

Excel 2003

Creating and Applying  
Templates

**User's Manual**

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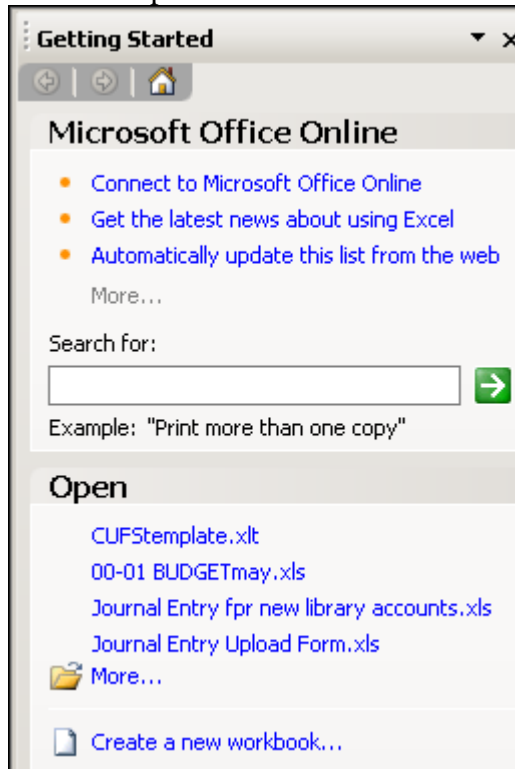
## Introduction

Templates are workbooks that contain pre-configured formatting, formulas and text. In Excel, they have an .xlt extension rather than the .xls extension. Templates are available from within the Excel program, on the Microsoft website, or you can create your own custom templates.

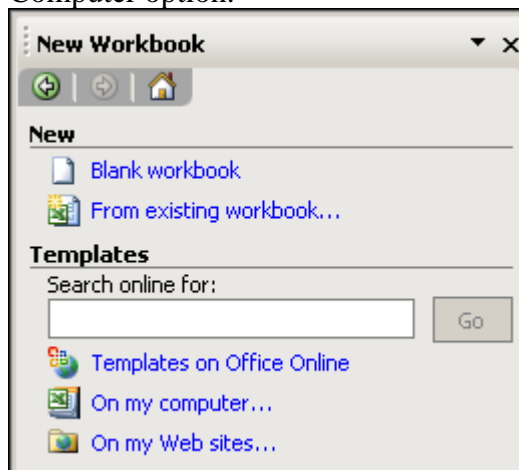
## Using Templates to Create Workbooks

To create a workbook from an Excel program template:

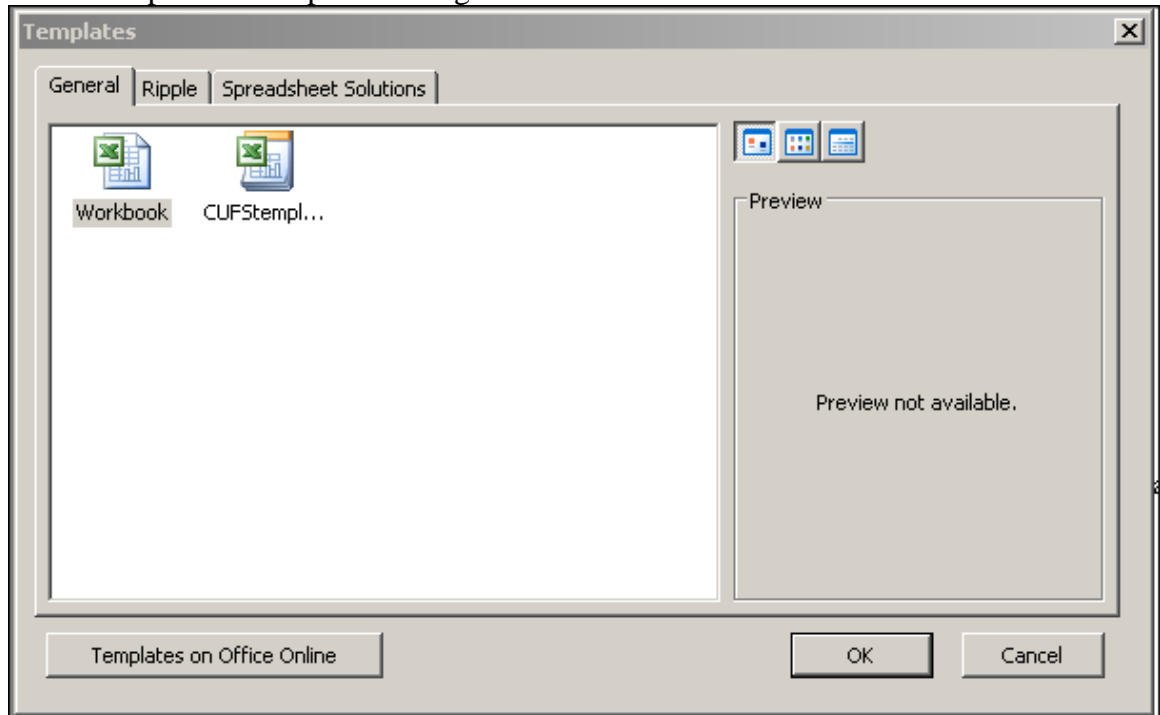
1. Open Excel.
2. In the task pane click on the Create a new Workbook option in the Open section.



