

Esse non videri: "To be, not to seem."

Up to Speed with Microsoft Office Excel 2007

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Using the Ribbon in Excel 2007

The *Ribbon* is the backbone of the Office 2007 applications and is now your control center for creating a spreadsheet. Four tabs remain constant in each of the Office 2007 applications that use the Ribbon (Word, Excel, and PowerPoint): Home, Insert, Review, and View. Excel 2007 uses several additional tabs including Page Layout, Formulas, and Data (see *Figure 1*). The tab groups and features of each are outlined in the table below. To reduce clutter, some tabs are shown only when needed. For example, the *Design* tab for headers and footers is shown only when you click in a header or footer area. Likewise, the *Chart Tools* tab is shown only when a chart is selected.

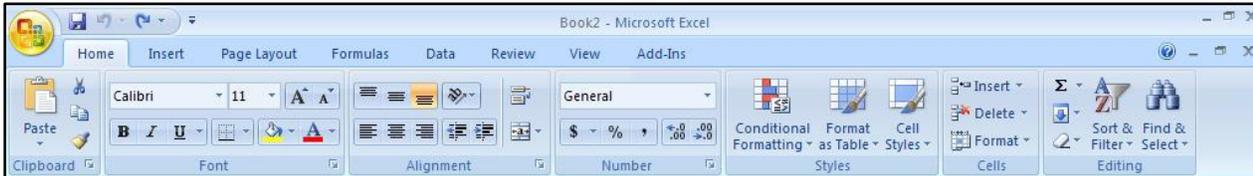


Figure 1: The new Ribbon in Excel 2007.

Tab	Functions
Home tab	Contains the Clipboard group, Font group, the typical formatting buttons for font type and size, bold, italic, color, alignment and so on in the Font and Alignment groups. Options also available for formatting numbers styles in the Number group. Formatting and cell appearance options in the Styles group. Options for inserting/deleting cells, rows and columns in the Cells group. The Editing group holds the clear formatting command, Sorting and Filtering tools, and Find and Replace settings.
Insert tab	Contains all the things you might want to put on a spreadsheet — from tables, pictures, charts, and text boxes to hyperlinks, headers, footers, and symbols.
Page Layout tab	Contains many of the options that were found in the File menu and the Page Setup option of the older Excel programs. This includes: margins, page orientation, print area and print titles (all in the <i>Page Setup</i> group), options for scaling the pages and displaying gridlines/headings and commands for arranging objects in the <i>Arrange</i> group.
Formulas tab	All the Excel formulas you love to use are here.
Data tab	Pull data in from outside sources, use the sorting, filtering and other data related tools found on this tab.
Review tab	Find the spelling checker and other proofing tools here. Markup the spreadsheet with comments or turn on track changes and workbook protection.
View tab	Make a quick switch to any one of the five views, turn on gridlines, zoom in on sheets, or arrange all your open spreadsheets in the window.

If your screen resolution is not set high enough, or if you do not have the Excel 2007 window maximized, you will not see the full listing of Ribbon tools. For example, with a higher resolution you will see all the commands in the *Show/Hide* group on the *View* tab. However, with 800 by 600 resolution, you will see the **Show/Hide** button only, not the commands in the group (see *Figure 2*).

In that case, click the arrow on the **Show/Hide** button to display the commands in the group. Generally, the groups that display only the group name at a lower resolution are those with less frequently used commands.

