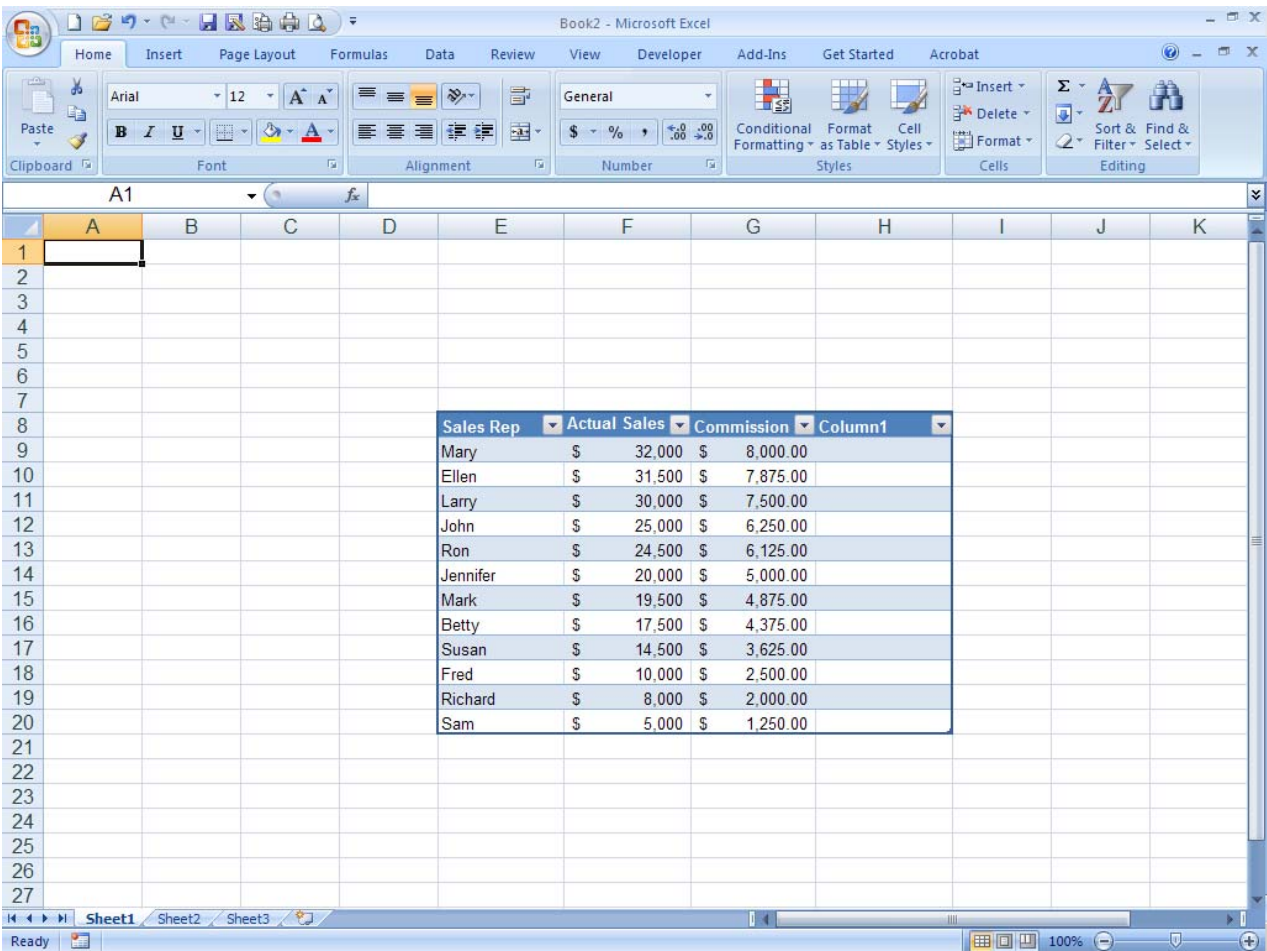


Transition from Excel 2003 to Excel 2007



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KU School of Medicine - Wichita

Transition from Excel 2003 to Excel 2007

Excel 2007 has a new look with many new features. Commands and features that were often buried in complex menus and toolbars are now easier to find on task-oriented tabs that contain logical groups of commands and features. Many dialog boxes are replaced with drop-down galleries that display options and descriptive tips or sample previews to help you decide on the right option.

No matter what activity you are performing, Excel presents the useful tools to successfully complete the task.

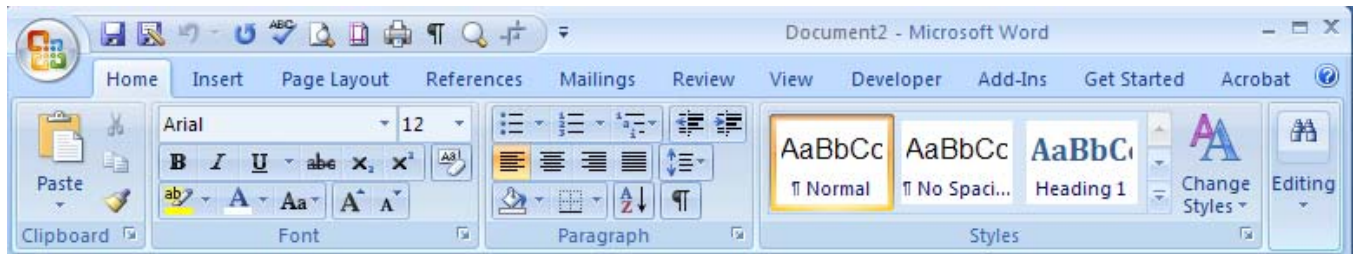
Course Objectives:


