

# Applied Systems Client Network

SEMINAR HANDOUT

***Excel 2003 vs. 2007,  
Where ARE things now?***

ASCnet<sup>TM</sup>

## Prepared for ASCnet

Applied Systems Client Network  
801 Douglas Avenue #205  
Altamonte Springs, FL 32714  
Phone: 407-869-0404 Fax: 407-869-0418

Copyright © 2008 by Applied Systems Client Network, Inc. (ASCnet), 801 Douglas Avenue #205, Altamonte Springs, FL 32714. Protection claimed in all forms and matters of copyrightable material and information now allowed by law or hereafter granted including both electronic and conventional distribution of herein products. Reproduction or transmission unless authorized by ASCnet is prohibited. All rights reserved. Specific product information regarding Applied Systems' The Agency Manager and Vision, as well as other products copyrighted and mentioned within (ex: Microsoft, Excel, etc.) are the product of the individual company and no endorsement or ownership of product should be implied by its mention and use. All workflows are suggested and common workflows. Users of this material agree that ASCnet cannot be held liable for any omissions or errors within the guide.

### Presented by:

Name:	John Warn	Sue Saverino
Company:	Rue Insurance	Bollinger Ins.
Phone:	732-818-3700, x209	
Email:	<a href="mailto:JWarn@RueInsurance.com">JWarn@RueInsurance.com</a>	

**Objective:** This class will review the changes in upgrading from Excel 2003 to Excel 2007 looking mostly at the differences in command locations and will incorporate some new features as we go. We will take a look at:

- Applied's TAM integration.
- What's New and Different in Excel 2007.
- Some common commands comparing their use in Excel 2003 along side a demonstration of the new command navigation and location in Excel 2007.

**Assumptions:** This seminar is based on the following:  
Microsoft ® Excel Version 2007 and 2003

## Table of Contents

Office 2007 Quick Reference Card.....	4
Excel 2007 Quick Reference Card .....	6
Tam Integration .....	8
Excel 2007 Overview.....	10
Office Button.....	10
Quick Access Toolbar.....	10
The Ribbon.....	10
Command Tabs .....	11
Home .....	11
Insert.....	11
Page Layout.....	11
Formulas .....	11
Data .....	11
Review .....	12
View .....	12
Contextual Tabs.....	12
Groups.....	13
Dialog Box Launcher .....	13
Super Tooltips .....	13
Mini Toolbar.....	13
Sorting .....	13
Status Line Changes .....	13
Tables.....	13
Other Cool Features .....	14
Excel 2003 vs. Excel 2007 .....	14
Hot Keys .....	14
Window Split or Freeze Panes.....	14
Entering and Formatting Data .....	14
Text to Columns.....	15
Formatting.....	15
Formulas and Functions.....	15
Filter.....	15
Tables .....	15
Chart .....	15
Pivot Table .....	16
Page Setup .....	16
Notes:.....	16
Export to PDF .....	16
Additional Material .....	16

# Office 2007 Quick Reference Card

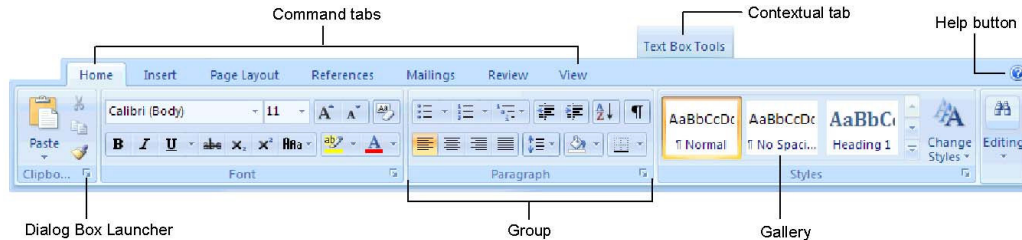
Microsoft®

## Microsoft Office 2007 Quick Reference Card

**CustomGuide**  
Learn on Demand  
Download More FREE Quick References!  
Visit: [gr.customguide.com](http://gr.customguide.com)

### The Ribbon

Microsoft Office 2007 provides easy access to commands through the **Ribbon**, which replaces the menus and toolbars found in previous versions. The purpose of the Ribbon is to keep commands visible while you work instead of hiding them under menus and toolbars.



- **Command tabs:** Appear by default whenever you open a Microsoft Office program. Click on a tab to view its available commands.
- **Contextual tabs:** Appear whenever you perform a specific task and offer commands relative to only that task.
- **Dialog Box Launcher:** Click to display a dialog box or task pane.
- **Group:** To make things easier to find, the commands on each tab are organized into groups of related commands.
- **Gallery:** A set of thumbnail graphics that represent the result of applying a series of formatting commands.
- **Help button:** Click to display the new Help window.

### Microsoft Office Button

The **Microsoft Office Button**, located in the upper left-hand corner of the program window, replaces the File menu found in previous versions of Microsoft Office. The Microsoft Office Button menu contains basic file management commands, including New, Open, Save, and Close.

#### Inspect Document

Removes comments, tracked changes, metadata (document history such as the author and editors) and other information that you don't want to appear in the finished document.

#### Restrict Permission

Uses Information Rights Management (IRM) to specify access permissions.

#### Add a Digital Signature

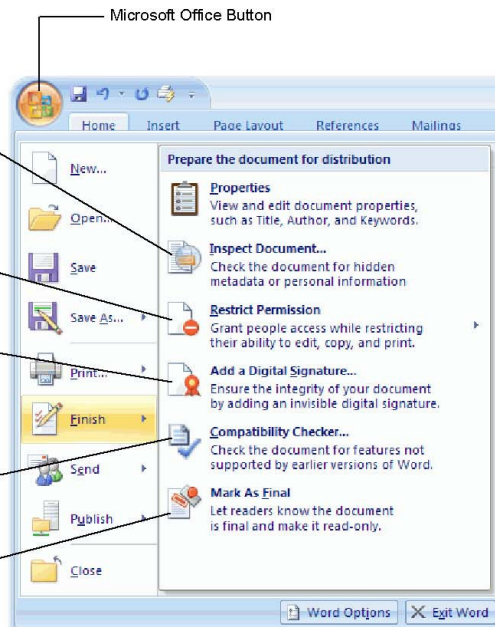
Adding a digital signature prevents inadvertent changes, ensuring that your content cannot be altered.