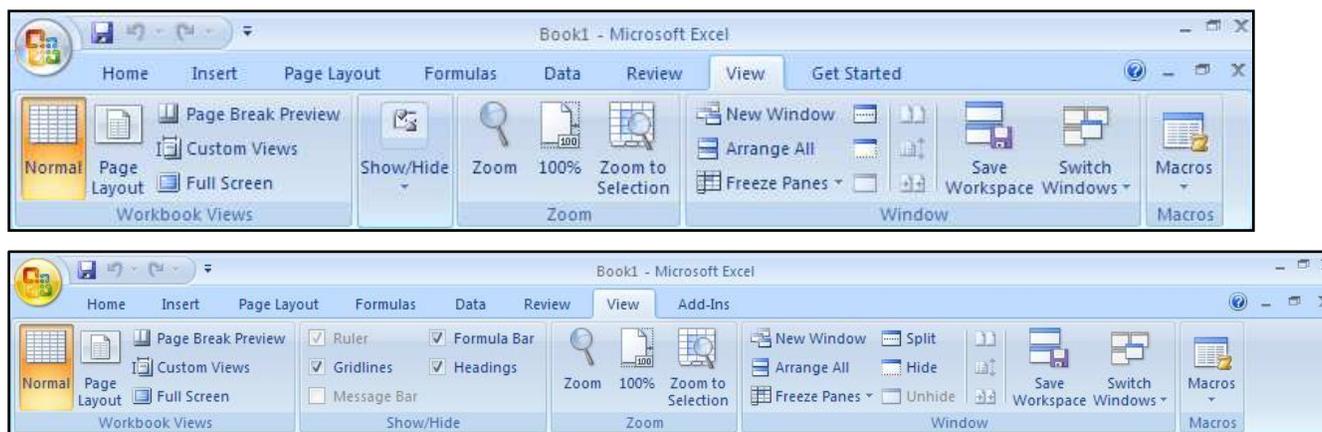


Figure 2: The top image shows the *View* tab on the Excel 2007 Ribbon at a lower resolution. Notice the collapsed *Show/Hide* group with a small arrow below the group name. The bottom image shows the same tab on the Ribbon when displayed at a higher resolution.

If necessary, adjust the screen resolution used with your monitor. Use the maximize button in the upper right corner of the Excel window to expand the program so it fills the screen and the Ribbon expands to full size.

Locating Basic Commands

The *Home* tab holds the commands most people use frequently when they develop spreadsheets. This includes all the options for changing font types, styles, cell alignment, adding/deleting rows and columns, clearing cell formatting, and pasting content from other applications. If you need to change cell styles (for example, from text to currency), you'll find the commands for it in the *Number* group of the *Home* tab.

The *Insert* tab contains all of the objects (Excel refers to some of them as "Illustrations") and text based components that you can add to the spreadsheet. An extensive list of charts you can insert and use can be found in the *Insert* tab.

The *Page Layout* tab contains just about all of the features you need to manage the overall appearance of the spreadsheet. Most of the options on this tab (margins, scaling, print titles, etc.) were located in the *File*→*Page Setup* menu option of previous Excel versions.

All keyboard shortcuts you may have used in previous versions of Excel work in 2007.

To help you find Excel 2003 commands in the new Excel 2007 interface, you can use the interactive command reference guide found on the Microsoft Office web site. The guide maps all the previous menu commands to their new location in the Ribbon or elsewhere in Excel 2007. You can find the guide at the following web site: <http://office.microsoft.com/en-us/help/HA101491511033.aspx>

 **TIP:** If you have the *Getting Started* tab installed, you can find the Interactive Guide in the *Find a Command* group on this tab.

Additional file level options (new, open, save, save as, print, close, etc.) can be found by clicking the **Microsoft Office Button** in the upper left corner of the Excel window. 

Default Font Change

In Excel 2007, fonts in newly created spreadsheets look different than in previous versions of Excel. All new spreadsheets use the **Body Font (Calibri font at 11 points)** when you type data into the spreadsheet, header or footer, or a text box. The default Excel 2007 change in font face and size were designed with on-screen readability in mind.

To change the default Excel 2007 font face and size, follow these steps:

- 1) Click the **Microsoft Office Button**.
- 2) Click the **Excel Options** button.
- 3) In the *Popular* category, under *When creating new workbooks*, do the following (see Figure 3):
 - a. In the *Use this font* box, click the font that you want to use.
 - b. In the *Font Size* box, enter the font size that you want to use.
- 4) Click the OK button to apply the change.

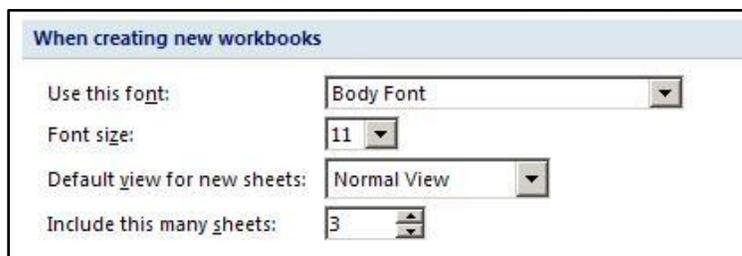


Figure 3: Easily change the default Excel 2007 font.

NOTE: To begin using the new default font and font size, you must restart Excel. The new default font and font size are used only in new workbooks that you create after you restart Excel; existing workbooks are not affected.

Format and Edit Data

Editing data in Excel 2007 hasn't changed much since previous versions of Excel. You can still edit the contents of a cell by clicking the cell and retyping the information over the existing cell contents, pressing the **F2** key to place the cursor in the cell for editing or edit directly from the Formula bar.

