Custom Actions and Options Buttons

Excel's Custom Actions and Option Buttons can provide you with information and can perform actions based on the context of what you are currently doing with your worksheet.

In this lesson, we will learn what Custom Actions are and how to use them. You will also learn about the Error option button, the AutoFill option button, and the Paste option button, and how they can make tasks easier.

What are Custom Actions?

A Custom Action is a type of command button that appears in response to information you enter in a worksheet. Custom Actions are capable of recognizing certain types of data and will sometimes appear based on the context of your current actions. The Custom Action will then provide a menu of options related to the information you are entering or the action you are performing.

As an example, if you enter the letters "MSFT" in a cell with the appropriate Custom Action enabled, and then right-click that cell, Excel is capable of recognizing that text as the stock symbol for the Microsoft Corporation:
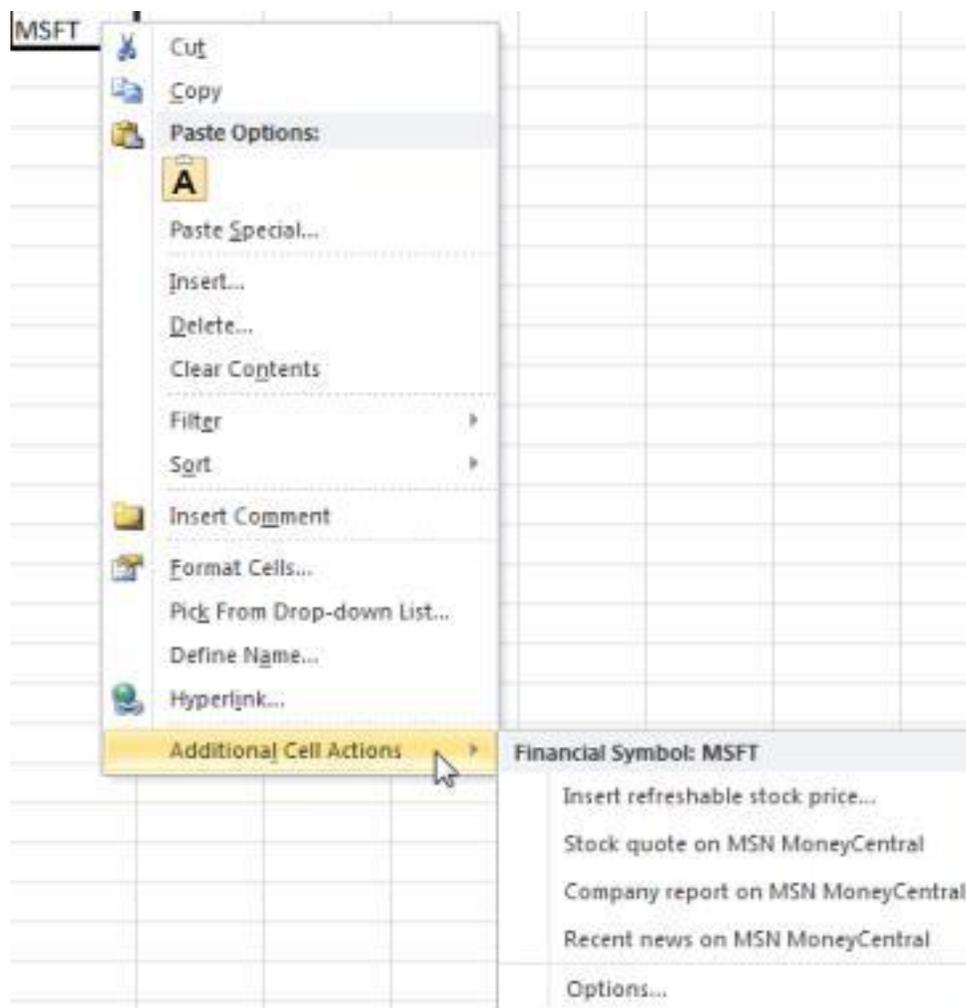
Setting Custom Action Options

You can configure Custom Actions by clicking File $\rightarrow$ Options. When the Excel Options window appears, select Proofing from the panel on the left, and then click the AutoCorrect Options button:
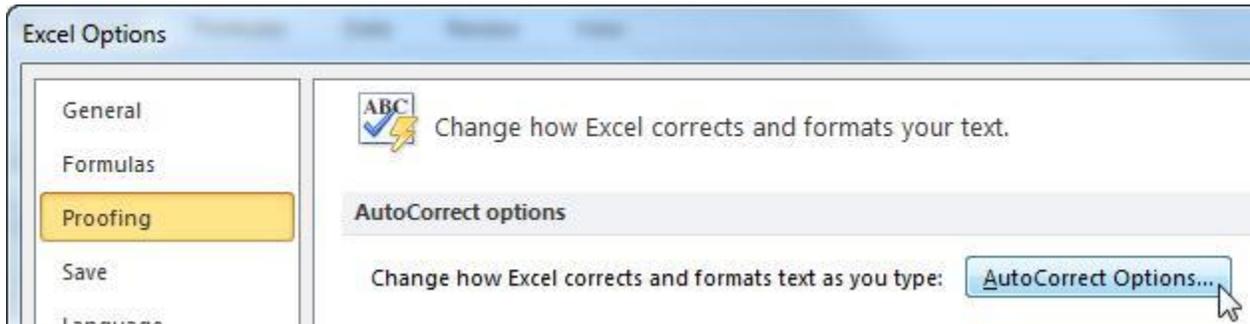
When the AutoCorrect dialog box appears, click the Actions tab:

To enable Custom Actions in your worksheets, check the Enable additional actions… checkbox. Here you can specify which Custom Actions to use. If you change the Custom Actions settings, click the OK button to activate the changes.

