks for being great neighbors.



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About the author

Bill Jelen, Excel MVP and the host of MrExcel.com, has been using spreadsheets since 1985, and he launched the MrExcel.com website in 1998. He has produced more than 2,400 episodes of his daily video podcast, *Learn Excel from MrExcel*. He is the author of 64 books about Microsoft Excel and writes the monthly Excel column for *Strategic Finance* magazine. Before founding MrExcel.com, Bill Jelen spent 12 years in the trenches—working as a financial analyst for finance, marketing, accounting, and operations departments of a \$500 million public company. When he is not geeking out about Excel, you will find him kayaking Sykes Creek or photographing rocket launches from Cape Canaveral. Check out his photography at WeReportSpace.com. He lives in Merritt Island, Florida, with his wife, Mary Ellen.

Inside OUT

You can find my favorite tricks in the Inside Out sidebars throughout this book.

If you have a favorite Excel trick or technique that is not in this book, consider sending it via email to InsideTips@MrExcel.com. Anyone sending in a tip that is new to me will win bragging rights and a collectible Excel Guru patch, designed by the same people who design the NASA mission patches.



Introduction

Microsoft 365 Excel is now the dominant way to purchase Excel. Microsoft did a good job of offering more value to Microsoft 365. They are reluctantly releasing a perpetual edition of Excel 2021, but they say that it is only for specific scenarios where people do not have access to the Internet.

Those people without the Internet will be paying quite a premium for an obsolete version of Excel without any of the connected features. The price for the perpetual version of Office increased by 10% to \$440 per device for Office 2021. In contrast, you can license Microsoft 365 for five devices for \$99 per year.

The Excel team has been responsive to items requested through the [Excel.UserVoice.com](https://www.exceluservoice.com) website, and many small features and improvements have happened since the last edition of this book.

- You can now unhide multiple worksheets at once.
- The Conditional Formatting Rules Manager dialog box is now resizable.
- Scroll horizontally with Ctrl+Shift+Wheel.
- Increased the 218-character file limit.
- When copying a worksheet, added a Yes To All option for dealing with Name conflicts.
- The Excel team added a new padlock icon to the sheet tabs to indicate if a sheet was protected. When this was met with a chorus of complaints, the lock icon was promptly removed.
- The `SINGLE` function, used to trigger implicit intersection, was replaced with the `@` operator.
- You can insert new icons and cut-out people in Excel.
- Images can easily be set to semi-transparent so you can see the data behind an image.
- Right-click any object and choose Save As Image to create an image of a chart, SmartArt, shape, and so on.
- You can “write” data using the Action Pen.
- Multiple task panes now collapse into a single strip at the right side of Excel.
- There is a new Accessibility Checker tab in the ribbon.
- Several performance improvements make Excel faster.

There are also several large changes made to Excel:

- Co-authoring continues to improve. You can now @Mention people in comments and create tasks. Excel will allow each person to have their own version of the data with filters and sorting that only they can see. The new Show Changes feature lets you see changes made to your worksheet in the last 60 days. Read more in Chapter 28, “Collaborating in Excel.”
- A new XLOOKUP function is designed to improve on VLOOKUP and INDEX/MATCH functions. Excel also offers XMATCH. See Chapter 9, “Using powerful functions: logical, lookup, and database functions.”
- New LET and LAMBDA functions let you store logic in a formula. See Chapter 10, “Using names, LET, LAMBDA, and Data Types in Excel.”
- There are new features in Power Query (found in the Get & Transform group on the Data tab). You can now import from PDF files. You can also define your own custom data types. Read about Power Query in Chapter 13, “Transforming data with Power Query.”
- Data types improve with the ability to return photos and arrays. There are several new categories from Wolfram including weather history for all cities. See Chapter 10, “Using names, LET, LAMBDA, and Data Types in Excel.”
- The artificial-intelligence Ideas feature is re-branded as “Analyze Data.” The new version will create dynamic array formulas and allow you to ask a question about your data. Excel analyzes up to 250,000 cells of data and uses artificial intelligence to provide more than 30 charts. For now, this feature is exclusive to Office 365. See Chapter 15, “Using pivot tables to analyze data.”
- Although this book covers VBA as the macro language, there is one new interesting feature in programmability: A new TypeScript macro language is available for Excel Online.

The Excel team continues to innovate, with several new features planned for the upcoming years.