Text and Cell Formatting

You can change text formatting using the tools found on the Ribbon or the options in the Font dialog box. From the *Home* tab, use the options in the *Font* group to format text or cells (see Figure 4). Some of the font formatting options in this group have a small down arrow on the right side of the button. Click the arrow to see more formatting choices open in a drop down list. As you hover the mouse arrow over some of the choices in the list, you will see a preview of the change on the spreadsheet.

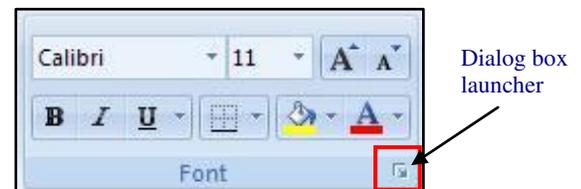


Figure 4: The *Font* group on the *Home* tab.

To apply font formatting changes using the dialog box option, click the dialog box launcher in the lower right corner of the *Font* group found on the *Home* tab (outlined in the red box in Figure 4). Browse through the many font formatting options available in this dialog box. Adjust the settings for the font faces using the options in the *Font* dialog box and click the OK button when finished.

To align cell contents either horizontally or vertically within a cell, use the options available within the *Alignment* group on the *Home* tab (see *Figure 5*).

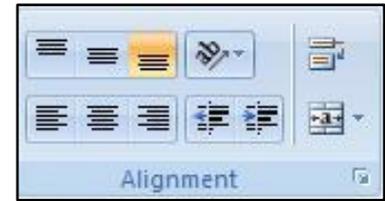


Figure 5: The *Alignment* group on the *Home* tab.

Several preformatted cell styles are available in the **Cell Styles** option on the *Styles* group on the *Home* tab. These cell styles are based on the applied spreadsheet theme found on the *Page Layout* tab in the *Themes* group.

The **Format** option in the *Cells* group found on the *Home* tab contains many of the commonly used options for changing columns and rows (see *Figure 6*). This includes: adjusting row height and column width, hiding and unhiding rows, columns and sheets.

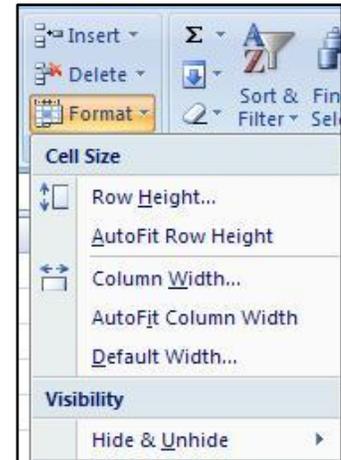
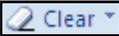


Figure 6: The **Format** option found in the *Cells* group.

Clear Command

Although not a new feature in Excel, the **Clear** command is available on the *Home* tab, in the *Editing* group. You can remove all cell formatting while preserving text formatting in selected cells (e.g., fill color, alignment, and borders will be cleared, but text color, font size, and font face will not be cleared). This feature was "hidden" in one of the many nested menus in previous versions of Excel.

- 1) Select the cell(s) containing the formatting to be cleared.
- 2) From the *Home* tab, in the *Editing* group, click **Clear**  and select **Clear Formats**.
- 3) The cell formatting is removed.

Insert/Delete Rows and Columns

A common Excel task is to add or delete rows and columns from a spreadsheet. The options for inserting and deleting rows and columns are in the *Cells* group on the *Home* tab (see *Figure 7*). Oddly enough, the option for inserting rows and columns is **not** found on the *Insert* tab.



Figure 7: The *Cells* group on the *Home* tab.

When you insert rows or columns in an area of the spreadsheet where there is existing formatting (cell fill color, borders, etc.) you will be prompted with an option to retain formatting from adjacent cells or clear formatting from the newly inserted row or column. These choices are visible when you click the smart tag (small paintbrush icon) that appears in the area where you have inserted the new rows or columns (see *Figure 8*). Choose the appropriate option or simply ignore the paintbrush icon altogether.

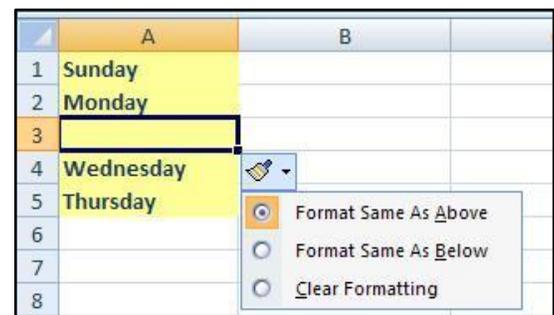


Figure 8: Format options appear in the smart tag after inserting a row within a formatted area.