3. In the Template section of the New Workbook task pane, select the On My Computer option.



4. This will open the Templates dialog box:



There are 3 tabs: General, Ripple and Spreadsheet Solutions. The General tab will show all templates you create. Existing program templates are located on the Ripple and Spreadsheet Solutions tabs.

5. Select the template you want to use.
6. Click OK or double-click the template.

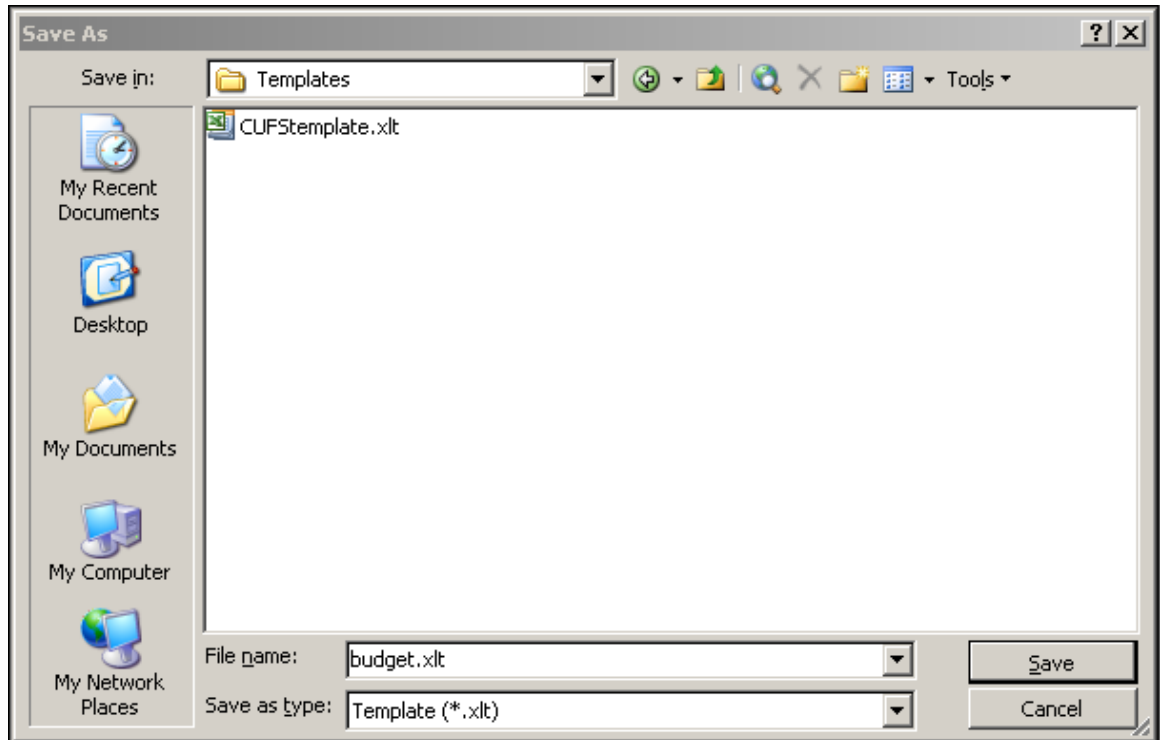
#### **To create a workbook from a Microsoft.com template:**