Who this book is for

This book is for anyone who uses Excel twenty hours a week or more. Whether you use Excel for organizing your to-do list or to analyze 5 million rows of call center data every day, this book includes the information you need to solve problems quickly and easily.

Assumptions about you

I like to believe most of my readers use Excel 40 hours a week, and those are the weeks you are on vacation. At the very least, I'm assuming you regularly use Excel for your job. You are comfortable using Excel formulas beyond AutoSum. You likely know and use VLOOKUP and Pivot Tables regularly. You are looking for the fastest and most efficient ways to finish tasks in Excel.

How this book is organized

This book gives you a comprehensive look at the various features you will use. This book is structured in a logical approach to all aspects of using the Windows-based versions of Excel, with some mentions of Excel Online when there is important functionality available only in Excel Online.

Part I, "The Excel interface," covers the ribbon, customizing Excel, and keyboard shortcuts.

Part II, "Calculating with Excel," covers all Excel calculation functions.

Part III, "Data analysis with Excel," covers Power Query, pivot tables, and other features that help you perform data analysis.

Part IV, "Excel visuals," covers charting, 3D Map, and collaborating in Excel.

About the companion content

I have included the Excel workbooks I used to create the screenshots in this book to enrich your learning experience. You can download this book's companion content from the following page:

MicrosoftPressStore.com/Excel365insideout/downloads

The companion content includes the following:

- Workbooks used to create the examples in the workbook
- Sample data that you can use to practice the concepts in the book
- VBA macros from Chapter 19

Acknowledgments

Thanks to all the Excel project managers who were happy to take the time to discuss the how or why behind a feature. At various times, Sonia Atchinson, Andrew Becker, Darcy Cain, Elisabetta Caldesi, Howie Dickerman, Mar Gines, Sharon Grimshaw, Chris Gross, Urmi Gupta, Curt Hagenlocher, Guy Hunkin, Brian Jones, Aimee Leong, Vashisht Mahana, Michelle Maislen, Joe McDaid, David Monroy, Micah Myerscough, Meenakshi Naren, Jeet Mukeshkumar Patel, Eric Patterson, Cuong Pham, Sudhi Ramamurthy, Prash Shirolkar, Rochelle Sonnenberg, Allie Wieczorek, and Bill Wu pitched in to help with a particular issue. Thanks to Tracy Syrstad, Barb Jelen, Mary Ellen Jelen, Zeke Jelen, and Suat Ozgur for making up the MrExcel.com team.

Other Excel MVPs often offered their take on potential bugs. I could send a group email over a weekend, and someone like Ken Puls, Roger Govier, Liam Bastick, Jon Peltier, Jan-Karel Piet-erse, Charles Williams, Brad Yundt, Nabil Mourad, Wyn Hopkins, David Benaim, Oz du Soleil, or Ingeborg Hawighorst would usually respond. I particularly loved launching a missive just after the Microsoft crew in Building 36 went home on Friday evening, knowing they would return on Monday morning with 40 or 50 responses to the conversation. Without any Excel project managers to temper the discussion, we would often have designed massive improvements that we would have liked to have implemented in Excel. Someone would show up on Monday and tell us why that could never be done.

Thanks to the people who frequently leave constructive comments at my MrExcel.com YouTube channel: Mike Girvin, Rico S, Wayne Edmonson, Darryl Morgan, ExcelLambda, Matt Schoular, Patrick Schardt, John Borg, Oz du Soleil, Nader Mounir, Prakash Ravikumar, Paul Sparrow, Chris M, Bradford Myers, Oakley Turvey, DRSteele, Celia Alves, TSSC, Brian Spiller, Jonathan, and Jeff Davis. Several Excel problems have been solved by suggestions from this group.

Bob Umlas is the smartest Excel guy that I know, and I was thrilled to have him as the technical editor for this book.

Putting together a book requires careful coordination with editors, proofreaders, and compositors. My sincere thanks to Charlotte and Rick Kughen for guiding this book to completion. Thanks to Sarah Kearns for having the attention to detail in proofreading and to Tricia Bronkella for her awesome compositor skills.

I've been writing books for Loretta Yates since 2004. If my spreadsheet is correct, this is our 30th project. Thanks for 17 years of trusting me with your books.

At the MrExcel website, Suat Ozgur manages the database of more than 1 million Excel posts and makes sure that Google likes our content.

