



Office 2003 Resource Kit

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Customizing User-Defined Settings

Microsoft® Office 2003 applications are highly customizable. Users can change how Office 2003 functions by setting options or adding custom templates or tools. For example, a sales department can create a custom template for invoices or a custom dictionary with industry-specific terms. Users can change everything from the screen resolution to the default file format for saving documents. Most of these user-defined settings are recorded as values in the Microsoft Windows® registry.

As an administrator, you can customize user-defined settings and distribute a standard Microsoft Office 2003 configuration to all the users in your organization by using the Profile Wizard to capture settings an Office profile settings file (OPS file). When you add the OPS file to a transform (MST file), your customized settings are included when Office 2003 is installed on client computers.

The Custom Installation Wizard also allows you to customize user-defined settings directly in the transform. You can set user options and add or modify registry entries. You can even add the Profile Wizard to a transform and run it separately to distribute new default settings. When Office is installed, your customizations modify values in the Windows registry, and your settings appear as the defaults on users' computers.

Methods of customizing user settings

The method you choose to customize user-defined settings depends on the following:

- How extensively you want to configure Office 2003.

You can create a custom configuration for all of Office 2003 or preset just a few key options.

- How complex your deployment scenarios are.

You can distribute the same custom settings to all the users in your organization, or you can configure Office 2003 applications differently to meet the needs of different groups of users.

- How and when you deploy Office 2003 applications.

If you are staging your Office 2003 deployment, you can customize only the applications that you are installing at a given time. Or, if you have already deployed Office, you can distribute a standard configuration to all Office 2003 users.

- Whether you want to enforce your custom settings.

Settings that you distribute through a transform (MST file) or Office profile settings file (OPS file) appear to users as the default settings — but users can choose different options for themselves. By contrast, using Office 2003 policies ensures that your settings are always applied.

The following table lists typical scenarios for customizing user settings and the recommended methods and tools to use in each case.

Original page: <http://office.microsoft.com/en-us/ork2003/HA011401971033.aspx>

Scenario	Method	Tool
Distribute a standard default Office 2003 configuration.	Add an OPS file to a transform.	Profile Wizard and Custom Installation Wizard (Customize Default Application Settings page)
Set just a few options or adjust your Office 2003 configuration without recreating the OPS file.	Add user settings to a transform.	Custom Installation Wizard (Change Office User Settings page)
Set default security levels.	Specify security settings in a transform.	Custom Installation Wizard (Specify Office Security Settings page)
Distribute a default Microsoft Office Outlook® 2003 profile.	Specify Outlook settings in a transform.	Custom Installation Wizard (Outlook: Customize Default Profile page)
Specify settings that are not captured in an OPS file.	Add registry values to a transform.	Custom Installation Wizard (Add/Remove Registry Entries page)
Distribute a default Office 2003 configuration but store one or more OPS files separately from the MST file.	Run the Profile Wizard during Setup.	Profile Wizard and Custom Installation Wizard (Add Installations and Run Programs page)
Preserve users' custom settings from a previous version instead of specifying new default settings.	Allow Setup to migrate settings from a previous version of Office.	Default Setup behavior
Set unique options for Microsoft Office 2003 Multilingual User Interface Packs or other chained packages.	Specify settings in the transform applied to the chained package.	Custom Installation Wizard and Setup settings file (Setup.ini)
Distribute a default Office 2003 configuration that overrides individual users' settings.	Run the Profile Wizard as a stand-alone tool after Office is installed.	Profile Wizard
Modify user settings after Office is installed.	Distribute a configuration maintenance file (CMW file) after Office is installed.	Custom Maintenance Wizard
Prevent users from modifying the options you set.	Set Office policies.	Group Policy snap-in
Customize user-defined options for Microsoft Office Project 2003	Add an OPS file to the transform.	Profile Wizard and Custom Installation Wizard.
Customize Microsoft Office Visio® 2003 application settings and user-defined options	Set policies or run the Profile Wizard as a stand-alone tool after Office is installed	Group Policy snap-in or Profile Wizard

Resolving conflicting settings

Most customized user options correspond to entries in the Windows registry. If you define conflicting values for the same setting, Windows Installer must determine which value to use. In most cases, a setting applied later in the installation

process overwrites any settings applied earlier.

Settings for user options are applied in the following order:

1. Settings in an OPS file included in a transform.
2. Settings specified in a transform.

These settings can be entered on the **Change Office User Settings**, **Specify Office Security Settings**, or **Outlook: Customize Default Settings** pages of the Custom Installation Wizard.

