Understanding Templates and How They Work

I have seen many people reuse the same workbook over and over. They edit the data and then use the Save As command to save it with a different name. In some cases, when the data being edited is not a significant amount, this works fine: If you are simply changing the date at the top of a worksheet or changing the data in only one or two cells, it's easy to just do this and save it with a new name. But when you're changing more than you're keeping, this can be a lot of work. For example, think of a yearly expense report. At the end of the year, you could delete all of the data for that year and leave only the column and row headings intact, and then use Save As and give it a new name to produce a new empty expense report for the next year. However, inevitably, you might find you have deleted something from the original workbook that you need in the new one, so you have to enter it all over again. Or, maybe you had formulas in the previous workbook that you've deleted and need to use again, so now you have to open the old workbook to view these formulas so that you can create them again in the new workbook. And what if you remove data from the original workbook, then accidentally click the Save button instead of using Save As? Whoops, the previous year's expense report is now lost forever!

When you use a template, you access it using the File ➢ New command, and it works similarly to a blank workbook. You can simply enter or edit data in the workbook, then click the Save button and name it just as you would if you had created the new workbook starting with a blank workbook. The blank workbook itself is a template—albeit a template without much preset formatting.

It's important for you to understand the difference between using a template and editing a template. Using a template allows you to produce a new workbook based on the template. Editing a template lets you change the actual template itself. To use a template (as we did in Chapter 2), you choose File ➢ New and select a template. When you've finished adding data, you simply click Save to create a new workbook based on this template. However, to edit a template, you can use File ➢ Open instead, and then locate the template file and make your changes. Then, when you save it, you're updating the actual template itself instead of creating a new workbook based on the template. Since templates are stored in an obscure location designated by Microsoft, it's usually easiest to find one by just loading it as a template using File ➢ New, then clicking on the On My Computer link in your task pane, which opens the Templates dialog box and displays them all for you. If you load a template by using File ➢ New, you can use File ➢ Save As and choose to save it as a Template (*.xlt) file. This would also update the actual template instead of creating a new workbook based on that template. In Excel's Save As dialog box, if you choose Template (*.xlt) from the Save As Type dropdown, Excel will automatically open your default Templates folder. Once you save the template in this location, Excel includes the template name on the General tab of the Templates dialog box.

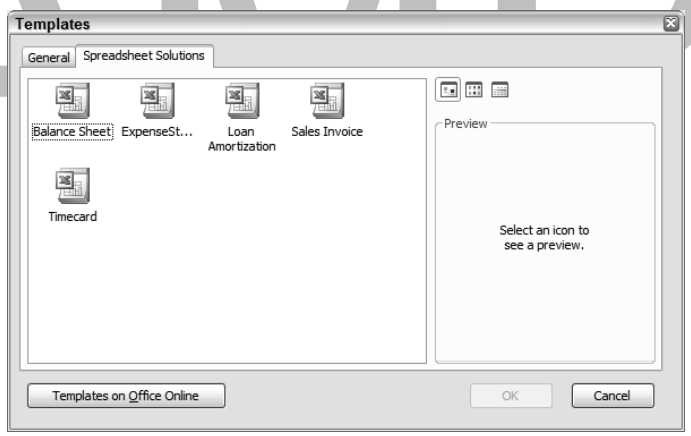
Let's get our feet wet by editing one of Microsoft's templates first. Then you'll move on to learn how to make your own from scratch.

Editing Existing Templates

In some cases, when you want a new template, there's already one on your computer that is close to what you want. In this case, there's no need to reinvent the wheel by starting from scratch; instead, it's easiest to edit the one you already have. You can edit existing templates, then save them with the same name to overwrite the existing one with your new one. Or you can save it with a new name so that you have both available in your Templates dialog box.

By default, Excel has two tabs in the Templates dialog box. The General tab shows your blank workbook template and any new templates you create and save in Excel's default location. The other tab is Spreadsheet Solutions; this tab contains Microsoft's templates that are included when you install Excel (see Figure 9.1). Remember, in Chapter 2, we used the Timecard template to create a new workbook based on a template? Excel also includes templates to produce balance sheets, expense statements, loan amortization tables, and sales invoices. There's also a Templates On Office Online button at the bottom of the Templates dialog box. If you're connected to the Internet, clicking this button takes you to Microsoft's website, where you can download more templates not only for Excel but also for all of the Microsoft Office programs. I recommend you go there and check them out.

FIGURE 9.1 Excel's Spreadsheet Solutions templates



Usually, when you use a template created by someone else, the template is protected with a password so that you cannot change it. However, because Microsoft assumes you'll want to modify these templates to suit your own needs, they are not password-protected.