I wrote this book at the Kola Mi Writing Camp. The staff there was fantastic.

Mary Ellen Jelen did a great job of keeping me on track with this book.

Support and feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata, updates, and book support

We've made every effort to ensure the accuracy of this book and its companion content. You can access updates to this book—in the form of a list of submitted errata and their related corrections—at:

MicrosoftPressStore.com/Excel365insideout/errata

If you discover an error that is not already listed, please submit it to us at the same page.

For additional book support and information, please visit *MicrosoftPressStore.com/Support*.

Please note that product support for Microsoft software and hardware is not offered through the previous addresses. For help with Microsoft software or hardware, go to *<http://support.microsoft.com>*.

Stay in touch

Let's keep the conversation going! We're on Twitter:

<http://twitter.com/MicrosoftPress>

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The Excel Options dialog box offers hundreds of changes you can make in Excel. This chapter walks you through examples of customizing the ribbon and discusses some of the important option settings available in Excel.

Performing a simple ribbon modification

Suppose that you generally like the ribbon, but there is one icon that seems to be missing. You can add icons to the ribbon to make it customized to your preference. If you feel the Data tab would be perfect with the addition of a pivot table icon, you can add it (see Figure 3.1).

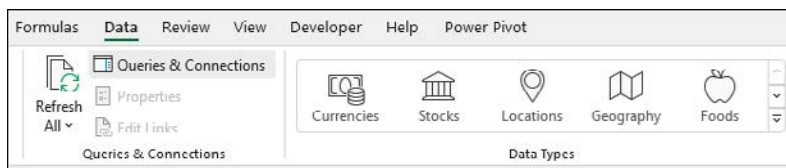


Figure 3.1 Decide where the new command should go on the ribbon.

To add the pivot table command to the Data tab, follow these steps:

1. Right-click the ribbon and select **Customize The Ribbon**.
2. In the right list box, expand the Data tab by clicking the + sign next to Data.
3. Click the **Sort & Filter** entry in the right list box. The new group will go after this entry.
4. Click the **New Group** button at the bottom of the right list box. A **New Group (Custom)** item appears after **Sort & Filter**, as shown in Figure 3.2.

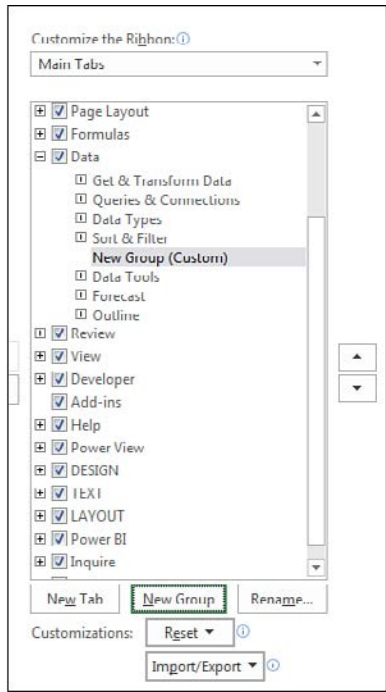


Figure 3.2 Commands must be added to a new group.

5. While the New Group is selected, click the Rename button at the bottom of the list box. The Rename dialog box appears.
6. The Rename dialog box offers to let you choose an icon and specify a name for the group. The icon is shown only when the Excel window is too small to display the whole group. Choose any icon and type a display name of **Pivot**. Click OK.
7. The left list box shows the popular commands. You could change Popular Commands to All Commands and scroll through 2,400 commands. However, in this case, the commands you want are on the Insert tab. Choose All Tabs from the top-left drop-down menu.
8. Expand the Insert tab, and then expand Tables. Click PivotTable in the left list box.
9. Click the Add button in the center of the dialog box to add PivotTable to the new custom Pivot group on the ribbon. Excel automatically advances to the next icon of Recommended PivotTables. Click Add again.
10. In the drop-down menu above the left list box, select All Commands. The left list box changes to show an alphabetical list of all commands.

11. Scroll through the left list box until you find PivotTable And PivotChart Wizard. This is the obscure entry point to create Multiple Consolidation Range pivot tables. Select that item in the left list box. Click Add. At this point, the right side of the dialog box should look like Figure 3.3.

