

Setting up and Customizing the Interface for Excel 2007/2010/2013

For quick access to some of the features in Excel it is a good idea to customize the interface.

In Excel Options set the following:

- for Excel 2007 in Popular, Show Developer Tab
- for Excel 2010/2013 go to Customise Ribbon and check the box for Developer Tab
- In Advanced under Display, Show the Formula Bar.

For Excel 2007 under Customize or for Excel 2010/13 under Quick Access Toolbar add the following commands to the Quick Access toolbar:

Home Tab

- Fill
- Fill Colour
- Format Painter
- Font Colour
- Font Size

Formulas Tab

- Name Manager
- Insert Function

Review Tab

- Protect Sheet

View Tab

- Freeze Panes
- Split
- Zoom

Office Menu

- Application Options

Insert Tab

- Create Chart
- TextBox
- Symbol

All Commands

- Manage Rules
(For Conditional Formatting)
- Form (For Databases)

Data Tab

- Data Validation

Developer Tab

- Insert Controls
- Design Mode
- Record Macro
- Visual Basic
- View Macros

Chart Tools | Layout Tab

- Chart Elements
- Format Selection
- Chart Gridlines

Then choose “Show below the ribbon” and “Minimize the Ribbon” from the drop down tab at the end of the Quick Access toolbar. Should look something like this:



Finally in the Developer Tab under Macro security choose “Enable all Macros” or “Disable all Macros with notification” and tick “Trust access to the VBA project object model.”

The Quick Access Toolbar settings are kept in a file called Excel.qat for Office 2007 or Excel.officeUI for Office 2010. For XP look in C:\Documents and Settings\username\Local Settings\Application Data\Microsoft\Office\ . For Vista or Win7/8 go to C:\Users\<username>\AppData\Local\Microsoft\Office\Excel.qat. To backup your toolbar customisations save a copy of this file. Alternatively you can choose to save the toolbar customizations in a workbook and save it as a template.