1. Open Excel.
2. In the task pane click on the Create a new Workbook option in the Open section.
3. In the Template section of the New Workbook task pane, select the Templates on Office Online option.
4. Browse the various categories and select an appropriate template.  
(*Note: You can also search online for templates.*)

## **Create a Custom Template**

#### **To create a custom template:**

1. Open a workbook you want to use as a template.
2. From the File menu, select Save As.
3. In the File Name text box, type the name you want to call the template.
4. From the Save As Type drop-down list, select Template. This will automatically change the Save In location to the Templates folder. If you want to save the template in another place, select the location after you have selected the file type.



5. Click Save.

## Working with Comments

Comments are pop-up text boxes you can add to specific cells. You will recognize a comment by a small red triangle in the upper right corner of a cell. Comments are used to provide information on data that does not need to be reflected on the actual worksheet. They are hidden by default but pop-up when you run your cursor over the cell.

	A	B	C	D	E	F
1	Expenses	January	February	March	April	May
2	Office Supplies	\$150	\$0	\$75	\$75	\$
3	Travel	\$87	\$137	\$163	\$129	\$1
4	Printing	\$29	\$8	\$52	\$30	\$
5	Postage & Freight	\$45	\$20	\$36	\$34	\$
6	Telephone	\$120	\$120	\$120	\$120	\$1
7	Utilities	\$100	\$100	\$100	\$100	\$1
8	Maintenance & Repairs	\$50	\$50	\$50	\$50	\$
9						
10	Total	\$581	\$435	\$596	\$537	\$5
11						
12						
13						
14						

A comment box is visible in the bottom right corner of the worksheet, pointing to cell C2. The comment text is: "February Office Supplies appear on March VISA statement."

**To add a comment:**

1. Select the cell that you want to add a comment to.
2. From the Insert menu, select Comments, or **right-click your mouse and select Insert Comment**. A comment text box will appear, usually with your name (taken from the Author listed in the file properties).
3. Type the comment text, removing your name if you don't want it to appear.
4. To view your comment, click on any other cell then move your cursor over the cell containing the comment.

**To edit a comment:**

1. Select the cell containing the comment.
2. The *Edit Comment* command now appears on the Insert menu. It also appears when you right-click your mouse. Click on this command.
3. The comment box will pop-up. Make the changes as necessary.

**To delete a comment:**

1. Right-click the cell where the comment is located.
2. Select the *Delete Comment* command.  
(You can also delete a comment with the *Edit Comment* command by clicking on the outer edge of the text box and pressing the Delete key.)


**Viewing and printing comments**

- You can have your comments displayed by selecting the Comments option from the View menu. The comments will appear on your screen but not a printed worksheet.
- If you want comments to appear on your printed document, that feature is available on the Sheet tab of Page Setup. You have the choice of printing comments as they appear on your screen, or at the end of the sheet.

