

Office Doc

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100	15.déc.07	12	1	100.50	100.50	BRUNO	EAO
101	19.déc.07	6	3	120.60	721.80	JOHN	EAO
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Payment

Cheque Send invoice

Information Request

Europe Africa
 USA Middle East
 South America Far East

Company :

New client : Yes No

Program :
Word
Excel
PowerPoint
Outlook
Access
FrontPage
Formulaires

Your level :
 Satisfied Unsatisfied
Reason : _____

Environment

Training quality
 Excellent Good Uns

MS-OFFICE 2007

English version

EXCEL

Customize - Automate

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Table of contents

TEMPLATES3

1	Default location for documents, picture files etc	4
1.1	Standard workbooks.....	4
1.2	Picture files	4
2	Types of templates	4
2.1	A standard « .xlsx » workbook used as a « template »	4
2.2	The .xltx - .xltm files	6
2.3	What is the templates default path ? (.xltx or .xltm)	7
2.4	Saving a file as a .xltx or .xltm template	8
2.5	Creating a new workbook based on a template	9
3	The other files related to customization	10
3.1	Files stored in the XLSTART folder	10
3.2	Creating a corporate theme (the company's theme)	11
3.2.1	<i>User assigned as responsible for corporate templates</i>	<i>11</i>
3.2.2	<i>The other users or « end-users »</i>	<i>11</i>
3.2.3	<i>Saving a custom theme</i>	<i>12</i>
3.2.4	<i>If you wish to add extra access to the colors/fonts scheme in order to modify them</i>	<i>12</i>
4	Customizing the QUICK ACCESS toolbar.....	13
4.1	Keyboard shortcuts.....	13
4.2	Buttons displayed only in a given workbook or template	14
4.3	Buttons running macros.....	14

AUTOMATE (MACRO-INSTRUCTIONS).....16

1	Introduction to macro instructions	17
1.1	Viewing the DEVELOPER Tab.....	17
1.2	Recording a simple macro.....	17
1.3	Saving the file containing the macro	18
1.4	Storing macros into the Personal Macro Workbook	18
1.5	Managing macros : run, delete etc.....	19
1.6	Creating a new workbook : will the macros be copied ?	20
1.7	Macro security	20
1.7.1	<i>Trusted locations</i>	<i>20</i>
1.7.2	<i>What will Excel do when the file is not in a trusted location</i>	<i>21</i>
1.8	Custom button for a macro	22

CONTENT OF A TEMPLATE (IT IS OFTEN CALLED A « FORM »).....23

1	A Word or an Excel form ?.....	24
2	Content.....	24
2.1	Simple contents : empty formulas, comments, validation, protection and macros	24
2.2	Form controls.....	29
2.2.1	<i>The controls</i>	<i>30</i>
2.2.2	<i>Creating</i>	<i>31</i>
2.2.3	<i>Selecting</i>	<i>31</i>
2.2.4	<i>Managing</i>	<i>31</i>

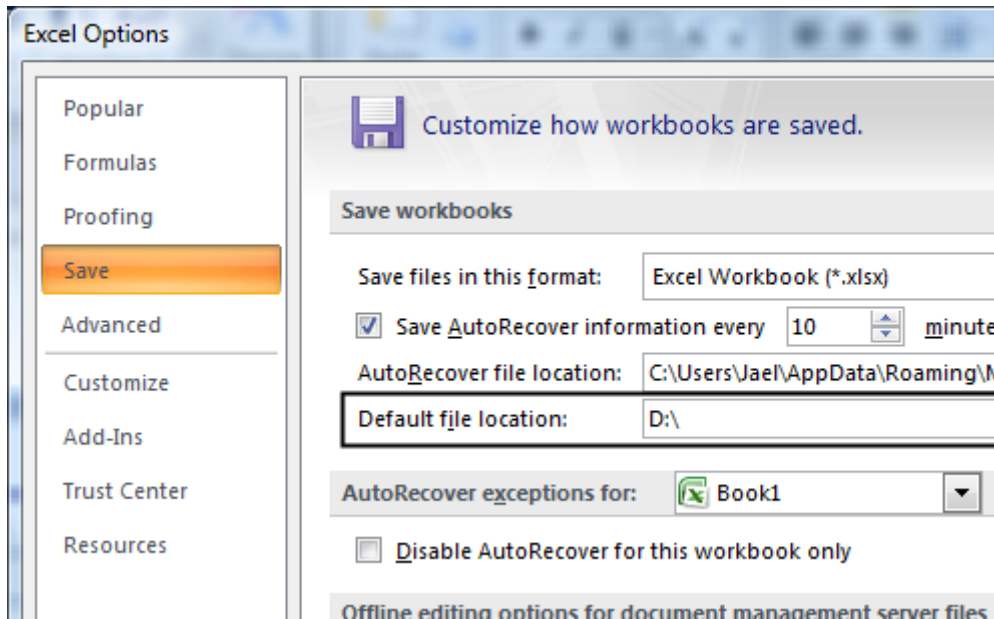
2.2.5	<i>Specific to lists and spinner : defining the list entries and the spinner start number.....</i>	31
2.2.6	<i>Linking controls (dialog box CONTROL FORMAT).....</i>	32
2.2.7	<i>What can be done to help retrieving the returned values.....</i>	34
2.2.8	<i>Retrieving the returned values.....</i>	34
3	Hiding a worksheet or a workbook.....	35

TEMPLATES

1 Default location for documents, picture files etc ...

1.1 Standard workbooks

- OFFICE Button – EXCEL OPTIONS Button – SAVE Category – SAVE WORKBOOKS Topic - DEFAULT FILE LOCATION Option



When you install Office, the default folder for opening or saving Excel workbooks will be the DOCUMENTS folder (sub-folder in your user profile, created when installing Windows). You can select any other folder.

 What you set in Excel has no influence in Word or PowerPoint.

1.2 Picture files

Contrary to Word, there is not default folder you can set for picture files. When you insert a picture, Excel opens the last used folder.

2 Types of templates

2.1 A standard « .xlsx » workbook used as a « template »

A standard workbook can word as a *template*. You will retrieve the content : a table with no data, "empty" formulas returning a 0 value for the moment, any format, the page layout etc ...

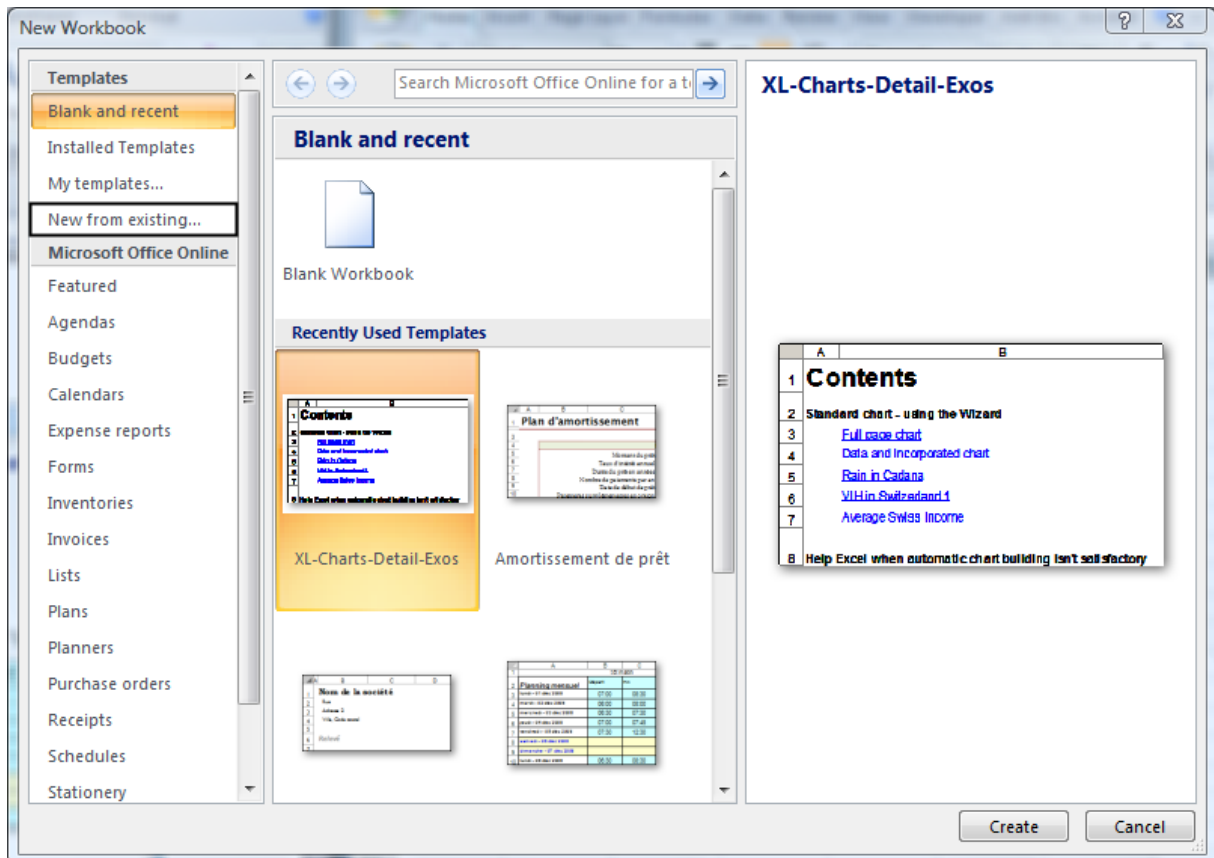
This is particularly appropriate for *custom templates or shared by a team (usually a small team)*.

Create

Save the workbook as usual but it may be advisable to give a name that explicitly points to using it as a template.

Use

OFFICE Button – NEW



New from existing

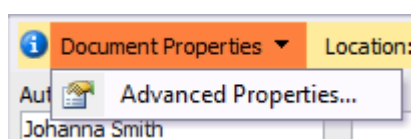
A dialog box of the File – Open type
Select the required workbook
Excel creates an unsaved copy of the workbook

Important

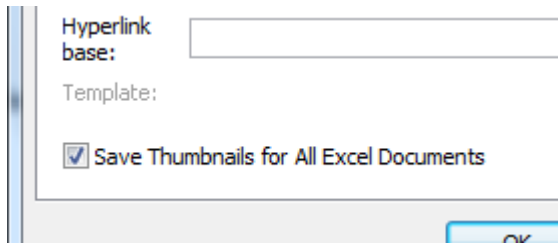
Point the template and a tooltip will indicate its path.

