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Tutorials and Add-ins for Microsoft Excel, Word and PowerPoint

February 2008 - Letter from the Editor

Welcome to the seventh edition of the BetterSolutions.com newsletter. We have got tonnes of Microsoft Office related information to share with you this year and lots of new and exciting developments. In addition to sharing our thoughts and tutorials this newsletter will try and explain some of the mysteries behind the Microsoft Office applications, especially Office 2003. The most significant development for us this year will be the learning and implementation of SharePoint. If you are looking to improve team collaboration or just increase productivity on a general level I would suggest having a look at Windows SharePoint Services (WSS). At the moment we are doing some preliminary testing but we are hoping to start integrating parts of WSS into the website towards the end of the year.

Office Open XML File Formats

Often referred to as Office Open XML or just Open XML this is the XML based file format that is used by default in Microsoft Office 2007. Office Open XML provides a standardised and open file format that combines ZIP data compression with XML. This allows you to quickly access the individual components of an Office 2007 file by changing the file extension to ".zip". Office Open XML file formats have been designed to work on multiple platforms making it very easy to access and update the information contained in an Office document. Open XML is divided into several supporting languages: there is SpreadsheetML for spreadsheets; WordprocessingML for documents; PresentationML for presentations and DrawingML for graphics, charts, tables and diagrams. To accompany this new file format there is also a new website: www.openxmldeveloper.org. This website is a dedicated resource for the Office Open XML file formats and can be used to help answer questions that users or developers may have.

```xml
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>
- <w:document xmlns:ve="http://schemas.openxmlformats.org/markup-compatibility/2006"
   xmlns:o="urn:schemas-microsoft-com:office:office"
   xmlns:r="http://schemas.openxmlformats.org/officeDocument/2006/relationships"
   xmlns:m="http://schemas.openxmlformats.org/officeDocument/2006/math"
   xmlns:v="urn:schemas-microsoft-com:vml"
   xmlns:wp="http://schemas.openxmlformats.org/drawingml/2006/wordprocessingDrawing"
   xmlns:w10="urn:schemas-microsoft-com:office:word"
   xmlns:w="http://schemas.openxmlformats.org/wordprocessingml/2006/main"
   xmlns:wne="http://schemas.microsoft.com/office/word/2006/wordml">
 - <w:body>
  - <w:p w:rsidR="00E71D87" w:rsidRDefault="00DC37B9" w:rsidP="00015D25">
    - <w:pPr>
       <w:pStyle w:val="Heading1" />
      </w:pPr>
```

It is important to realise that this new Open XML file format is completely different to the Office 2003 XML file format. The XML file format available in Office 2003 uses a single XML file with all the content embedded inside it as opposed to the open packaging (or zipped) file format used in Office 2007. For older versions of Microsoft Office, Compatibility Packs are available from the Microsoft website to provide backwards compatibility for the new Open XML file formats.
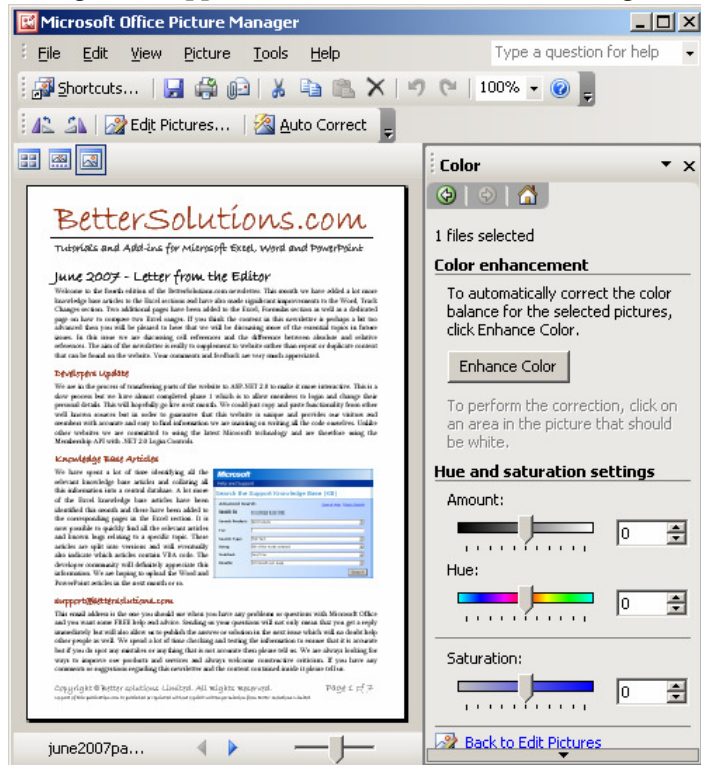
support@bettersolutions.com