3. Registry values specified in a transform.
4. Settings applied by running the Profile Wizard during Setup.
5. Settings that migrate from a previous version of Office.
6. Settings applied by using the Profile Wizard or Custom Maintenance Wizard after Office is installed.

This precedence assumes that users have already started each Office 2003 application and any migrated settings have already been applied.

7. Settings managed through policies.

Using the Profile Wizard

The Profile Wizard saves and restores user-defined settings in Office 2003 applications. Most user-defined settings can be stored in an Office user profile. When you run the Office Profile Wizard to save a user profile, you create an Office profile settings file (OPS file). Setup uses the OPS file to apply default settings when Office 2003 is installed.

For Office 2003, the Profile Wizard allows you to save settings for only a selected application or group of applications. This feature is particularly useful when you are staging your Office 2003 deployment; you can limit the settings saved in the OPS file to only the applications that you are deploying at a given time.

By design, the Profile Wizard excludes some settings, including user-specific information such as the user name and the Most Recently Used file list (**File** menu). Nor does the Profile Wizard capture all Outlook 2003 settings. For a list of the settings not captured by the Profile Wizard, see [Office Profile Wizard](#) in the Office 2003 Editions Resource Kit Reference.

Toolbox The **Office 2003 Editions Resource Kit (ork.exe)** includes the Office Profile Wizard and is available as a download. You can find this downloadable file on the Office 2003 Resource Kit [Downloads](#) page.

Add an OPS file to a transform

Adding an OPS file to a transform is a convenient way to deploy a collection of custom settings throughout your organization. Settings contained in the OPS file are implemented when users install Office, and those settings apply to every user who logs on using that computer. However, any other method of customizing user options — including

specifying user settings elsewhere in the transform or choosing to migrate settings from a previous version of Office — overwrites default settings in the OPS file.

To customize default options for users by using an OPS file, follow these general steps:

1. Use the Profile Wizard to create an OPS file that contains your default settings for Office application options.
2. Use the Custom Installation Wizard to create a transform (MST file) that contains the OPS file.
3. Install Office 2003 on users' computers with your transform.

Create an OPS file

Before you create an OPS file, you must start each Office application on a test computer and set all the options you want to customize. You can set most options by using the **Options** command (**Tools** menu). To customize toolbars and menus, use the **Customize** command (**Tools** menu). After you have customized the Office applications, run the Profile Wizard to save the settings to an OPS file.

To save settings to an OPS file

1. Start the Profile Wizard.
2. On the **Save or Restore Settings** page, select **Save the settings from this machine**, and enter the name and path for the OPS file.
3. Select the check boxes next to the Office 2003 applications you want to include in your OPS file, and then click **Finish**.

The Profile Wizard saves the Office application settings on your computer to the OPS file.

NOTE If an OPS file contains settings for an application that is not installed on a user's computer, those settings are still written to the registry.

Create a transform that contains the OPS file

You use the Custom Installation Wizard to create a transform that includes the OPS file.

To create a custom transform that contains the OPS file

1. Start the Custom Installation Wizard.
2. On the **Customize Default Application Settings** page, select **Get values from an existing settings profile**, and enter the file name and path of the OPS file you created.

The Custom Installation Wizard creates a transform that contains your OPS file and any other customizations you have made.

Toolbox The **Office 2003 Editions Resource Kit (ork.exe)** includes the Custom Installation Wizard and is available as a

download. You can find this downloadable file on the Office 2003 Resource Kit [Downloads](#) page.

Determine whether Setup migrates settings

By default, if a previous version of Office is installed on a user's computer, Windows Installer copies the previous application settings for that version to Office 2003. Migrated settings are applied the first time each user starts an Office application, and the user's migrated settings overwrite any duplicate settings contained in an OPS file or added to the transform.

On the **Customize Default Application Settings** page of the Custom Installation Wizard you can modify this Setup behavior. If you are not including an OPS file in the installation, the wizard selects the **Migrate user settings** check box by default. When users install Office 2003 with your transform, Setup migrates relevant settings from a previous version. If you add an OPS file to the transform, the wizard clears the **Migrate user settings** check box and uses the values in your OPS file instead.

NOTE If you add an OPS file to the transform and also select the **Migrate user settings** check box, the settings from your OPS file are applied during the initial installation. However, the first time a user starts an Office application, Windows Installer migrates settings from a previous version of Office and overwrites any corresponding settings previously applied.