#### Compatibility Checker

Checks for elements in a document that aren't supported or will behave differently in previous versions of the program.

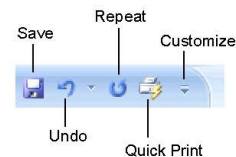
#### Mark As Final

Prevents changes by making the document read-only.



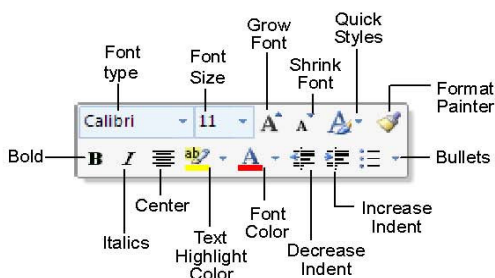
### Quick Access Toolbar

The **Quick Access Toolbar** provides easy access to the commands you use most frequently. The Save, Undo, Redo/Repeat, and Quick Print buttons appear on the Quick Access Toolbar by default, but you can add and remove commands to meet your needs.



- **To Move the Quick Access Toolbar:** Click the **Customize Quick Access Toolbar** button on the Quick Access Toolbar and, depending on the location of the toolbar, select **Place Quick Access Toolbar below the Ribbon** or **Place Quick Access Toolbar above the Ribbon** from the menu.
- **To Add a Command to the Quick Access Toolbar:** Click the **Customize Quick Access Toolbar** button and select **Customize Quick Access Toolbar** from the menu. Select the command you want to add, click the **Add** button, and click **OK**. Or, on the Ribbon, right-click the command you want to add and select **Add to Quick Access Toolbar** from the contextual menu.
- **To Remove a Command from the Quick Access Toolbar:** Right-click the command you want to remove and select **Remove from Quick Access Toolbar** from the contextual menu.

contains common text formatting commands.



- **To Use the Mini Toolbar:** Select the text you want to format and click the desired command on the Mini Toolbar. Click anywhere outside the Mini Toolbar to close it.
- **To Turn Off the Mini Toolbar:** Click the **Microsoft Office Button** and click the **Options** button. Click the **Personalize** tab, uncheck the **Show Mini Toolbar on selection** check box, and click **OK**.

## Themes

A **theme** is a set of unified design elements that you can apply to a document to give it a consistent look and feel. Themes coordinate the look of a document using colors, fonts, and effects.



- **To Apply a Theme:** Click the **Page Layout** tab on the Ribbon and click the **Themes** button in the Themes group (Word/Excel) or click the **Design** tab on the Ribbon and click the **More** button in the Themes group (PowerPoint).

## XML Compatibility

The new Microsoft Office Open XML format (.docx, .pptx, .xlsx, etc.) is based on the XML (Extensible Markup Language) programming language. Here are its main benefits:

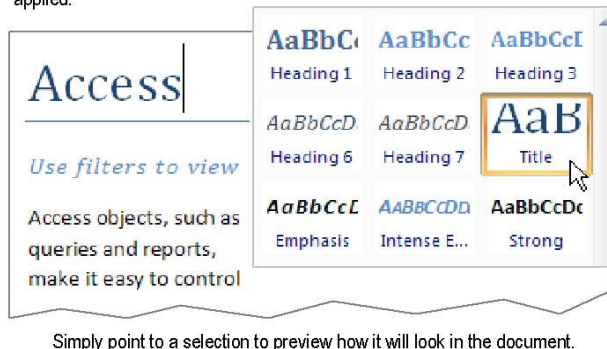
- **Safer documents:** Documents containing unwanted code, macros, or controls are easier to identify and block.
- **Reduced file size:** All Office 2007 documents are automatically compressed.
- **Improved information security:** Personal and business-sensitive information is easier to remove.
- **Improved damaged-file recovery:** A file can still be opened even if part of it is damaged.
- **Easier integration:** Document content can be shared with and opened in other programs.

PDF format allows you to share your presentation with users on any platform

- **To Save a Document as a PDF:** Click the **Microsoft Office Button** point to the **Save As** list arrow, and select **PDF**. Give the presentation a name, select **PDF** in the Save as type list, and click **OK**. Click **Publish**.

## Live Preview

**Live Preview** enables you to preview how a formatting change will look before applying it. Simply point to a selection and Office 2007 shows you a preview of what your document or object would look like if the selected changes were applied.

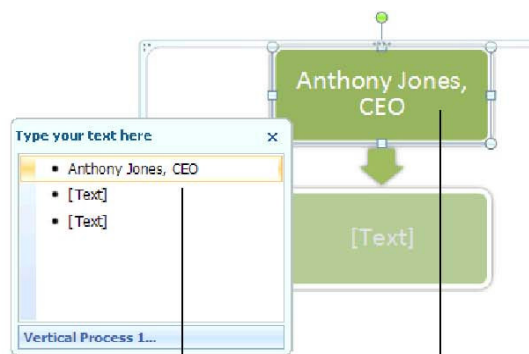


Simply point to a selection to preview how it will look in the document.

## SmartArt Diagrams

**SmartArt** diagrams are dynamic diagrams that update automatically according to the type of information you want to include.

- You can create SmartArt diagrams in Excel 2007, Outlook 2007, PowerPoint 2007, and Word 2007. Although you cannot create a SmartArt diagram in other Office 2007 programs, you can copy and paste SmartArt diagrams as images into those programs.
- **To Insert a SmartArt Diagram:** Click the **Insert** tab on the Ribbon and click the **SmartArt** button in the Illustrations group. Select the SmartArt type you want to use and click **OK**.
- **To Add Text to a SmartArt Diagram:** Click inside the Text pane and type your text.
- **To Add a Shape to a SmartArt Diagram:** In the Text pane, position the insertion point where you want to add the shape and press **<Enter>**.
- **To Remove a Shape from a SmartArt Diagram:** Select the shape you want to remove and press **<Delete>**.