This email address is the one you should use when you have any problems or questions with Microsoft Office and you want some FREE help and advice. Sending us your questions will not only mean that you get a reply immediately but will also allow us to publish the answers in the next issue which will help other people as well. We spend a lot of time checking and testing the information to ensure that it is accurate but if you do spot any mistakes or anything that is wrong then please tell us. We are always looking for ways to improve our products and services and always welcome constructive criticism. If you have any comments or suggestions regarding this newsletter and the content contained inside it please tell us.

News and Related Information

Microsoft Office Picture Manager

Microsoft Office Picture Manager was first introduced with Office 2003 and is a picture editing and management application that comes FREE of charge with any installation of Microsoft Office. This application replaces Microsoft Photo Editor which was available in Office 97, 2000 and 2002. This application can be thought of as the big brother to Microsoft Paint and is often just referred to as Picture Manager. As well as being a file management tool it also has better picture quality than Microsoft Paint, batch editing, saving and renaming, red eye removal and one-click compression. It also has the facility to link and upload pictures to a Microsoft SharePoint picture library making it very easy to share files among team members over the Internet.

The application can be accessed from (Start > All Programs > Microsoft Office > Microsoft Office Tools > Microsoft Office Picture Manager).

We will be adding more information about this application in the PowerPoint section of the website but for now the best source of information is the Office Online website: http://office.microsoft.com/en-gb/help/CH010001171033.aspx

Microsoft Office Isolation Conversion Environment (MOICE)

This has been mentioned a couple of times before in previous issues but it is such an important aspect of Office 2007 that we want to try and increase awareness as much as possible. Properly implemented this provides users with a way of pre-processing potentially unsafe Office binary files before converting them into Office Open XML file format. To install MOICE, you must have either Office 2003 or 2007 installed and have the Compatibility Pack for Excel, Word and PowerPoint 2007 File Formats installed. MOICE should be used in conjunction with the File Block functionality that is available for Office 2003 and Office 2007.

File Block Functionality

File Blocking provides a mechanism that can control and block the opening of specific Microsoft Office file types. The File Block Functionality for Microsoft Office 2003 and 2007 allows administrators to prevent different file types from being opened by using registry settings and group policy. Blocking specific file types allows administrators to prevent users from opening certain types of files, such as those most likely to contain malicious code.

Outlook and Business Contact Manager

Outlook and Business Contact Manager is a plug-in for Microsoft Outlook that helps you manage all your business contacts, accounts, projects, tasks, meetings and email all in one place. This application is Microsoft's equivalent of a CRM (Client Relationship Management) application. You can still keep your personal information in Outlook but this provides a central depository for all those business clients and customer related information. This application is never installed by default when you install Microsoft Outlook and is provided as an additional disk when you purchase one of the following Office 2007 suites: Small Business, Office Professional or Office Ultimate. After this has been installed you will need to restart Outlook for the installation to complete. All the information is stored in a SQL Server Express database and once installed you will see an additional Business Contact Manager drop-down menu as well as a Business Contact Manager toolbar.

Fully integrated with Microsoft Outlook it provides you with an additional interface to easily view, edit and track your business contacts and sales opportunities. The Business Contacts Dashboard includes quick links to the important details of your business allowing you to prioritise more effectively. Quickly view, use and update information on your accounts, opportunities and marketing activities in addition to your contact information. It can also be closely integrated with Microsoft Office Accounting (previously called Small Business Accounting). Any financial data entered in Office Accounting flows directly into Business Contact Manager.