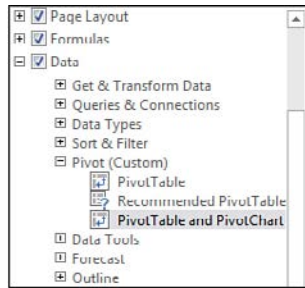


Figure 3.3 Three new icons have been added to a new custom group on the Data tab.

12. Click OK.

Figure 3.4 shows the new group in the Data tab of the ribbon.

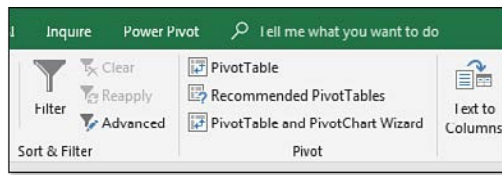


Figure 3.4 The results appear in the ribbon.

Adding a new ribbon tab

To add a new ribbon tab, follow these basic steps:

1. Right-click the ribbon and select Customize The Ribbon.
2. Click New Tab and rename the tab.
3. Add New Group(s) to the new tab.
4. Add commands to the new groups.

As you go through the steps to add a new ribbon tab, you will discover how absolutely limiting the ribbon customizations are. You have no control over which items appear with large icons and which appear with small icons. This applies even to galleries. If you add the Cell Styles

gallery to a group on the ribbon, it always appears as an icon instead of a gallery, even if it is the only thing on the entire ribbon tab (see the left icon in Figure 3.5). The workaround is to add an entire built-in group to the tab. On the right of Figure 3.5, the entire Styles group was added. The Cell Styles gallery is now allowed to appear as a gallery.

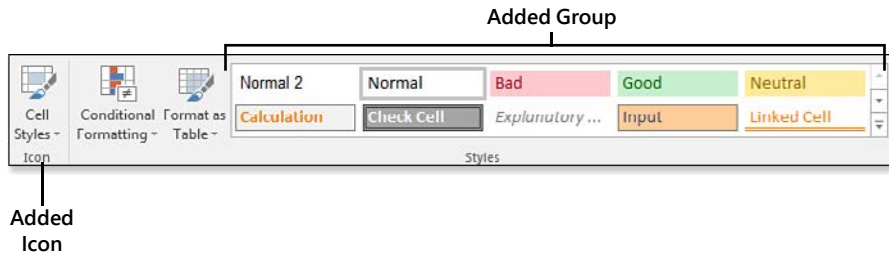


Figure 3.5 When added to a custom group, a gallery is reduced to a single icon with a drop-down menu.

TROUBLESHOOTING

When customizing the ribbon using this interface, you cannot control which icons appear large and which appear small in the ribbon.

The Excel ribbon contains a logical mix of large icons for important features and small icons for minor features. If you would like to create a new group, you cannot control which icons will be small and which will be large.

You can either learn RibbonML or use a third-party tool such as Ribbon Commander to create custom ribbon tabs. Try a free trial of Ribbon Commander at <https://mrx.cl/ribboncommander>.

Sharing customizations with others

If you have developed the perfect ribbon customization and you want everyone in your department to have the same customization, you can export all the ribbon customizations.

To export the changes, follow these steps:

1. Right-click the ribbon and select **Customize The Ribbon**.
2. Below the right list box, select **Import/Export, Export All Customizations**.
3. Browse to a folder and provide a name for the customization file. The file type will be **.exportedUI**. Click **OK**.
4. In Windows Explorer, find the **.exportedUI** file. Copy it to a coworker's computer.

5. On the coworker's computer, repeat step 1. In step 2, select Import Customization File. Find the file and click OK.

NOTE

This is an all-or-nothing proposition. You cannot export your changes to one custom tab without exporting your changes to the Data and Home tabs.

Questions about ribbon customization

Can the customizations apply only to a certain workbook?

No. The Customize the Ribbon command in Excel applies to all workbooks.

Can I reset my customizations and go back to the original ribbon?

Right-click the ribbon and select Customize The Ribbon. Below the right list box, select Reset > Reset All Customizations.

How can I get complete control over the ribbon?

Learn RibbonX and write some VBA to build your own ribbon.

- For more information on building your own ribbon, see *RibbonX: Customizing the Office 2007 Ribbon*, by Robert Martin, Ken Puls, and Teresa Hennig (Wiley, ISBN 0470191112).

These ribbon customizations are really lacking. Is there another option that doesn't require me to write a program?

Yes, some third-party ribbon customization programs are available. For example, check out a free one from Excel MVP Andy Pope at https://andypope.info/vba/ribboneditor_2010.htm.

