Transcript for Session 024

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Transcript:

Hey podcast listeners, welcome to chandoo.org podcast session 24.

Thank you so much for joining me today. I am really glad to be here for recording another podcast after what has been a pretty devastating and incredibly powerful cyclone experience.

As you may know, I narrated my experience of witnessing a cyclone in session 23. On October 12th, suddenly we had a category 3 hurricane or cyclone passing through our city. It lasted for about 24 hours. It was a very intense, horrifying and devastating experience of such a massive force of nature - uprooting the trees, weak roofs of houses, destroying all the natural beauty around our house and pretty much throughout the city where we live. It was a very intense experience and I am really fortunate that nothing serious happened to me and my family or anybody that I know around the place where we are living. So, all my close relatives, friends and family members are all unhurt. Of course, we are worried because so many things that we came to love and appreciate about this city have been completely uprooted and gone. For example, we really enjoy the greenery and natural beauty of this city, but it's no longer there. Anyway, it is also an indication that we should have a fresh start. So, a lot of us are planting a lot of trees and setting things up in a way that, in the next decade or so, we could again have similar greenery and natural beauty in Vizag (my city).

I don't want to make it sound depressing or anything, so I won't talk about the storm. The upside of the storm is that it knocked me offline for about 2 weeks. I didn't have internet connection - not just me, most people in Vizag didn't have internet connections or electricity or even clean water supply - so it's not an upside as such, but the upside for me as an individual is that I used this time to work on several pending projects. One of the projects that I worked on during this time is creating a set of ready-to-use dashboard templates. I know quite a few of you are familiar with Excel dashboards and on http://chandoo.org we dedicate a lot of space, energy and thinking to create better Excel dashboards. We have been talking about dashboards since 2008-2009. In fact, the pages on dashboards are the most frequently visited pages on our website. Our Excel School dashboards program, which is an online training program, is quite popular because I teach people how to create Excel dashboards - not simple ones but pretty awesome and interesting looking dashboards. Till date, more than 5000 people have joined that program and learnt how to create them.

But, every 2-3 days, I would get an email from someone asking me, "Hey, Chandoo, I like your dashboards, but I don't have time to learn how to create them. Do you have a template or anything where we can just plug our data and generate the dashboard?" I always tell them that I'm sorry that I don't have anything like that to offer. But this has been on my mind because, unlike the training programs that we run which help you learn how to create them, a template is more like giving you

something that is readymade. You put in your data, save heaps of time and you generate beautiful, awesome looking reports that are insightful and useful for your business all in a matter of 30 minutes or less. I wanted to create something like this but I've always been postponing it because it requires a lot of quiet time to sit down and create it. So, I used the cyclone inflicted downtime to really work on it. And, I am very happy to tell you that I created the very first version of this dashboard templates and I am planning to launch them for public sales and consumption on Thursday, November 13th. So, you can find them soon on http://chandoo.org/session24/ to access the link related to these dashboard templates along with a sneak-peak review of the files. So, if you visit between now and November 13th, you'll find 6 sneak-peaks. If you visit after November 13th, you'll find a link to the page where you can learn more about the templates and maybe get a copy for yourself. So, I'll talk about the templates in a later podcast or on our website.

For now, let's move on. The topic of today's podcast is **'Customization of Excel'**. Quite a few of you are familiar with Excel customization features but if you look at Excel, it is like a box software. Of course not many of us purchase the box software these days as it has moved to the cloud, i.e. you buy a new computer or tablet, connect it to the internet and download the software as an app from the internet. But whether you are buying a box or downloading it from the internet, the reality is that Excel is like a small box - when we are buying Excel or installing it, we find that our Excel is similar to the Excel that or colleagues or someone across the world has. Everyone has the same Excel, i.e. if you are using Excel 2010 and someone else is using Excel 2010 as well, you can be pretty sure that it's the same stuff. There's really no difference in terms of what the program can do. But, the reality is that although it is the same Excel for all of us, each of us will use it differently. For example, you might be using it for marketing data analysis whereas your colleague or spouse might be using it for HR data analysis and someone else down the lane may be using it to analyse charity fund-raising progress. Everybody has got their own motives and intentions when they open up Excel and start to use it. So, how come we have millions of people using the same software? This is where customization comes into the picture. By customizing Excel and telling it how to behave in many default situations, we can increase our productivity and do a lot more with it. So, today, I will talk about some **very powerful, useful and simple ways to customize Excel.**

When I think of customization, I can see **six different ways in which we can customize Excel**. These are six distinct ways in which we can customize Excel. Of course, there are probably more ways to customize it, but, for me, it really boils down to these six high-level ways.