Excel Services

Excel Services is only available in Office 2007 and is a component of Microsoft Office SharePoint Server 2007. This technology allows you to calculate, load and create Excel workbooks remotely from a server. You can think of Excel as being the authoring tool and Excel Services as the reporting tool. There are three main components:

Excel Calculation Service – This is the engine that actually loads, calculates and refreshes the external data within the workbooks and also maintains the session state for interactivity. Excel Calculation Services maintains a session for the duration of interactions with the same workbook by a user and a session is closed when the caller explicitly closes it or when the session times out on the server. Excel Services caches the opened workbooks, calculation states, and external data query results, for improved performance when multiple users access the same set of workbooks.

Excel Web Service – This is a web service hosted within SharePoint that gives developers programmatic access to its web service. You can develop applications that call Excel Web Services to calculate, set, and extract values from workbooks, as well as refresh external data connections. Using Excel Web Services, you can incorporate server-side workbook logic into an application, automate the updating of workbooks and create application-specific user interfaces around server-side Excel calculations.

Excel Web Access – This is a specific web part that displays charts and tables from an Excel workbook in a web browser. Although you might be accessing the workbook from within a browser it still looks and feels like Excel. Depending on permissions users can then copy the current state of the workbook to their local computer for further analysis either as a snapshot or as an Excel workbook.
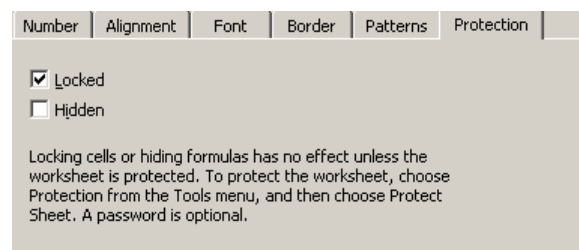
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Your Questions and Problems

Excel – How can I hide the formulas on my worksheet?

Hiding your formulas can prevent accidental editing and viewing and can be achieved by protecting the worksheet. Before protecting the worksheet you must first specify which formulas you want to hide. By default when you protect a worksheet all the formulas in all the cells will be visible. Whether the formulas are visible or not is controlled by an option on the (Format > Cells) dialog box. Select all the cells that contain the formulas you want to hide. You can quickly select formula cells by using the (Edit > GoTo) dialog box, pressing the Special button at the bottom and choosing "Formulas". Once the cells are selected display the (Format > Cells)(Protection tab) and tick the "Hidden" check box. The formulas will only be hidden when the worksheet is protected. Select (Tools > Protection > Protect Sheet) and press OK. Adding a password is optional.

Excel – What is the quickest way to convert dates in the dd.mm.yyyy format?

The quickest way to change a list of dates in the (01.01.2008) format is to use a formula to change the date into its corresponding date serial number. The advantage of expressing a date as a date serial number is that you can easily perform addition and subtraction on these dates. If the date you want to convert is in cell "A1" the following formula splits the date into its day, month and year components and returns the date as a date serial number:
=DATE(RIGHT(A1,4),MID(A1,4,2),LEFT(A1,2))

Excel – Is there a way to automatically backup my work?

Yes there is but it is important to emphasis that this is no substitute for pressing the Save button on a regular basis. There is an Auto Recover feature in Excel which can provide you with a previously saved copy of your workbook. Every time you save a workbook your backup copy will be overwritten.
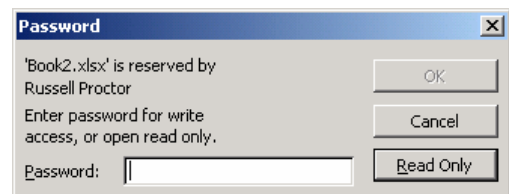In Excel 2003 select (Tools > Options)(Save tab, "Save AutoRecover info every").
In Excel 2007 select (Office > Excel Options)(Save tab, "Save AutoRecover info every").
In the minutes box type or select the frequency interval. This feature can prove to be extremely useful especially if Excel crashes unexpectedly however the automatic saving is quite annoying.

Excel – Why is my name not displayed in the Read Only prompt dialog box?

Let's suppose that you work in a small team and your team is responsible for maintaining a large number of different workbooks. All the workbooks are saved as read-only and you can normally tell who made the last change by looking at the name on the Read Only dialog box. From this screen shot you would assume that I was the last person to edit this file. This is misleading and is not always accurate. In fact the name of the person who last edited the workbook is only updated when you save the file using Save As rather than just Save.

