

***New Efficiencies with Excel 2007
and
Getting Visual in Excel 2007***

**Judy Borsher, CPA, MBA, CITP, MCT
SCG Training & Consulting**

Judy Borsher CPA, MBA, CITP

Microsoft Certified Trainer (Office 2007)

- **MBA Cornell University**
- **CPA, CITP with over 25 years of Accounting and Technology business experience, including public accounting, consulting, and finance**
- **Microsoft Certified Trainer**
- **Creator and presenter of technology CPE in the Washington DC / Maryland / VA area for 20 years**
- **Speaker at AICPA Tech on Pivot Tables and new features in Excel 2007**
- **Direct consulting experience with and for numerous organizations including CPA Firms.**

Objectives and Highlights

1. Use new security features to control input and distribution of worksheets and to discover hidden information in a file;
2. Use the new Table feature to control referencing a list with functions and Pivot Tables;
3. Explore the use of color, styles and charting features to identify trends in data;
4. Understand when macros are not backwards compatible due to new feature enhancements; and
5. Understand issues regarding the new file formats and backwards compatibility with earlier versions of Excel.

Excel 2007 Limits

1. The total number of available columns in Excel
Old Limit: 256 (2^8) New Limit: 16k (2^{14})
2. The total number of available rows in Excel
Old Limit: 64k (2^{16}) New Limit: 1M (2^{20})
3. Total amount of PC memory that Excel can use
Old Limit: 1GB New Limit: Maximum allowed by Windows
4. Number of unique colors allowed a single workbook
Old Limit: 56 New Limit: 4.3 billion (32-bit color)
5. Number of conditional format conditions on a cell
Old Limit: 3 conditions New Limit: Limited by available RAM

Excel 2007 Limits

6. Number of levels of sorting on a range or table
Old Limit: 3 New Limit: 64
7. Number of items shown in the Auto-Filter dropdown
Old Limit: 1,000 New Limit: 10,000
8. The total number of characters that can display in a cell
Old Limit: 1k (when the text is formatted)
New Limit: 32k (regardless of formatting)
9. The number of characters per cell that Excel can print
Old Limit: 1k New Limit: 32k

Excel 2007 Limits

10. The maximum length of formulas (in characters)
Old Limit: 1k characters New Limit: 8k characters
11. The number of levels of nesting that Excel allows in formulas
Old Limit: 7 New Limit: 64
12. Maximum number of arguments to a function
Old Limit: 30 New Limit: 255
13. Maximum number of items found by “Find All”
Old Limit: ~64k (65472) New Limit: ~2 Billion
14. Number of rows allowed in a Pivot Table
Old Limit: 64k New Limit: 1M

Excel 2007 Limits

- 15. Maximum number of unique items within a single Pivot Field
Old Limit: 32k New Limit: 1M
- 16. The number of fields (as seen in the field list) that a single PivotTable can have
Old Limit: 255 New Limit: 16k
- 17. The number of cells that may depend on a single area before Excel must do full calculations instead of partial calculations (because it can no longer track the dependencies required to do partial calculations)
Old Limit: 8k New Limit: Limited by available memory

Excel 2007 Limits

18. The number of different areas in a sheet that may have dependencies before Excel must do full calculations instead of partial calculations (because it can no longer track the dependencies required to do partial calculations)
Old Limit: 64k New Limit: Limited by available memory
19. The number of characters that may be updated in an external workbook reference
Old Limit: 255 New Limit: 32k
20. The number of characters that can be stored and displayed in a cell formatted as Text
Old Limit: 255 New Limit: 32k

TOPIC 1

NEW SECURITY FEATURES

UNCOVER HIDDEN INFORMATION

Live Demonstration

- Hide rows and columns
- Hide sheets
- Inspect Document for hidden information
- Protect sheets
- Encrypt Files
- Mark As Final
- Add a Digital Signature

TOPIC 2

THE NEW TABLE FEATURE

HOW YOU CAN BENEFIT FROM A PIVOT TABLE BASED ON A TABLE

Live Demonstration

- Create a Table and use Structured Referencing
- Apply Styles
- Use the interactive Table Range Name
- Build a Pivot Table based on a List
- Build a Pivot Table based on a Table
- Update the List, Range Name and Pivot Table

Live Demonstration

- Compare Sales Results over time by categories
- Generate separate reports by cost center
- Group transaction dates into date ranges, months, quarters or years
- Sort results within the pivot table
- Select rankings and top percentages
- Add a custom calculation
- Add a calculated field
- Connect to and update from an external data source

TOPIC 3

USING COLOR, STYLES AND CHARTING

Live Demonstration

- Apply Cell Styles
- Create a Chart using the new Chart Engine of Excel
- Apply Chart Formatting Features
- Use Conditional Formatting Rules
- Add new SmartArt diagrams

TOPIC 4

MACROS, TRUST CENTER AND BACKWARD COMPATIBILITY TO EXCEL 2003

Live Demonstration

- Create a data cleanup macro
- Understand when an Excel 2007 macro will not run in Excel 2003
- Add Looping and IF testing to the VBA code
- Save a macro enabled file as .XLSM
- Change the Trusted Locations setting to allow macros to run without prompts

TOPIC 5

FILE FORMATS AND COMPATIBILITY

Live Demonstration

- Understand feature availability when using Compatibility Mode
- The Office 2007 Compatibility Pack
- .XLS vs. .XLSX and .XLSM
- View file format extensions
- Save as .PDF

**TIME SAVING
TRAINING LINKS
AT THE MICROSOFT
WEBSITE**

Excel 2007 Guide: Excel 2003 to Excel 2007 interactive command reference guide

<http://www.microsoft.com/downloads/details.aspx?FamilyID=89718abd-2758-47b3-9f90-93788112b985&DisplayLang=en>

