## Templates!

HelpMeExcel.com

James Tobin Consulting, LLC

### Why Bother With a Template?

Does it bug you that every time you open a new file you have to fix the headers and/or footers? Maybe the number format is all wrong. Maybe every new file you open you want to be macro-enabled. Maybe you want every new file to have the company name, your division and date in the first three rows of column A. Or perhaps you prefer the wing-dings font instead of Calibri.

Wouldn't be great to have the new blank file all ready set up to go when you open it? Dang right it would....

You can create a template that'll be loaded with all your favorite formatting and tools to enable you to jump right in. There'll be no more backfilling of formats, footers/headers, styles etc.. You'll open a new file and voilà, you're ready to roll!

A template serves as an example from which to copy. Synonyms might include cookie cutter, model, pattern, blueprint, archetype and prototype.

Typically, in Excel, there are three types of templates:

- 1. Worksheet;
- 2. Workbook; and,
- 3. Custom.

The worksheet and workbook templates are sometimes referred to as "Default Templates" because they are used when opening Excel or used when a new workbook is created (File\Open\New or Ctrl+n) or a new worksheet is added to a workbook (Home\Insert\Insert Sheets or Shift+F11 or the "+" button at the far right-hand side of the worksheet tabs).

The custom template is usually a file that is used quite often such as an Invoice, an Expense Report, a Journal Entry Upload, a monthly Sales Report, a Quarterly Forecast or an Annual Budget. Typically, the custom template requires only new data be input. The formulae and formatting wouldn't change, and the workbook is ready as soon as the new data is installed.

An important aspect of working with templates is that when you open a new workbook/worksheet based on a template, any changes you make will <u>NOT</u> be to the template but newly created workbook/worksheet created from that template. To change the template, you'll have to perform the same steps as if you were creating the template, except that you'll use the actual template file.

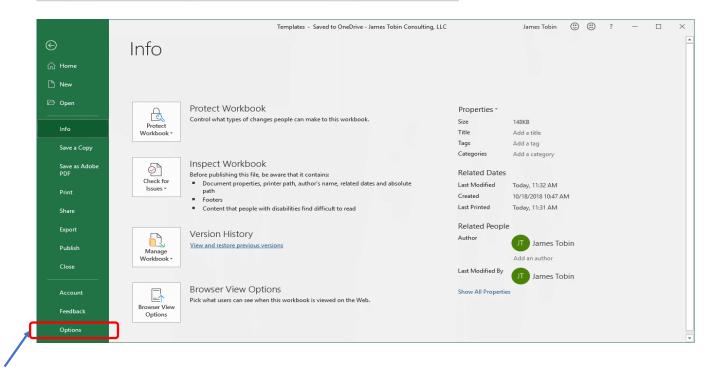
Templates!	
HelpMeExcel.com	
James Tobin Consulting, LLC	

#### **Creating a Default Template**

The first thing you'll need to do is to locate where your default templates are stored.

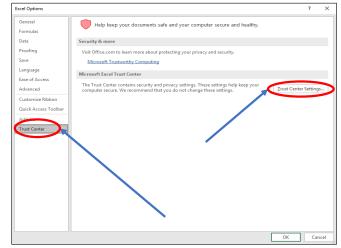
1. From the ribbon, select File then select Options and a dialogue box will appear.

	File	Home	Insert	Page	a Layout	Formulas	Data	Review	View	Developer		Help	
/	Paste	K Cut Copy ▼ Format Pain		Calibri <b>B</b> I <u>L</u>		8 • A^ A*		= ≫. = ⊡ =	ë⊉ Wra	ip Text ige & Center	-	Gene	
	Cli	ipboard	rs I		Font	G		Align	ment		rsi i		N



Templates!
HelpMeExcel.com
James Tobin Consulting, LLC

2. From the Excel Options dialogue box, select Trust Center then select "Trust Center Settings...".



3. From the Trust Center dialogue box, select "Trusted Locations" and then write down the path that corresponds to the "User StartUp" description. Typically, that path appears as C:\Users\<username>\AppData\Roaming\Microsoft\Excel\XLSTART

Trusted Publishers	
Trusted Locations	
Trusted Doluments Path Description Date Mod	ad X
Trusted Add in Catalogs User Locations Description	eu ·
C. (Frogram Files (Microsoft Office) Root (Templaces) Excel default location: Application Templaces	
Add-ins C:\Users\JamesTobin\AppData\Roaming\Microsoft\Excel\XLSTART\ Excel default location: User StartUp C:\Desgram Files\Microsoft\Excel\YLSTART\ Excel\YLSTART\ Exc	
ActiveX Settings C:\Users\JamesTobin\AppData\Roaming\Microsoft\Templates\Excel dr.ault location: User Templates C:\Program Files\Microsoft Office\Root\Office16\STARTUP\Excel default location: Office StartUp	
Protected View C:\Program Files\Microsoft Office\Root\Office16\Library\Exce default location: Add-ins	
Message Bar Policy Locations	
External Content	
File Block Settings	
Privacy Options	
Path: C:\Users\JamesTobin\AppData\Roaming\Microsoft\Excel\XLSTART\	
Description: Excel default location: User StartUp	
Date Modified:	
Sub Folders: Disallowed	
Add new location <u>R</u> emove <u>Moo</u>	fy
Allow Trusted Locations on my network (not recommended)	
Disable all Trusted Locations	
ОК	ancel