Create a workbook and save it with a read-only password. When you next open the workbook you are prompted with a read-only prompt and your name will be displayed. Ask one of your colleagues to open the workbook, enter the password, make some changes and then save the workbook. Re-open the workbook and you will see that it still has your name against it and not your colleagues. The name that is displayed is only updated when you use Save As rather than just Save.

(Edit > GoTo) dialog box

This dialog box provides a quick way to move around worksheets and workbooks and can also be used to list workbook and worksheet level named ranges. This dialog box will also display the last four cell addresses that you jump to, either using this dialog box or using the Name Box. For example select cell "B1" on any worksheet and select (Edit > GoTo). Type the cell address "D20" into the reference box and press OK to jump straight to that cell. If you select (Edit > GoTo) again you will see that the cell address you were at previously has been added to the top of the list (i.e. cell "B1"). Using this technique you can quickly navigate to different cells, worksheets and workbooks. This dialog box can be quickly displayed by pressing F5 or (Ctrl + G).
Here are a few more facts about the (Edit > GoTo) dialog box:
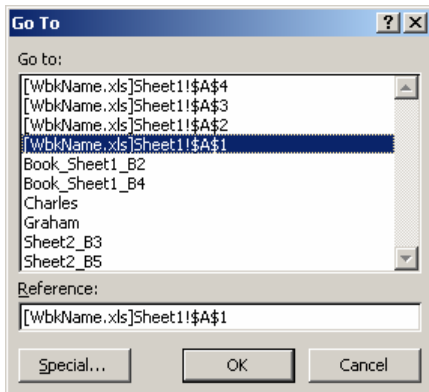
1) An important difference between this dialog box and the (Insert > Name > Define) dialog box is that the GoTo dialog box does not show any named ranges that contain #REF. This can be very useful when debugging large complicated workbooks.

2) The Reference box can only be used to type in cell addresses or named ranges. If you want to select anything else then you must press the Special button.

3) There is no way to delete the four most recently used cell addresses without closing the workbook(s) and reopening them. These cell addresses are workbook dependent and will be available all the time that particular workbook remains open.

4) The four recently used cell addresses will always be displayed as a cell reference relative to the active workbook. If you are using this technique to move between different workbooks then the cell reference will look different depending on which workbook is active when the dialog box is displayed.
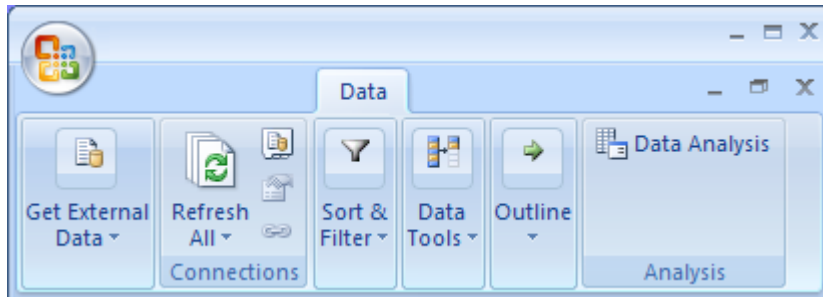
Paste Special Dialog Box