Using the Excel Options dialog box

Open the File menu and select Options from the left navigation pane to open the Excel Options dialog box. The dialog box has categories for General, Formulas, Data, Proofing, Save, Language, Ease Of Access, Advanced, Customize Ribbon, Quick Access Toolbar, Add-Ins, and Trust Center. The Trust Center leads to another 13 categories.

To the Excel team's credit, they tried to move the top options to the General category. Beyond those 19 settings, though, are hundreds of settings spread throughout 24 categories in the Excel Options and Trust Center. Table 3.1 gives you a top-level view of where to start looking for settings.

Table 3.1 Excel Options dialog box settings

Category	Types of Settings
General	The most commonly used settings, such as user interface settings, the default font for new workbooks, number of sheets in a new workbook, customer name, and Start screen.
Formulas	All options for controlling calculation, error-checking rules, and formula settings. Note that options for multithreaded calculations are currently considered obscure enough to be on the Advanced tab rather than on the Formulas Tab.
Data	The data category is new in 2017. It offers the new Edit Default Layout for pivot tables, several other pivot table options, and then a series of checkboxes to bring back the legacy Get Data categories. When Power Query replaced Get Data on the Data tab of the ribbon, the old legacy icons were removed.
Proofing	Spell-check options and a link to the AutoCorrect dialog box.
Save	The default method for saving, AutoRecovery settings, legacy colors, and web server options.
Language	Choose the editing language, ToolTip language, and Help language.
Ease of Access	Options available are Provide Feedback With Sound, Provide Feedback With Animation, Screen Tip Style, and the default document font size.
Advanced	All options that Microsoft considers advanced, spread among 15 headings.
Customize Ribbon	Icons to customize the ribbon.
Quick Access Toolbar	Icons to customize the Quick Access Toolbar (QAT).
Add-Ins	A list of available and installed add-ins. New add-ins can be installed from the button at the bottom of this category.
Trust Center	Links to the Microsoft Trust Center, with 13 additional categories.

Getting help with a setting

Many settings appear with a small *i* icon. If you hover the mouse near this icon, Excel displays a super ToolTip for the setting. The ToolTip explains what happens when you choose the setting. It also provides some tips about what you need to be aware of when you turn on the setting. For example, the ToolTip in Figure 3.6 shows information about the calculation settings. It also explains that you should use the F9 key to invoke a manual calculation.

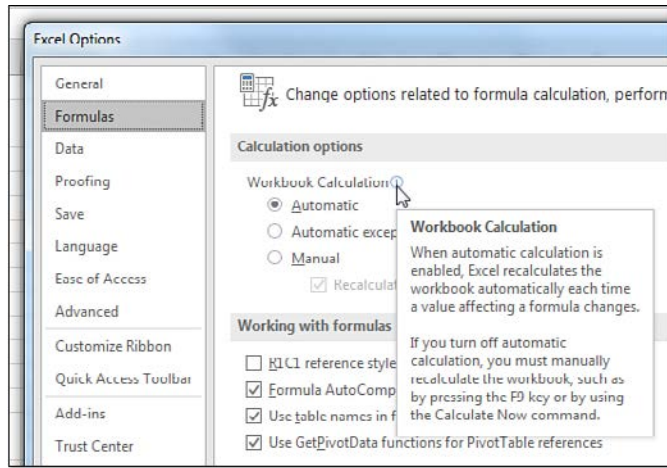


Figure 3.6 The *i* button explains many settings.

Inside OUT

The Excel team is actively listening to ideas suggested by their customers. Several of the settings in the following section were suggested by customers.

If you have a great idea that would make Excel easier, post your idea to Excel.UserVoice.com. Create a good title and use a slightly humorous tone when writing up how your idea would make the work life of millions of people easier.

After posting your idea, others can vote for your idea. As others browsing <https://msfeedbackprod.powerappsportals.com/feedback/> read your idea, they can vote. If you get above the 200-vote level, it is likely that your idea will be added to a future release of Office 365.

Recent new options in Excel

Excel today offers several new settings:

1. When Using Multiple Displays is found in the General category. Excel now supports newer High DPI displays, but many people might have two-monitor setups with one High DPI display and one older display. If you have problems when moving Excel between displays, choose Optimize For Compatibility from this setting.
2. Excel introduced data types for stocks, currency, geography, and more. In an effort to make the feature discoverable, if you enter city names into a few cells, Excel can offer to convert those cells to a Geography Data Type. This is great at first, but if it becomes

bothersome, unselect Show Convert To Data Types When Typing from the General category.