Templates!
HelpMeExcel.com
James Tobin Consulting, LLC

- 4. Select Cancel (twice) so that you'll return to Excel info and then return to the open workbook.
- 5. First, create the workbook template, then create the worksheet template. For the best results, open a new workbook and remove all the worksheets except Sheet1.
- 6. In Sheet1, create the headers, footers, formatting, fonts, alignments, number formatting, styles etc.. If you're creating a workbook template, copy the newly formatted worksheet and add as many copies of the worksheet as you wish to the open workbook to create the workbook template, then continue to the next step. If you're creating a worksheet template, simply continue to the next step.
- 7. Once you've created your pièce de résistance, you'll need to save it as a template in the subdirectory that you copied from step #3. To begin saving the template, press F12 to "Save As...". The Save As dialogue box appears.

Save As						×	
→ 👻 🛧 📙 « TI10685	500A (C:)	→ Users → JamesTobin →	> AppData > Roaming > Microsoft >	Excel > XLSTART	Search X	LSTART ル	
rganize 🔻 New folder						EE - (?)	
ZZZ Stuff	^	Name	Date modified	Туре	Size		
💻 This PC		Book	1/14/2019 3:18 PM	Microsoft Excel Te	16 KB		
🧊 3D Objects		🔊 Sheet	1/14/2019 3:02 PM	Microsoft Excel Te	16 KB		
🔜 Desktop							
🔮 Documents							
🕹 Downloads							
👌 Music							
Pictures							
📑 Videos							
LI10685500A (C:)							
- New Volume (D-)	~						
File <u>n</u> ame: Book						~	-
Save as <u>t</u> ype: Excel Temp	olate					~	
Authors: James Tob	oin	Tags:	Add a tag T	itle: Add a title	Subject: Speci	fy the subject	
Hide Folders					Too <u>l</u> s <del>▼</del> <u>S</u> av	ve Cancel	

#### 8. \*\*\* Save Your Life Tip \*\*\*

Start at the "Save as type:" field (found at the bottom section of the Save As dialogue box) and select either Excel Template or Excel Macro-Enabled Template. It is very rare that a default template is macro-enabled, however, custom templates are more frequently macro enabled.

#### 9. \*\*\* Save Your Life Tip \*\*\*

Next, in the "File name:" field (immediately above the "Save as type:" field), type either "Sheet" or "Book" (sans quotes) depending on the default template you wish to create. Note that there are no numbers following Sheet and Book as the numbers are placed and incremented automatically by Excel as each worksheet is added or workbook is created.

#### 10. \*\*\* Save Your Life Tip \*\*\*

Next, in the path field (toward the top of the dialogue box), type the path that you found in step #3.

11. When all the elements are correct, press "Save" to save your default template.

# Templates!

HelpMeExcel.com

James Tobin Consulting, LLC

#### **Creating a Custom Template**

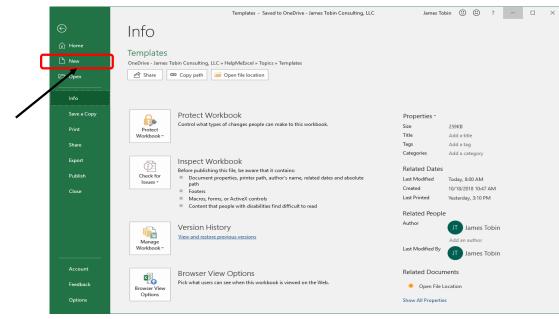
The custom template is usually a file that is used repeatedly such as an Invoice, an Expense Report, a Journal Entry Upload, a monthly Sales Report, a Quarterly Forecast or an Annual Budget. Typically, the custom template requires only new data be input. The formulae and formatting wouldn't change, and the workbook is ready as soon as the new data is installed.

Microsoft has already made hundreds of templates available for Excel users. In many cases, the template you seek may already exist, all you have to do is to open it, make the custom changes you desire and save it again as a custom template (as opposed to a default template) in Excel. For example, you might find an expense report template already created by Microsoft for Excel that will fit in perfectly for your company.

After determining that the template will work perfectly, you need to adjust the template so that the Company Name, Division and perhaps the Approval Path are accurate. Upon opening a new workbook based on the Microsoft template, make the needed changes and then save the workbook as a custom template.

Because this is not a "default" template, it will be stored in a different place. The nice thing about saving custom templates is that when they are saved as templates, Excel automatically changes the path to the correct subdirectory.

1. To find the hundreds (MS says thousands....) of prepared templates, select File from the ribbon and from the Info page, select "New".



Templates!
HelpMeExcel.com
James Tobin Consulting, LLC

2. Select the category of template based on the suggested searches provided by Excel. Or, if the template you seek does not fit into the listed categories, you can type it into the "Search for online templates" field to see if someone may have thought of it before.