Additionally, you can still right click the column/row labels and choose **Insert** or **Delete** from the context menu that appears to add/delete columns and rows.

Page Setups and Printing

In Excel 2007, you'll find that the *Page Layout* tab contains the majority of the tools you need to setup the overall appearance of your spreadsheets. As mentioned in a previous section, this tab contains most of the settings from previous versions of Excel that were stored in the File→Page Setup menu option. You can still get into the familiar Page Setup dialog box by clicking the dialog box launcher in the lower right corner of the *Page Setup*, *Scale to Fit*, or *Sheet Options* groups.

Page Layout View

Page Layout view is new in Excel 2007. If you have worked in Print Layout view in Microsoft Office Word, this new view in Excel will look familiar to you.

In Page Layout view there are page margins at the top, sides, and bottom of the worksheet, and a bit of blue space between worksheets. While in this view, there are rulers at the top and side that you can use to adjust margins. You can turn the margins on and off as you need them.

To change views, click the *View* tab, and select a view in the *Workbook Views* group. Or select a view by clicking a button on the zoom slider toolbar  in the bottom right of the window.

Headers and Footers

Adding headers and footers to spreadsheets has changed in Excel 2007. Headers and footers repeat on every printed page of the worksheet and each worksheet in a workbook can have different headers and footers. In previous versions of Excel, you worked in a dialog box to add a header or footer. Now, you can add and edit the header or footer directly in the *Page Layout* view while seeing the rest of the spreadsheet.

To add headers and footers, follow these steps:

- 1) Select the worksheet tab in the lower left corner to which you want to add the header or footer.
- 2) If you are in *Normal* view, on the *Insert* tab, in the *Text* group, click **Header & Footer**. A header area appears at the top of the sheet and the *Design* tab is visible on the Ribbon. If you are already in *Page Layout* view, the header area is visible at the top of the sheet.
- 3) One section of the header appears on the left of the top margin, one in the center, and one on the right. Although all three sections may not be visible, clicking in one of these areas will trigger that section to appear (see *Figure 9*).

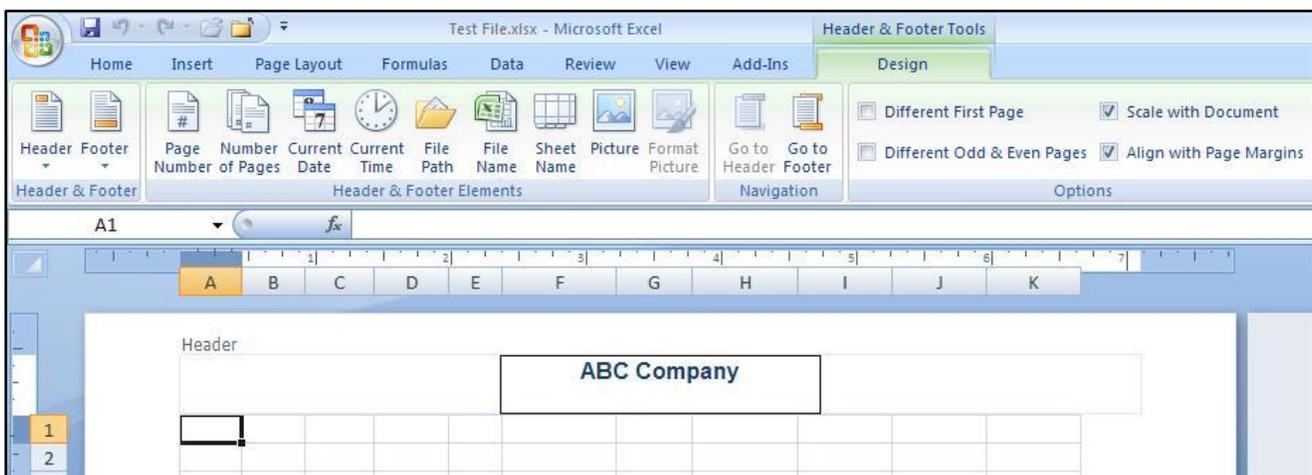


Figure 9: The Header area of a spreadsheet and related *Design* tab on the Ribbon.