3. Excel offers a Search box in the title bar. This is designed for finding commands when you can't find them on the ribbon. If you think the Search box is taking up too much space, select Collapse The Microsoft Search Box By Default. It is found in the General category.
4. Microsoft added a dark mode to Excel. Use the Office Theme drop-down menu in the General category.
5. Near the bottom of the General category, you can assign which file extensions will open in Excel and ask Excel to notify you if it is not the default program for .XLSX and .XLSM files.
6. With the introduction of Dynamic Arrays, the Implicit Intersection behavior is different. If you attempt to write a formula with @ in the wrong places, Excel can warn you that the formula is not compatible with older versions of Excel. It offers to change the formula so it is backward compatible, as shown in Figure 3.7. To check any random formula, enter `=@ (the formula)` and see if Excel shows a dialog box. To turn off this behavior, on the Formulas category, unselect Suggest Formula Variations That Are Supported By Older Versions of Excel.

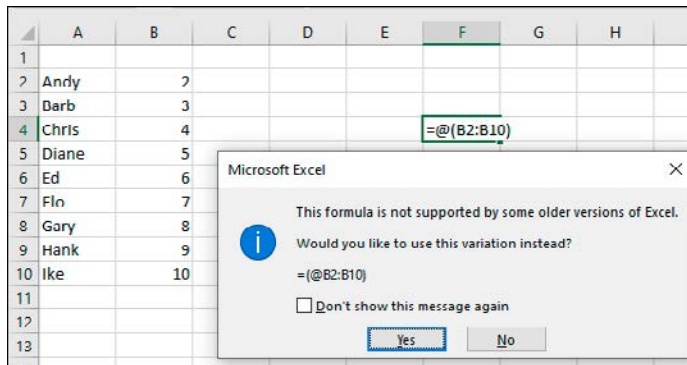


Figure 3.7 The @ will make sure that a formula designed to return a single value won't return an array in earlier versions of Excel.

7. There are two new error-checking options in the Formulas category. A warning about a Misleading Number Format appears if your formula points to a numeric cell, but the formula is formatted as a date, as shown in Figure 3.8. By choosing Update Format, the number format from the source cell will be copied to the formula cell. Another new error-checking option is Cells Containing Data Types That Couldn't Refresh. This alerts you if the linked data type cell could not be refreshed.

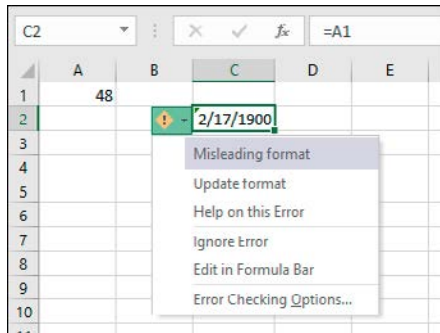


Figure 3.8 If a cell formatted as a date is pointing to cells formatted as a number, the Misleading Number Format warning displays.

8. Default PivotTable Layout is found in the new Data category. Change the default layout for all future pivot tables. Several items in the new Data category were moved to the Data category from the Advanced category.
9. Show Legacy Data Import Wizards is a series of seven choices in the new Data category. The Power Query tools debuted in Excel 2016 on the Data tab of the ribbon. These tools became so popular, Microsoft decided to remove the old Get External Data group from the ribbon, but some people had specific reasons why they liked the old icons. You can now add those old icons back by choosing From Access, From Web, From Text, From SQL Server, From OData Data Feed, From XML Data Import, or From Data Connection. If you choose something from this area, it will appear hidden on the ribbon. Look in Data, Get Data, Legacy Wizards.
10. Show Data Loss Warning when Editing Comma Delimited Files (*.csv) is found in the Save category. Excel used to nag you whenever you opened a file in CSV format. If you did not save the file as XLSX, it would warn you that you are about to lose formulas and formatting. A lot of people were tired of the nagging, and Microsoft turned off the nagging by default. If you need to be nagged, you can turn it back on here.
11. A new Cache Settings in the Save category controls how many days to keep files in the Office document cache and lets you empty the cache.
12. The Ease Of Access category is new in Excel 2019. You can choose to Provide Feedback With Sound and choose a Modern or Classic sound scheme. The new part is the Modern sound scheme. The annoying Classic Sound Scheme was previously the only choice in the Advanced category. You can turn off Animations. The choice to control whether Screen Tips are shown is repeated here from the General category. You can set the Default Font Size used in the document, and you can choose to turn off the calculation Function Screen Tips.