As you type your text in the Text pane...

...Office 2007 inserts it into the diagram automatically.



# Excel 2007 Quick Reference Card

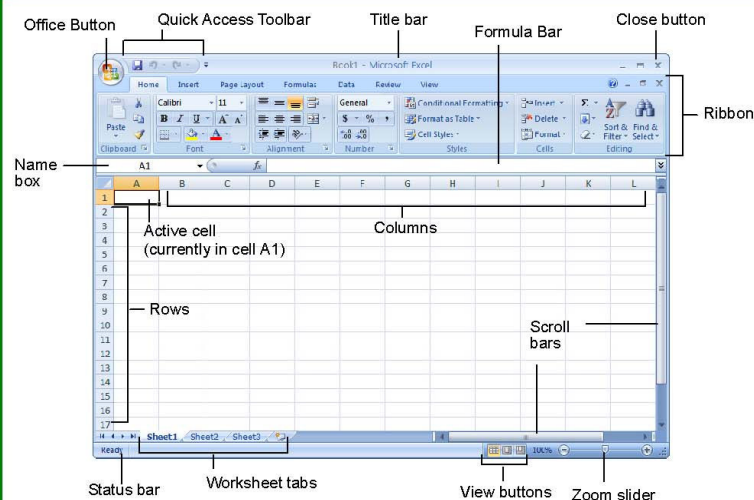
Microsoft®

## Excel 2007

### Quick Reference Card

**CustomGuide**  
Learn on Demand  
Download More FREE Quick References!  
Visit: [qr.customguide.com](http://qr.customguide.com)

#### The Excel 2007 Screen



#### Keyboard Shortcuts

##### General

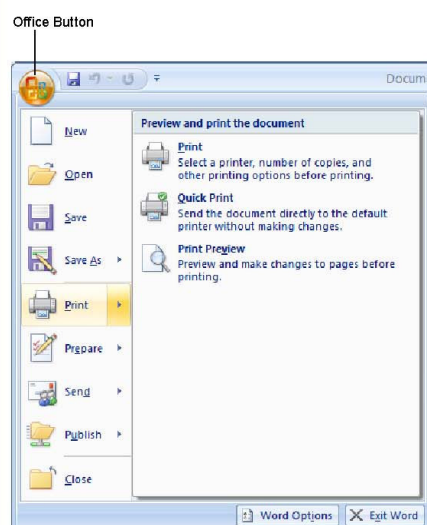
Open a Workbook	<Ctrl> + <O>
Create New	<Ctrl> + <N>
Save a Workbook	<Ctrl> + <S>
Print a Workbook	<Ctrl> + <P>
Close a Workbook	<Ctrl> + <W>
Help	<F1>
Run Spelling Check	<F7>

##### Navigation:

Move Between Cells	<↑>, <↓>, <←>, <→>
Go One Cell to the Right	<Tab>
Go One Cell to the Left	<Shift> + <Tab>
Down One Cell	<Enter>
Up One Cell	<Shift> + <Enter>
Up One Screen	<Page Up>
Down One Screen	<Page Down>
To Cell A1	<Ctrl> + <Home>
To Last Cell with Data	<Ctrl> + <End>
Open Go To Dialog Box	<F5>

#### The Fundamentals

The **Office Button**, located in the upper left-hand corner of the program window, replaces the File menu found in previous versions of Microsoft Excel. The Office Button menu contains basic file management commands, including New, Open, Save, Print and Close.



- **To Create a New Workbook:** Click the **Office Button**, select **New**, and click **Create**, or press <Ctrl> + <N>.
- **To Open a Workbook:** Click the **Office Button** and select **Open**, or press <Ctrl> + <O>.
- **To Save a Workbook:** Click the **Save** button on the Quick Access Toolbar, or press <Ctrl> + <S>.
- **To Save a Workbook with a Different Name:** Click the **Office Button**, select **Save As**, and enter a new name for the presentation.
- **To Preview a Workbook:** Click the **Office Button**, point to **Print**, and select **Print Preview**.
- **To Print a Workbook:** Click the **Office Button** and select **Print**, or press <Ctrl> + <P>.
- **To Quick Print:** Click the **Office Button**, point to **Print**, and select **Quick Print**.
- **To Undo:** Click the **Undo** button on the Quick Access Toolbar or press <Ctrl> + <Z>.
- **To Close a Workbook:** Click the **Close** button or press <Ctrl> + <W>.
- **To Get Help:** Press <F1> to open the Help window. Type your question and press <Enter>.
- **To Exit Excel:** Click the **Office Button** and click **Exit Excel**.

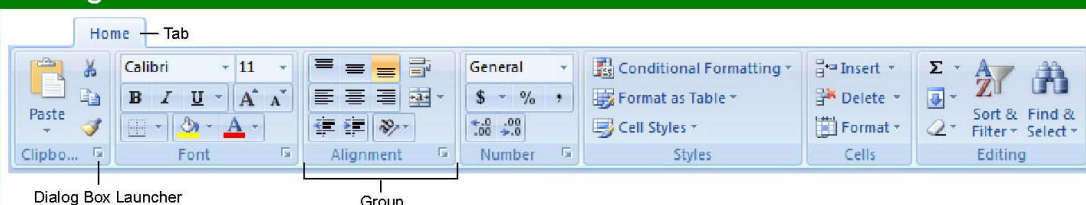
##### Editing

Cut	<Ctrl> + <X>
Copy	<Ctrl> + <C>
Paste	<Ctrl> + <V>
Undo	<Ctrl> + <Z>
Redo	<Ctrl> + <Y>
Find	<Ctrl> + <F>
Replace	<Ctrl> + <H>
Select All	<Ctrl> + <A>

##### Formatting

Bold	<Ctrl> + <B>
Italics	<Ctrl> + <I>
Underline	<Ctrl> + <U>
Open Format Cells Dialog Box	<Ctrl> + <E>