- The Ribbon, the Office Button, Page Layout view and the Quick Access Toolbar
- Create, open and save Excel workbooks using the Office Button
- Select, format, copy and move data using the Home tab
- Create simple and complex formulas and calculations using the Formulas tab
- Format worksheets using the Ribbon
- Using the Page Layout tab to set up worksheets for printing

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➔ The Ribbon, the Office Button and the Quick Access Toolbar



- **The Ribbon** - Upon launching Excel 2007 for the first time the most noticeable change is likely Microsoft's replacement of the traditional toolbars and menus with the Ribbon. The Ribbon presents you with a panel of commands which are organized into a set of tabs (known as the Tab Bar). Each task-oriented tab presents groupings of tasks and their associated subtasks.
- **The Microsoft Office Button**  - The Microsoft Office Button has replaced the File menu in earlier versions of Excel. By clicking on this button, you are presented with the commands previously found in the File menu of Excel 2003, including *New*, *Open*, *Save*, *Save As*, *Print* and *Close*. In addition, some of these commands include an expandable menu to provide additional options.
- **Live Preview** - Another new feature in Excel 2007 is Live Preview, which temporarily applies formatting on the selected text or object when you mouse-over any of the formatting buttons. This temporary formatting is removed once the mouse pointer is moved away from the button, allowing you to preview how the text would appear without having to apply it.

- **Mini Toolbar** - The Mini Toolbar pops up whenever text is selected. This new feature provides easy access to the most commonly used formatting commands in Excel. The toolbar will also appear when you right-click on a selection of text. Initially, the toolbar is semitransparent to allow you a nearly unobstructed view of the text beneath, and becomes opaque when the mouse pointer moves over it.



- **Quick Access Toolbar** - The Quick Access Toolbar is a customizable toolbar which contains shortcuts for commonly used tools. You have the ability to add and remove the toolbar buttons based on your personal preferences.



- **Status Bar** - The Status Bar is located in the lower right hand corner of the Window. It controls allow you to change the view and size of your workbook.



→ Create, Open and Save Excel Workbooks (Office Button)

As was the case with Excel 2003, when you first open Excel 2007, a new workbook (named Book1) will be created automatically with three worksheets (Sheet1, Sheet2, and Sheet3).

What is new in Excel 2007 is the size of each worksheet. Each worksheet contains 1,048,576 rows and 16,384 columns.

▪ Create a New Workbook

If you want to create a new workbook, click the **Microsoft Office button** and click **New**. There are many options in the New Workbook window; choose **Blank Workbook** and click **Create**. There are many Microsoft Office Online Templates available when you select **New**.

▪ Open an Existing Workbook

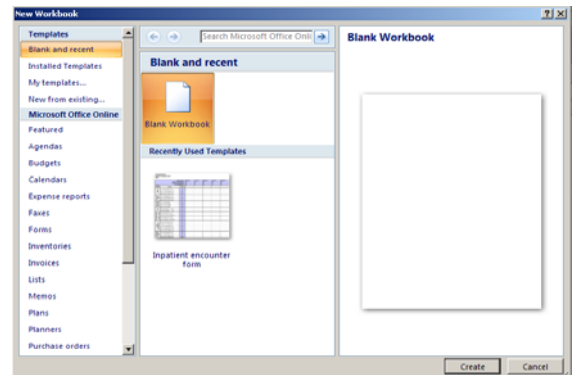
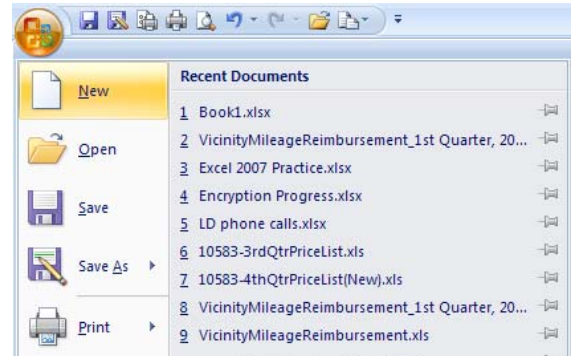
Click the **Office Button** and select **Open**. From the resulting menu, navigate to the existing workbook you wish to open. Click the Open button once you've selected your workbook.

▪ Save Files

Saving files in Excel 2007 is done through the **Office Button** or the **Quick Access toolbar**.

- ✓ To save a file, click the **Office Button** and select **Save**. Navigate to the location and save your file.
- ✓ Save an existing workbook as a new Excel workbook or file type, click the **Office Button** and select **Save As**. Select the file format from the resulting menu. Navigate to the location and save the new copy of your file.

New in 2007: When you select **Save**, Excel saves the workbook in the default file format. If you are working on a workbook that was made in an earlier version of Excel, the workbook will be saved in that same version of Excel (.xls).



If you are saving a workbook that was created in Excel 2007, the workbook will be saved in the Excel 2007 format (.xlsx)

▪ Compatibility Mode and Converting Workbooks

You may find that there are times you will need to access and edit workbooks created in previous versions of Excel. The following information will provide you with the resources you need while working with these workbooks.

✓ Compatibility Mode

When you open a workbook created in previous versions of Excel, **Compatibility Mode** is turned on and you will see Compatibility Mode in the title bar of that workbook window. While you are able to open, edit and save workbooks created in previous versions of Excel, you will not be able to use any of the new or enhanced Excel 2007 features.

