



Customize All Future Workbooks

BY BILL JELEN

Every time I create a new workbook, I find myself making the same changes to the worksheet before using it. For example, I adjust the margins, the scaling, and the text in the header and footer. Using the techniques in this article, you can adjust these settings for all future workbooks.

When you click the New icon to generate a workbook, Excel opens a generic workbook with 1" margins at the top and bottom, 0.75" margins at the left and right, and blank headers and footers. Before this default workbook is generated, however, the program first checks to see if you have specified alternate settings in a file called book.xlt. Any settings in book.xlt will override the defaults. It only takes a couple of minutes to set up and store book.xlt once, preventing you from having to continually make the same changes to every new workbook.

Create an XLStart Folder

The first step is to create a new folder by using Windows Explorer. I generally call my folder C:\XLStart\, but it could easily be called Bob or Fred. More importantly, the folder can be located on a network drive. This is

useful if you want everyone in a department to use the same headers and footers on all documents—everyone with access to the network drive can share the same book.xlt.

If your keyboard has a flying windows key, a fast way to launch Windows Explorer is to hold down the flying windows key while pressing E. Alternatively, go to Start, My Computer. Navigate to the desired drive. Right-click in the file list area of Windows Explorer, choose New, Folder. Explorer will create a new folder with the generic name of "New Folder" and put the folder name in edit mode. Enter the name you want for the folder, such as XLStart.

Tell Excel Where to Look for Book.xlt

In Excel 97, 2000, and 2003, go to Tools, Options. On the General tab, enter the name of the folder you've just created into the next-to-last field.

In Excel 2003, this field is labeled "At Startup, Open All Files In." In Excel 2000, the field is in the same location but is labeled "Alternate Startup Location." In Excel 2007, click on the Office Icon and go to Excel Options. Choose the Advanced category in the left navigation. Scroll all the way down to the General section—it's the ninth section, almost at the end of the dialog. Enter the new folder name in the text box labeled "At Startup, Open All Files In."

Make Your Favorite Changes One Last Time

Create a blank workbook with a single worksheet. Make all of your favorite changes to the Page Setup dialog. Other changes that can be stored include the worksheet View options, which include the presence or absence of gridlines, outline symbols, or row and column headers. Although it's less likely that you'll want to do so, you can also make changes to column widths, cell colors, and fonts. Perhaps you want every new workbook to have a green heading in row 1 with your company name and address. Feel free to make these company-specific changes.

Many changes are made in the



Page Setup dialog. In Excel 2003 and earlier, choose Page Setup from the File menu. In Excel 2007, Microsoft replaced the Page Setup dialog with a dizzying array of icons on the Page Layout tab of the ribbon, but you can get back to the original Page Setup dialog by clicking the tiny Dialog Launcher icon in the lower-right corner of the Page Setup group (see the mouse pointer in Figure 1).

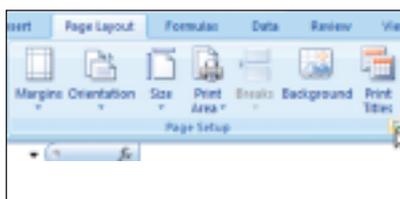


Figure 1

Here are the changes that I regularly make in the Page Setup dialog:

- ◆ On the Margins tab, I change the left, top, and right margins to 0.25", the bottom margin to 0.5", and the footer location to 0.25".
- ◆ On the Header/Footer tab, I add the built-in "Page 1 of ?" footer and then use the "Custom Footer..." button to add "Confidential" to the left footer and perhaps the file path & name or the date and time to the right footer.
- ◆ On the Page tab, I click inside the

textbox for "by 1 tall" and use the backspace key to clear the 1. This will choose the Scaling option of "Fit to 1 page(s) wide," but it won't constrain the report to fit to one page tall. The end result should be that the "tall" setting is blank, as shown in Figure 2.

To adjust gridlines in Excel 97, 2000, and 2003, use Tools, Options, View. In Excel 2007, use Office Icon, Excel Options, Advanced, Display Options.

Save the File as Book.xlt and Sheet.xlt

Use File, Save As to access the Save As dialog. (In Excel 2007, use Office icon, Save As, Other Formats.) In the bottom of the dialog, open the dropdown for "Save as Type" and choose Template. When you do so, Excel automatically navigates to the Documents and Settings\Your Name\Application Data\Microsoft\Templates\ folder. So choose Templates first, then navigate back to the new folder that you created to hold book.xlt. Once you have navigated to the new folder, save the file as book.xlt. If you want your new settings to be applied to any worksheets that you insert into an existing doc-

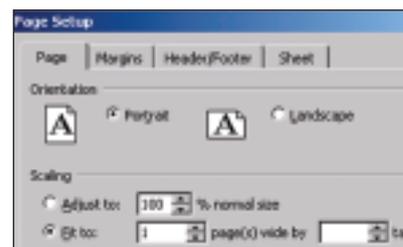


Figure 2

ument, then save an identical copy of the workbook as sheet.xlt. (Note that sheet.xlt can only contain a single worksheet. If you want every new workbook to have three worksheets, you are allowed to include multiple worksheets in book.xlt.) In Excel 2007, the files will be saved with the new XLTX extension.

You've now effectively changed the default margins, footer, and other settings for all future workbooks that you create using Ctrl+N or the New icon in the Standard toolbar. A common question is: "Will this affect workbooks that were created by others and sent to you?" It doesn't, but if you pass this trick on to others in your department, you can all begin to create documents with common settings. ■

Bill Jelen is the host of MrExcel.com. Download a free preview of his latest book from www.MrExcel.com/previewIMA.html. Send questions for future articles to IMA@MrExcel.com.