A preview of the template content is displayed but only if a thumbnail has been saved while saving the file for the first time. To check this :

- Open the source file
- OFFICE Button – PREPARE – PROPERTIES



SUMMARY Tab



Make sure that the SAVE THUMBNAI... option is turned on (it is not necessarily on by default). You do it only once as it is memorized for the next files and across sessions.

** SAVE THUMBNAI... should be on only for templates. If this option remains active for heavier files, it sometimes tremendously increases the size of the file*

Right click and you may select REMOVE TEMPLATE.

Advantages	You are working with standard workbooks. The destination folder is free. <i>Note : contrary to Word, macros contained inside the source file (.xlm) will be copied into the new file.</i>
Weaknesses	Simple OPEN to edit the source document. Dangerous. You can add a <i>password to modify</i> to the source file. When someone tries to open it, a dialog box will prompt the user for the password. This will provide direct access for a password holder and only a read-only access for the others. When you will create a new workbook based onto this protected file, no password will be asked. A good solution. This is particularly appropriate for <i>custom templates or shared by a team (usually a small team)</i> .

2.2 The .xltx - .xltn files

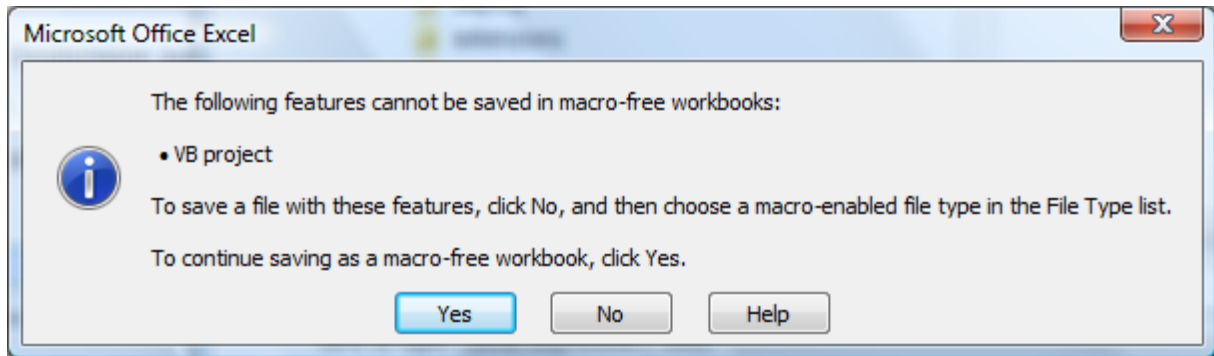
Files of these types are appropriate to *corporate templates*, namely those used by a large department or the whole company.

The templates files can be of two types :

.xltx	Excel template with no macro
.xltn	Excel template with macros (ActiveX not affected)


Caution : the presence of a macro FORCES you to save the file with the correct extension. It is not a question of personal choice.

If you try to force saving the file with the .xltx extension instead of the .xlsm one, the following dialog box will warn about the consequences :



NO : back to the workbook – now save again using the correct extension

YES : the workbook remains a normal template with no macro. Until you close the file, the macros are still visible. When you open the file again, you will see that all macros have been removed.

 The same warning box will be displayed if you try to save a standard workbook containing macros by using the .xlsx extension instead of the .xlsm one. See page 18.

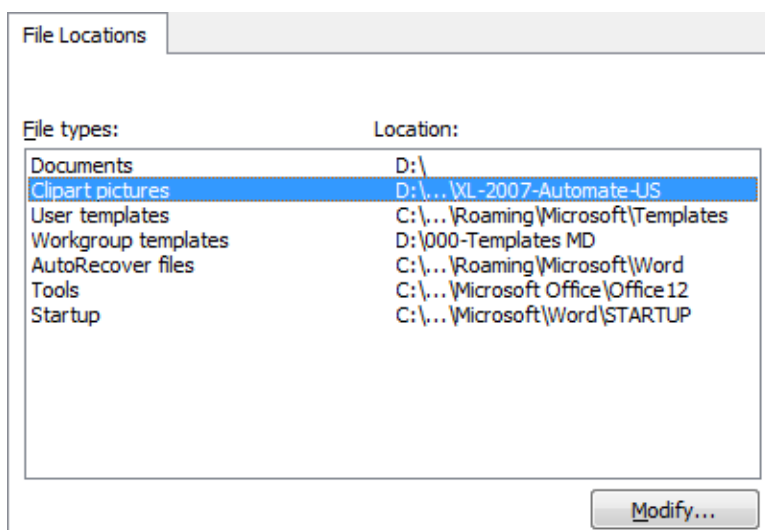
2.3 What is the templates default path ? (.xltx or .xlsm)

Before you save a template, it is important to think twice about who is going to use it. Private ? The whole department ? The whole company ? (then the templates are called *corporate*). It is important because the path will be different.

The **Word** options – indicate – and allow to modify – the default path for templates.

Word ? Yes, this is set in Word but it is applied by default to all Office programs :

- OFFICE Button – WORD OPTIONS Button – ADVANCED Category – GENERAL Topic – FILE LOCATIONS Button



User templates

Usually a local drive folder (C), which is dangerous in most cases as companies have no *backup* procedure on local hard drives. A sub-folder in your *network folder* would be more advisable.

Note : the AppData folder is a hidden folder. To show hidden folders (and files). ORGANIZE Button – FOLDER AND SEARCH OPTIONS Option – VIEW Tab

Workgroup templates

It is the path for templates shared by a dept or the whole company. Usually it refers to a network folder *protected and accessible to only assigned users that are allowed to create, open and edit templates*)

But although the folder is protected, any user can create a new workbook based on one of those templates. (protection is only to manage them)

2.4 Saving a file as a .xltx or .xltm template

- Prepare the template content : texts, formats, header and footer, « empty » formulas, data validation, form controls ...
- In the drop-down list of *Save as type* at the bottom of the saving dialog box, just below *File name* : save as a template.

 While saving, check if the **SAVE THUMBNAILS ...** option is turned on, as this guarantees that users will see a preview of the template in the **NEW WORKBOOK** dialog box.

** SAVE THUMBNAILS ... should be on only for templates. If this option remains active for heavier files, it sometimes tremendously increases the size of the file*

- Make sure to select the folder corresponding to User templates or Workgroup templates (according to your access rights).

Usually the User templates folder is automatically selected

In the main folder

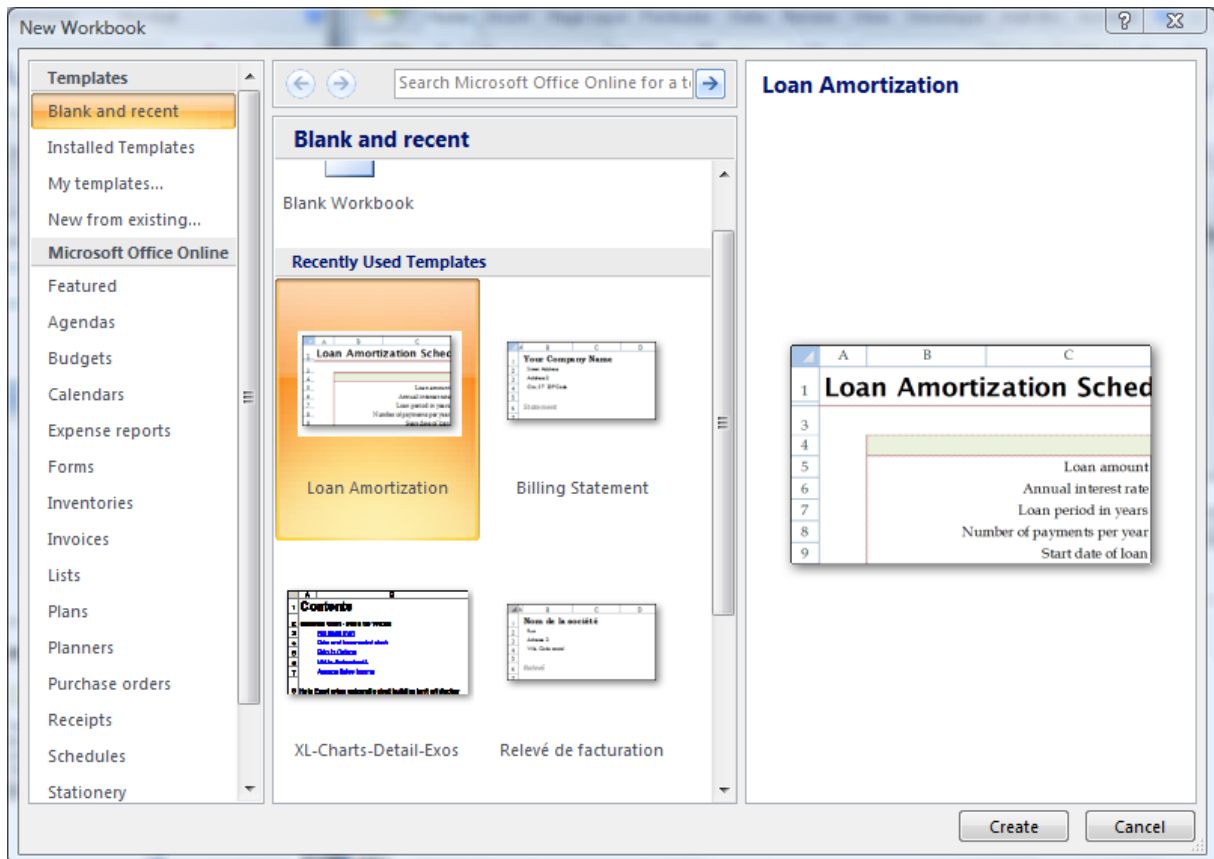
The template will be displayed in the general Tab « My templates ».