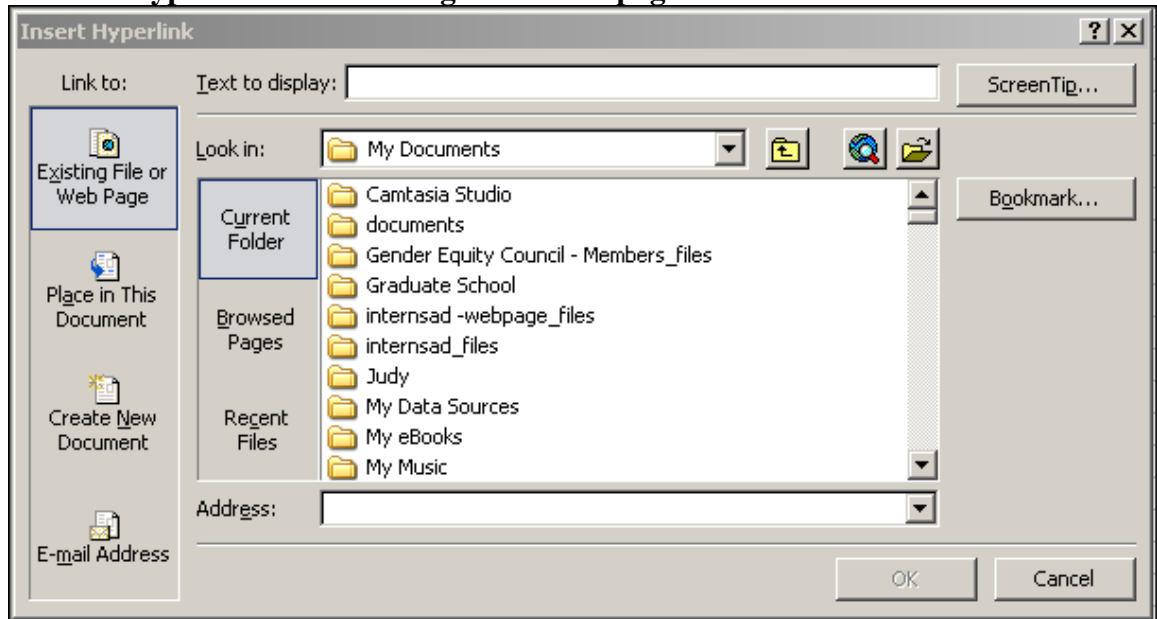
## Create a Hyperlink

Hyperlinks connect a specific cell in a worksheet to another cell in the same workbook, an existing file (such as a Word document) or a web page, a new document or an email address. When you click on the hyperlink, your screen view automatically displays the file, web page or new email message with the email address entered.

**To create a hyperlink:**

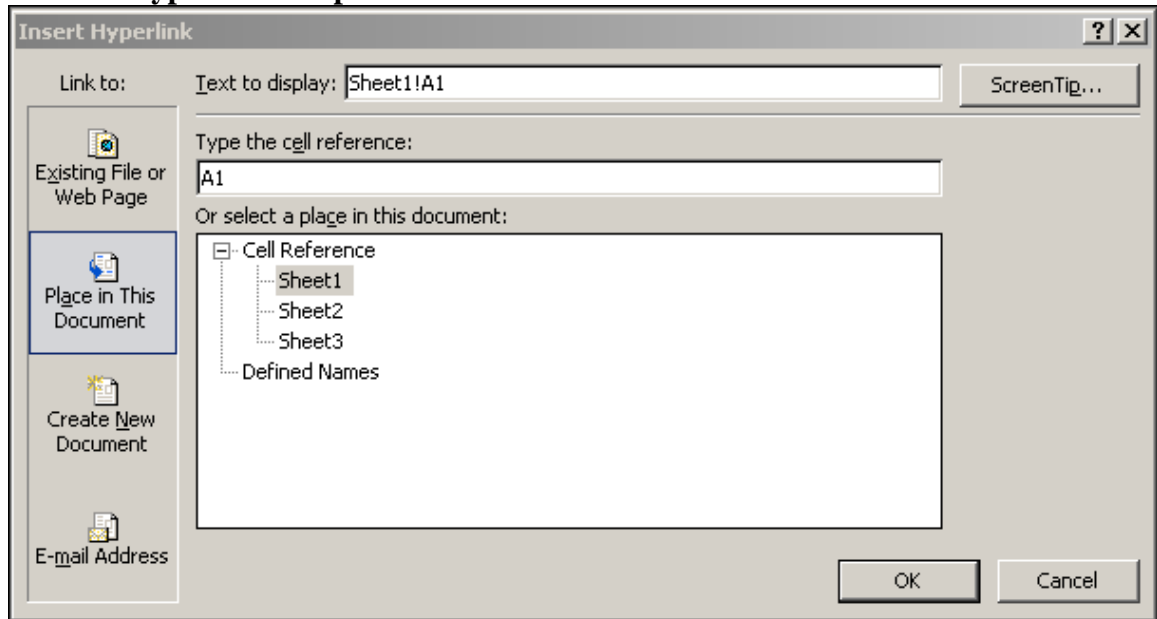
1. Select the cell you want to create a hyperlink in.
2. Right-click your mouse and choose the Hyperlink option, or use the Hyperlink  button on the Standard toolbar, or select the Hyperlink command on the Insert menu.
3. Select the type of hyperlink you want.