## Editing



- **To Edit a Cell's Contents:** Select the cell, click the Formula Bar, edit the cell contents, and press **<Enter>** when you're finished.
- **To Clear a Cell's Contents:** Select the cell(s) and press the **<Delete>** key.
- **To Cut or Copy Data:** Select cell(s) and click the **Cut** or **Copy** button in the Clipboard group on the Home tab.
- **To Paste Data:** Select the destination cell(s) and click the **Paste** button in the Clipboard group on the Home tab.
- **To Copy Using Auto Fill:** Point to the fill handle at the bottom-right corner of the selected cell(s), then drag to the destination cell(s).
- **To Move or Copy Cells Using Drag and Drop:** Select the cell(s) you want to move or copy, position the pointer over any border of the selected cell(s), then drag to the destination cells. To copy, hold down **<Ctrl>** key while dragging.
- **To Paste Special:** Cut or copy the cell(s), select the destination cell(s), click the **Paste** button list arrow in the Clipboard group on the Home tab, and select **Paste Special**. Select an option and click **OK**.
- **To Insert a Column or Row:** Right-click the selected row or column heading(s) to the right of the column or below the row you want to insert and select **Insert** from the contextual menu.
- **To Delete a Column or Row:** Select the row or column heading(s) and either right-click them and select **Delete** from the contextual menu, or click the **Delete** button in the Cells group on the Home tab.
- **To Insert a Comment:** Select the cell where you want to insert a comment and click the **Review** tab on the Ribbon. Click the **New Comment** button in the Comments group. Type a comment, then click outside the comment text box. Point to the cell to view the comment.

## Formatting

- **To Format Text:** Use the commands in the Font group on the Home tab, or click the **Dialog Box Launcher** in the Font group to open the Font dialog box.
- **To Format Values:** Use the commands in the Number group on the Home tab, or click the **Dialog Box Launcher** in the Number group to open the Format Cells dialog box.
- **To Copy Formatting with the Format Painter:** Select the cell(s) with the formatting you want to copy and click the **Format Painter** button in the Clipboard group on the Home tab. Then, select the cell(s) you want to apply the copied formatting to.
- **To Change Cell Alignment:** Select the cell(s) and click the appropriate alignment button (**Align Left**, **Center**, **Align Right**) in the Alignment group on the Home tab.
- **To Adjust Column Width:** Drag the right border of the column header. Double-click the border to AutoFit the row according to its contents.
- **To Adjust Row Height:** Drag the bottom border of the row header. Double-click the border to AutoFit the row according to its contents.
- **To Add Cell Borders:** Select the cell(s), click the **Border** button list arrow in the Font group on the Home tab, and select a border type.
- **To Add Cell Shading:** Select the cell(s), click the **Fill Color** button list arrow in the Font group on the Home tab, and select a fill color.
- **To Apply a Document Theme:** Click the **Page Layout** tab on the Ribbon, click the **Themes** button in the Themes group, and select a theme from the gallery.
- **To Insert a Header or Footer:** Click the **Insert** tab on the Ribbon and click the **Header & Footer** button in the Text group. Enter header text.

## Formulas and Functions

- **To Total a Cell Range:** Click the cell where you want to insert the total and click the **Sum** button in the Editing group on the Home tab. Verify the selected cell range and click the **Sum** button again.
- **To Enter a Formula:** Select the cell where you want to insert the formula, press **<=>**, and enter the formula using values, cell references, operators, and functions. Press **<Enter>** when you're finished.
- **To Insert a Function:** Select the cell where you want to enter the function and click the **Insert Function** button on the Formula Bar.
- **To Reference a Cell in a Formula:** Type the cell reference (for example, B5) in the formula or click the cell you want to reference.
- **To Create an Absolute Cell Reference:** Precede the cell references with a \$ sign or press **<F4>** after selecting a cell range to make it absolute.
- **To Use Several Operators or Cell Ranges:** Enclose the part of a formula you want to calculate first in parentheses.

## Charts

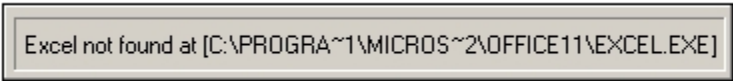
- **To Create a Chart:** Select the cell range that contains the data you want to chart and click the **Insert** tab on the Ribbon. Click a chart type button in the Charts group and select the chart you want to use from the list.

## Workbook Management

- **To Add a New Worksheet:** Click the **Insert Worksheet** tab next to the sheet tabs at the bottom of the program screen.
- **To Delete a Worksheet:** Select the sheet want to delete, click the **Delete** button in the Cells group on the Home tab, and select **Delete Sheet**. Or, right-click the sheet tab and select **Delete** from the contextual menu.
- **To Rename a Worksheet:** Double-click the sheet tab, enter a new name for the worksheet, and press **<Enter>**.
- **To Split a Window:** Drag either the vertical or horizontal split bar (located near the scroll bars) onto the worksheet.
- **To Freeze Panes:** Place the cell pointer where you want to freeze the window, click the **View** tab on the Ribbon, click the **Freeze Panes** button in the Window group, and select an option from the list.
- **To Select a Print Area:** Select the cell range you want to print, click the **Page Layout** tab on the Ribbon, click the **Print Area** button in the Page Setup group, and select **Set Print Area**.
- **To Adjust Page Margins, Orientation, Size, and Breaks:** Click the **Page Layout** tab on the Ribbon and use the commands in the Page Layout group, or click the **Dialog Box Launcher** in the Page Setup group to open the Page Setup dialog box.
- **To Protect or Share a Workbook:** Click the **Review** tab on the Ribbon and use the commands in the Changes group.