Reference: Locations of Excel 2003 commands in Excel 2007

<http://office.microsoft.com/en-us/excel/HA100860481033.aspx>

Excel Ribbon Mapping Workbook

<http://office.microsoft.com/search/redir.aspx?AssetID=AM101864291033&CTT=5&Origin=HA100860481033>

2007 Microsoft Office Add-in: Microsoft Save as PDF

<http://www.microsoft.com/downloads/details.aspx?FamilyId=F1FC413C-6D89-4F15-991B-63B07BA5F2E5&displaylang=en>

Word 2007 Guide: Word 2003 to Word 2007 interactive command reference guide

<http://www.microsoft.com/downloads/details.aspx?familyid=9044790B-4E24-4277-B714-66D7B18D0AA1&displaylang=en>

PowerPoint 2007 Guide: PowerPoint 2003 to PowerPoint 2007 interactive command reference guide

<http://www.microsoft.com/downloads/details.aspx?familyid=BEF41DC3-8E28-4282-82D4-CEC2F416CD40&displaylang=en>

Outlook 2007 Guide: Outlook 2003 to Outlook 2007 Interactive Command Reference Guide

<http://www.microsoft.com/downloads/details.aspx?>

2007 Microsoft Office System for Business Intelligence Fact Sheet

<http://www.microsoft.com/presspass/newsroom/office/BusinessIntelligenceFS.aspx>

Business Intelligence Features

<http://www.microsoft.com/sharepoint/capabilities/bi/features.aspx>

Excel 2007 Add-in: Get Started Tab for Excel 2007

<http://www.microsoft.com/downloads/details.aspx?FamilyId=8A5AF9D7-08A7-41BA-8844-76BB94228957&displaylang=en>

The 2007 Microsoft Office Suite Service Pack 1 (SP1)

<http://www.microsoft.com/downloads/details.aspx?FamilyID=9EC51594-992C-4165-A997-25DA01F388F5&displaylang=en>

Security Update for Microsoft Office Excel 2007 (KB959997)

<http://www.microsoft.com/downloads/details.aspx?FamilyID=50d8630b-1365-4007-81a0-18c0d6d4b86e&displaylang=en>

This security update is a post 2007 Microsoft Office Suite Service Pack 1 security update. To install the security update, you must have 2007 Microsoft Office Suite Service Pack 1 installed.

After you install this update, when you copy data from Excel and try to paste it into Access, you encounter an error message. To resolve this problem, install the Access 2007 hotfix package that is dated February 24, 2009.

Excel 2007 Demo: Organize your data by using an Excel table

<http://www.microsoft.com/downloads/details.aspx?FamilyId=44C9427C-E55A-4ADD-B8B7-0182D533886C&displaylang=en>

2007 Office System Demo: Enable blocked macros

<http://www.microsoft.com/downloads/details.aspx?FamilyId=FBCE876B-12E5-4DE2-B0D1-F2EF6123FEE8&displaylang=en>

2007 Office System Demo: Set a password for a workbook, document, or presentation

<http://www.microsoft.com/downloads/details.aspx?FamilyId=3932E944-697D-4EFC-8E19-325B3E6C13A3&displaylang=en>

Excel 2007 Demo: Analyze product sales with a PivotTable report

<http://www.microsoft.com/downloads/details.aspx?FamilyId=36B09FFD-146E-46B9-931E-0F37F642E7D3&displaylang=en>

Pivot Table I

<http://office.microsoft.com/training/training.aspx?AssetID=RC102058721033&pid=CR100479681033>

Pivot Table II

<http://office.microsoft.com/training/training.aspx?AssetID=RC102080371033&pid=CR100479681033>

Pivot Table III

<http://office.microsoft.com/training/training.aspx?AssetID=RC102102791033&pid=CR100479681033>

2007 Office System Demo: Apply Your Brand to Office Documents with Themes

<http://www.microsoft.com/downloads/details.aspx?FamilyId=28AC7E16-761F-4004-9676-8D489254A1A3&displaylang=en>

Excel 2007 Demo: Data Takes Shape with Conditional Formatting

<http://www.microsoft.com/downloads/details.aspx?FamilyId=4BDAEDA8-A6C3-4D4E-9516-B6026850CC43&displaylang=en>

Office 2007 Demo: Spice Up Your Text With SmartArt Graphics

<http://www.microsoft.com/downloads/details.aspx?FamilyId=4736EBA5-03B3-4B43-97B2-7E19F1987203&displaylang=en>

Demo: Create charts in Excel 2007

<http://office.microsoft.com/en-us/excel/HA102004991033.aspx?pid=CH100740791033>

Overview of charting

<http://office.microsoft.com/en-us/excel/HP012163481033.aspx>

Create a chart

<http://office.microsoft.com/en-us/excel/HP012337281033.aspx>

Available chart types

<http://office.microsoft.com/en-us/excel/HA012337371033.aspx>

Change the layout or style of a chart

<http://office.microsoft.com/en-us/excel/HA012341691033.aspx>

Change the format of chart elements

<http://office.microsoft.com/en-us/excel/HA101534471033.aspx>

Office 2007 Podcasts

<http://office.microsoft.com/en-us/help/FX102863881033.aspx>

Office 2007 Demos

<http://office.microsoft.com/en-us/help/HA102689511033.aspx>

*Thank you for
your participation!*

Judy Borsher, CPA, MBA, CITP, Microsoft Certified Trainer
SCG Training & Consulting Corporation
Results Driven Technology Training and Consulting
Direct phone- Maryland: (301) 585-1174
Direct phone- Virginia: (703) 298-5692
mailto:j_borsher@msn.com