- 4) Click the section of the header where you want to add content.
- 5) Type in the text you want to repeat at the top of each printed page or click one of the options from the *Header & Footer Elements* group on the *Design* tab (current time, file name, etc.).
 - a. To change the formatting of the text, select the text that you want to format.
 - b. Select the *Home* tab and use the formatting commands in the *Font* group.
- 6) To stop working with your header, click outside of it.
- 7) If necessary, change your screen view back to **Normal** using the option on the *View* tab in the *Workbook Views* group.

To add a footer to the spreadsheet, follow the same steps as listed above with the exception of a change in step 2. Before entering any text, click the **Go to Footer** button in the *Navigation* group on the *Design* tab.



Print Preview

Working in the Print Preview mode has changed in Excel 2007. To start with, there is no visible command for Print Preview on the Ribbon (you can add a button for it on the Quick Access toolbar). This option is found by clicking the **Microsoft Office Button**, pointing to the **Print** option and then clicking **Print Preview**.

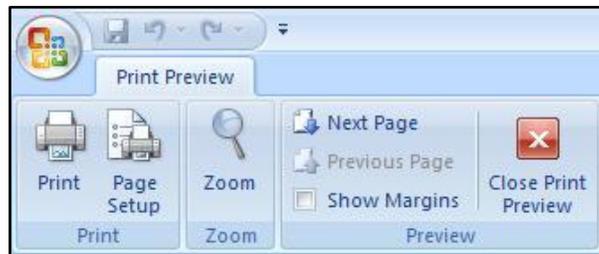


Figure 10: The Print Preview option in Excel 2007.

The spreadsheet view changes so there is only a Print Preview tab on the Ribbon. There aren't too many tools within the tab and each is pretty self-explanatory. Notice the large **Close Print Preview** option (*see Figure 10*). Use this option to return to the Normal spreadsheet view; not the "x" in the upper right corner of the program window that you may have used in previous versions of Excel.

Zooming Controls

You can quickly zoom in to get a close-up view of your spreadsheet or zoom out to see more of the page at a reduced size using the new zoom slider (*see Figure 11*). In the lower right corner of the status bar, drag the zoom slider or click the plus/minus buttons to adjust the zoom to suit your needs. The center point of the slider is equivalent to 100%.



Figure 11: The new zoom slider in Excel 2007.



TIP: Additional zoom options are found on the Ribbon in the *Zoom* group of the *View* tab or by left clicking the displayed percentage on the left side of the zoom slider .

Sorting and Filtering Data

Sorting and filtering are powerful Excel tools that can help you manage large lists. You can sort data by text (A to Z or Z to A), numbers (smallest to largest or largest to smallest), and dates and times (oldest to newest and newest to oldest), or by font or cell colors in one or more columns. Filtering allows you to display only data that meets certain criteria. For example, only records where the abbreviation NY is found in the *State* field. If you had used these tools in previous versions of Excel, you'll notice some changes when you use these tools in Excel 2007.

Sorting Data

Older versions of Excel limited sorting to up to three sets of criteria. In Excel 2007, you can sort by up to 64 columns. To sort data follow these steps:

- 1) Make sure there are no empty rows or columns in the list (remove them if any are found). Click any cell inside the list.
- 2) On the *Home* tab, in the *Editing* group, click **Sort & Filter** and then click **Custom Sort** (see Figure 12). The Sort dialog box is displayed.
- 3) If your list has a header row, make sure the "My data has headers" box is selected. Click the box if it is not checked.
- 4) Under **Column**, in the Sort by drop down list, select the first column that you want to sort (see Figure 13).
- 5) Under **Sort On**, select the type of sort. Do one of the following:
 - a. To sort by text, number, or date and time, select Values.
 - b. To sort by format, select Cell Color, Font Color, or Cell Icon.
- 6) Under **Order**, select how you want to sort. Do one of the following:
 - a. For text values, select A to Z or Z to A.
 - b. For number values, select Smallest to Largest or Largest to Smallest.
 - c. For date or time values, select Oldest to Newest or Newest to Oldest.
 - d. To sort based on a custom list, select Custom List.

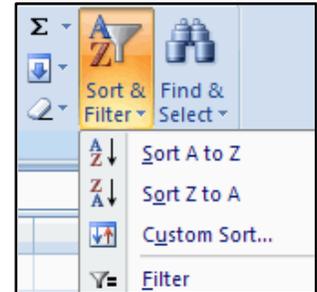


Figure 12: Sort & Filter option in the *Editing* group.