In one sub-folder

A tab with the name of the sub-folder will be created and displayed in the dialog box. « neater » ...

2.5 Creating a new workbook based on a template

- OFFICE Button – NEW



Blank and recent

A new Excel workbook
A "standard" workbook using Excel default global settings.

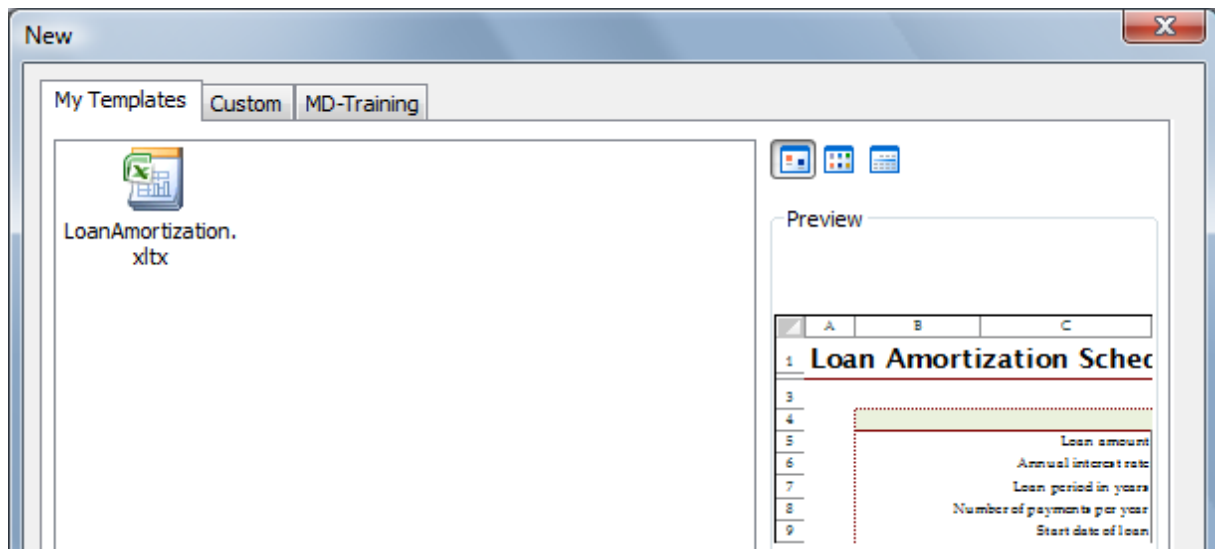
Installed Templates

A gallery of Microsoft preset templates – make your choice
Their path : C:/Programs/Microsoft Office/Templates/1033

My templates

The dialog box will display the custom templates :

1. that have been saved in the user templates folder
2. that have been saved in the workgroup templates folder



The above tabs :

My Templates The .xltx or .xltm files saved in the main folder indicated for the *user* and *workgroup templates* path.

In the above screen capture, it is the case of the *LoanAmortization.dotx* template.

Custom *My custom templates.* They have been saved in a sub-folder – named Custom by the user - of the main folder indicated for the *user templates* path.

MD-Training *The corporate templates.* They have been saved in a sub-folder – named MD Training – of the main folder indicated for the *workgroup templates* path.

Microsoft Office Online Microsoft templates that you can download from their web site Impossible to find the folder into which they are saved. They are listed in no folder, even though they appear in the list of recently used templates.

3 The other files related to customization

3.1 Files stored in the XLSTART folder

This folder is usually located at the following path :

C:\Documents and Settings\User Profile\Application Data\Microsoft\Excel\XLSTART
(Windows Vista : add the folder *Roaming* between Application Data and Microsoft)

Any file stored into this folder will be opened when you run Excel, whatever the file extension (.xlsx) or (.xltx - .xltm).

Creating a template **Book.xltn** in the XLSTART folder

Purpose : include number formats, macros ... in the file

When Excel is run, this file is automatically active. It replaces Excel preset values when creating a blank workbook. The user does not see the difference because the new workbook default name is as usual *Book1*, *Book2* etc ...

Weakness : the storing path is on the local C drive, always a dangerous address ...

But you can change the folder and select one of your network address. But then make sure to set it as startup folder through : : OFFICE Button – EXCEL OPTIONS Button – ADVANCED Category – GENERAL Topic – AT STARTUP, OPEN ALL FILES IN : Option

3.2 Creating a corporate theme (the company's theme)

3.2.1 User assigned as responsible for corporate templates

This person will create a *colors and fonts scheme*. An .xml file will be created for each scheme. The whole set (colors-fonts-effects) will be saved as a theme (a .thmx file). All these files will be stored on the user's local hard drive. Then the theme will be applied to all the Office company's templates (Word, Excel, PowerPoint etc ...). Updating the theme or the corporate templates will be his/her task. Options to create the colors and fonts schemes are at the bottom of the corresponding galleries.

Finally the theme will be either *installed* on each user's workstation or *sent* to each user with instructions on how to install the theme and make it available to any Office file.

3.2.2 The other users or « end-users »

The theme has been saved onto the local hard drive

It is displayed in the themes gallery and is available to any Office file.

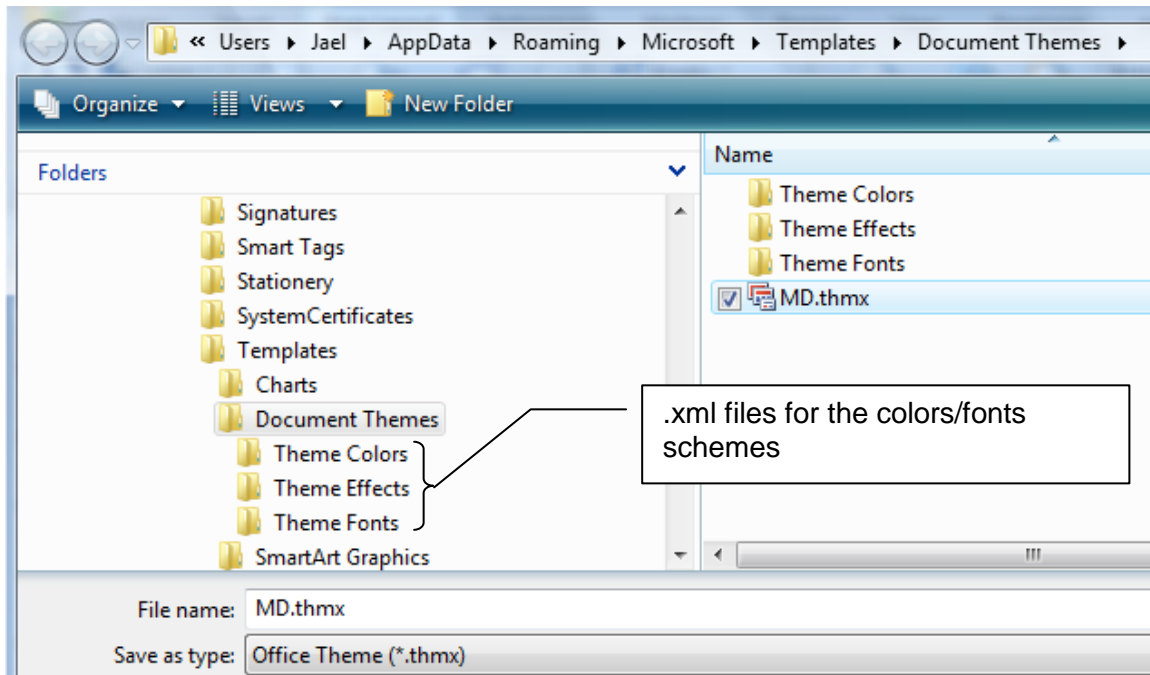
No theme file on the hard drive

The theme is not displayed in the themes gallery and is not available to any Office file. But if the theme has been added to the Excel basic template (Book.xltn), any new workbook will automatically include the theme. If you receive a file from the outside but containing the theme, it will be present when you edit the file. *The theme is incorporated into the file – but this is invisible. To check it : create an item using an automatic sequence of colors – you will see that the theme colors have been applied automatically.*

What should you do in the latter case ? If this is no worry to you, don't do anything. If selecting the theme from the themes gallery is important, then save the current theme onto the hard disk (option at the bottom of the themes gallery). And if you also want to change something in the colors/fonts schemes, then click on the CREATE NEW THEME COLORS / FONTS ... option and save the files.

3.2.3 Saving a custom theme

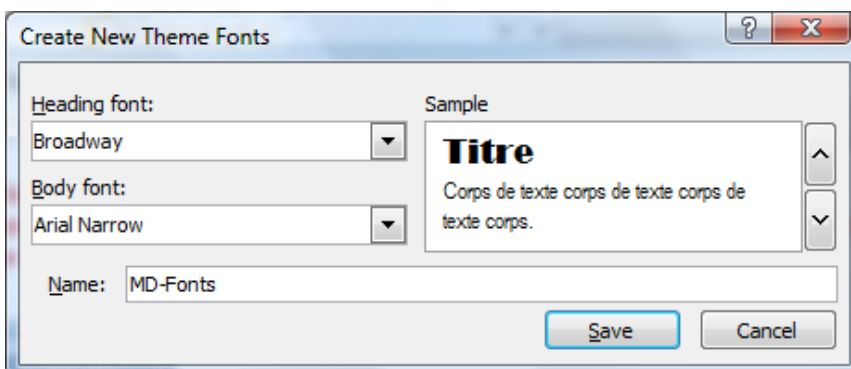
- Themes gallery : SAVE CURRENT THEME

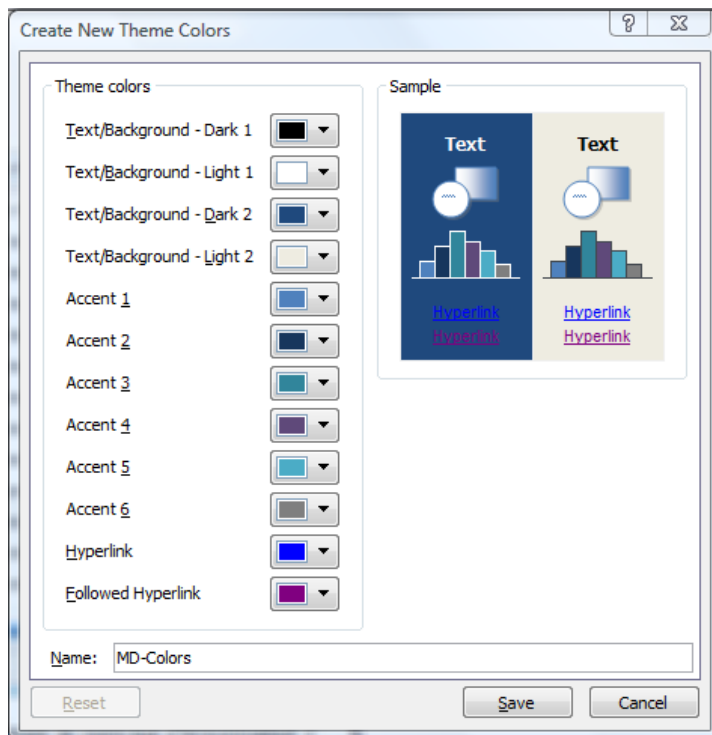


Note : the above folders are hidden by default. Therefore they appear when you save the files but will not be displayed in the Windows Explorer.