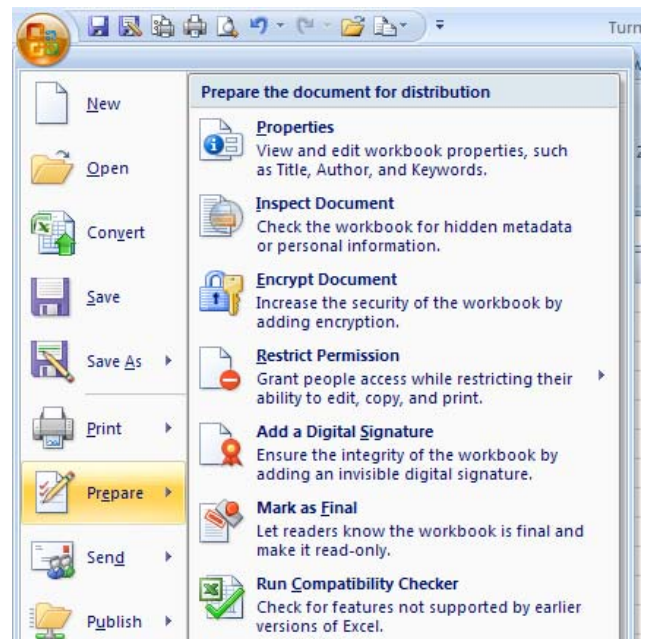
✓ Convert a Workbook to Excel 2007

1. Click the **Microsoft Office Button**, then click **Convert**.
2. A dialog box will appear and inform you that the workbook will be converted with the new features of Excel and the original workbook will be deleted and can't be restored after the conversion. Click **OK**.
3. A 2nd dialog box will appear and inform you the workbook conversion was successful and in order to use the new features, the workbook will need to be closed, then reopened. Click **Yes**.

✓ Run the Compatibility Checker

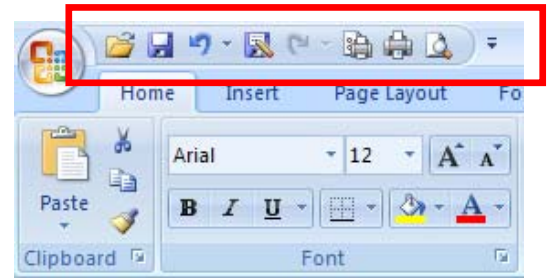
The Compatibility Checker will check your workbook for features which are not supported by earlier versions of Excel. Additionally, the default installation of Microsoft Excel 2007 includes the Compatibility Checker.

1. Click the **Microsoft Office Button**.
2. Select **Prepare**.
3. Select **Run Compatibility Checker** from the resulting menu. Any compatibility issues will now display in the **Microsoft Compatibility Checker** dialog box.
4. Click **OK** to close the dialog box and return to your workbook.



→ Customize the Quick Access Toolbar (QAT)

1. Click the drop-down arrow next to the **Customize Quick Access Toolbar** button.
2. From the resulting menu, **select More Commands**.
3. From the **Choose commands from** drop-down menu, select a category.
4. In the box on the left, select the command you wish to add and click the **Add** button.
5. Click the **OK** button.




Note: To remove a command from the toolbar, select the command you wish to remove from the box on the right, and click the **Remove** button.

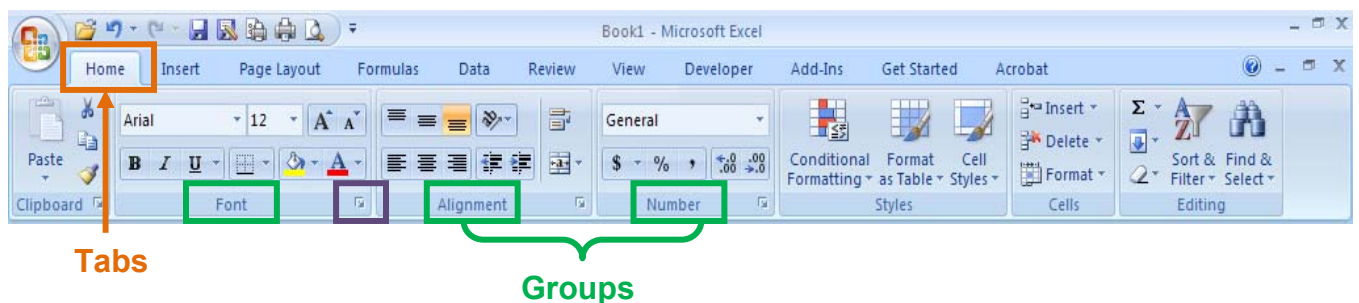
Note: A quick way to add a command is right click on the command on the ribbon you want to add, then select **Add to Quick Access Toolbar**. To remove a command from the Quick Access Toolbar, right click on the command and select **Remove from Quick Access Toolbar**.

Using Undo and Redo



- ✓ You will find the Undo and Redo commands on the Quick Access toolbar.
- ✓ If you click the Redo button (which in this case is a Repeat arrow: ) the text will be repeated.
- ✓ You can also click the down arrow beside the Undo button to undo several actions. You can Undo 100 levels in Excel 2007, compared to 16 levels in Excel 2003.

→ Navigate the Ribbon



There are seven ribbon **tabs** plus contextual tabs (picture, chart, table) when objects are selected, as well as and ribbon **groups** within each of the tabs.