## Tam Integration

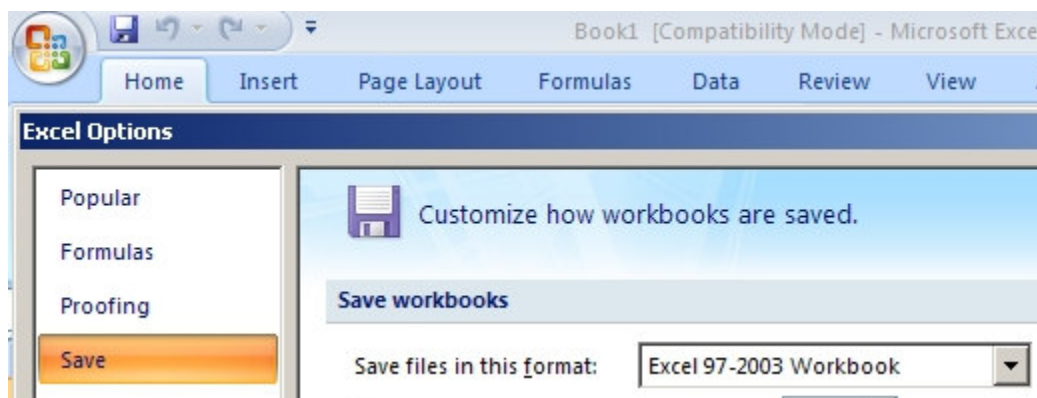
Upgrading Excel from a previous version will cause the below Excel error when setting TAM Reports output to Excel – Raw Data. To correct this error run X:\Wintam\Tamini.exe /r to reset the proper Excel .exe in wintam.ini. If this doesn't work, delete the local wintam.ini file and run the above again. If it still fails, run X:\Wintam\Aupdate.exe /rr as well.

A screenshot of an Excel error message box. The text inside the box reads: "Excel not found at [C:\PROGRA~1\MICROS~2\OFFICE11\EXCEL.EXE]". The box has a standard Windows error dialog appearance with a close button in the top right corner.

Excel not found at [C:\PROGRA~1\MICROS~2\OFFICE11\EXCEL.EXE]

Additionally, the newer Office file formats default to a 4 digit extension (.xlsx for Excel or .docx for Word). The TAM Attach database only recognizes 3 character file extensions so you may need to set the default save formats to the older 97-2003 format for both programs, particularly in a mixed version environment. In Excel, this can be done by accessing **Excel Options** from the Office Button.

*Refer also to the Compatibility Checker when saving down versions using the Office button and selecting Prepare.*



*Note: Other file extensions include .xlsm for a macro enabled workbook; .xltx for a template; and .xltm for a macro enabled template.*

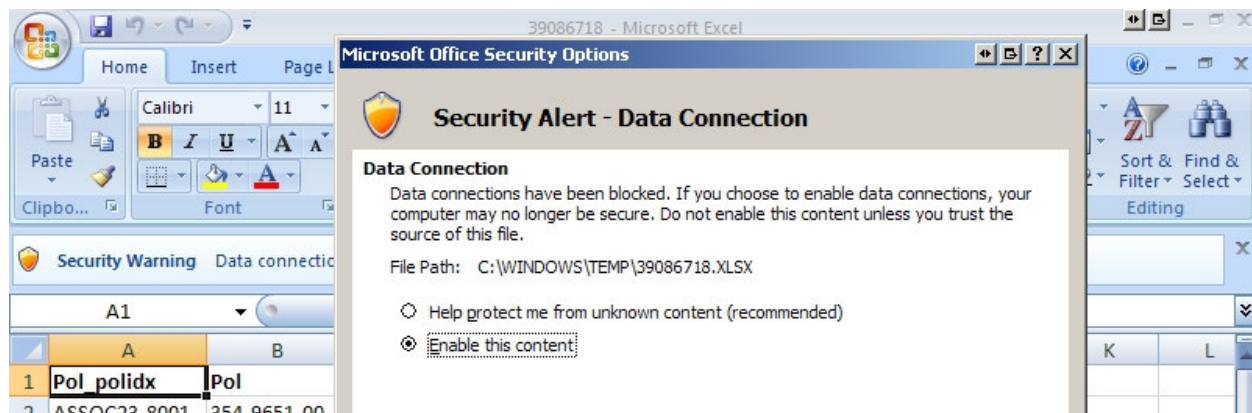
There is also some addition security with respects to scripts and macros in the newer Excel program. Creating a new Excel file from within TAM causes a security warning which can be avoided by adding the network share in the **Trust Center** located under Excel Options.



## Excel 2003 vs. 2007



Select allow Trusted Locations on Network and add X:\Doc\sp-sheet in the Trust Center



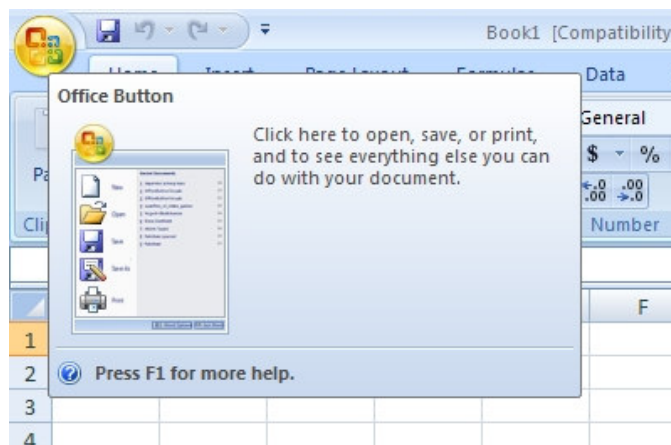
When Using Excel Temp file in TAM, just select "Enable this content"

You can also export larger data sets from TAM. Excel 2007 now supports up to 16,384 columns and 1,048,576 rows of data.

## Excel 2007 Overview

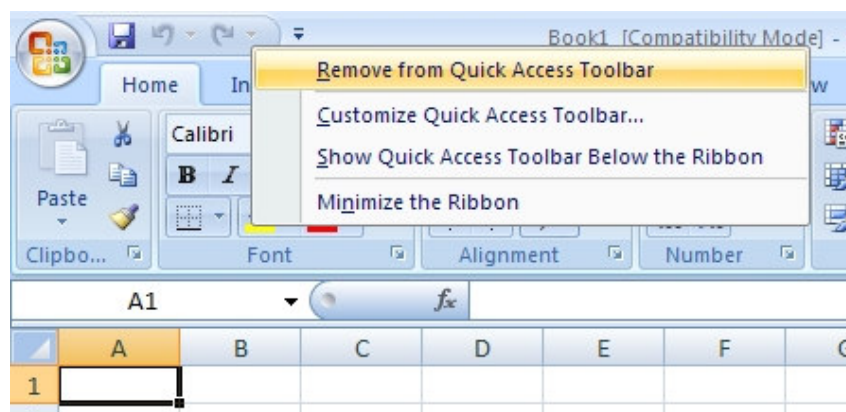
### Office Button

The **Office Button** is the equivalent of the File menu list in Excel 2003. Using the 2007 Office Button you Open, Create New, Save, Print and Send workbooks. This is also where you find Excel Options which replaces the Tools...Options dialog box.