13. Use Pen To Select and Interact By Default is new in the Advanced category. If you prefer using a touchscreen, you can change the default behavior of touch.
14. Hyperlinks to Excel files stored in the cloud might open in Excel Online. If you prefer them to open in the desktop version of Excel, there is a new setting. The Link Handling subcategory is the third subcategory in the Advanced category. Choose Open Supported Hyperlinks To Office Files In Desktop Apps.
15. Excel lets you control how many recent files appear when you choose File > Open. The new Find Show This Number Of Recent Unpinned settings controls how many recent folders will be shown.

Using AutoRecover options

For many versions, Excel periodically saves a copy of your work every 10 minutes. If your computer crashes, the recovery pane offers to let you open the last AutoRecovered version of the file. This feature is sure to save you from retyping data that might have otherwise been lost.

Another painful situation occurs when you do not save changes and then close Excel. Yes, Excel asks if you want to save changes for each open document, but this question usually pops up at 5:00 p.m. when you are in a hurry to get out of the office. If you are thinking about what you need to do after work and not paying attention to which files are still open, you might click No to the first document and then click No again and again without noticing that the fifth open document was one that should have been saved.

Another scenario involves leaving an Excel file open overnight only to discover that Windows Update decided to restart the computer at 3 AM. After being burned a dozen times, you can change the behavior of Windows Update to stop doing this. However, if Windows Update closed Excel without saving your documents, you can lose those AutoRecovered documents.

A setting introduced in Excel 2010 has Excel save the last AutoRecovered version of each open file when you close without saving. This setting is on the Save category of Excel Options and is called Keep The Last AutoRecovered Version If I Close Without Saving.

Controlling image sizes

An Image Size & Quality section appears in the Advanced category. Most people add a photo to dress up the cover page of a document. However, you probably don't need an 8-megapixel image being saved in the workbook. By default, Excel compresses the image before saving the file. You can control the target output size using the drop-down menu in Excel options. Choices include 96ppi, 150ppi, and 220ppi. The 96ppi setting will look fine on your display. Use 220ppi for images you will print. If you want to keep your images at the original size, you can select the Do Not Compress Images In File setting.

You should also understand the Discard Editing Data check box. Suppose that you insert an image in your workbook and then crop out part of the photograph. If you do not enable Discard Editing Data, someone else can come along and uncrop your photo. This can be an embarrassing situation—just ask the former TechTV co-host who discovered certain bits of photographs were still hanging around after she cropped them out.

Working with protected view for files originating from the Internet

Starting in Excel 2010, files from the Internet or Outlook initially open in protected mode. This mode gives you a chance to look at the workbook and formulas without having anything malicious happen. Unfortunately, you cannot view the macro code while the workbook is in protected view.

If you only want to view or print the workbook, protected mode works great. One statistic says that 40% of the time, people simply open a document and never make changes to it.

After you click Enable Editing, Excel will skip protected mode the next time you open the file.

Working with Trusted Document settings

By default, Excel warns you about all sorts of things. If you open a workbook with macros, links, external data connections, or even the new `WEBSERVICE` function, a message bar appears above the worksheet to let you know that Excel disabled those “threats.”

If you declare a folder on your hard drive to be a trusted folder, you can open those documents without Excel warning you about the items. Visit File, Options, Trust Center, Trust Center Settings, Trusted Locations to set up a trusted folder.

Starting in Excel 2010, if you open a file from your hard drive and enable the content, Excel automatically enables that content the next time. The inherent problem here is that if you open a file and discover the macros are bad, you will not want those macros to open the next time automatically. There is no way to untrust a single document other than deleting, renaming, or moving it. Instead, you have to go to the Trusted Documents category of the Trust Center where you can choose to clear the entire list of trusted documents.

Options to consider

Although hundreds of Excel options exist, this section provides a quick review of options that might be helpful to you:

1. **Save Files In This Format** in the Save category. If you regularly create macros, choose the Excel Macro-Enabled Workbook as the default format type.
2. **Update your Default Local File Location** on the Save tab. Excel always wants to save new documents in your My Documents folder. However, if you always work in the C:\AccountingFiles\ folder, update the default folder to match your preferred location.