The **first method** to customize Excel is to **use Excel options**. Again, just to highlight, when I talk about these things, usually I talk from the context of Excel 2007, 2010 and 2013, so most of these things will work in these three new versions of Excel. But, if you are running an older version of Excel, you could still apply many of the concepts that I am explaining but some of them won't work as Excel has changed dramatically since Excel 2007.

So, the first method to customize Excel is to use Excel options. The options area has been there since Excel 2000. So, even in a very old version like Excel 97, you might find a screen that says 'options'. But, what that screen can do and how that screen is laid out have changed over time. Starting with Excel 2007, if you go to the File menu or Office button or Backstage view, if you click on the Options button, it'll open up a whole new dialog box called 'Excel options' where you can tweak a lot of switches that tell Excel how to behave by default. For example, one of the popular ways in which I customize my Excel is

related to how Excel shows three new worksheet tabs when you open Excel. When you open Excel and create a new workbook, you'll see Sheet 1, 2 and 3. It's as if Excel wants you to work on three different tabs whereas, for most of my work, I usually work on one tab or, at best, two because that's the kind of work I do. So, I find that these extra tabs are really useless. So, in my Excel options, I have told Excel to start Excel with only one tab. Whenever I create a new workbook, I only see one worksheet tab there. It saves me a lot of time because most of the time I publish my workbooks online, and when I do that, I want to make sure that the file contains only what is needed and all the extraneous stuff is gone. So, these extra tabs are things that I would often delete and instead of my deleting them every time, I've told Excel once that I simply want to start with one tab. And, from that time on, I haven't had to delete the extra tabs! This is one way to customize Excel through Options.

There are many other customization options. Some of my favorite ones for my work, which mostly involves developing a formula or creating a chart or dashboard or writing a macro - since I know what I am doing, I find **Excel's error checking options** a little tedious. For this reason, I go the Formulas area from Excel Options and I tell Excel to not bother me for most types of errors. Excel tries to be helpful with various error-checking options. For example, one of the options is that if you put in a number in a particular cell but it is formatted as text, then Excel warns you. But, this might happen to someone who doesn't know what they are doing or someone who is working with data coming from an external system through an import or connection where the database is often sending the numbers as text whereas you are supposed to deal with them as numbers. But, for me, 99% of the time, I deal with data that I am creating and I know what I am doing, so I find the warning message that pops up when a number is formatted as text a little annoying and I have to turn it off. So, I thought that instead of having to do this every now and then, why don't I go and do it once and for all. So, from the Excel Options Formula screen, I've turned off many of the error notifications. You can also try it depending on the nature of your work and the kind of things that you do, you can **turn off various error notifications** because, instead of helping you, they might sometimes come in your way when you are trying to work.

The third thing that I often customize from Excel options is **changing the auto-correct behavior**. Again, this depends on the nature of your work. For example, I tend to mis-spell certain spellings maybe because I have learnt English in India whereas most of my writings on the blog are targeted to Western countries like US, Canada and parts of Europe. So, certain spellings that I am used to are not the same as how Americans would spell them. So, I've added some customizations in the auto-correct options so that instead of remembering how Americans spell it, I just type my spelling and I tell Excel to change it to the American way. That saves me some time. **Auto-correct is a powerful way to customize Excel and tell it how you want it to behave when you are typing certain types of things.**

Likewise, another very important feature in Excel that you can customize is **how it should auto-save**. Again, for me, most of the work that I do in Excel is really important because my life is entirely dependent on Excel - I maintain an Excel website, I talk about Excel and I create Excel files that other people can use. So, it's important that I don't lose my work. So, I set up auto-save in my Excel options as 'on' so that even if I am a little casual and forget to save, Excel is saving the workbooks and it maintains a recovery repository of the files so that if I lose power or if my computer crashes or if something else happens, I can be rest assured that the files are there.

These are some of the popular ways to customize Excel through Excel options. That's the number one method of customizing Excel.