### Quick Access Toolbar

The **Quick Access Toolbar** can be moved, minimized, and customized by each individual. Items can be added by customizing the toolbar with the drop down arrow or by right clicking on your favorite command and adding it to the Quick Access Toolbar.



With Respect to TAM, be sure to add your most commonly used commands and functions to the Quick Access Toolbar such as sort, filter, subtotal, tables, and personal macros.

### The Ribbon

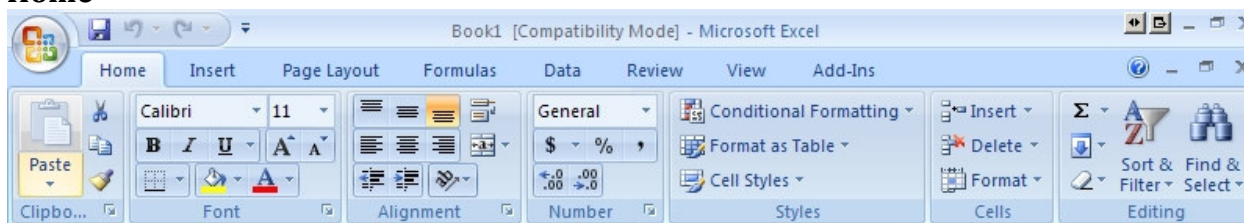
The Ribbon Control Center is a visual organization of the most common commands in Excel. It is considered an improvement on the 30 or un-displayed tools and commands buried under the old menu structure. The **Ribbon** replaces your old menus, toolbars and the task pane. You can still use **Ctrl+F1** to turn on and off the task pane or ribbon respectively in '03 and '07. The

Ribbon can be **hidden** to show a larger workspace using a right click or with a **double click on the active Tab**. The Ribbon consists of different Tabs and Groups. To see more details for a set of commands simply click on the drop down arrow if presented or the Dialog Launcher icon to the right of the group name and a detailed dialog box will open.

## Command Tabs

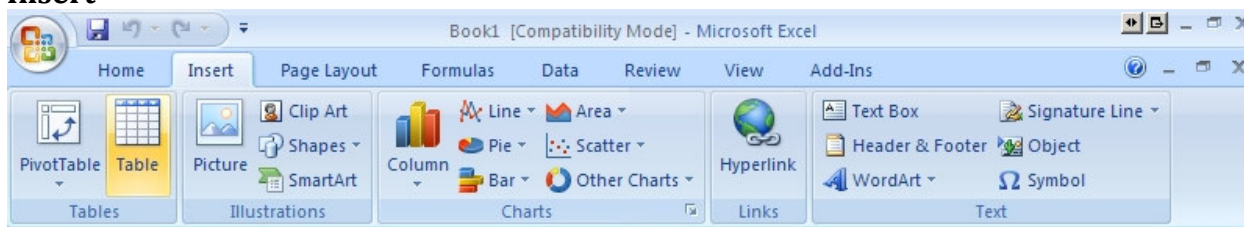
The Tabs in Excel have been created to organize core tasks through the application.

### Home



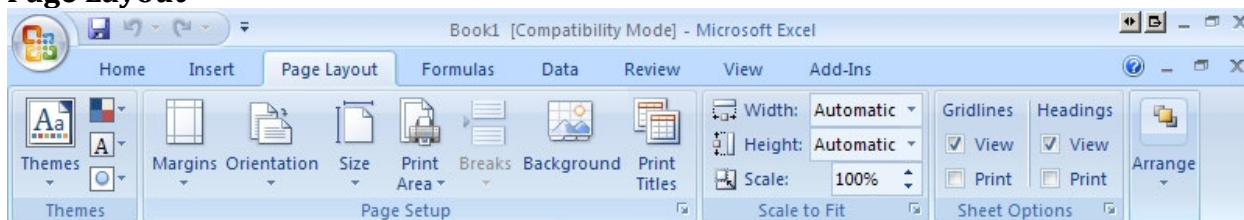
Most common commands used in Excel including cut, copy, paste, clipboard, fonts, formatting, alignment, and insert-delete of cells, rows and columns.

### Insert



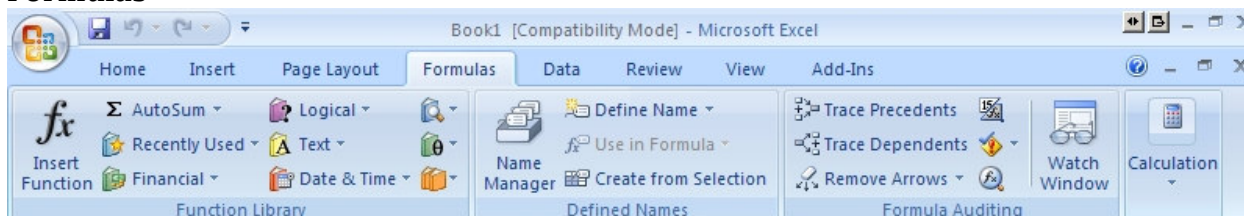
Includes groups of commands for tables, charts and text such as headers and footers.

### Page Layout



Print options including Orientation, Margins, Scale, etc.