Let's use Exercise 9.1 to edit Microsoft's Sales Invoice template.

EXERCISE 9.1

Making Changes to a Template

1. Open Excel, and choose File ➢ New. The New Workbook task pane opens.
2. In the Templates section, click the On My Computer link. The Templates dialog box opens.
3. Select the Spreadsheet Solutions tab, then double-click the Sales Invoice template. The template loads; Excel's title bar reads, "Microsoft Excel Sales Invoice1" instead of the usual "Microsoft Excel Book1."
4. Click on the Insert Company Information Here text at the top of the worksheet. A message appears explaining how to use Excel's Help files to learn how to edit the template.
5. Try to click on any other text in the invoice and you'll see that you can't select those cells. However, you can select the cells to the right of the text (remember we learned this in Chapter 2). This is because the template is protected.
6. Choose Tools ➢ Protection ➢ Unprotect Sheet. Because Microsoft did not password-protect this template, the protection is removed, and now you can select all areas and edit them.
7. Choose File ➢ Save. When the Save As dialog box comes up, use the Save As Type drop-down box at the bottom to choose Template (*.xlt). When you do, the Save In box at the top displays Microsoft's Templates folder. Do not change this location or your template will not show up in the Templates dialog box.
8. Name the template **My Invoice.xlt** and click Save. (Remember, you don't have to type the .xlt extension. Because you chose that as your file type, Excel will add the extension for you.)
9. Click Insert Company Information Here. You can see by the shading of the row and column headers that this is a merged cell that includes C3:J6. Use the buttons on the Formatting toolbar to change the font to Comic Sans MS, 12pt., Dark Blue, bold, and remove the italics. Then use the Fill Color button to set the fill color to Light Turquoise.
10. With the merged cell still selected, type **Choice Chocolates** and press Alt+Enter. Then type **10 Sweet Street, Candyville, PA** and press Enter.
11. Click the Invoice No text. As you can see, the Name box shows that you're in cell L3. Click in the Formula bar and change the word *Invoice* to **Order** so that the cell now contains **Order No.** Press Enter.
12. Click in the Name box, type **m19**, and press Enter. This moves you to the first cell below the text TOTAL. As you can see in the Formula bar, this cell contains a formula.

    According to this formula, if the value in L19 (unit price) is not (<>) empty (""), Excel should multiply L19 by C19 (quantity), then round this off to two decimal places. However, if L19 is empty, Excel should leave this cell empty too.

EXERCISE 9.1 ***(continued)***

Check out the other formulas in M36, M38, M39, and M40 and try to figure out what they are doing.

13. Cells M38 and M39 contain formulas to calculate the sales tax on the order based on different tax rates you can enter in L38 and L39. Let's assume we only have one tax rate, so select cells L39:M39 and press your Delete key to clear them. Then type **6** in L38 and press Enter. Note that it is formatted as a percentage with two decimal places and is converted to 6.00%. Return to cell L38 and click the Decrease Decimal button two times to change it to 6%.

14. Click the Insert Fine Print Here text and type **All Sales Are Final.** Press Enter.

15. Move to cell A1, then choose Insert ➢ Picture ➢ Clip Art. The Clip Art task pane appears.

16. In the Search For box, type **candy**. Be sure the Search In box says All Collections and use the Results Should Be dropdown to deselect everything except Clip Art. Click the Go button.

17. Click on any one of the candy pictures that appears in the task pane to insert it on the invoice. Close the Clip Art task pane.

18. Select the merged cell at the top of the invoice that holds the company name and address, and click the Align Right button on the Formatting toolbar. Then resize and reposition the Clip Art picture that you inserted so that it sits to the left of the company name at the top of the invoice.

19. Choose Tools ➢ Protection ➢ Protect Sheet. When the Protect Sheet dialog box opens, leave all the default settings, but type **123** in the Password To Unprotect Sheet box. Click OK. Then type **123** again when Excel asks you to confirm the password and click OK again.

20. Click Save to update the invoice, then close it.

21. Choose File ➢ New and select On My Computer in the task pane. Note the template, My Invoice, appears on the General tab. Double-click to load it.

22. Notice the areas you couldn't select before cannot be selected again. This is because you protected the template. Choose Tools ➢ Protection ➢ Unprotect Sheet and see you're prompted for a password. Click Cancel.

Try entering some items and amounts and see how the template works. When you're done, close it again. Remember, when you close it, if you're prompted to save, it's a new workbook you're saving and not the template itself. You can save it if you want, but it's not necessary.