Run the Profile Wizard during Setup

Adding an OPS file to the MST file increases the size of the transform and also requires that you recreate the transform whenever you modify the OPS file. Alternatively, you can store the OPS file on a network server and direct Setup to run the Profile Wizard with that OPS file during the Office 2003 installation.

Running the Profile Wizard during Setup applies a standard default Office 2003 configuration to users' computers. However, because the OPS file is stored separately, you can modify the configuration without changing the transform. You can also create different OPS files for different groups of users.

When you run the Profile Wizard separately, you can choose whether to apply the settings in the OPS file once per user (the recommended option) or once per computer. You can also specify whether user-defined options are returned to their original default settings before your customized settings are applied; this step ensures that all users begin with exactly the same Office 2003 configuration.

When you add Proflwiz.exe to a transform, the Profile Wizard runs after Office is installed, so settings from this OPS file overwrite any duplicate settings specified in the transform, including the following:

- Settings specified in an OPS file added to a transform
- Settings specified on the **Change Office User Settings** page
- Microsoft Outlook e-mail options specified on the **Outlook: Customize Default Settings** page
- Security levels specified on the **Specify Office Security Settings** page

- Registry entries added on the **Add/Remove Registry Entries** page
-

NOTE When you run the Custom Installation Wizard with the Visio 2003 package, the **Customize Default Application Settings** page is not displayed, and you cannot add an OPS file to the transform. However, on the **Add Installations and Run Programs** page, you can specify that the Profile Wizard run at the end of the installation and apply an OPS file stored in another location.

To run the Profile Wizard during Setup

1. Copy the Profile Wizard executable file (Proflwiz.exe) and your customized OPS file to the Office administrative installation point.

You can place the files in the same folder as Office Setup.exe, or you can create a subfolder for them.

2. Start the Custom Installation Wizard.
3. On the **Add Installations and Run Programs** page, click **Add**.
4. In the **Target** box , type the file name and path to Proflwiz.exe, or click **Browse** to select the file.
5. In the **Arguments** box , add command-line options directing the Profile Wizard to apply the OPS file to the user's computer, and then click **OK**.
6. Choose **Run this program once per machine** to apply your default settings the first time a user logs on.

— or —

Choose **Run this program once per user** to apply your default settings to every user of the computer. Note that this option requires a connection to the network every time a new user logs on.

For example, to run the Profile Wizard from the Profile subfolder on the Office administrative installation point, enter the following in the **Target** box:

```
\\server\share\admin_install_point\profile\proflwiz.exe
```

Then add the following command-line options to the **Arguments** box :

```
profile\newprofile.ops /r /q
```

These arguments run the Profile Wizard quietly (*/q*), reset all options to their original default settings (*/r*), and apply settings from the file Newprofile.ops (**profile\newprofile.ops**).

For more information about using the Profile Wizard, including command-line options that customize the way the wizard runs, see [Office Profile Wizard](#) in the Office 2003 Editions Resource Kit Reference.

Run the Profile Wizard after Office is installed

You can run the Profile Wizard as a stand-alone tool after you deploy Office 2003. This method allows you to distribute a

standard user profile that overwrites any other settings distributed through a transform, migrated during Setup, or set by users. Running the Profile Wizard separately also allows you to customize the process more precisely and include only the particular applications settings you want to manage.

To customize the performance of the Profile Wizard, you edit the INI file (Opw11adm.ini). Open the file in Notepad or another text editor, and then add or delete references to settings that you want to include or exclude. You can include or exclude registry settings or Application Data folders, template files, and so on. You can also run the Profile Wizard from the command line with no loss in functionality. Every option available in the wizard has a corresponding command-line switch.

TIP You do not need to edit the Profile Wizard INI file to include or exclude Office applications. On the **Save or Restore Settings** page of the wizard, select the check boxes next to the applications for which you want to save settings.

For more information about customizing the Profile Wizard, editing the Profile Wizard INI file, or specifying command-line options for the Profile Wizard, see [Office Profile Wizard](#) in the Office 2003 Editions Resource Kit Reference.

For more information about using the Profile Wizard to update user settings after Office is deployed, see [Updating Feature Installation States and Application Settings](#).

Specifying user settings in a transform

If you do not want to distribute an entire Office 2003 configuration, you can customize selected user-defined options in a transform.

Add user settings to a transform

Most of the options captured by the Profile Wizard can also be set on the **Change Office User Settings** page of the Custom Installation Wizard. This method is useful for presetting just a few key options, or for modifying a standard configuration without recreating the OPS file.