When you copy data between cells, worksheets and workbooks in the same session of Excel the Paste Special dialog box will always be the dialog box on the left. This contains the very useful options like Values, Column Widths, Skip Blanks, Transpose and Paste Link. If the data has been copied from a different Excel session or from a different application altogether and you display the Paste Special dialog box you will get the dialog box on the right.
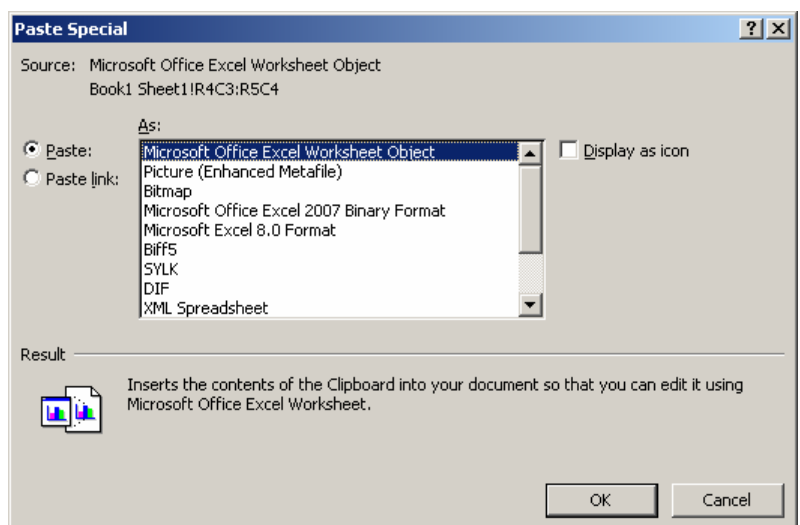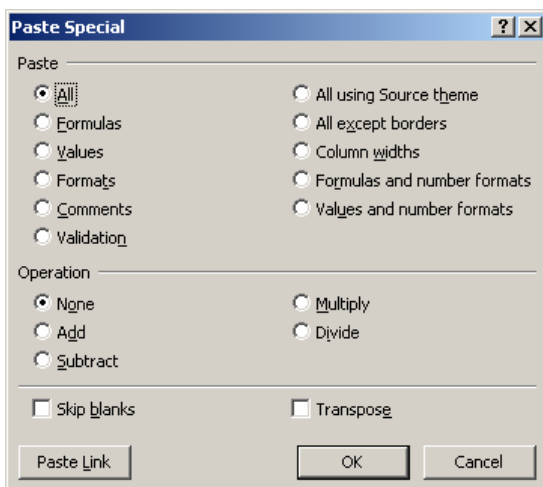
Excel 2007 – Data Tab

This tab probably looks the most unfamiliar out of all of them but don't be put off. The majority of these commands are available in Excel 2003 although some of them were not easily accessible. There are several additional commands but the most significant changes have been to the Get External Data group. Spreadsheets are increasingly used to present data from other systems: either databases, web services or just flat files and being able to control and update this information quickly is becoming more important. In Excel 2003 data could be connected to a workbook in two ways either storing the connection information in the workbook itself as a "workbook connection" or by using a "connection file" typically an Office Data Connection (ODC) file. Connection files just provide an easy way to share and reuse connections to the same data sources without having to enter all the connection details again. The only real change in Excel 2007 is that this functionality is now a lot more accessible and that all the data connections can be managed from a single dialog box.

Get External Data
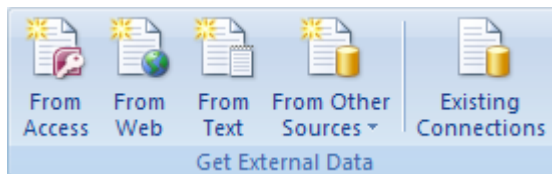
The "From Access" button gives you a quick way to insert data from an Access database. This displays the Select Data Source dialog box which is the old (Data > Import External Data > Import Data) dialog box with the filter changed to files of type "Access Databases". The "From Web" button displays the New Web Query dialog box and replaces the old (Data > Import External Data > New Web Query). The "From Text" button displays the Import Text File dialog box which is the old (Data > Import External Data > Import Data) dialog box with the filter changed to files of type "Text Files".

The "From Other Sources" drop-down list provides you with a list of other common data sources which you might want to retrieve data from including: SQL Server database, Analysis Services, XML Data Source, Data Connection Wizard and Microsoft Query. The SQL Server, Analysis Services and Data Connection Wizard all display the Data Connection Wizard which is the old (Data > Import External Data > Import Data)(New Source) dialog box. The XML Data Source is the old (Data > XML > Import) dialog box and the Microsoft Query is the old (Data > Import External Data > New Database Query) dialog box. The most significant change is the new Existing Connections dialog box. This dialog box lets you find existing connection files on your computer and on your network.