**Create a hyperlink to an existing file or web page:**



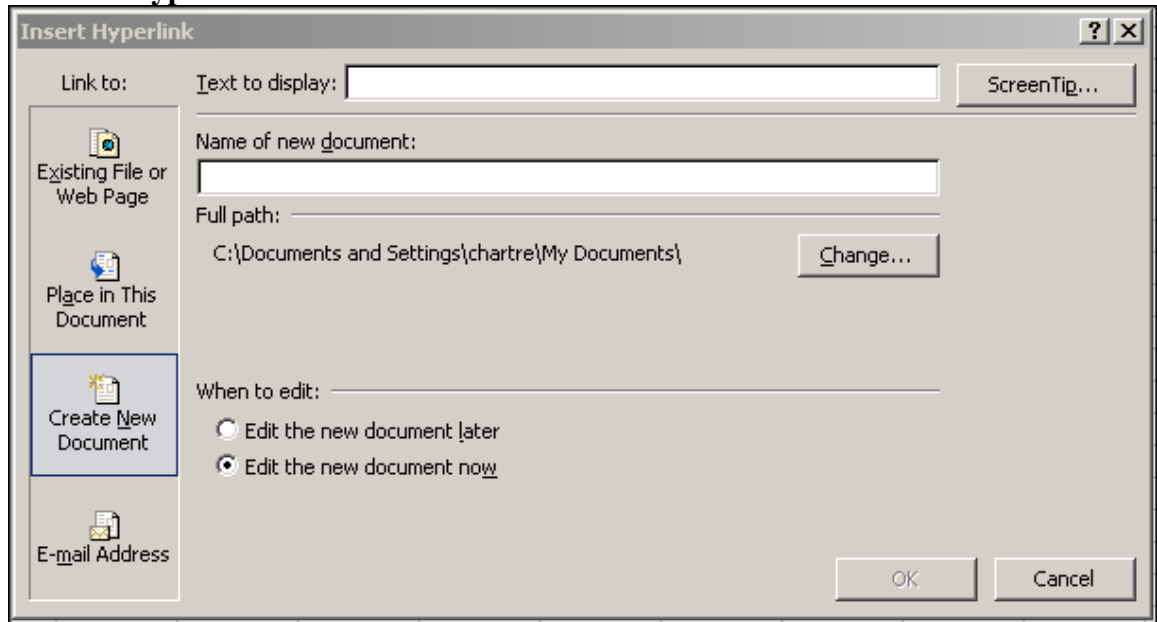
- Under the *Link To* heading, choose Existing File or Web Page.
- In the *Text To Display* box, enter a name for the hyperlink.
- Type the full name of the file, including the path) or choose the file or web page from the list.