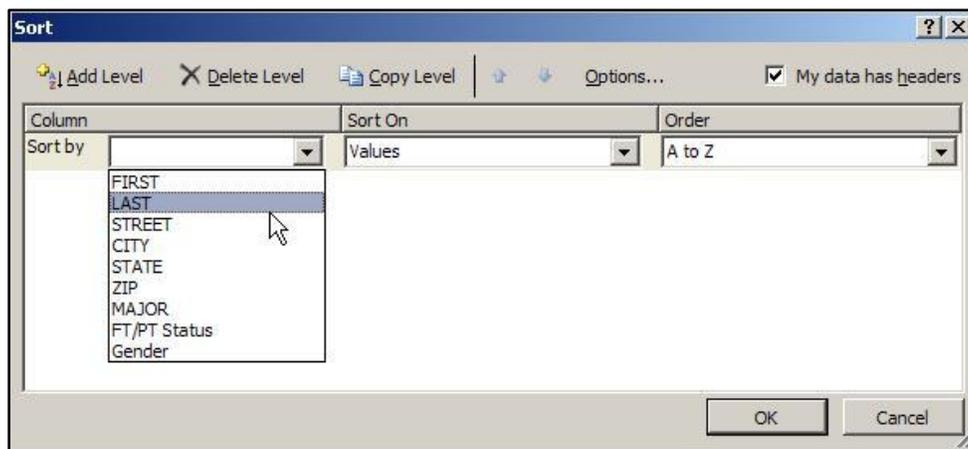


Figure 13: Choose the columns to be sorted on in the Sort dialog box.

- 7) To add another column to sort on, click **Add Level** and then repeat steps four through six. For example, you may want to sort on the column that contains the list of majors and then last name or last name and then town.
- 8) To delete a column used for the sort, select the entry and then click **Delete Level**. (You must keep at least one entry in the list.)

- 9) To change the order in which the columns are sorted, select an entry and then click the **Up** or **Down** arrow to change the order. Entries higher in the list are sorted before entries lower in the list.
- 10) Click the OK button when you are finished. Excel sorts the list based on the criterion you selected.

Using AutoFilter

To filter an Excel database to just a relevant list of records, follow these steps:

- 1) Make sure there are no empty rows or columns in the list (remove them if any are found). Click any cell inside the list.
- 2) On the *Home* tab, in the *Editing* group, click **Sort & Filter** and then click the **Filter** option. The filter arrow appears at the right end of each of the cells in the header row.
- 3) Click the filter arrow at the right end of the first cell in the column you want to filter.
- 4) All of the possible data entries in the column are selected in the filter list. Click the check boxes to the left of each item you want to include or remove in the filter or click the box next to (Select All) at the top of the list (see Figure 14).
- 5) Click the OK button to filter the Excel list.

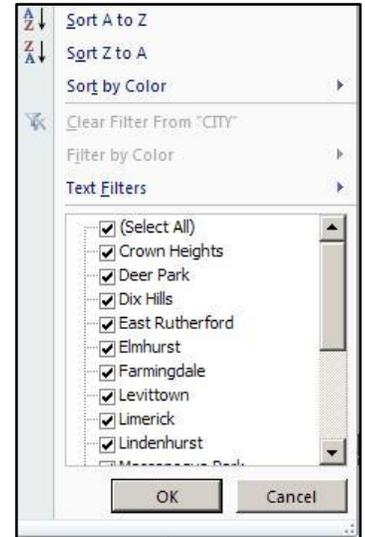


Figure 14: A sample AutoFilter list of entries.

To clear the filter, on the *Home* tab, in the *Editing* group, click **Sort & Filter** and then click the **Clear** option.

There are additional text and number based filters available when you click the filter arrow at the right end of the first cell in the column you want to filter. These additional filters, found by pointing to the *Text Filters* option, allow you to focus on ranges of data or locate partial matches (e.g., all zip codes that start with 117).

Creating Charts

The entire charting engine in Excel 2007 has been overhauled. In previous versions of Excel, you used a Wizard interface to gradually build the chart by adding in each element found in a series a tabs. Now, you can quickly insert a chart and use specific chart related tabs on the Ribbon to add, remove, and change chart elements.

The type of chart you choose depends on the type of data you have, how much data you have, and the message you want to communicate. Choose one of the 11 Excel chart types by following these steps:

- 1) Select the range of data to be charted.
- 2) From the *Insert* tab, in the *Charts* group, click the type of chart you prefer (see Figure 15). A pull-down list of gallery choices appears.



Figure 15: Available chart types are listed in the *Charts* group on the *Insert* tab.

- 3) Click the specific chart subtype you want from the list of choices in the gallery.
- 4) Excel places the chart as an embedded object on the current worksheet and the *Design*, *Layout*, and *Format* tabs appear on the Ribbon under Chart Tools.