3. Show This Number Of Recent Workbooks has been enhanced dramatically since Excel 2003. Whereas legacy versions of Excel showed up to nine recent workbooks at the bottom of the File menu, Excel allows you to see up to 50 recent workbooks in the Open category of the File menu. You can change this setting by visiting the Display section of the Advanced category.
4. Edit Custom Lists has been moved to the General section of the Advanced category. Custom lists add functionality to the fill handle, allow custom sort orders, and control how fields are displayed in the label area of a pivot table. Type a list in the correct sequence in a worksheet. Edit Custom Lists and click Import. Excel can now automatically extend items from that list, the same as it can extend January into February, March, and so on.
5. Make Excel look less like Excel by hiding interface elements in the three Display sections of the Advanced category. You can turn off the formula bar, scrollbars, sheet tabs, row and column headers, and gridlines. You can customize the ribbon to remove all main tabs except the File menu. The point is that if you design a model to be used by someone who never uses Excel, the person can open the model, plug in a few numbers, and get the result without having to see the entire Excel interface.
6. Show A Zero In Cells That Have Zero Value is in the Display Options For This Worksheet section of the Advanced category. Occasionally people want zeros to be displayed as blanks. Although a custom number format of 0; -0; ; will do this, you can change the setting globally by clearing this option.
7. Group Dates in the AutoFilter Menu is in the Display Options For This Workbook section of the Advanced category. Starting with Excel 2007, date columns show a hierarchical view of years, months, and days in the AutoFilter drop-down menu. If you like the old behavior of showing each date, turn off this setting.
8. Add a folder on your local hard drive as a trusted location. Files stored in a trusted location automatically have macros enabled and external links updated. If you can trust that you will not write malicious code, then define a folder on your hard drive as a trusted location. From Excel Options, select the Trust Center category and then Trust Center Settings. In the Trust Center, select Trusted Locations, Add New Location.

Five Excel oddities

You might rarely need any of the features presented in this section. However, in the right circumstance, they can be time-savers.

1. Adjust the gridline color in the Display section of the Advanced category. If you are tired of gray gridlines, you can get a new outlook with bright red gridlines. I've met people who have changed the gridline color and can attest that nothing annoys an old accountant more than seeing bright red gridlines.

2. Allow negative time by switching to the 1904 date system in the General section of the Advanced category. Excel never allows a time to return a negative time. However, if you are tracking comp time and you allow people to borrow against future comp time, it might be nice to allow negative time. In this case, switch to the 1904 date system to have up to four years of negative time. Use caution when changing this setting. All existing dates in the workbook will shift by approximately four years.
3. Put an end to the green triangles on your account numbers stored as text. Most of the green triangle indicators are useful. However, if you have a column of text account numbers in which most values are numbers, seeing thousands of green triangles can be annoying. Also, the green triangles can hide other, more serious problems. Clear the Numbers Formatted As Text or Preceded By An Apostrophe in the Error Checking Rules check box in the Formulas category.
4. Automatically Insert A Decimal Point replicates the antique adding machines that were office fixtures in the 1970s. When working with a manual adding machine, it was frustrating to type decimal points. You could type 123456, and the adding machine would interpret the entry as 1,234.56. If you find that you are doing massive data entry of numbers in dollars and cents, you can have Excel replicate the old adding machine functionality. After enabling this setting, you can indicate how many digits of the number should be interpreted as being after the decimal point. The only hassle is that you need to enter \$5 as 500. The old adding machines actually had a 00 key, but those are long since gone.
5. Change Dwight to Diapers using AutoCorrect Options. If you were a fan of the NBC sitcom *The Office*, you might remember the 2007 episode in which Jim allegedly put a macro on Dwight's computer that automatically changed the typed word Dwight to Diapers. However, this doesn't require a macro. From Excel Options, choose the Proofing Category and then click the AutoCorrect Options button. On the AutoCorrect tab, you can type new correction pairs. In this example, you would type Dw ight into the Replace box and Di apers into the With box. The next time someone types Dw ight and then a space, the word will automatically change to Di apers. You can also remove correction pairs by selecting the pairs and then pressing Delete. For example, if you hate that Microsoft converts (c) to ©, you can delete that entry from the list.



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