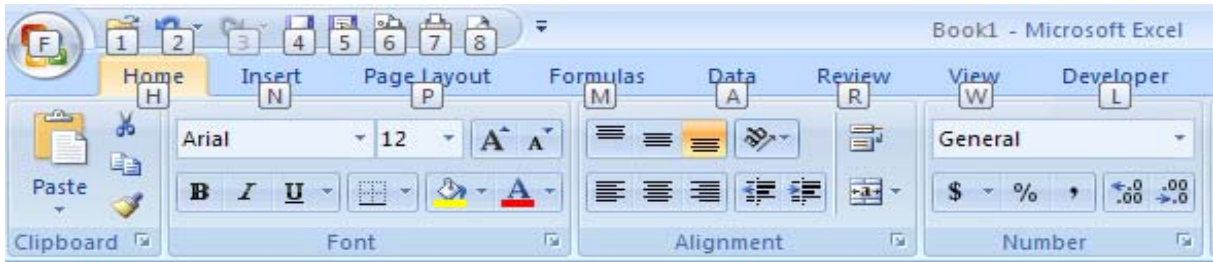
The Dialog Box Launcher



Dialog Box Launchers are small icons that appear in some groups. Clicking a Dialog Box Launcher opens a related dialog box or task pane, providing more options related to that group.

→ Navigate the Office Fluent Ribbon

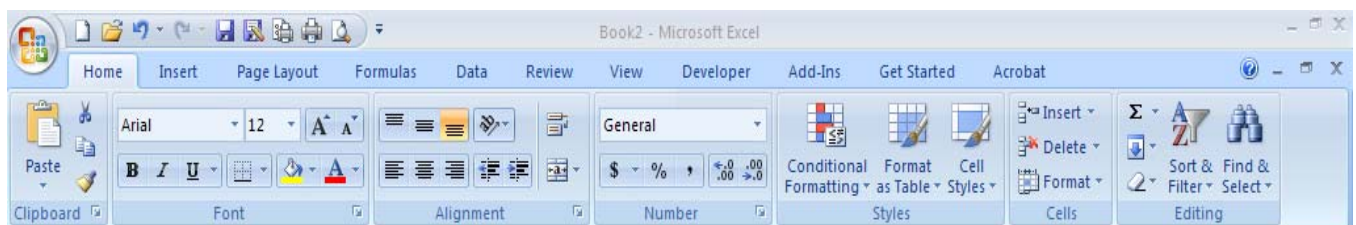
Access keys or Hotkeys provide a way to quickly use a command by pressing a few keys, no matter where you are in the program. Every command in Office Excel 2007 can be accessed by using an access key. You can get to most commands by using two to five keystrokes. To use an access key:



1. Press ALT.
The **Key Tips** are displayed over each feature that is available in the current view.
2. Press the letter shown in the Key Tip over the feature that you want to use.
3. Depending on which letter you press, you may be shown additional Key Tips. For example, if the **Home** tab is active and you press N, the **Insert** tab is displayed, along with the Key Tips for the groups on that tab.
Continue pressing letters until you press the letter of the command or control that you want to use. In some cases, you must first press the letter of the group that contains the command.




→ Work With Your Workbook

When you open Excel for the 1st time, the blank page presented will appear with all “default” settings. You can easily change the settings, many of which are located on the **Home** tab.



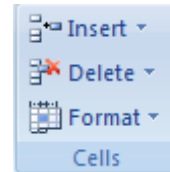
1. **Clipboard** - Copy, Cut, Paste, Format Painter
2. **Font** - Font size and style, **bold**, *italics*, underline, **text highlighter color**, **font color**.
3. **Alignment** - Options to align information in cells horizontally and vertically, orientation, indentation, merging and text wrapping
4. **Number** - Formatting numbers in selected cells

5. **Styles** - Apply table styles to groups of cells and individual styles to individual cells. There is also a conditional formatting control which allows you to quickly apply special color coding and other rules to cells conditionally (based on particular aspects or qualities of the data).

<p>Conditional Formatting</p>  <p>Conditional Formatting ▾</p>	<p>This button allows you to create formatting rules based on conditions of your choice. For example, you can ask Excel to automatically color a cell red if the value in a cell is less than or equal to a certain number.</p>
<p>Format as Table</p>  <p>Format as Table ▾</p>	<p>Clicking this button allows you to quickly format a selection of cells with one of several preset table styles.</p>
<p>Format Cell</p>  <p>Cell Styles ▾</p>	<p>Clicking this button allows you to quickly format a cell or selection of cells with any one of a number of preset cell formats.</p>

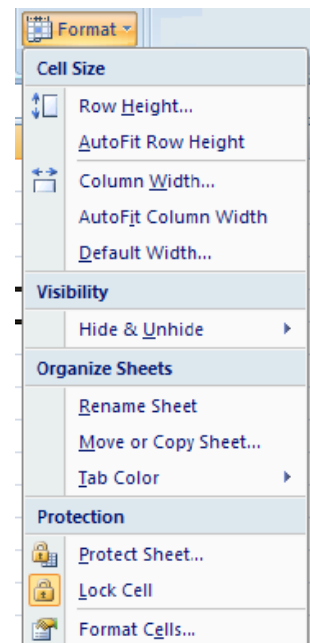
6. **Cells** - Gives you control over inserting, deleting, and adjusting the size of a cell or group of cells.

Clicking the small arrow on each button displays a menu of options corresponding to the button in question (insert, delete, or format).



As you might expect, the **Insert** button drop down menu allows you to insert cells, rows, columns, or sheets, while the **Delete** button drop down menu allows you to delete cells, rows, columns, or sheets.

The **Format** button drop down menu allows you to change the height, and the width of cells. It also provides options for hiding sheets, rows, or columns, as well as options for organizing and protecting your worksheets.