3.2.4 If you wish to add extra access to the colors/fonts scheme in order to modify them

- At the bottom of the colors or fonts set galleries, click on the CREATE NEW THEME COLORS or CREATE NEW THEME FONTS option
- Change as necessary and save **THE SCHEME**





Do not leave the name on the default *Custom 1*

The colors or fonts scheme is saved as an .xml file and stored in one subfolders or the main THEMES folder (see previous screen capture)

It is not possible to save the effects scheme (although the corresponding subfolder does exist)

4 Customizing the QUICK ACCESS toolbar

You certainly master the first "level" of this customization : adding buttons to the bar, placing the bar above or below the ribbon. *Reminder on how to add a button to the toolbar : right click any button or command and click on ADD TO QUICK ACCESS TOOLBAR.*

Customizing can go far deeper :

- Special buttons for a given file
- Buttons running macros

Right click any button on the ribbon : CUSTOMIZE QUICK ACCESS TOOLBAR

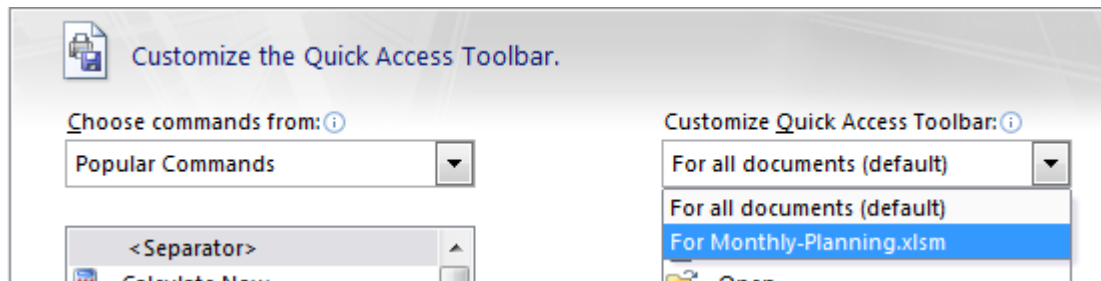
4.1 Keyboard shortcuts

Contrary to Word, no CUSTOMIZE button for modifying an Excel keyboard shortcut.

4.2 Buttons displayed only in a given workbook or template

It is possible to set buttons for commands, macros ... **that will be displayed only in the workbook/template itself or in any new workbook created on this workbook/template.**

Simply specify so in the customize dialog box :

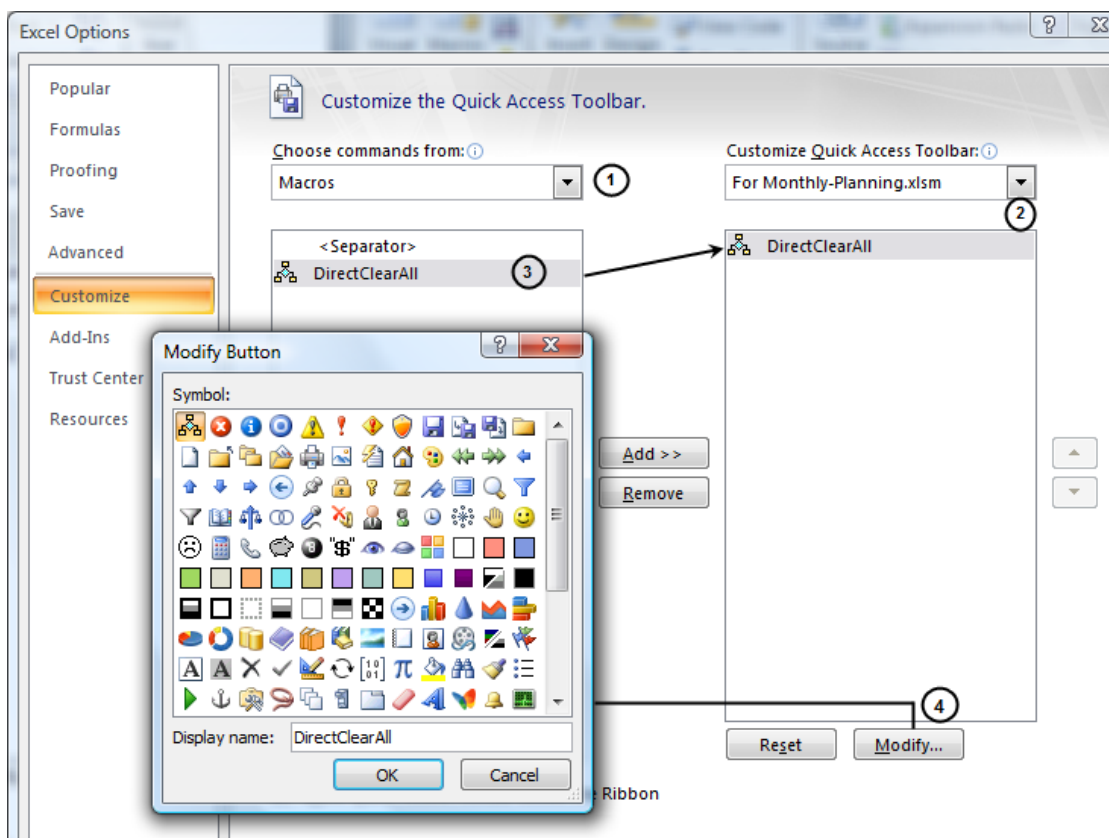


Once you have indicated the required file (workbook or template), the commands that you add will be added to THIS file only and will be displayed at the right end of the Quick Access toolbar.

4.3 Buttons running macros

It is not possible to modify the buttons assigned to Excel preset commands. But you may assign custom buttons to macros

Do as follows :



- ❶ Choose the *macros* category in the drop-down list
- ❷ Select the required workbook or template
- ❸ Select the macro and click on the ADD button
- ❹ Select the macro shortcut and click on the MODIFY button (has now become available) : select the button

Symbol Choose the button from the displayed gallery but please not that you cannot edit and modify its "look" or create a custom button.

Display name You can modify the button label

- 🔦 Make sure to assign the macro button to a specific workbook/template. Or the button will be systematically displayed on the toolbar, whatever the active file.

Note : when you add a macro button for a specific file, the quick access toolbar will display :

the usual buttons + the macro buttons

(although in the Customize dialog box, the right pane gets « empty »).

AUTOMATE
(macro-instructions)

1 Introduction to macro instructions

You can automate some of your work using macro-instructions. A *macro* is a series of commands and other instructions that you can *run* to perform a given task. It can be a good idea to replace repetitive actions with macros

1.1 Viewing the DEVELOPER Tab

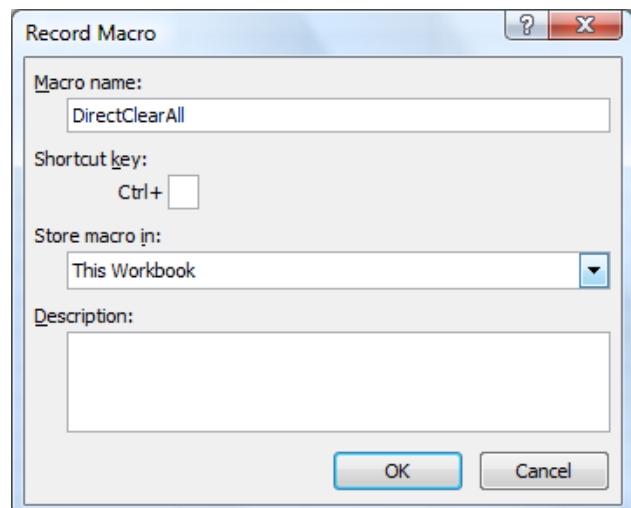
It is the Tab containing commands for so-called « super-user ». The commands include macros and macro security, form controls and XML tools.

How to display this Tab : OFFICE Button – EXCEL OPTIONS Button – POPULAR Category – SHOW DEVELOPER TAB IN THE RIBBON Option.

1.2 Recording a simple macro

You perform the commands as usual and the macro recorder will convert them into VBA (Visual Basic Edition for Application) lines.

