Lesson 5 Creating and Using Templates

Templates help you to create documents with special formatting for your desired task (e.g. calendar template, Inventory templates, Schedule templates, etc). You can create your own templates based off of an existing spreadsheet**.**

The sample below shows a template for calculating first quarter sales for a company. The template was created by modifying an existing spreadsheet and saving it as a template file. The template could also have been created from a new spreadsheet, with the formulas for totals saved in the proper cells.



Company 1st Quarter Sales				
Region	January	February	March	Totals
Eastern Region	$110.00	$175.00	$140.00	$425.00
Western Region	$200.00	$210.00	$240.00	$650.00
Southern Region	$300.00	$160.00	$215.00	$675.00
Northern Region	$220.00	$205.00	$195.00	$620.00
Total	$830.00	$770.00	$870.00	$2,470.00
Average	$207.50	$192.50	$217.50	$617.50

1

To prepare your spreadsheet as a template.

1. Create your spreadsheet as normal (e.g. formatting, headers, formulas for totals, etc).
2. In the *Ribbon*, click the **File** tab.**1**



1

3. The *Backstage view* will appear. Click **Save As 2.**



2

4. The *Save As* options will appear, Click **Browse**. **2**



2

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5. The *Save As* window will open. In the *File name*: field, enter a name for the template.3
6. In the *Save As* type *field*, select **Excel Macro Enabled Template 3**
7. Click **Save As.** 3



3

8. Your template will be saved in the *My Documents/Custom Office Templates* folder.

Using a Template

The following explains how to access the custom-made template created in the *Creating Templates* section.

Note: The following instructions show how to access templates saved to the default. My *Documents/Custom Office templates* location on your computer.

1. In the Ribbon, click on the File tab. 1



1

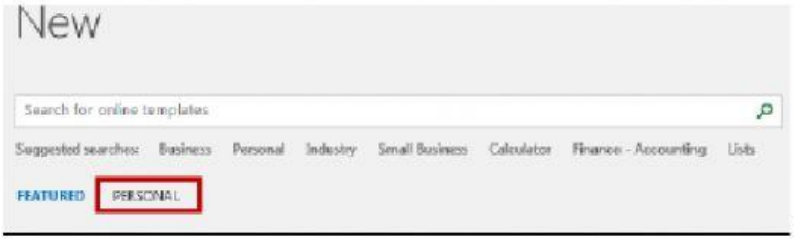
2. The **Backstage View** will appear. Click **New.2**



2

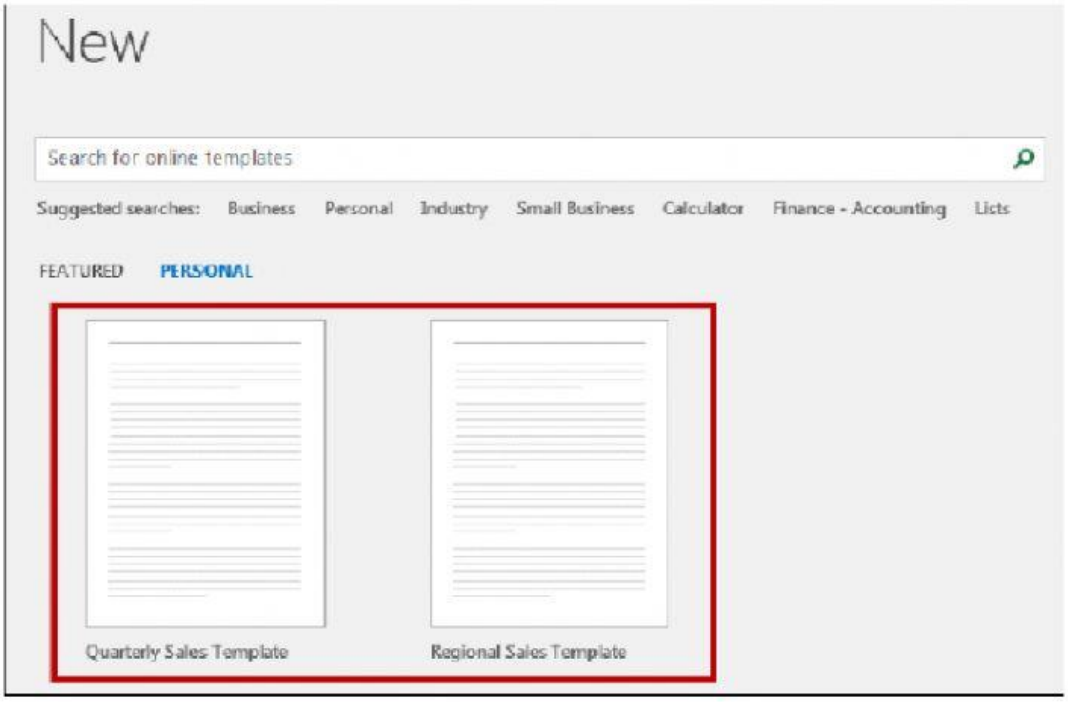
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3. The *New* option will display. Click **Personal** to access your custom templates.**3**



3

4. Your created templates will be displayed. Click on your ***desired template***. 4



4

Question

1. **Describer the steps to create a template .**

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2. **Describe the steps on how to use a template**

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