Connections

The "Refresh All" button and drop-down list display commands from the earlier External Tools toolbar and include the Refresh All, Refresh, Refresh Status, Cancel Refresh and Connection Properties commands. The "Connections" button displays the new Workbook Connections dialog box which helps you to manage all the connections that are used within a workbook. This dialog box not only shows you where every connection is used but also displays a large number of useful properties including automatic refresh options as well as the full connection string. The "Properties" button displays the External Data Properties dialog box that just contains some of the options from the previous Data Range Properties dialog box. The "Edit Links" is the old (Edit > Links) command which displays a list of any external references used in a workbook.

Sort & Filter
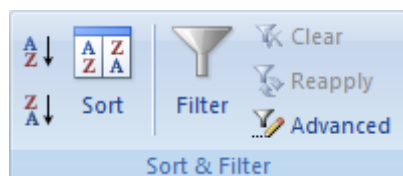
The "Sort Ascending" and "Sort Descending" buttons are just the equivalent buttons from the Standard toolbar. The "Sort" button displays a new Sort dialog box making it very easy to sort your data. This dialog box includes several new options. The most noticeable are that you can now sort by any number of columns rather than being restricted to just three and being able to sort by colour. The "Filter" button provides a very quick toggle to the old (Data > Filter > AutoFilter) command. The "Clear" button quickly removes any filtering criteria from the current range or table. This is the equivalent to selecting (All) in every column. The new "Reapply" button is extremely confusing at first and only makes sense when you have a filter (and/or sort) applied to a table and you then add "more" data. This will reapply the current sort and filter criteria to make sure the additional rows are also sorted and filtered accordingly. The "Advanced" button provides access to the old (Data > Filter > Advanced) dialog box.

Data Tools
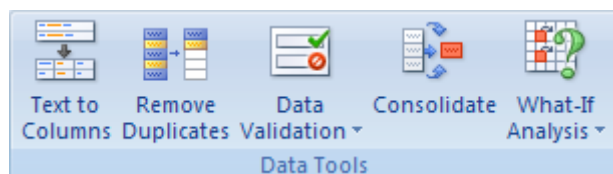
The "Text to Columns" button is the old (Data > Text to Columns) dialog box. The "Remove Duplicates" button is an addition and is very handy when you want to quickly remove those annoying duplicates from list or table. The "Data Validation" button is the old (Data > Validation) dialog box and the drop-down gives you quick access to the Circle Invalid Data and Clear Validation Circles commands from the previous Formula Auditing toolbar. The "Consolidate" button is the old (Data > Consolidate) dialog box. The "What-If Analysis" drop-down displays three commands: Scenario Manager, Goal Seek and Data Table. The Scenario Manager is the old (Tools > Scenarios) command, The Goal Seek is the old (Tools > Goal Seek) command and Data Table is the old (Data > Table) command.

Outline
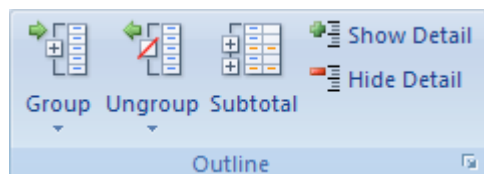
This group contains all the buttons and commands from the old Group and Outline extension menu and the functionality has not changed. The "Group" button and drop-down list contains the Group command and the Auto Outline command. The button always provides access to the Group command. The "Ungroup" button and drop-down list contains the Ungroup command and the Clear Outline command. The button always provides access to the Ungroup command. The "Subtotal" button (no drop-down list) is the old (Data > Subtotals) command. The "Show Detail" and "Hide Details" commands are the same as those on the old Group and Outline extension menu. Clicking in the bottom right corner of this group will display the old (Data > Group and Outline)(Settings) dialog box.

Data Analysis
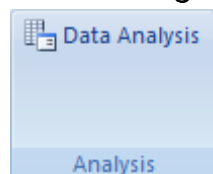
This provides access to the previous Analysis ToolPak add-in and will only appear when this add-in is loaded. This was previously accessible from the (Tools > Data Analysis) command. Although this add-in is not loaded by default you no longer have to worry about the extra worksheet functions as all these functions are now available by default.

Data Tab Summary

This tab is well organised and despite looking a bit scary initially there is not a great deal of new functionality. The improved Sort dialog box is a great addition as is the new Remove Duplicates functionality. The improved connection dialog boxes are very useful and making the Analysis ToolPak functions part of the default installation makes things a lot simpler.