		Templates - Saved to OneDrive - James	Fobin Consulting, LLC	James Tobin 🙂 🙁 ? —	
e	New				
☆ Home					
🗅 New	Search for online templates		Q		
— I⊅ Open	Suggested searches: Business Persona	I Planners and Trackers Lists Budget	s Charts Calendars		
	Featured Personal				
Info					*
Save a Copy	A B C 1		Get started with	Make your first	
Print	3	Take a tour	Formulas	PivotTable	
Share	4 5				
Export	6 7	<b>→</b>	fx		
Publish	Blank workbook	Welcome to Excel	Formula tutorial 🔗	PivotTable tutorial	
Close					
			Back To School Planner		
	New	A B C D		CLASS SCHEDULE MADE AND	
	Get more out of PivotTables	1	Nonsymp         Appl         Appl		
		3	Total         S         J         S         J         S         J           100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100         100 <t< th=""><th></th><th></th></t<>		
		6 Section Headers in Col		100 100 100 100 100 100 100 100 100 100	
Account	Get more out of PivotTables 🖈	HME Topic Template	Back to School Planner	Student schedule	
Feedback		YEAR JANUARY		Project Planner	
Options	YEAR MONTH	YEAR JAANUARY was in the second secon	January Year	Project Planner	-

Examples of a few templates listed in the "Business" category.

		Templates - Saved to OneDrive - James T	abin Consulting, LLC	James Tobin		?	-	×
Ð	New							
ሰ Home								
🗅 New	C All Business	م						
🗁 Open	DPDAT HPOH	COMPANY NAME	Quetation	-				
			Concess Anna Concess Anna American Statistics Anna Anna Anna Anna Anna Anna Anna Anna					
Info			Analas Ar Anima Aray Analas Anima Analas Anima Anima Anima Anima Anima Anima Anima Anima Anima Anima Anima					
Save a Copy			Per la					
Print			Sector         Sector         Sector         Sector           (10         Sector         1         100         Sector         1         100					
Share	Expense report	Business expenses budget	Business price quotation					
Export								
Publish	Annumburg Link Company Nacion	Expense Report	Mileage Log and Expense Reyout					
Close	Mar         Mar <th>Appendiations. Annou</th> <th>Anna Anna Anna Anna Anna Anna Anna Anna</th> <th></th> <th></th> <th></th> <th></th> <th></th>	Appendiations. Annou	Anna Anna Anna Anna Anna Anna Anna Anna					
CIUSE	BOD         BA1         BA1         BD0         BE         BD0           BOD         BA1		Desc         Of Anny Second Secon					
	2         2000         2014         2014         2014         2010         201         2010           1         2010         41.4         2010         201         21.0         21.0           7         2010         41.4         201.4         201.0         21.0         21.0           7         2010         21.0         201.0         201.0         20.0         21.0         21.0							
	Inventory list with reorder hig	Blue expense report	Blue mileage and expense re					
	Balance Sheet Company Name	Service Price List	Company Name					
Account	Ver 2017	Company Name Invest Marten, Op. Mark/Investor, 2010/addr	Invoice # 200 two the room two					
Feedback	had carring on been tary 64.440.00 Manual 84,000.00 Tariti barris and an	Service D Number Service Type Description	Bill To For New ( Constant or Section Section 1					
Options		Service I         Non I         Description I           Service 2         Non 2         Description 2	Prove Sees theorypean Rese					

# Templates! HelpMeExcel.com James Tobin Consulting, LLC

3. Make the needed changes you'd like to see every time you open the custom template then save it as a template by pressing the F12 button. This will open the "Save As" dialogue box.

X Save As				×
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\square$ $\Rightarrow$ This PC $\Rightarrow$ TI10685500A (C:) $\Rightarrow$ Us	ers > JamesTobin > Documents	s > Custom Office Templates	ٽ ~	Search Custom Office Templa 🔎
Organize 👻 New folder				E= ▼ (?)
🝊 OneDrive - James Tobin Consu ^ Name	^ Da	ate modified Type	Size	
This PC		No items match your se	arch.	
3D Objects				
E Desktop				
Documents				
Downloads     Music				
Pictures				
🗑 Videos				
🟪 TI10685500A (C:)				
File name: My Brand New Custom Template				
Save as type: Excel Template				
Authors: James Tobin	Tags: Add a tag	Title: Add a title	Su	bject: Specify the subject
∧ Hide Folders			Too <u>l</u> s	Save Cancel

- 4. Start in the "File name:" field (immediately above the "Save as type:" field) and type the name of your custom template. Excel will place and automatically increment numbers as you newly open your custom workbook.
- 5. Next, at the "Save as type:" field (found at the bottom section of the Save As dialogue box) select either Excel Template or Excel Macro-Enabled Template.
- 6. When all the elements are correct, press "Save" to save your custom template.

If after you've used your template (default or custom) and want to make changes, simply open the template, make the needed changes and re-save the template as default or custom.