- DEVELOPER Tab – CODE Group – RECORD MACRO Button



Macro name

The name cannot include a space or a dash

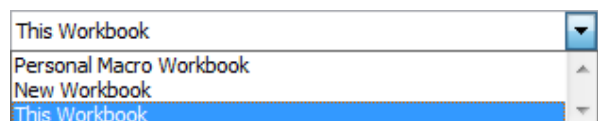
- Do not give an existing name such as FileClose because your macro could replace the Excel pre-set one

Shortcut key

To assign a keyboard shortcut key to the macro. If the chosen shortcut is not available, Excel automatically converts it into a free one (usually by adding the SHIFT key to it)

Store macro in

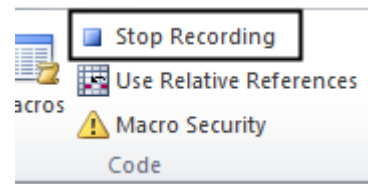
Macros can be stored in :



- Choose to save the macro into *This Workbook* or into a *New Workbook* (the Personal Macro Workbook is explained later on)

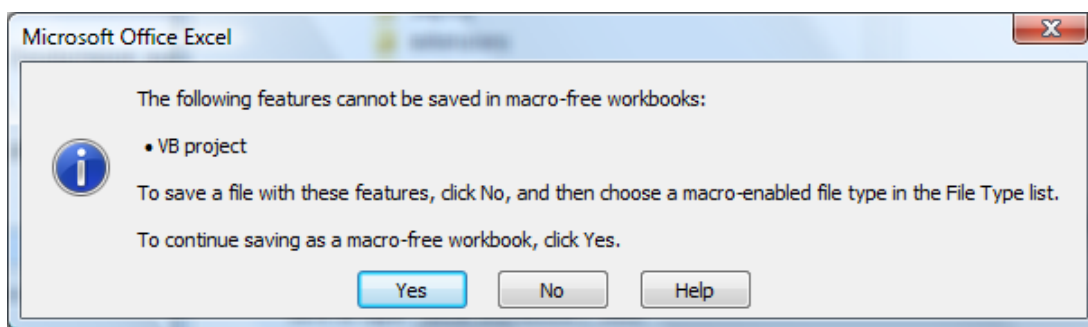
- OK to confirm
- Perform the commands to be turned into a macro.

When you have finished : click on the STOP RECORDING button.



1.3 Saving the file containing the macro

Impossible to assign a "normal" extension such as (.xlsx). You must save the file using the *Macro-Enabled* format, that is the .xls_m or .xlt_m extension. If you try to force saving the file with the .xlsx extension, the following message will be displayed :



NO : back to the workbook and this time save correctly (.xls_m or .xlt_m)

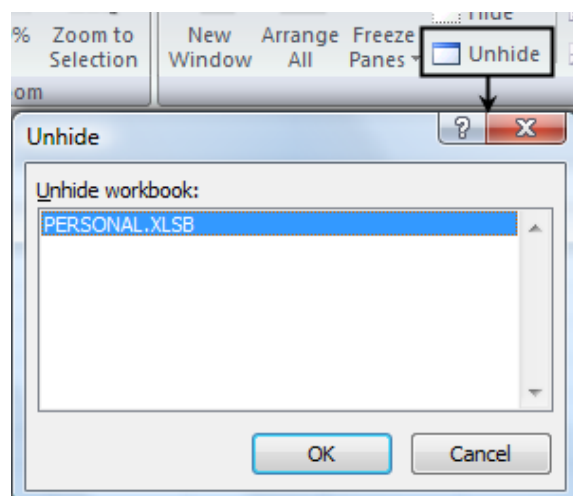
YES . the file will have the .xlsx extension. Provided you do not close the workbook, you will still see the macros. But when the file is closed and opened again : no more macros.

1.4 Storing macros into the Personal Macro Workbook

The real name of this workbook is PERSONAL.XLSB.

Provided it contains a minimum of one macro, it will be automatically active when you run Excel. All its macros will be available in Excel, whatever the file.

But caution, it is hidden. If you need to modify, delete ... one of its macros, you will first have to unhide it through the VIEW Tab :



But do not forget to hide it again once you have finished (click on the HIDE button)

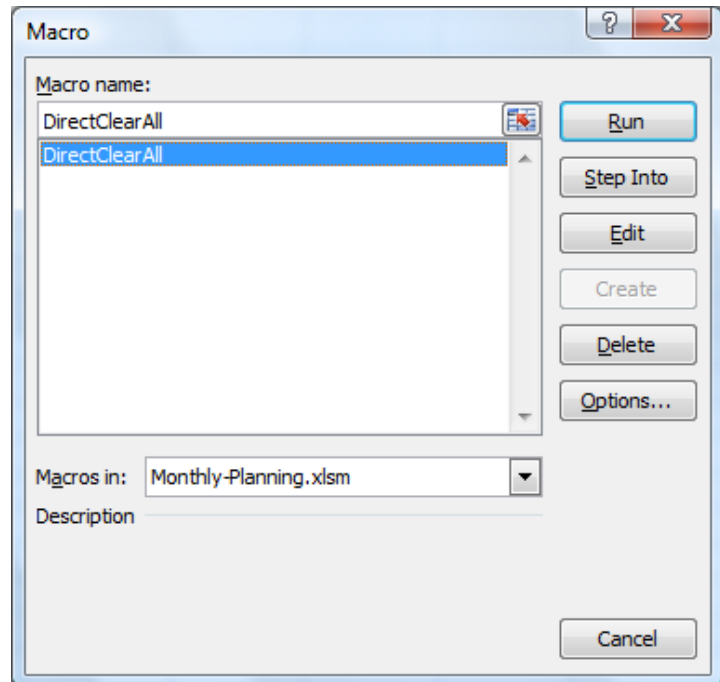
When you exit Excel, you will be prompted to save the PERSONAL.XLSB file (if you have modified it) : answer YES.

How to delete this file : make sure that Excel is fully closed then run the Explorer and delete it. It is usually stored in the XLSTART folder :

C: \Documents and Settings \user profile \Application Data \Microsoft \Excel \XLSTART
(if using Windows Vista add the *Roaming* folder between Application Data and Microsoft)

1.5 Managing macros : run, delete etc...

- DEVELOPER Tab – CODE Group – MACROS Button



Run To run or *execute* the macro

Note : if you have set a button or a keyboard shortcut, they can also be used to run the macro

Step Into Running the VBA editor. Select the command one by one by pressing the F8 key. *Good knowledge of the VBA language required*

Edit Running the VBA editor to edit the selected macro

Any user can make simple modifications but for the rest a good knowledge of the VBA language is required.


It is not possible to edit a macro stored into the Personal Macro Workbook from another file. You must first unhide it.

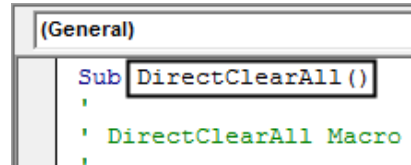
Create Running the VBA editor to create a macro, line by line.
Good knowledge of the VBA language required

Delete To delete the selected macro

It is not possible to delete a macro stored into the Personal Macro Workbook from another file. You must first unhide it.

Options You can add a keyboard shortcut to the macro as well as a short description of it – interesting if you have forgotten to set it in the Record Macro dialog box.

 There is no RENAME command. To rename a macro, you need to run the VBA editor (use the EDIT button for instance) and rename directly in the code.



```
(General)
Sub DirectClearAll ()
'
' DirectClearAll Macro
'
```

1.6 Creating a new workbook : will the macros be copied ?

Yes they are, whatever the extension .xlsm or .xltm
Therefore make sure when you save the new file to choose a "macro-enabled" extension

1.7 Macro security

Macros and computer security are linked as macros can contain viruses. In order to protect your files, Office needs to know what to do with files containing macros that you have not created yourself.

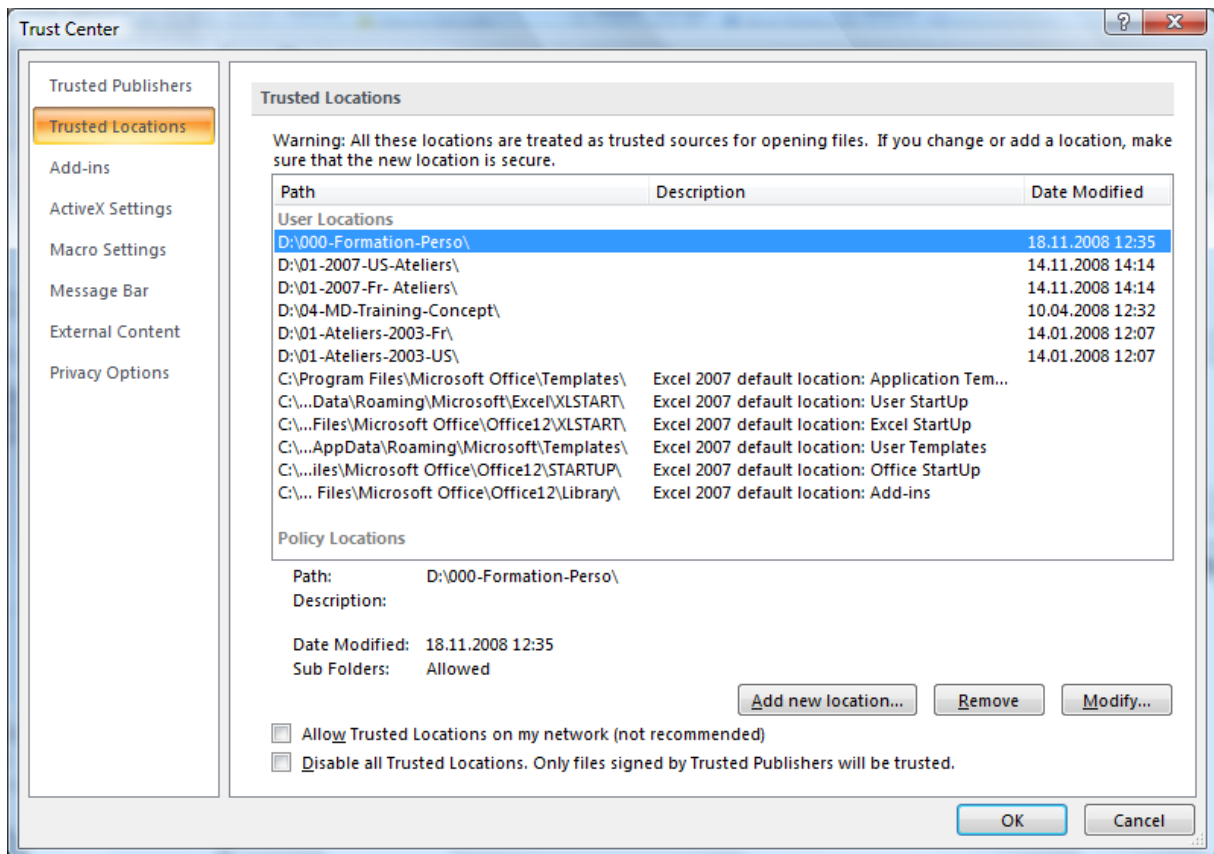
Office works with folders that are defined as « trusted locations » that means « safe ». If an Excel, Word, PowerPoint ... file is saved into one of these *trusted locations*, its macros will be automatically enabled – no special message.