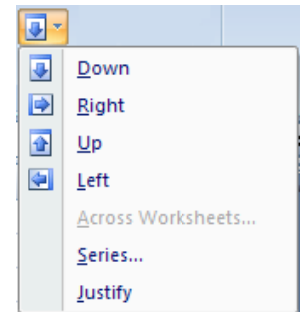


7. **Editing** - The editing button group provides quick access to some useful arithmetic features, filtering and sorting features, and a convenient search and replace feature.

The small arrow next to the summation symbol (Σ) will display a menu of simple but useful mathematical formulas.



The button immediately below this (with a thick blue arrow) provides a menu of options for continuing a pattern of data into another adjacent selection of cells.



The button immediately below this (the little white eraser) allows you to clear all, formats, contents, or comments

The **Sort & Filter** button provides options for sorting in ascending or descending order, as well as options for applying filters to selections of data.

Finally, the **Find & Select** button's drop menu allows you to quickly find cells with formulas, cells with comments, or cells with conditional formatting or data validation rules. Moreover, there are also options that will display the Find and Replace dialogue box, as well as the Go To dialogue box.

▪ **Conditional Formatting**

In Excel 2007 you can design a worksheet in such a way that data is formatted differently, based on the values the data assume at any given time. This is called conditional formatting.

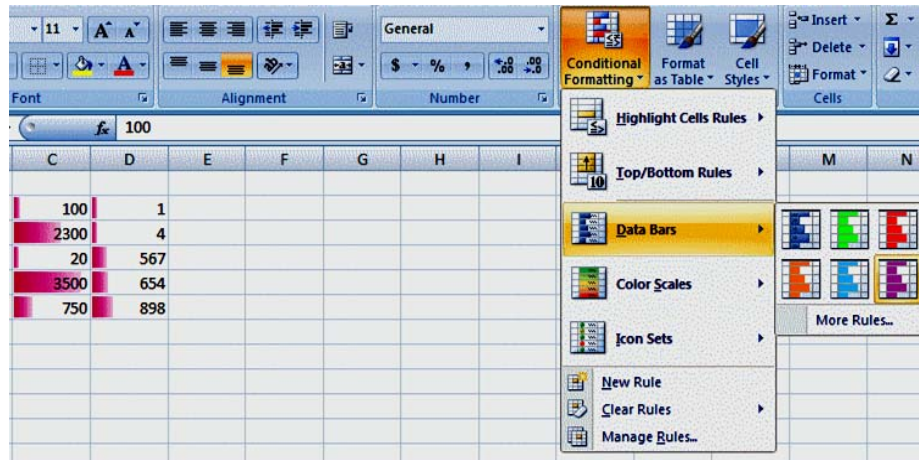
	A	B	C	D	E	F	G
1			Budget				
2	Region						
3		Income	Accounts Receivable	Overhead	Depreciation	Net	
4	Region1	\$1,000.00	\$ 500.00	100	50	\$ 1,350.00	
5	Region2	\$1,020.00	\$ 510.00	150	55	\$ 1,325.00	
6	Region3	\$1,040.00	\$ 520.00	200	60	\$ 1,300.00	
7	Region4	\$1,060.00	\$ 530.00	250	65	\$ 1,275.00	
8	Region5	\$1,080.00	\$ 540.00	300	70	\$ 1,250.00	
9	Region6	\$1,100.00	\$ 550.00	350	75	\$ 1,225.00	
10	Region7	\$1,120.00	\$ 560.00	400	80	\$ 1,200.00	
11	Region8	\$1,140.00	\$ 570.00	450	85	\$ 1,175.00	
12	Region9	\$1,160.00	\$ 580.00	500	90	\$ 1,150.00	
13	Total	\$9,720.00	\$ 4,860.00	\$ 2,700.00	\$ 630.00	\$ 11,250.00	
14							

This spreadsheet is conditionally formatted to highlight cells in different colors depending on the cell values.

1. To use conditional formatting, first select a range of data that you want to apply the formatting to.

	A	B	C	D	E
1					
2			100	1	
3			2300	4	
4			20	567	
5			3500	654	
6			750	898	
7					

2. The next step is to click on the **Conditional Formatting** button on the **Home** Ribbon.



This will display a menu of conditional formatting options. From this menu, you can choose:











Highlight Cells Rules	This will highlight cells that are greater than, less than, between or equal to values that you can specify.
Top/Bottom Rules	This option will allow you to highlight the top or bottom numbers or percent in the selected cells.
Data Bars	Will display colored bars that are indicative of the value in the cell. This is what is used in the image above.
Color Scales	Will use different shades of color to represent different values, from low to high.
Icon Sets	Will use sets of similar icons that will visually indicate a cell's value.