When you create a chart, the chart tools become available and the *Design*, *Layout*, and *Format* tabs are displayed (see *Figure 16*). You can use the commands on these tabs to modify the chart so that it presents the data the way that you want. For example, use the *Design* tab to make changes to the source data of the chart, change the location of the chart, change the chart type, or select predefined layout and formatting options. Use the *Layout* tab to add or change the display of chart elements such as chart titles and data labels, use drawing tools, or add text boxes and pictures to the chart. Use the *Format* tab to add fill colors, change line styles, or apply special effects.

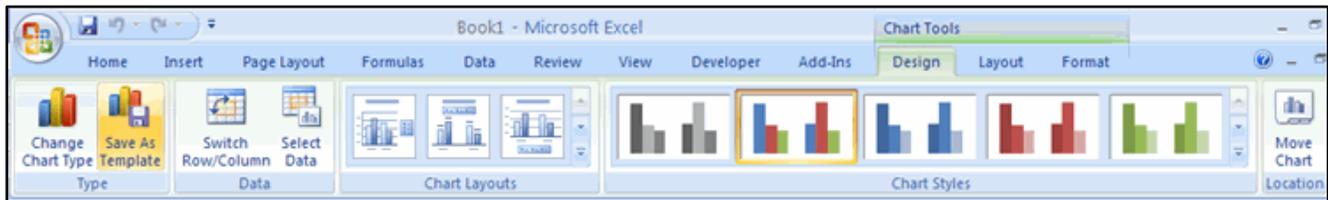


Figure 16: The *Design* tab under Chart Tools provides tools needed to change the chart type, layout, style, and location.

File Formats and Compatibility

Saving as PDF

Generating a printable version of your spreadsheet hasn't changed in Excel 2007. You can still print the spreadsheet, the entire workbook or just a selected range of cells on paper. New to this version is the ability to save a PDF version of the spreadsheet. With just a few clicks you can generate a non-editable PDF file that can be emailed, distributed on CD, or uploaded into your Blackboard course.

- 1) Click the **Microsoft Office Button**  in the upper left corner of the program.
- 2) Point to the **Save As** option in the Office Button menu.
- 3) Click the **PDF or XPS** option in the Save as submenu.
- 4) In the *Publish as PDF* dialog box, browse to the location where you want to save the file using the drop down list in the *Save in* field at the top.
- 5) Enter a meaningful file name in the bottom of the dialog box (see *Figure 17*). If you plan to distribute the PDF via email or Blackboard, avoid using spaces in the file name. Instead, use a hyphen or underscore.
- 6) In the *Optimize for* area, choose **Minimum size**.
- 7) Click the **Options** button to view additional options available before the PDF is created.
- 8) Click the **Publish** button to save the PDF.



Figure 17: Creating a PDF version is as easy as saving the file.

New Spreadsheet Format (xlsx)

Excel 2007 automatically saves new spreadsheet files in a new format (Excel Spreadsheet .xlsx). There are several benefits to using the new file format including: reduced file size, improved blocking of malicious code, improved damaged file recovery, and easier integration with other applications. You can open old spreadsheets just fine and save in the new format. However, the file format change does affect spreadsheet sharing between Excel 2007 and older versions of Excel.

There's no problem opening and editing an older spreadsheet in Excel 2007. What you'll need to decide is whether to keep the spreadsheet in its original format or save it in the new format. Excel 2007 recognizes the spreadsheet, when you open it, as being in the old format and Compatibility Mode is activated. In compatibility mode, you can open, edit, and save Excel 97–2003 spreadsheets, but you won't be able to use all of the new Excel 2007 features. Behind the scenes, Excel takes note of anything you add to the file, such as a new SmartArt graphic, that may not work exactly the same in the old format.

Then, when you click **Save**, Excel displays the **Compatibility Checker** dialog box. The Compatibility Checker warns you about any content that may be incompatible with versions of Excel earlier than Excel 2007. You can cancel the checker and select the new format in the **Save As** dialog box. Or, you can choose to continue and save in the old format.

Converting Older Spreadsheets

The **Convert** command in Excel 2007 provides you with a way to save an older spreadsheet in the new 2007 format. The effect is that Excel does an "in place" replacement of the old spreadsheet file format, converting it to the new format. Converting an old spreadsheet into the new will replace the original version of the file. However, you can convert a spreadsheet into the new format and retain the original file. Both sets of directions are listed below.