When users install Office with your transform, the settings you specify are applied to every user of the computer. However, only settings that differ from existing default settings are applied. Options that you set on this page of the wizard overwrite corresponding settings in an OPS file added to the transform.

NOTE When you run the Custom Installation Wizard with Visio 2003 or Project 2003, the **Change Office User Settings** page is not displayed. To deploy Visio or Project with custom settings, run the Profile Wizard to capture settings in an OPS file and then add the OPS file to the transform. Alternatively, you can manage Visio and Project settings by using Group Policy and the Visio 2003 policy template (Visio11.adm) or Project 2003 policy template (Proj11.adm).

Specify Outlook settings in a transform

Many Outlook options appear on the **Change Office User Settings** page, and you customize them the same way you customize options for any other Office 2003 application. However, several important Outlook settings appear on their own pages of the Custom Installation Wizard.

Outlook profile information

You cannot define an Outlook profile by running the Profile Wizard, adding registry entries, or setting Office policies. Instead, you must create or modify an Outlook profile on the **Outlook: Customize Default Profile** page of the Custom Installation Wizard. These settings are not overwritten by any other method of customizing user options.

Outlook account information

When you add or modify an Outlook profile, you can also configure e-mail account information. For example, on the **Outlook: Specify Exchange Settings** page, you can configure an Exchange connection and specify whether users work with a local copy of their Exchange mail box (Cached Exchange Mode feature). On the **Outlook: Add Accounts** page, you can include more e-mail accounts in the user's Outlook profile.

Outlook e-mail settings

You specify default settings for the following options or items on the **Outlook: Customize Default Settings** page of the wizard:

- Whether to convert the personal address book (PAB file) to an Outlook Address Book
- Default e-mail editor
- Default e-mail format

For more information about customizing Outlook, see [Customizing Outlook Features and Installation With the Custom Installation Wizard](#).

Specify security settings in a transform

You can customize Office 2003 security settings in a transform or OPS file, but some security settings are implemented differently than other user-defined settings.

Security levels

Security levels — **High**, **Medium**, or **Low** — apply to each Office 2003 application. However, the default security level can be set in one of two areas of the Windows registry:

- HKEY_CURRENT_USER\Software\Microsoft\Office\11.0\<Application>\Security

The **Level** value in this subkey is the security setting captured by the Profile Wizard when you create an OPS file or when you customize the setting on the **Specify Office Security Settings** page of the Custom Installation Wizard. It is applied once for each user of the computer.

- HKEY_LOCAL_MACHINE\Software\Microsoft\Office\11.0\<Application>\Security

The **Level** value in this subkey is the security setting that applies to the local computer. This setting takes precedence over the per-user setting, regardless of how the per-user setting is customized. You can customize this setting on the **Change Office User Settings** page or the **Add/Remove Registry Entries** page of the Custom Installation Wizard.

For example, on the **Specify Office Security Settings** page, you can set the default security level for Microsoft Office Word 2003 to **Medium**. This step sets the **Level** value in the Security subkeys in the HKEY_CURRENT_USER branch to **2**. However, on the **Change Office User Settings** page, you can also set the **Level** value in the Security subkey in the HKEY_LOCAL_MACHINE branch to **3**. In this scenario, Word is installed on the computer with the default security level set to **High** for all users.

You can also set security levels by using policies — a policy that applies to the security level in the HKEY_CURRENT_USER branch or another policy that applies to the HKEY_LOCAL_MACHINE branch. In this case, the security level set by policy for the local computer takes precedence over the policy set for the current user.

Trusted publishers

On the **Specify Office Security Settings** page of the Custom Installation Wizard, you can manage the list that identifies trusted sources for digitally signed macros, add-ins, ActiveX® controls, and other executable code used by Office applications. You can add Microsoft digital certificates (CER files) to help ensure that all add-ins and templates are installed with Office 2003. On the same page of the wizard, you can determine whether unsigned, and therefore potentially unsafe, ActiveX controls can initialize using persisted data.

For more information about configuring security settings for Office 2003 applications, see the Help for the **Specify Office Security Settings** page in the Custom Installation Wizard.

Add registry values to a transform

Because most Office options correspond to entries in the Windows registry, you can customize those options by adding or modifying registry values in a transform. Setup applies your new default options when users install Office. Depending on which branch of the registry you customize, your settings are applied once per user (HKEY_CURRENT_USER) or once per computer (HKEY_LOCAL_MACHINE).