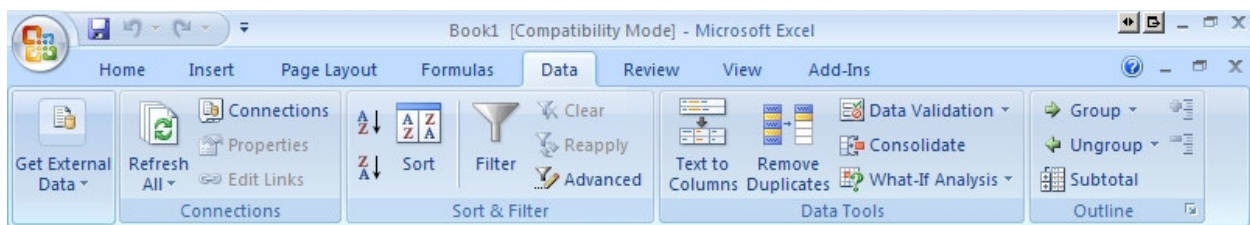
### Formulas



Formulas and Functions can be found here.

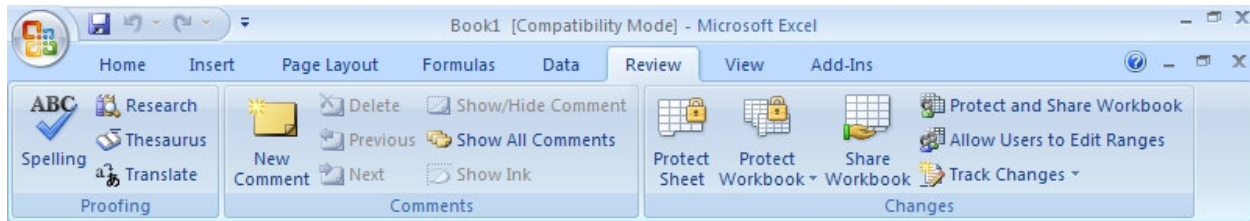
### Data

## Excel 2003 vs. 2007



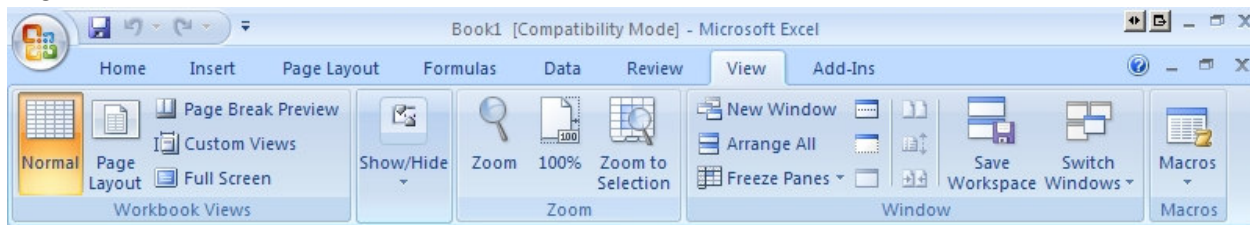
The Data tab contains common commands such as Sort, Filter, Subtotals, and Text to Columns.

### Review



Includes Proofing and Comment functions.

### View



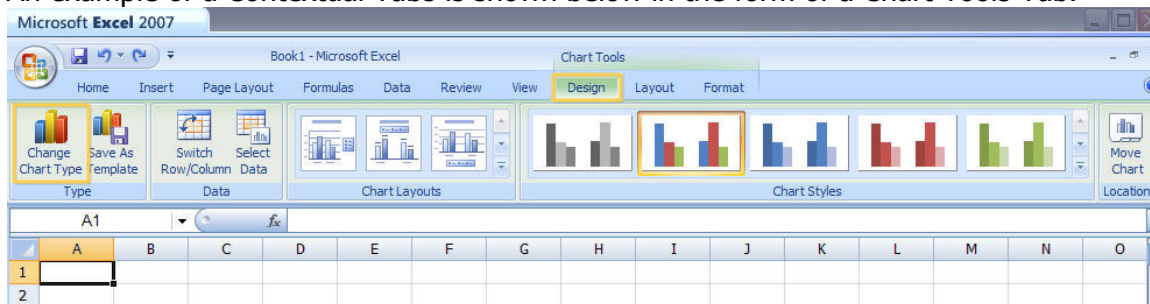
Organizes views, zoom, window organization and macros.

*Note: **Screen resolution** or sizing of the Excel workspace can alter the appearance of the Gallery thumbnails and commands in the ribbons. At a lower resolution (800x640) or at a reduce screen size some Gallery items will appear with a dropdown arrow to reveal commands rather than showing all the commands in the ribbon in a higher resolution or screen size.*

## Contextual Tabs

**Contextual tabs** appear whenever you perform a specific task and offer commands relative to the object currently being used in your worksheet.

An example of a Contextual Tabs is shown below in the form of a Chart Tools Tab.





## Groups

Within each tab, items are organized into **Groups** of related commands.

## Dialog Box Launcher

The **Dialog Box Launcher** appears in the lower right hand corner of a group within a tab. Click on the icon to display a dialog box or task pane for that group of commands.

## Super Tooltips

Excel 2007 has expanded the previous tool tips and has incorporated **Super Tooltips** providing a description of each command rather than just the command name, some Tooltips can be used to show a visual preview of what the tools does. The Tooltips provide F1 help compatibility to go directly to the help menu for further detail (can be set to automatically go to Office Online or only use the local help file).

## Mini Toolbar

The **Mini Toolbar** appears automatically whenever you select text and contains common formatting commands. Use the right click shortcut to access this toolbar.

## Sorting

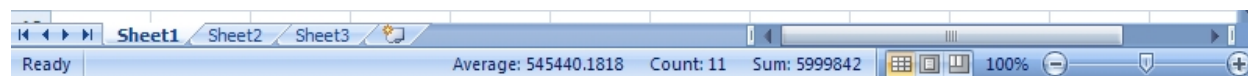
The ability to sort has been dramatically expanded in this version. Instead of having 3 levels, you can now have up to 64 levels and you can now sort by color and custom list. The Sort button can be found on the Data tab.

## Page Layout View

The **Page Layout** view has been added to Excel. This gives the ability to see what the printed page is going to look like. To switch to Page Layout view, use the view shortcut button in the status bar or go to the View tab.

## Status Line Changes

Additions to the customization of the **status bar** include the ability to change and add multiple status bar items. For example, you can select a range and display totals such as a count, average, sum, etc.; switch views using the **view shortcuts** which were added as well as zoom in and out of your workspace using the **zoom slider bar**.