You do not have to convert all of your old Excel spreadsheets into the new file format. Only convert if you want to use some, or all, of the new features of Excel 2007.

To use the Convert command, follow these steps:

- 1) Open the spreadsheet.
- 2) Click the **Microsoft Office Button**  and click the **Convert** option.
- 3) Click the OK button in the warning dialog box that appears.
- 4) The original version of the spreadsheet has been replaced with the new. Edit the spreadsheet as needed and resave it as you normally would.

To use the Save As command, to save a copy of the spreadsheet in the new format and retain the original spreadsheet in the old format, follow these steps:

- 1) Open the spreadsheet.
- 2) Click the **Microsoft Office Button**  and click the **Save As** option.
- 3) Browse to a folder location where you can save the spreadsheet.
- 4) Enter a file name at the bottom of the *Save As* dialog box.
- 5) In the *Save as type* field, choose **Excel Spreadsheet**.
- 6) Click the **Save** button. The old file will still exist in the old format in the original folder location.

Saving Down

If you are taking the spreadsheet to a computer that does not have Excel 2007, or you are sending it to an individual who does not have the new version, you should save the file in the older spreadsheet format. This makes the file more accessible for those users who cannot open the new spreadsheet file format.

- 1) Click the **Microsoft Office Button**  in the upper left corner of the program.
- 2) Point to the **Save As** option in the Office Button menu.
- 3) Click the **Excel 97-2003 Spreadsheet** option in the Save as submenu.
- 4) In the *Save as* dialog box, browse to the location where you want to save the file using the drop down list in the *Save in* field at the top.
- 5) Enter a meaningful file name in the bottom of the dialog box.
- 6) Click the **Save** button.

Getting Help

The Microsoft Office Help system provides concise, printable descriptions and procedures for virtually any Office feature. The Help system is useful for troubleshooting problems and explaining specific subjects. The topics found in the Help system are actually stored in an extensive help library on Microsoft's Office web site. The Help system in the Office 2007 programs utilizes a direct connection to this web site and allows for updated and new content (click the button in the lower right corner of the Help window to check the connection).

To open the Help system, click the **HELP icon**  in the upper right corner of the screen (or press the **F1** key on the keyboard) to open the *Help* dialog box. There are a number of buttons available in the Help toolbar at the top of the *Help* dialog box to help you navigate through the Help system: Back, Forward, Home, Print, Show Table of Contents, etc (see *Figure 18*).

There are two ways to search for help topics. You can use the search text box at the top or you can browse Office Help for information on your subject using the links in the main area of the window.

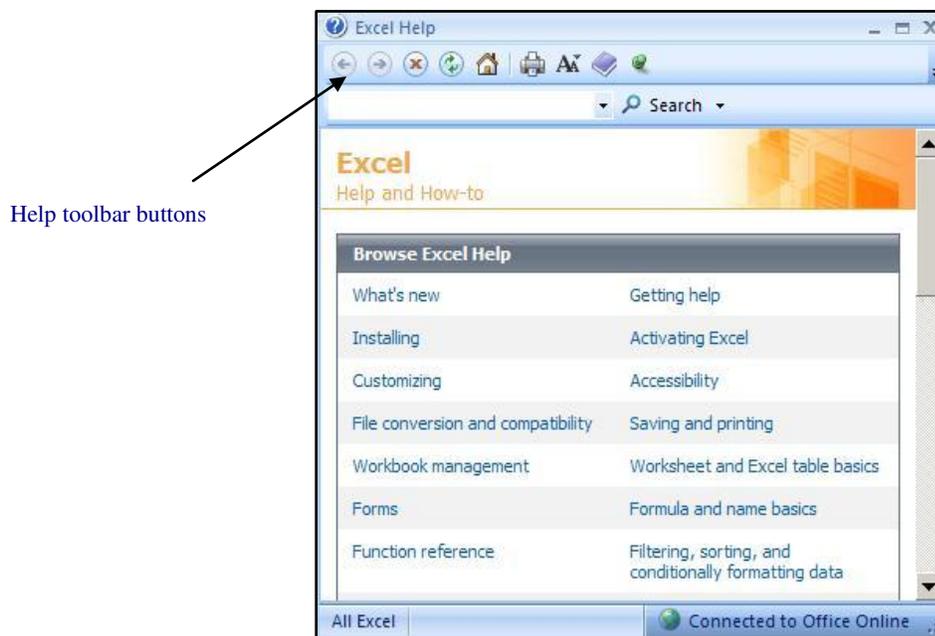


Figure 18: The Excel 2007 Help system dialog box.