In addition, you can add registry settings to customize some options that cannot be set directly in the Office 2003 user interface and are not captured by the Profile Wizard in an OPS file. For example, you can include custom applications in Office Setup that require custom Windows registry settings.

After Office Setup is complete, Windows Installer copies the registry entries that you added to the transform to users' computers. Options that you set by adding or modifying registry entries override duplicate values that you set on other pages of the Custom Installation Wizard, including the following:

- Settings specified in an OPS file added to a transform
- Settings specified on the **Change Office User Settings** page
- Options on the **Outlook: Customize Default Settings** page
- Settings configured on the **Specify Office Security Settings** page

Add registry entries to a transform

You add or modify registry entries on the **Add Registry Entries** page of the Custom Installation Wizard. You need to know the complete path for each registry entry, as well as the value name and the data type for that entry.

To add Windows registry entries to a transform

1. Start the Custom Installation Wizard.
2. On the **Add Registry Entries** page, click **Add**.
3. In the **Root** box, select the portion of the registry you want to modify.
4. In the **Data type** box, enter a data type for the new entry.
5. In the remaining boxes, enter the full path for the registry entry you want to add, enter the value name and data, and click **OK**.

For more information about these values, see the Help for the **Add/Remove Registry Entries** page in the Custom Installation Wizard.

Import a registry file into a transform

To add multiple registry entries to a transform, you can create a registry (.reg) file, and then use the **Add Registry Entries** page of the Custom Installation Wizard to import the registry file.

A registry file is a text file that contains a copy of a section of the Windows registry. If your computer already has the registry entries you want to copy to users' computers, then creating a registry file is an efficient way of distributing those entries.

To create a registry file

1. On the computer that has the registry entries you want to add to the installation, click **Run** on the **Start** menu and type **regedit**.
2. In the Registry Editor, select the portion of the registry tree that you want to copy.
3. On the **Registry** menu, click **Export Registry File**, and follow the instructions to export the selected portion of the registry tree to a registry file.

To import a registry file to a transform

1. Start the Custom Installation Wizard.
2. On the **Add Registry Entries** page, click **Import**.
3. Select the registry file you created, and click **Open**.

The wizard adds the registry entries from the registry file to the list on the **Add Registry Entries** page. If the wizard encounters an entry in the registry file that is a duplicate of an entry already in the list, and the two entries contain different value data, then the wizard prompts you to select the entry you want to keep.

Specify settings for chained packages

You can specify default settings for packages that you chain to your Office 2003 installation. If you create a transform for a chained package, you can include an OPS file or set options on other pages of the Custom Installation Wizard that apply only to the chained package. Because Windows Installer installs chained packages after Office 2003 is installed, any conflicting settings in the chained package overwrite options set during the Office 2003 portion of the installation.

For example, you can set the default installation language to French in a transform applied to the Office 2003 installation. You can also chain the German Multilingual User Interface Pack (MUI Pack) and apply a transform that sets the default language to German. In this scenario, Office 2003 installs with French as the default language; but the default language changes to German when the MUI Pack is installed.

For more information about chaining packages to the Office 2003 installation, see [Deploying Office and Other Products Together](#).

Modify settings by using the Custom Maintenance Wizard

You can apply a transform only during your initial installation of Office 2003. If you want to make changes after Office 2003 is installed, you can use the Custom Maintenance Wizard to modify almost everything that you can set in the Custom Installation Wizard — including default user settings, security levels, Outlook settings, and registry entries.

The user interface of both wizards is very similar. For example, you specify new default settings on the **Change Office User Settings** page of the Custom Maintenance Wizard. However, you cannot use the Custom Maintenance Wizard to distribute a new OPS file; you must run the Profile Wizard separately.

For more information about updating user-defined settings after Office is installed, see [Updating Feature Installation States and Application Settings](#). For more information about using the Custom Maintenance Wizard, see [Custom Maintenance Wizard](#) in the Office 2003 Editions Resource Kit Reference.

Toolbox The **Office 2003 Editions Resource Kit (ork.exe)** includes the Custom Maintenance Wizard and is available as a download. You can find this downloadable file on the Office 2003 Resource Kit [Downloads](#) page.

Modify settings by using Office policies

When you install Office, you can modify registry values by using Office Group Policy settings. Policy settings take effect when the user logs on to the network, and they override any duplicate values set during installation. Unlike default application settings set by means of an OPS file, policies are not optional; if a user changes a setting set by policy, Windows reinstates the policy setting the next time the user logs on.

For more information about setting Office 2003 policies, see [Managing Users' Configurations by Policy](#).

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