It is also necessary to decide what to do for files that have not been saved in a trusted location.

1.7.1 Trusted locations

By default, the Excel startup folder and the templates folder are activated.

- DEVELOPER Tab – CODE Group – MACRO SECURITY Button
or (if the DEVELOPER tab is not displayed) :
- OFFICE Button – EXCEL OPTIONS Button – TRUST CENTER Category – TRUST CENTER SETTINGS Button

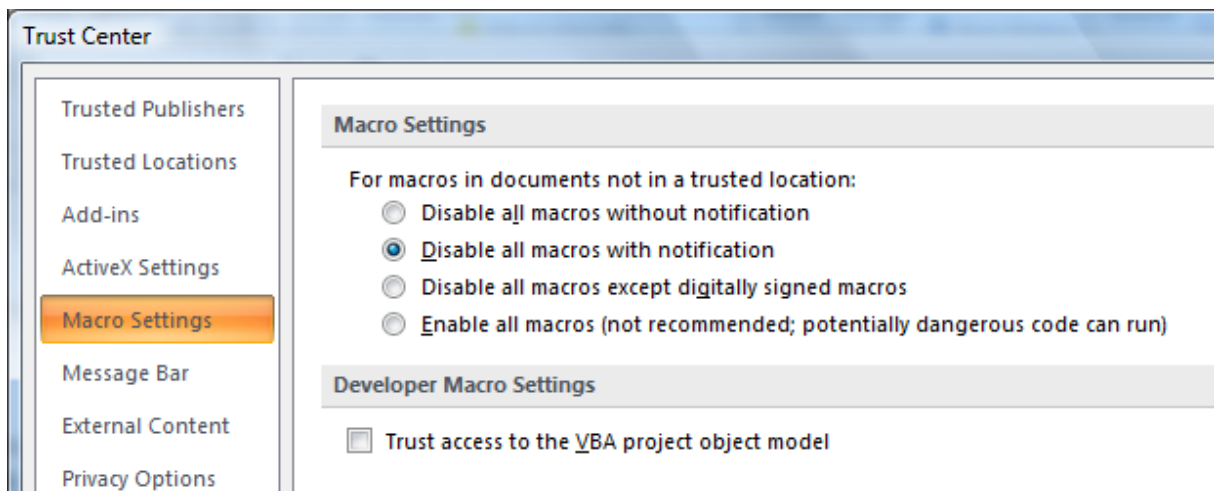


Simply click on the ADD NEW LOCATION button to set a folder as *trusted* – along with its subfolders if you set so.
 (a large address – such as a whole D:/ - P:/ ... drive is not allowed (too dangerous)).

Caution : locations are set by program and not for Office in general

1.7.2 What will Excel do when the file is not in a trusted location

You can choose to enable or disable all macros contained in a file that is not stored into a trusted location – with or without notification :



The options for the ActiveX settings are labeled differently but the concept behind is the same.

Here below an example of a macro/ActiveX notification (after having clicked on the OPTIONS button) :



Macros of previous versions ?

We have performed some tests and up to now, no problem to report.

1.8 Custom button for a macro

You may assign a macro to any graphical item such as a drawn shape, a picture etc ...

- Right click the object and ASSIGN MACRO
- Choose the macro in the dialog box list
- Provided the object is selected, you may modify as required : text, size, color ...

As soon as you click into the sheet, the macro button becomes active. Click and the macro will be run. To revert to managing the button : right click

You can also use the MACRO button that is located in the form control tear-off (Developer Tab). Once you have drawn the macro button onto the worksheet, a dialog box prompts you to indicate which macro should be assigned to the button. Then you may modify the button label.

CONTENT OF A TEMPLATE
(It is often called a « form »)

1 A Word or an Excel form ?

Word is really the program to choose if your form includes a rather complex setup : a lot of text with various text or paragraph formatting, pictures, incorporated objects and so on. **The form controls are limited (only text box, checkbox and combo box)**. Caution, as soon as calculating is required, problems will start

Excel forms offer a much wider choice of controls. Moreover, the power of Excel in terms of calculations, functions ... can be used if you link the controls to specific linked cells. But caution : if you wish to use this linked cells to return data and fill in a database ... **then you will quickly need more powerful tools, i.e. VBA ...**

2 Content

A form can contain :

- Pre-set formulas/functions
- Comments
- Help on input entry through data validation
- Cell protection
- Sheet protection (setting commands that should be left free)
- Simple macros
(with buttons calling these macros)

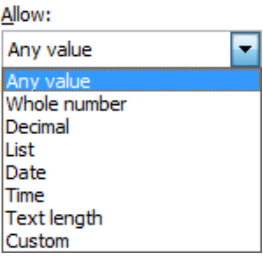
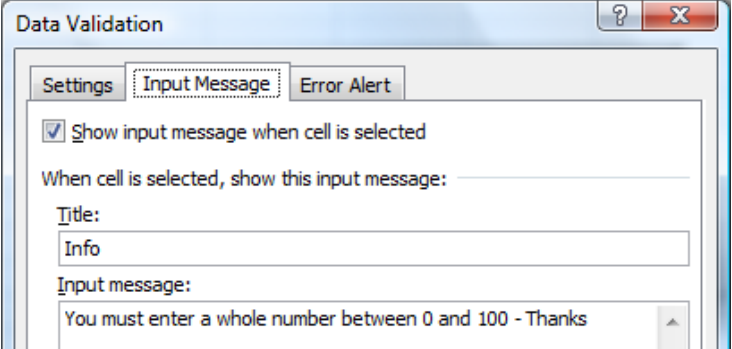
- Form controls

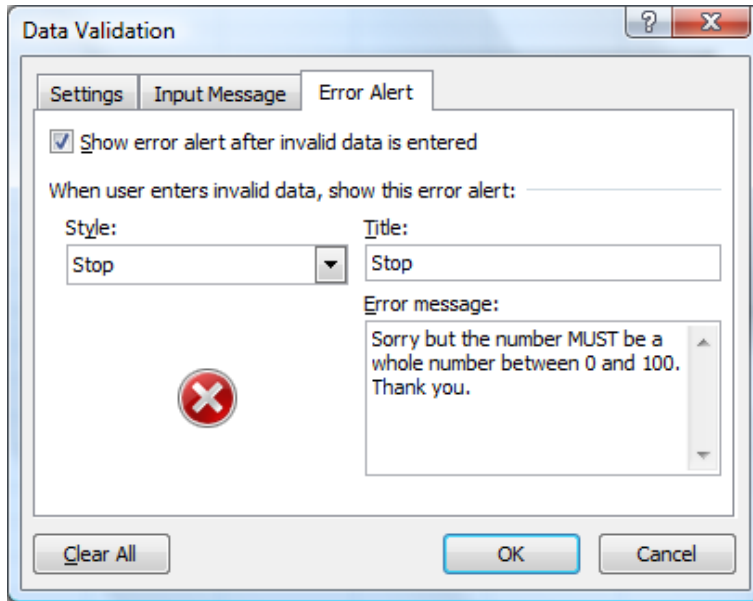
2.1 Simple contents : empty formulas, comments, validation, protection and macros

Formulas working on empty cells	Simply create the formulas/functions. They will return 0
Hide the zero values produced for the formulas	<i>For the active worksheet only :</i> Office Button – OPTIONS EXCEL Button – ADVANCED Category – DISPLAY OPTIONS FOR THIS WORKSHEET Topic – SHOW A ZERO IN CELLS THAT HAVE A ZERO VALUE Option

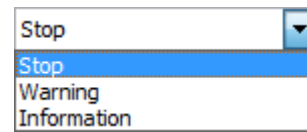
Comments	To provide useful information to the user
Insert a comment	Right click the cell and INSERT COMMENT
View/Hide ALL comments	REVIEW Tab – COMMENTS Group – SHOW ALL COMMENTS Option (switch)

View/Hide THIS comment	REVIEW Tab – COMMENTS Group – SHOW/HIDE COMMENT Button (or right click and same option)
Print comments	PAGE LAYOUT Tab – Dialog box launcher – SHEET Tab – COMMENTS Option(<i>None</i> by default – <i>At end of sheet</i> and the most common one : <i>As displayed on sheet</i>)

Validation	Help to fill in a form through input restrictions
<p>Set the required restrictions</p> <p>DATA Tab – DATA TOOLS Group – Drop-down menu of the DATA VALIDATION Button –DATA VALIDATION Option</p>	<p>OPTIONS Option</p> <p>Here after the possible restrictions :</p>  <p><u>An interesting choice : List</u></p> <p>It is possible to create a list of entries to avoid typing. Choose the LIST option from the drop-down list and indicate below the corresponding range of cells. (the data must be on the same sheet if you wish to select cells directly (=K\$2:\$K\$27 for ex.) but you may indicate an external sheet provided the corresponding range of cells has been named (=depts. for ex)). You may also type the list items manually (with the list separator). Drawback : you need to type manually. Advantage : there is not "external" list.</p> <p><u>Another interesting choice : Decimal</u></p> <p>Choose <i>Decimal</i> from the drop-down list and set that the number of decimals must be <i>comprised between 0 and 2</i> if you wish to limit the data entering to numbers with no or maximum 2 decimals.</p>
<p>Input Message</p>	<p>The information message will be displayed when you click on the cell.</p>  <p>If the user tries to enter invalid data, a <i>stop, warning or information message</i> will appear</p>

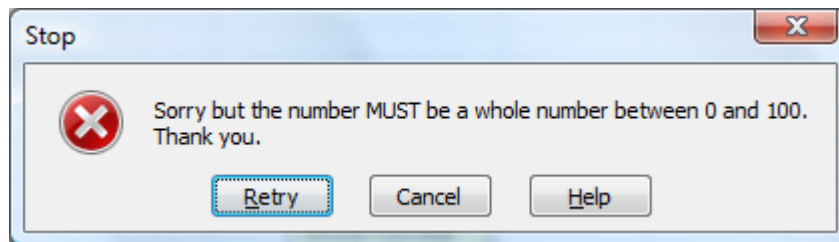


Other possibilities .