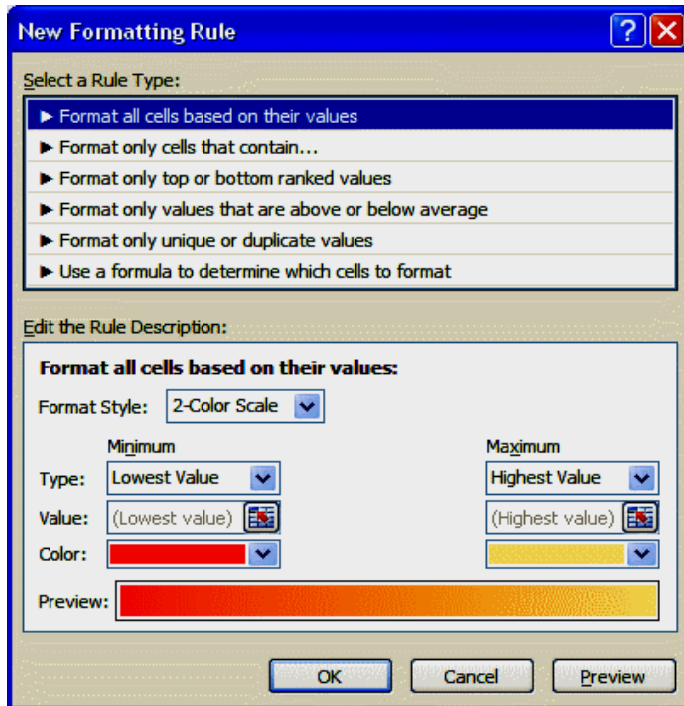
You will also notice at the bottom of the menu options for creating a new rule, for clearing rules, and for managing rules.

Each one of the conditional formatting menu options will display either a sub menu or a dialogue box. As you let your mouse pointer hover over an option in the sub menu, you will see a preview of the type of conditional formatting that your pointer is on applied to the cells that you selected. To implement the conditional formatting, just click the submenu option of your choice.

You can apply multiple conditional formatting rules to a group of cells by simply re-selecting the group, and then adding another conditional format by using the menu system discussed previously. The following image shows a group of cells with a data bar conditional format and an icon set conditional format.

The black and red circle icons represent low values, while the yellow and green icons represent higher values. You can also see that the size of the data bar in each cell corresponds to the given cell's value.

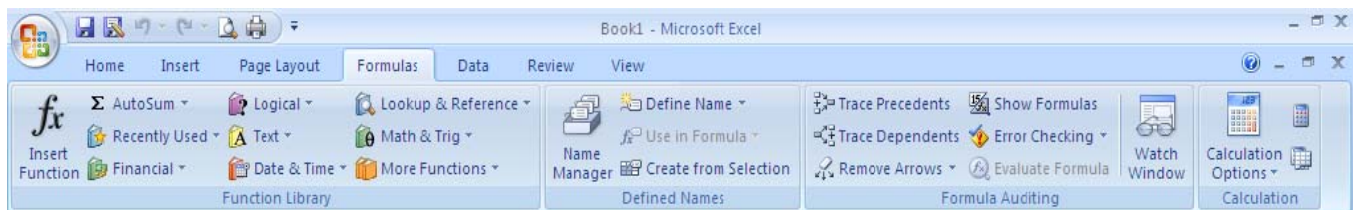
	A	B	C	D	E
1					
2			 100	 1	
3			 2300	 4	
4			 20	 567	
5			 3500	 654	
6			 750	 898	
7					



If you click the new rule option near the bottom of the conditional formatting menu, you will display the following New Formatting Rule dialog box.

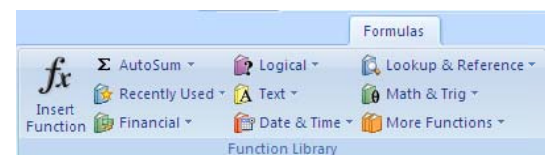
In this dialogue box you can configure more precise and specific conditional formatting rules. The options in the Edit the Rule Description panel will change as you clicking the different items in the Select a Rule

→ Formulas Tab

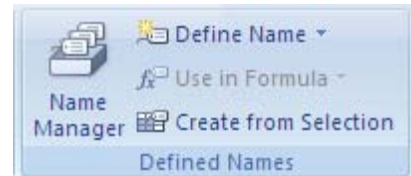


The Formulas tab contains four sections, **Function Library**, **Defined Names**, **Formula Auditing** and **Calculation**.

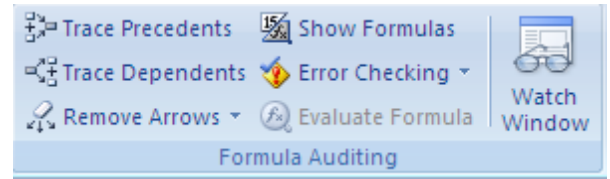
1. **Function Library** - This section gives you access to the large number of predefined Excel functions. There are **Auto Sum** functions, **Financial**, **Logical**, **Text**, **Date & Time**, **Lookup & Reference**, **Math & Trig**, and **More Functions**. Additionally there is a section for **Recently Used** functions so you can get back to the frequently used ones quickly.



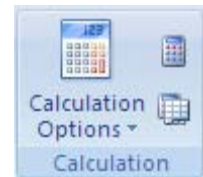
- 2. Defined Names** - The defined names section allows you to create names or variables to be referenced in other areas.



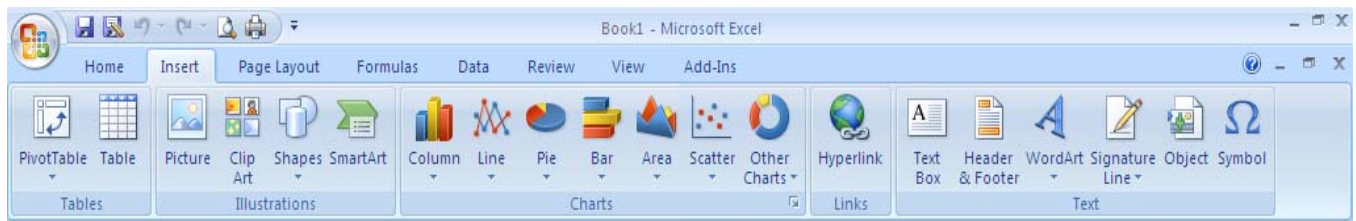
- 3. Formula Auditing** - This section provides tools to manage formulas to make sure that they are correct. These tools are here to find out what cells your formula depends on, what cells depend on the current cell, and show the formula in a cell instead of the resulting value. Additionally there is a tool for error checking which will look for common errors in formulas.