*Note also that a **new worksheet button** was added. Worksheet tabs can now be customized by color in the right click shortcut menu.*

## Tables

Tables have been greatly improved and are more user friendly in this version. If you like autofilter in previous versions... it is now incorporated into tables in this version. When you change your spreadsheet to a table, the Column Label become the Heading you specify in your

table, alleviating the need to freeze your top pane. You can convert your data to a table using the Table button found on the Insert Tab.

Excel will automatically locate your table from any cell in the table and once selected present a Contextual Tab for the Table design. Tables now include drop down auto filters, formatting and sorting options.

## Other Cool Features

Many new formatting options have been added to Tables, there are many other areas to explore like **Smart Art** and **Conditional Formatting** using Data Bars, Color Schemes, and Icon sets. I guarantee you'll get a "wow" on your next report (or Dashboard!).

## Excel 2003 vs. Excel 2007

### Hot Keys

Most of the old keyboard shortcuts from '03 work in '07.

Hit the ALT key to see the new keyboard shortcuts for each Tab. Select a tab and Excel will display the additional shortcuts for each command within that tab. There are shortcuts for every tab and ribbon requiring fewer keystrokes than in previous version.

Function – Using keyboard to delete a cell

- Excel 2003 - Alt E (Edit) – D (Delete)
- Excel 2007 - Alt E (Edit) – D (Delete)

Function – Using keyboard to Split the view screen

- Excel 2003 - Alt W (Windows) – S (Split)
- Excel 2007 - Alt W (Windows) – S (Split)

### Window Split or Freeze Panes

Function

- Excel 2003 – Windows...Split
- Excel 2007 – View Tab...Windows Group...Split

### Entering and Formatting Data

Function – Format Prem. and Comm. columns to Currency

- Excel 2003 – Select Column(s) and click Currency Style button (\$)
- Excel 2007 – Select Column(s) and click same button from the Home Tab in the Numbers Group, or right click after selecting the column to use the new format Mini Toolbar

Function – Inserting a column (virtually the same to delete, also applies to cells or rows)

- Excel 2003 – Select Insert...Column
- Excel 2007 – Select the drop down next to Insert on the Home Tab in the Cells Group and Select Insert a Column.

*Can still use the right click method the same under either version*

Function – Add a worksheet

- Excel 2003 – Insert...Worksheet

- Excel 2007 – Select the drop down next to Insert on the Home Tab in the Cells Group and Select Insert a Sheet.

*Also try the new shortcut in the worksheet view bar.*

### **Text to Columns**

Function – Insert a Column and split the Pol\_IDX field, Sort and Subtotal by customer

- Excel 2003 – Insert a Column, Select Pol\_IDX column and choose Data...Text to Columns. Complete the Wizard. Select the worksheet and choose Data...Sort and sort by the customer number. Select the worksheet and choose Data...Subtotal to add commission totals summarized by customer.
- Excel 2007 - Insert a Column, Select Pol\_IDX column and click the Data tab and Text to Columns in the Data Tools Group. Complete the Wizard. Select the worksheet and choose Home...Sort and sort by the customer number. Select the worksheet and choose Subtotal in the Data Tab in the Outline Group to add commission totals summarized by customer.

### **Formatting**

Function – Change a cells formatting to Bold, increase the font size and change the color

- Excel 2003 – Use the Formatting Toolbar
- Excel 2007 – Right click and use the Mini Toolbar

### **Formulas and Functions**

Function - Add Autosum to the Premium and Comm. columns

- Excel 2003 – Use the AutoSum button on the Standard toolbar...Use the button dropdown to count.
- Excel 2007 – Use the AutoSum button the same way located in the Home Tab in the Editing Group.

*Review the Formulas Tab*

### **Filter**

Function – Use Autofilter to show only PR = JW

- Excel 2003 – Data...Filter...AutoFilter
- Excel 2007 – Automatically added in a Table or use the Data tab and choose Filter in the Sort and Filter Group.

### **Tables**

Function – Use existing data to create a Table and demonstrate new functionality in 2007

Auto Select Table to auto format and create table headers – From the Insert Tab, click on Table from any cell in the table (Table cell range is automatically chosen).

Use the AutoFilter and Sort options – Using the newly created Column drop down arrows  
Review the Contextual Table Tab – Review the Table Tools Design Tab and change formatting.

Add Conditional Formatting – Select the Comm. Totals and see what can be done using Conditional Formatting under the Home Tab in the Styles Group.

### **Chart**

Function – Create and format a Chart of a data subset using F11

- Excel 2003 – Chart Menu is created for manipulating and formatting
- Excel 2007 – Design, Layout, and Format Contextual tabs added for a more visible list of options.

### **Pivot Table**

Function – Create a Pivot Table

- Excel 2003 – Data...Pivot Table
- Excel 2007 – Insert Tab...Pivot Table – added some additional drag and drop interface along with an Options and Design Tab again to add visibility to options and settings.

### **Page Setup**

Function – Setup page and print worksheet adjusting the Orientation, Margins, and adding a Header and Footer

- Excel 2003 – File...Page setup
- Excel 2007 – Page Layout tab...Page Setup Group

### **Notes:**

#### **Export to PDF**

Office 2007 will allow you to export to PDF files without purchasing any additional software. An “add in” must be installed on your workstation which is available from Microsoft’s website – [www.microsoft.com/downloads](http://www.microsoft.com/downloads) then type in “save as pdf or xps” in the search box and you will be brought to the 2007 Office Add-in for this feature. Once installed, you find this option in the Office Button, under the Save As command.

### **Additional Material**

- Custom Guides for 2003 and 2007 products @ [www.customguides.com](http://www.customguides.com)
- Microsoft training presentations @ <http://office.microsoft.com/en-us/help/default.aspx>
- Microsoft command reference guides - Word <http://office.microsoft.com/en-us/word/HA100744321033.aspx> - Excel <http://office.microsoft.com/en-us/excel/HA101491511033.aspx>
- Downloadable Training Presentations @ <http://office.microsoft.com/en-us/training/HA101926501033.aspx>