The **second method** of customizing Excel is called as **'quick access toolbar'**. It's the toolbar that shows at the top of the Excel screen when you open up Excel. It is right next to the Excel icon on the header, there are a bunch of icons - usually they are the save, undo and redo buttons. That area on the top where your workbook name is mentioned and the buttons for minimizing, maximizing and closing the window are mentioned is called the quick access toolbar. That toolbar is going to provide you with a lot of features that you frequently access. Instead of just having the save, redo and undo buttons there, you can also add any number of other buttons to it. The easiest way to do this would be as follows - let's say that your job involves applying conditional formatting quite often - instead of going to the Home ribbon and accessing Conditional Formatting from there every time - you could right click on the Condition Formatting icon on the Home ribbon and select 'add to quick access toolbar' and the button will get added to the quick access toolbar. Now, anytime that you need to apply conditional formatting, you don't have to switch the ribbons. Instead, you can just access it from the quick access toolbar. Hence the name 'quick access'. **It provides you quick access to the frequently used features of Excel.** If you look at my quick access toolbar, it has the save, undo and redo buttons and apart from those, it has buttons for inserting drawing shapes because in my most of my workbooks, I tend to add a lot of buttons and shapes. Likewise, it has tools for aligning objects. I work with a lot of shapes and I want them to be perfectly aligned which is why I have the alignment tools. It also has other features, for example, I use the Freeze Panes options very often and so I have added it to the quick access toolbar. I have also added macros developed by me which I need to quickly access. You can add any Excel features here as well as you can add your own macros.

The other feature of the quick access toolbar is that **you can move its location**. By default, Excel shows it right on top but you can move it right next to the formula bar. To do that, **right click on the quick access toolbar and tell Excel that you want to show the quick access toolbar below the ribbon**. Again, that's a powerful way to customize Excel.

So, the first method is using Excel options and the second option is to use the quick access toolbar to customize Excel.

The **third method** is to **customize the ribbon**. Starting with Excel 2010, Microsoft has introduced features built into Excel that'll let you create new ribbons as well as move around existing ribbons and modify them. Excel has 7-8 important ribbons like Home, Page Layout, Insert, Formulas etc. But, the functionalities that we access are really scattered across all these ribbons. So, instead of jumping around from one ribbon to another, **you can create a ribbon called 'My Ribbon' where you can bunch all the things that you frequently use** into that ribbon and make that your first ribbon. It'll show up there and you can use that for everything that you do most often and the only when you don't find a feature in there would you need to go into some of the other ribbons. **This is one way to dramatically increase your productivity in Excel** because most of us tend to spend a lot of time in one ribbon, navigating from one ribbon to another finding the feature that we want. So, you could add all the things that you frequently access into a custom ribbon. For example, if your job involves importing data from an external connection, formatting it as a table, making some pivot tables, saving the workbook and making some PDFs from it, all of these features are scattered across multiple ribbons. Instead, you could create one ribbon called 'My Job Ribbon' and add the data connection features there along with the table features, pivot tables features and the page layout formatting features so that you can do all your work from that one ribbon itself. It's a very powerful way however **it is only possible from Excel 2010 and**

above. **One of the things that you need to remember is that all these customizations are local to your computer.** They are not specific to the workbook that you creating; they work on any workbook as long as you are using the same computer. So, you really increase a lot of productivity and save quite a bit of time by customizing Excel through this method. **To customize the ribbon, right click anywhere on the ribbon and just go to the 'customize ribbon' button and once you are there, you can go ahead and make changes to the exiting ribbons**. For example, if you just want to add something to the Home ribbon, you can do that. Or, if you want to create a new ribbon, you can do that as well. That screen could be a little confusing so I am going to provide a link to a detailed tutorial on the show notes page of this podcast. For that, just visit http://chandoo.org/session24/. This is the third way to customize Excel.

The first way is through Excel options, the second way is through the quick access toolbar and the third way is through the ribbon.

The **fourth method** is that you can also **customize how the Backstage view or the File menu** looks. This is not really like customizing a ribbon as what we have in the File menu or Backstage view is an area that we frequently access. When we open Excel, we are in the File menu. When you want to save a file, you're in the File menu. When you want to open something like another workbook, you're in the File menu. Likewise, when you're printing or doing other things we frequently bounce back to the File menu or the Backstage view. So, you can save some time in that page by customizing it. The customization options that I frequently use are - let's say that my work involves going to a certain folder or a certain workbook or a certain set of files everyday - this is quite applicable for those of you who work with the same report format or the same file everyday - once you open the file and it shows up in the recent workbooks area, you could **right click on it and pin it to the list. By pinning it that file will always be visible.** It's as if you're taking that file, workbook or folder and telling Excel to always show it to you right at the top of the list every time. This is a very powerful way to access your recent workbooks list, your saving folder location etc. For example, I tend to save all my workbooks to a folder called chandoo.org on my computer. So, I have pinned the location of chandoo.org in my save path so that I don't have to go Windows Explorer and select the folder each time. I just click on it and it opens my folder and I save my file there. This is how you can customize the Backstage view and save some time.

So far we have talked about customization of Excel. We're customizing Excel and it is customized on our computer, i.e. it is applicable for all the files within that computer.