- 4. Calculation** - Here you can turn on or off automatic calculation from formulas. If you turn off automatic calculations you can use the area to calculate the current cell or the whole sheet manually.



→ Insert Tab



The Insert tab has five sections for inserting most types of objects. The sections include: **Tables, Illustrations, Charts, Links, Text and Symbols.**

- 1. Tables** - The tables section has an option for **Pivot Tables** and **Charts** and **Tables**. You can select an area and turn it into a formatted table or pivot table with these options. Once you have created your table there is another tab which becomes available to work with the **Table Design**. This tab is shown below.

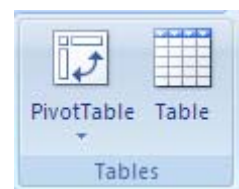
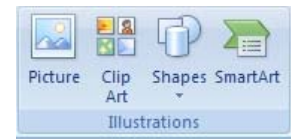


Table Design



- Illustrations** - The Illustrations section allows you to insert **Pictures, Clipart, Shapes, and SmartArt**. After inserting or selecting a picture you are provided with a new toolbar along the top shown here.



Picture Format



This toolbar gives you the ability to change the brightness, contrast, shape, position, text wrapping and other options for the picture. Clicking off the picture or on one of the other tabs will take you back to the standard toolbars.

The **Shapes** option of the Illustrations section allows you to insert lines, arrows, boxes, basic flowchart shapes and a number of others. The **SmartArt** option provides features like org charts, flow charts, illustrated lists and processes.

- Charts** - The charts section provides drop down menus to insert different types of **Column, Line, Pie, Bar, Area, Scatter and Other Chart types**. Once you create a chart, you will get three additional tabs to work with your chart. They are shown below.



Chart Design Tab

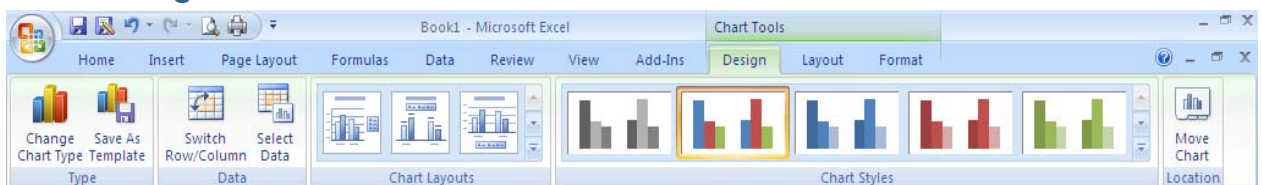


Chart Layout Tab

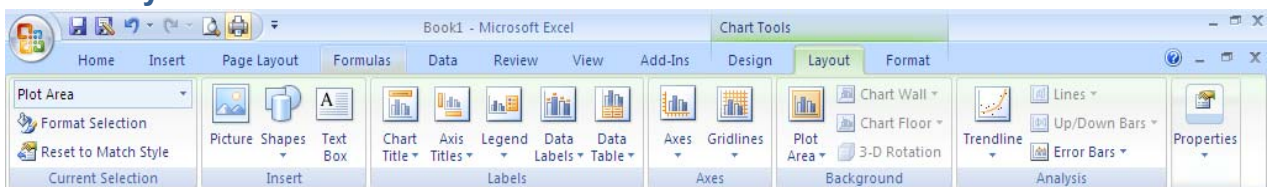


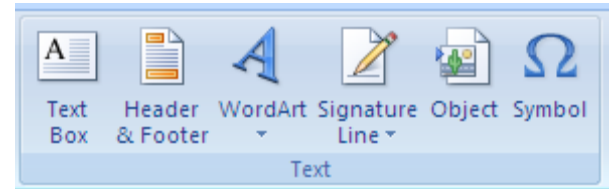
Chart Format Tab



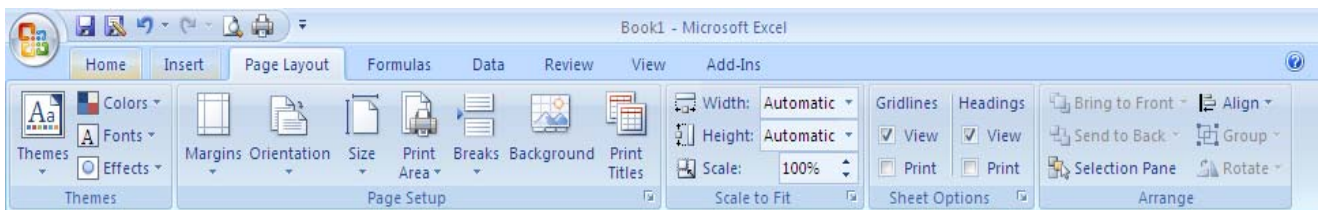
- Links** - The **Links** section provides options for inserting hyperlinks to your spreadsheet.



- Text** - Options in the **Text** section include **Text Box**, **Header & Footer**, **WordArt** and many predefined text blocks like a **Signature Line**, **Object** and **Symbols**. There are many options to setup on your own, or you can use Excel's predefined options.