The More Actions button will open your Web browser to a page listing available actions for Microsoft Excel, PowerPoint, and Word 2010. You can also purchase additional Custom Action procedures from third-party vendors.

The Error Option Button

Excel keeps an eye on your work as you define and calculate formulae. If it detects an error in your work, you will be warned. For example, consider the following worksheet. A formula is being entered into C2. Do you see the error?

The formula does not contain an error, but the data does. Because cell B2 has the value 0, the formula =A2/B2 will cause an error (division by zero is mathematically undefined). If you press Enter to move to the next cell, you will see the following warning:

Notice that there is a small green triangle in the upper left of the cell. If you click this triangle, you will see the Error option button.

Click the pull-down arrow for information on resolving this error:
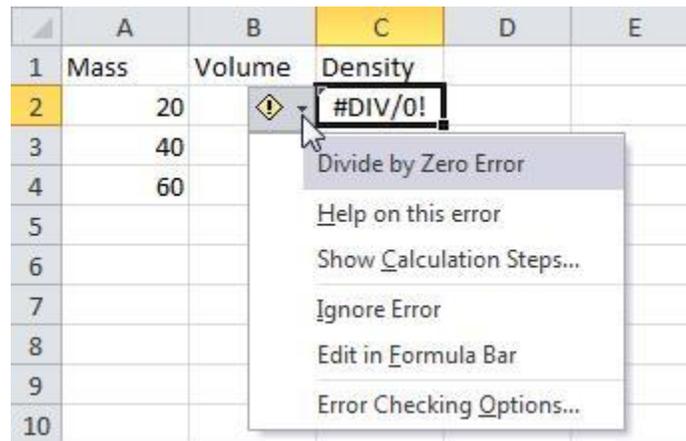
This is a good example of how Option Buttons can provide context-sensitive help. If you made another type of error (other than division by zero), the choices on the option button's menu would change to reflect this error.

The AutoFill Option Button

After using AutoFill to complete a row or column, the AutoFill option button will appear:

Click the pull-down arrow to see additional options, depending on the AutoFill sequence you have created:
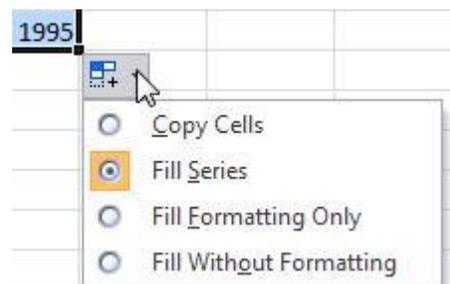
For example, if you use AutoFill to complete dates, you will have more specific options available:
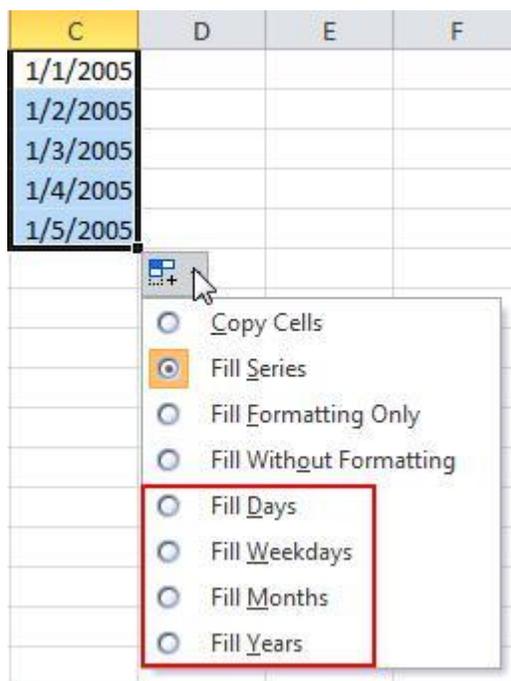
The Paste Option Button

Whenever you paste something in Excel, you will see this notification appear beside the pasted data:
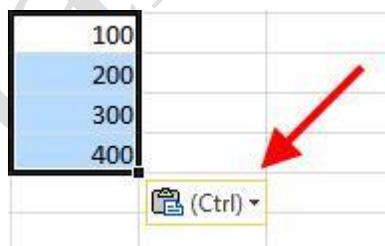
Click this notification to use the different paste options:

As you can see, there are a large number of options. Let's quickly go over the different choices:

Paste		A 1:1 paste of the original data, whatever it may be. This is the default Paste option.
Formulas		Pastes the formulas and recalculates upon pasting.
Formulas and Number Formatting		Pastes the formulas and recalculates upon pasting, preserving whatever formatting was applied to the formulas.
Keep Source Formatting		Preserves all formatting from source data.
No Borders		If the cut/copied information contained border formatting, the pasted data would not.
Keep Source Column Widths		Excel allows you to adjust the width/height of columns/rows. If the source data used a different column width than the destination cell, use this option to keep the same width.
Transpose		If source data was 2 columns x 3 rows, transposed data would be 3 columns x 2 rows.
Values		Copies only the values as calculated by any formula in the source data. The formulas themselves and source formatting are not copied.
Values and Numbering		Copies values and number formatting; formulas and text formatting are not copied.

Values and Source Formatting   Copies values and all formatting; formulas are not copied.

Formatting   Pastes only the formatting from the source data.

Paste Link   Pastes a link to the source data.

Picture   Excel captures a screenshot of the source data and turns it into a picture.

Linked Picture   Pastes a link to a screenshot of the source data.