The **fifth method** of customization is similar but slightly different. It is called **themes and templates**. Often, due to corporate policy or personal reasons or style preferences, you want to use a certain set of colors or fonts or cell styles or charts. Instead of creating them from scratch for every workbook, you can go ahead and set up a style or theme in Excel so that every time you apply that theme, Excel will apply it for that workbook and the workbook will get changed. For example, if you go the Home ribbon on Excel, you'll see a big, prominent area right next to the Conditional Formatting and Format as Table icons, called Styles, Excel comes pre-loaded with several styles. When you buy Excel, it comes with these styles created by Microsoft. These are the styles that they have created. But, you can click on the 'new cell style' button and set up a style as per your requirements, for example the kind of formatting, fonts, colors, cell-protection etc. that you want. **Give it a name and save the style. That style will be saved in your computer. The next time you open up Excel with any other workbook, you can access that style.**

Likewise, if you go to the page layout ribbon, on the left hand style you will see a **Themes** button. Again,

Microsoft Excel comes with several pre-loaded themes which are a set of font and color rules that tell Excel what fonts and colors to apply by default. By default, the theme will be Office or Office 2010. But, you can go ahead and create a whole new theme depending on your personal preferences and choices and save it to apply it later on for any other workbook that you work on. So, by creating a set of styles, themes, color choices or templates, you can again save a lot of time. As I told you earlier in this podcast, our dashboard templates are one of the ways to help you save time. I've created a template where I've set up an area for data entry and customization. Once you've completed the data entry and customization, the report is ready! You don't have to develop the formulas every time. That's the kind of productivity gains that you'll see by using styles, templates and themes.

The **last way to customize is by using personal macros**. We've discussed VBA and an introduction to it in session 22 of the podcasts. So we know that by using VBA and macros, we can customize Excel, i.e. we can create code or features in Excel that are not natively supported. For example, just yesterday I was trying to create several worksheet tabs that have the same row height. If you open Excel and it has Sheet 1 and Sheet 2 as two tabs in it. By default, the row heights on both tabs are the same. However, let's say that I've adjusted the row heights on the first tab in a certain way and I want to have the same row heights replicated on the second tab as well. Since they are structurally similar, I really want them to have the same heights. But, if I start to do this row by row and there are 35 rows, that's just going to take forever. The problem is that we just can't copy and paste. If you just copy and paste, it won't work. If you copy and paste, you must copy and paste the entire worksheet. Then it'll work. But, I don't want to copy and paste the entire worksheet; I just want to copy and paste my row heights. There is really no way to do this. So, I wrote a small macro so that I could go to Sheet 1 and get the row height for each and every row and apply it to Sheet 2 for the first 40 rows as that was the only area that I was using. This way I could quickly get the row heights on multiple tabs by writing a simple macro. While I was writing it, I figured that this could be something that I also use in the future. So, I saved it in a personal macro workbook. I didn't save it as part of the current file but I saved it as part of a personal macro workbook and made the macro a little generic. Once I save it there, I can re-use it anywhere. This is what macros do; they can **help you customize a lot by helping you create and save macros in your personal macro workbook and add it as an add-in to Excel.** Again, explaining how all of this works in a podcast could be slightly tricky. So, I will provide a link to a tutorial that my good friend Jeff wrote on my blog about how personal macro workbooks work and how you can set it up and use it. So, please visit http://chandoo.org/session24/ for accessing this.

These are the six methods. **To summarize, the first method is to use Excel Options, the second method is to customize your quick access toolbar, the third method is to customize the ribbon, the fourth method is to customize your File menu or Backstage view, the fifth method is to define some styles and themes, and the sixth method is to develop some personal macros so that you can customize Excel**. So go ahead and customize Excel and let us know how you customize Excel in the comments section.

As a **gift**, if you comment and tell me how you customize Excel and the kind of customization that you're doing and the techniques that you follow and share your tips and stories, I will give an **Excel customization handbook**. This is a PDF document that I am preparing and I'll give this to you as a free gift. So, go ahead and tell me how you customize Excel in the comments section. I want to learn from your experience and I want to learn what you do to speed up Excel for your day-to-day work. So, go ahead and tell me that and I'll be happy to give this Excel customization handbook to you so that you

can maybe learn a couple of more techniques and apply them.

Thank you so much for listening to this podcast. I really can't tell you how thankful I am for having you tune in to my podcast every week and learn something new about Excel. If you like our podcast, can I be a little selfish and ask you for a small favor? Please go to iTunes at itunes.chandoo.org or on you iPad or iPhone or whatever device you are using and search for Chandoo. Our podcast will pop up there and please leave your honest feedback or review there. I will really appreciate your review there because if you have something to say then other people have the chance of discovering our podcast and they will also be able to become awesome in Excel.

Thank you so much. I will see you in the next episode. Bye.