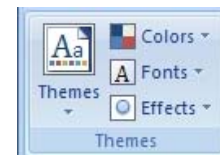


→ Page Layout Tab

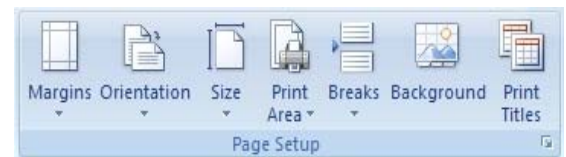


The **Page Layout** tab has five sections, **Themes**, **Page Setup**, **Scale to Fit**, **Sheet Options**, and **Arrange**.

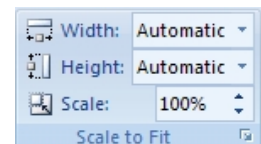
- Themes** - The **Themes** section provides a quick way to format your document. By choosing a theme you will have a set color scheme, font combinations, and effects. You can choose one of the provided themes, modify any provided theme or create your own.



- Page Setup** - Page setup provides you with the tools to change margins, size, orientation, columns, breaks, backgrounds and add print titles to the document.



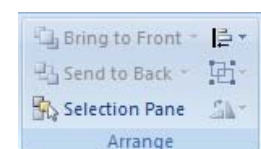
- Scale To Fit** - This section allows you to scale to fit your document onto a certain number of pages or to scale it to a certain percentage of its current size.



- Sheet Options** - This section gives you checkboxes to view or print headings and gridlines.



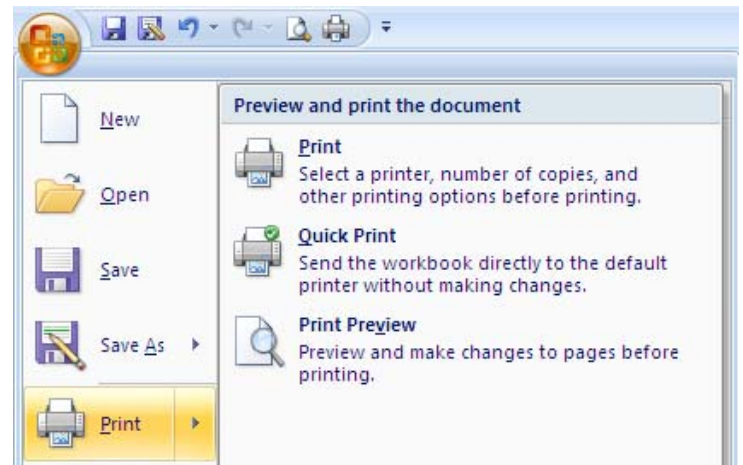
- Arrange** - The arrange section is also found in the image toolbar when an image is selected. Here you can change an images position, the alignment, grouping and rotation or the image.



➔ Preview and Print Your Workbooks

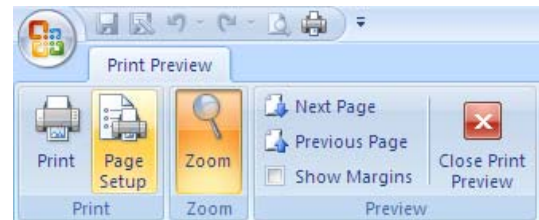
To open **Print Preview**, click the **Office Button**, choose **Print**, then **Print Preview**. Your workbook will then appear in the Print Preview screen.

You will notice that all default ribbons have disappeared, but you still have the status bar and the scroll bar.



Navigate Print Preview

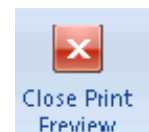
To move through the pages in your workbook in print preview, you can use a few different tools. You can use the browse arrows, scroll bars, or the scroll wheel on your mouse to move between pages.



You can also use the **Next Page** and **Previous Page** buttons on the **Preview** group of the Print Preview ribbon to navigate.

Close Print Preview

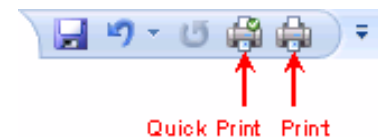
To close Print Preview and return to editing view, press the **Esc** key on your keyboard, or click **Close Print Preview** on the Preview group of the ribbon.



Print Commands

There are a few ways you can print your workbook.

1. You can add a **Quick Print** or **Print** icon to the Quick Access toolbar. The Quick Print icon will send the workbook directly to the printer, while the Print icon will open the Print dialog.
2. The more conventional method is to use the **Print** section of the **Office Button**.



→ File Formats

For workbooks the default file format now has an “x” on the end, representing the XML format. For example, in Excel, a workbook is now saved by default with the extension .xlsx, rather than .xls.

If you save a file as a template, the same applies: You get the template extension of old, with an “x” on the end; for example, .xltx in Excel.

If your file contains code or macros, you have to save it using the new macro-enabled file format. For a Excel workbook, that translates into .xlsm; for a Excel template, it's .xltn.

→ Learning Resources for Office 2007

Atomic Learning Tutorials

Need a quick answer on how to use changes in Office 2007? Choose from thousands of short how-to movie clips. To access Atomic Learning, login to my.kumc.edu, go to the Training tab, and click the Atomic Learning link.

Office Online self-paced training courses

These are a great way to learn how to use each of the Office programs – Access, Excel, PowerPoint and Word with clickable demos to walk through the steps.

<http://office.microsoft.com/enus/training/default.aspx>

Microsoft E-Learning - OfficeSystem2007

Send email for KUMC password from Dianne Griffin (agriffin@kumc.edu). This site has self-paced training courses for the Office 2007 user interface and all the Microsoft products.

<https://www.microsoftlearning.com/catalog/homeAndOffice.aspx#>