**Create a hyperlink to a place in the document:**



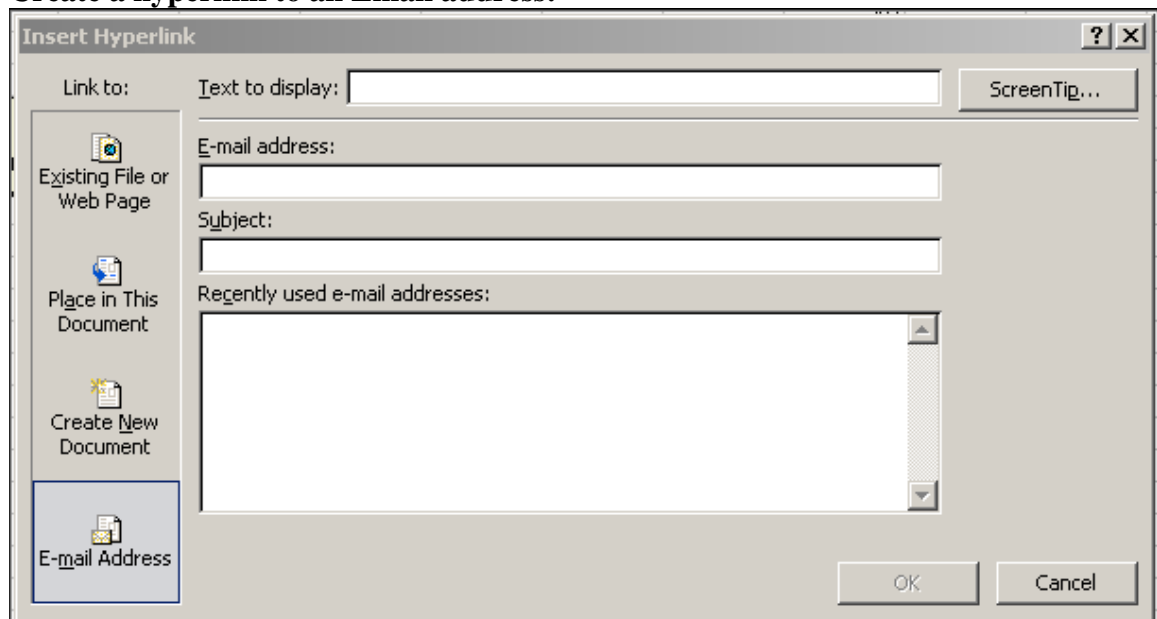
- Under the *Link To* heading, choose Place in This Document.
- In the *Text To Display* box, enter a name for the hyperlink.
- Enter the cell reference or select a place from the list.

**Create a hyperlink to a new document:**



- Under the *Link To* heading, choose Create New Document.
- In the *Text To Display* box, enter a name for the hyperlink.
- In the *Name of New Document* box, enter the name of the new document.
- If necessary, click the *Change* button to change the path.
- Under *When To Edit*, select to edit the new document now or later.


**Create a hyperlink to an Email address:**



- Under the *Link To* heading, choose E-mail Address.
- In the *Text To Display* box, enter a name for the hyperlink.
- Enter a *Subject* for the email.
- Enter the *E-mail Address* or choose one of the *Recently Used E-mail Addresses*.

4. Click OK.  
To see the hyperlink details, hover over the hyperlink.

**Edit a hyperlink:**

1. Select the cell where the hyperlink is located.
2. Right-click your mouse and choose the Edit Hyperlink option, or use the  Hyperlink button on the Standard toolbar, or select the Hyperlink command on the Insert menu.
3. Make the necessary changes.
4. Click OK.


## Use Web-based Research Tools

If you're looking for additional help or resources when creating templates, you can use web-based research tools to find information you need. There are four categories of web-based research tools:

- Dictionary – to locate definitions of a selected word.
- Thesaurus – offers similar or opposite word suggestions for a selected word.
- Encyclopedias – provide background information on a particular subject containing the selected word.
- Translation – offers the selected word in several different languages.

The research tools search your computer first and then search the resources available on the web. You can also customize the research tools for the options and language you prefer.

**To use web-based research tools:**

1. Select the cell that contains the data you want to research.
2. Right-click the cell and select the *Look Up* command, or click on the Research button on the Standard toolbar, or select Research on the Tools menu. 
3. If necessary, enter the word you want to research in the Search box.
4. Select the research tool you want to use from the *Search For* drop-down list.
5. If necessary, click the *Start Searching* button.