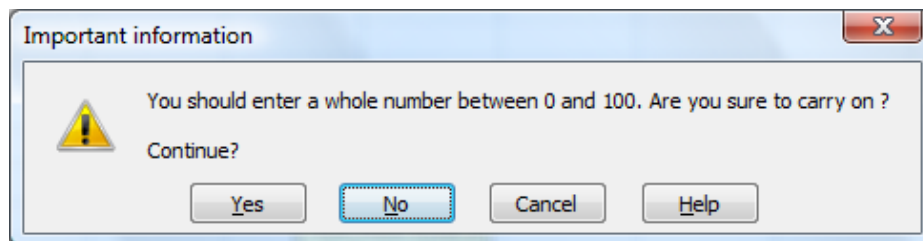


Examples :

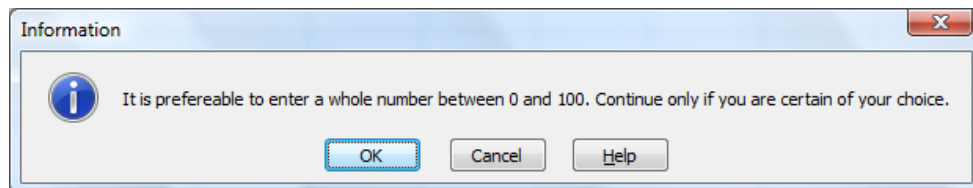
Stop



Warning




Information



If the message is not a stop message, the user can ignore the information or the alert, and type what he wants. If the error generates a stop message, the user is prompted to "retry" until the entry matches the set restrictions, but this is not a 100% security. Indeed a simple COPY-PASTE can bypass this stop message.

Protection	To prevent any unwanted modification To prevent any command other than authorized ones
Through the cell status	<p>Select the required cells HOME Tab – CELLS Group – Drop-down menu of the FORMAT Button – FORMAT CELLS Option – PROTECTION Tab</p> <p>Check on/off the LOCKED option <i>Then click on the PROTECT SHEET command (drop-down menu). With or without password.</i></p> <p><u>Weak points</u> No visual indication on which cells are locked and which are left free.</p>
By protecting commands	<p>HOME Tab – CELLS Group – Drop-down menu of the FORMAT Button – PROTECT SHEET Option Set which command to leave access-free.</p> <p>Caution : some commands require that the cells be set on <i>unlocked</i>. <i>Note : select locked/Select unlocked cells are on by default</i></p>

Command	Condition
Select locked / unlocked cells	By default, if you can select, you can also copy-paste into another workbook.
Format cells	None
Format columns / rows (autofit, hide ...)	None
Insert columns / rows	Inserting is possible with no special condition. But if you wish to type data into the new cells, it is necessary to check that the whole row or column located <u>top</u> or <u>left</u> has been unlocked through FORMAT – CELLS – PROTECTION Tab
Insert hyperlinks	The cell must have been unlocked through FORMAT – CELLS – PROTECTION Tab
Delete columns / rows	All cells must have been unlocked through FORMAT – CELLS – PROTECTION Tab
Sort	<p>All <u>rows</u> and <u>columns</u> must have been unlocked through FORMAT – CELLS – PROTECTION Tab</p> <p>Or</p> <p>The range of cells must have been set as a free range through : REVIEW Tab – CHANGES Group – ALLOW USERS TO EDIT RANGES Button.</p> <p> Caution : the cells content can now be freely modified</p>

Use AutoFilter	The autofilter mode must be active
Use PivotTable reports	You must have created the pivot table. Then the user can use it
Edit objects	None
Edit scenarios	You may <i>modify</i> them. If the option is left unchecked you can simply <i>show</i> a given scenario.

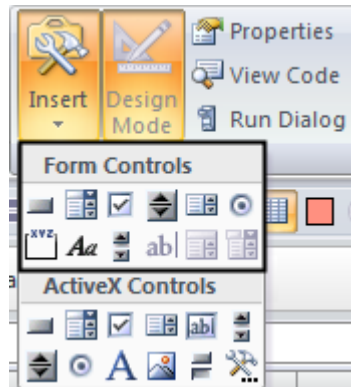
Access to free cells by pressing the TAB key.

Through free ranges of cells	<p>Microsoft associate the part of protection to the concept of « Reviewing » and the commands are consequently located on the REVIEW Tab – CHANGES Group</p> <ul style="list-style-type: none"> • Select the required ranges (optional but more comfortable) • ALLOW USERS TO EDIT RANGES Button • In the dialog box : click on the NEW button. The selected range is automatically retrieved (if there is no selection, you can now select directly in the worksheet) • Name this range. You are not allowed to use characters such as a space or a dash but may use the underscore. • The range(s) are saved. You can later on modify or delete them as required. You can also set access rights for other users on your network. You may print a list of the ranges. <p><u>Strong points</u></p> <p>It is possible <u>to list, print ...</u> the free ranges Access rights can be set</p>
Protect the workbook	<p>Not directly related to cell protection. You may protect :</p> <p><u>Structure</u> The worksheets can no longer be copied, moved, deleted ...</p> <p><u>Window</u> The windows buttons (minimize, full scree ...) are removed</p> <p><i>All the rest is available</i></p>

Macros	<p>To automate given tasks</p> <p>Explained in a previous chapter (page 17)</p>
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2.2 Form controls

DEVELOPER Tab – CONTROLS Group



- ✎ ActiveX Controls are not explained in this documentation because they belong to the VBA (Visual Basic for Applications) language. These controls are mainly used for online forms or controls that run « events » (running a given macro depending on the user choice in a drop-down list for instance).

Example of a form :

	Evaluation questionnaire		PRINT
1			
2			
3	First name :	<input type="text" value="Johanna"/>	
4			
5	Last name :	<input type="text" value="Smith"/>	
6			
7	Company :	<input type="text" value="COMPUTERS SA"/>	
8			
9	New client :	<input checked="" type="radio"/> Yes <input type="radio"/> No	
10			
11			
12	Program :	<input type="text" value="PowerPoint"/>	
13			
14			
15	Your level :	<input type="text" value="Basic"/>	
16			
17			
18			
19	Environment	<input checked="" type="radio"/> Satisfied <input type="radio"/> Unsatisfied	
21		Reason : <input type="text"/>	
22			
23	Training quality	<input checked="" type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Unsatisfactory	
24			
25			
26	Training book	<input checked="" type="radio"/> Exhaustive <input type="radio"/> Well structured <input type="radio"/> Confused	
27			
28			
29	Do you wish to attend other courses ?	<input checked="" type="checkbox"/> Word <input type="checkbox"/> Excel <input type="checkbox"/> PowerPoint <input type="checkbox"/> Outlook	
30		<input checked="" type="checkbox"/> Other <input type="text" value="Illustrator"/>	
31			

2.2.1 The controls



To create the *label* that will go with your control. But most often you can simply use a cell and type in the label

Label

Label as a form control :

Your level :
Basic
Medium
Advanced

Cell used as label :

Your level :	Basic Medium Advanced
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Group Box

This control is used to group other controls. Its purpose can be only esthetic

In some cases – grouping check boxes – its purpose is not esthetic at all : it groups the check boxes to prevent interaction with other controls.

Excellent Good Unsatisfactory



Check Box

Word Excel PowerPoint Outlook



Option Button

Excellent Good Unsatisfactory



List Box

To create a list of possible entries. The list is pre-set and cannot be modified.

Basic
Medium
Advanced



Combo Box

This list is also pre-set and cannot be modified.

After the user choice :

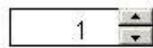
PowerPoint
Word
Excel
PowerPoint
Outlook
Access
Visio
Acrobat

PowerPoint

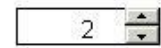


To increment a cell value.

Spin Button



click on the control :



Macro button.

Once you have drawn the macro button onto the worksheet, a dialog box prompts you to indicate which macro should be assigned to the button. Then you may modify the button label.

Note : you may assign a macro to any graphical object such as a shape, a picture etc ...



Not available in standard Excel workbooks. This control is used to work with old Excel 5.0 sheets

2.2.2 Creating

- Click on the required control
- Click onto the sheet for a standard size and click and drag to set the size
- Click outside the control : it is automatically active

2.2.3 Selecting

- Click = run the control / Right click = select the button
- To enable selection using a simple click, you need to be in the *object selecting mode* : HOME Tab – EDITING Group – Drop-down menu of the FIND & SELECT Button – SELECT OBJECTS Option.

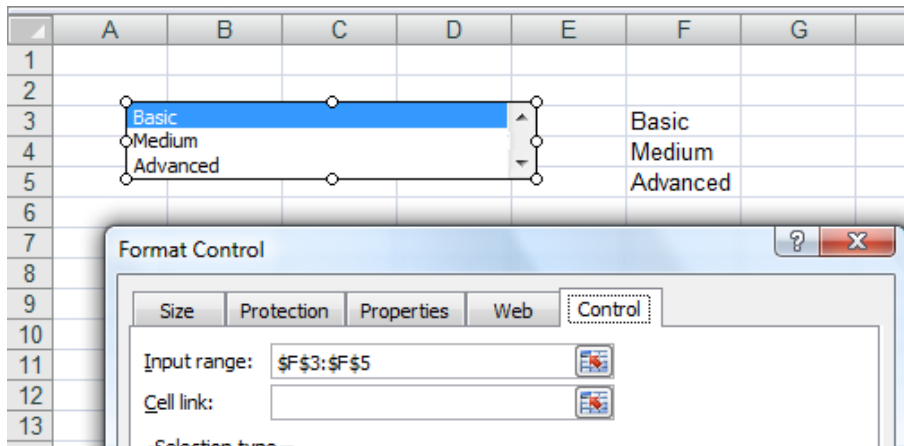
2.2.4 Managing

- Right click the control, then click the border line : now you can move, size it.
- Right click the control, then EDIT TEXT
- Right click the control, then FORMAT CONTROL
The tabs displayed in the dialog box offer various options such as sizing, properties and other such as : should the control be pre-activated ? 3D view ? Link cell ?

2.2.5 Specific to lists and spinner : defining the list entries and the spinner start number

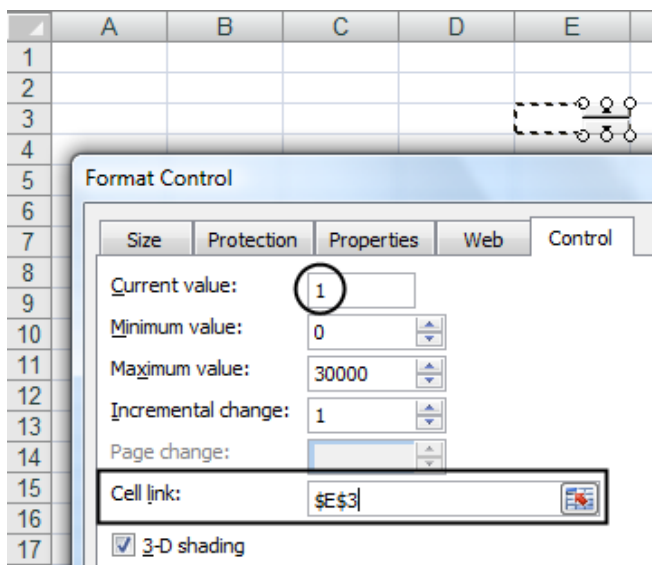
If your form only includes some check boxes, option buttons, your work can be considered as finished. All you will have to do is print your form. But if you wish to add drop-down lists or spinner, then you will need to create the list entries, set the spinner start number and required interval ...

- Create the control
- Display the format dialog box (right click and CONTROL FORMAT)

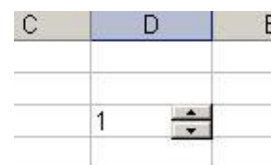


If you do not create a list entries, your control will display an empty list. Where should you create the list ? Outside the form so that users cannot delete it by mistake. A good idea is to choose a location quite far away from the form and to hide the corresponding columns. You can even add cell protection. You may also type the list onto an external sheet. Up to you.

The spinner can be managed differently. Usually the cell linked to the spinner is the one right next to the control :



To display the number, simply choose a left alignment. You may even set in the PROPERTIES Tab that you wish *not to print* the control. Very handy for an invoice number : you choose the number through the spinner control but you print only the number.



If no other special control is required, your form is ready to be printed or sent.

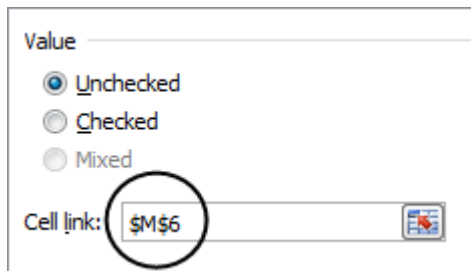
2.2.6 Linking controls (dialog box CONTROL FORMAT)

Important to tell you right from the very beginning : linking controls will require that you are at ease with formulas and functions. Worse : very quickly, specific needs will need VBA commands.

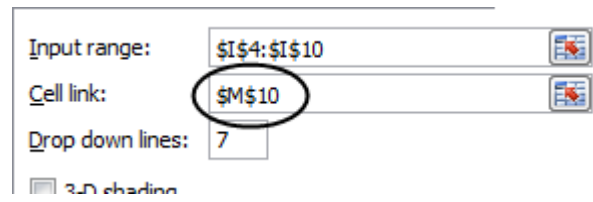
The role of the linked cell

The link cell "memorizes" the user choice (which check box was turned on, which list entry and so on). The required cell is indicated in the CONTROL Tab

Check box or option button



List box or combo box



Some examples. Each control has its own way to "return" the choice :

Check boxes return TRUE if turned on and FALSE if not

29	Do you wish to attend other courses ?			
30	<input checked="" type="checkbox"/> Word	<input type="checkbox"/> Excel	<input type="checkbox"/> PowerPoint	<input type="checkbox"/> Outlook
31	<input checked="" type="checkbox"/> Other <input type="text" value="Illustrator"/>			
32				
33				
34	Other courses ?	Word	TRUE	1
35		Excel	FALSE	0
36		PowerPoint	FALSE	0
37		Outlook	FALSE	0
38		Other	TRUE	1

Option buttons (grouped into a box group) return the number of the turned on button

Training quality		<input checked="" type="radio"/> Excellent	<input type="radio"/> Good	<input type="radio"/> Unsatisfactory
Training quality	1=Excellent			1
	2=Good			
	3=Peu satisfaisante			

 **Reminder :** if you need to prepare several groups of option buttons, it is necessary to "isolate" each group into a group box.

For lists, the linked cell returns the number of the entry :

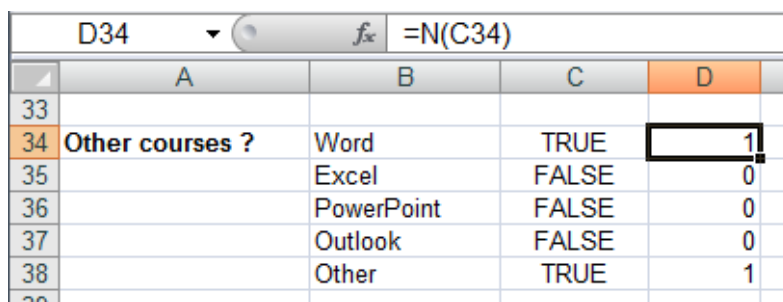
12				
13	Program :	<div style="border: 1px solid gray; padding: 2px;"> PowerPoint Word Excel PowerPoint Outlook Access Visio Acrobat </div>		
14				
15				
16				
17				
18				
19				
20	Program	1 Word		3
21		2 Excel		
22		3 PowerPoint		
23		4 Outlook		
24		5 Access		
25		6 Visio		
26		7 Acrobat		

2.2.7 What can be done to help retrieving the returned values

As you can well guess from the above screen captures, it is not possible to retrieve the return values with no other "treatment". Indeed : What can you do with a TRUE, a 2 value without knowing what it corresponds to ? How to retrieve the "text" chosen by the user (True = Word, 2 = Excel) and copy it into a separate sheet for instance ?

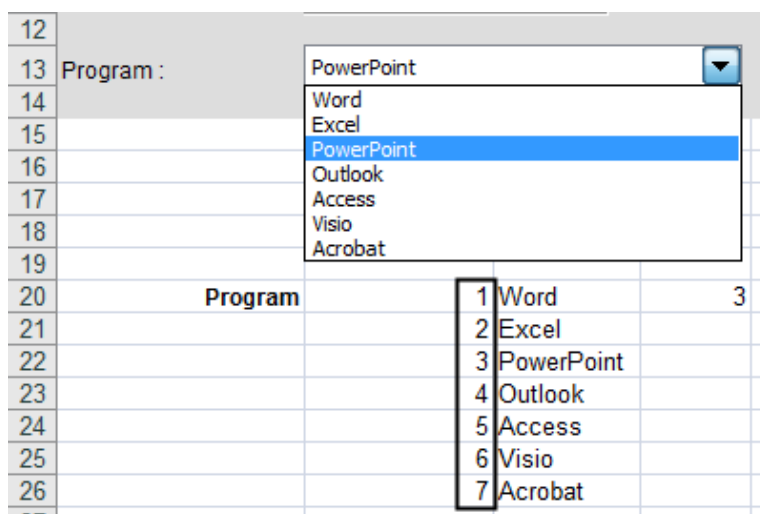
Some hints :

Whatever the control, we usually type the corresponding labels next to the linked cell. For check boxes and option buttons returning the TRUE or FALSE logical values, we convert them into 1 for TRUE and 0 for false, because this will be easier to test with an IF function. To convert, use the =N(cell) function :



	A	B	C	D
33				
34	Other courses ?	Word	TRUE	1
35		Excel	FALSE	0
36		PowerPoint	FALSE	0
37		Outlook	FALSE	0
38		Other	TRUE	1

For lists, we usually create a table showing the label corresponding to each number :



12				
13	Program :			
14				
15				
16				
17				
18				
19				
20	Program	1	Word	3
21		2	Excel	
22		3	PowerPoint	
23		4	Outlook	
24		5	Access	
25		6	Visio	
26		7	Acrobat	

Then it will be easy to retrieve the label through a VLOOKUP function.

2.2.8 Retrieving the returned values

Simply use links, tests with an IF function, the VLOOKUP function and so on

Here below the user choices for a given form (pasted as a record in order to create a little "data base") :

	A	B	C	D	E	F	G	H	I	J
1	Company	Name	New client	Workshop	Level	Environment	Training quality	Training book	WD	XI
2	COMPUTERS S	Smith Johanna	Yes	PowerPoint	Basics	Satisfied	Excellent	Exhaustive	Yes	
3										
4										
5			=Questionnaire-linked-cells!B8							=IF("Questionnaire-linked-cells!M6=1,"Yes","No")
6										
7										
8										
9										=VLOOKUP("Questionnaire-linked-cells!M10,"Questionnaire-linked-cells!K10:L16,2,FALSE)
10										
11										=IF("Questionnaire-linked-cells!M26=1,"Excellent",IF("Questionnaire-linked-cells!M26=2,"Good","Fair"))
12										

What should follow is quite easy to guess : when someone fills in the form, a macro (as a macro button for example) would copy the user choices and paste them into an Excel list (preferably into a another workbook).

It is quite simple to create a macro that will copy the row 2 and paste it into an Excel database.

But when the form is used a second time, this row will be overwritten by the coming values because an automatic macro does not specify that it must find the first empty row before pasting. A very small problem, but that can only be solved through a VBA command.

3 Hiding a worksheet or a workbook

When you need to automate you work in Excel, it can prove handy to hide a worksheet (for instance the sheet where you have typed the list of items for form combox box).

- Right click the required worksheet and option HIDE

Less common because used mostly be developers : hiding a workbook

- VIEW Tab – WINDOW Group – HIDE Button

Unhiding : the UNHIDE command in both cases.