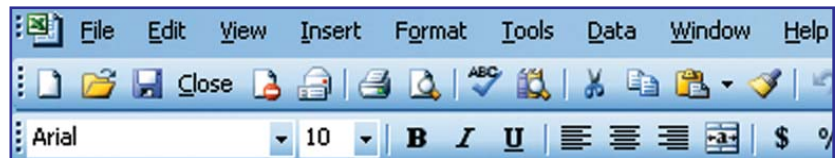


Introducing the Ribbon

If you are a regular at MrExcel.com, you undoubtedly know and love the File – Edit – View – Insert – Format – Tools – Data – Window – Help menu bar that has been at the top of Excel for two decades.

Figure 1.1

If you are an Excel pro, you probably know this menu bar inside and out.



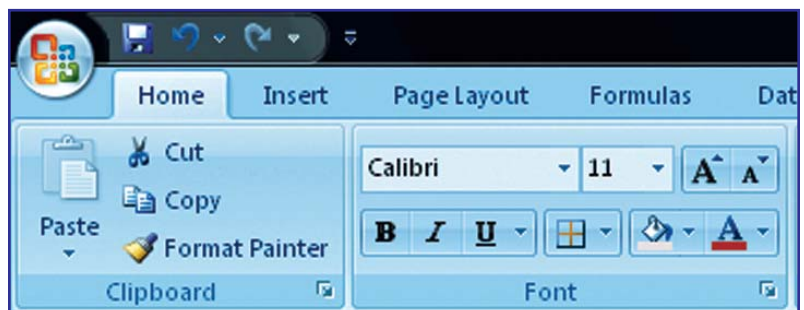
Unfortunately, Microsoft no longer loves the menu bar. In fact, they have completely abandoned the menu bar and the toolbars in favor of something called the Ribbon.

Why would they fix something that was not broken? Well, perhaps the menu system actually was broken. Excel pros knew where to find everything on the menu, but it was pretty hopeless for a person new to Excel to ever navigate to Edit – Fill – Justify to learn that you could have Excel behave a little bit like a word processor. The chances of them finding Data – Import External Data – New Web Query to learn that their dashboards could put data from a table directly on a website were bleak.

In fact, I've heard that the Office team will visit customers and ask what new features the customer would like in Excel. Most of the time, someone asks for something that was added 10 years ago. The conclusion: There is a lot of powerful functionality in Excel that customers have not been able to discover. Instead of adding new features, Microsoft could instead make it easier for everyone to find the features that already exist. (In reality, Excel 2007 offers many fantastic new features, plus a new menu system that will help customers find previously existing features. Excel 2007 is the best new version of Excel since Excel 97.)

Figure 1.2

Icons are classified in logical groups within each ribbon tab



The ribbon is the new user interface at the top of Excel, PowerPoint, Word, and Access 2007. The ribbon is also present in the Compose Mail portion of Outlook 2007.

The ribbon is comprised of icons and words grouped into several tabs. In Excel, many of the editing icons are on the Home ribbon. Within the Home ribbon, icons are further classified into groups. In Figure 1.2, there are four icons in the Clipboard group of the Home ribbon and 11 icons in the Font group of the Home ribbon.

When I wrote *Special Edition Using Excel 2007*, the editorial style included the group name in the menu path. For example, the QUE book might say to “Select Home, Clipboard, Format Painter”. During the course of writing the book, I started to think it was a bit strange to indicate that someone should select Clipboard. In reality, you would click on Home and then click on the Format Painter within the Clipboard group. In this book, I will say “Select Home – Format Painter”.

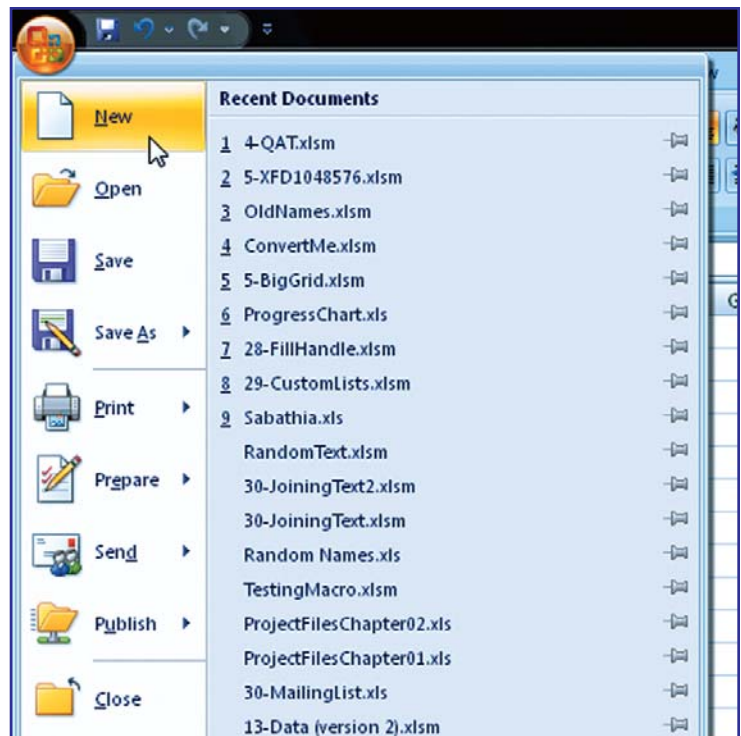
The Most Important Choices Are Behind the Office Icon!

In the original version of Excel 2007, there was a File choice along the ribbon. For some unknown reason, Microsoft replaced the File choice with a funny looking round Office icon. This is downright confusing, because the most important commands for working with Excel are behind this icon.

Click the Office Icon and you will find most of the settings that used to be on the File menu in Excel 2003 (see Figure 1.3).

Figure 1.3

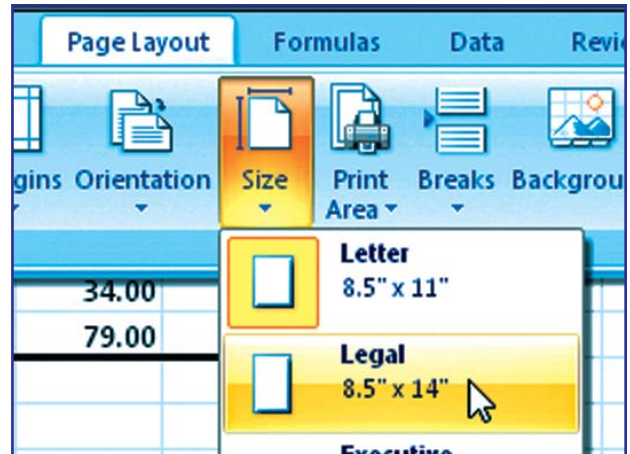
Why Microsoft would hide the most important commands behind an icon instead of the word “File” is a mystery.



After the ribbon is hidden, you have more room to work with your document. You also can click any ribbon tab name at any time to open the ribbon temporarily. In Figure 1.6, I've selected Page Layout – Size – Legal. After clicking Legal, Excel returns the ribbon back to the view in Figure 1.5. (At least this feels more like a typical menu system.)

Figure 1.6

Click a selection and the ribbon expands.



Tip: See Where Can I Find That on the Ribbon? on page 9 for a complete mapping from the old menu to the new ribbons. See Keyboard Shortcuts on page 19 for information on how to add buttons to the Quick Access Toolbar.

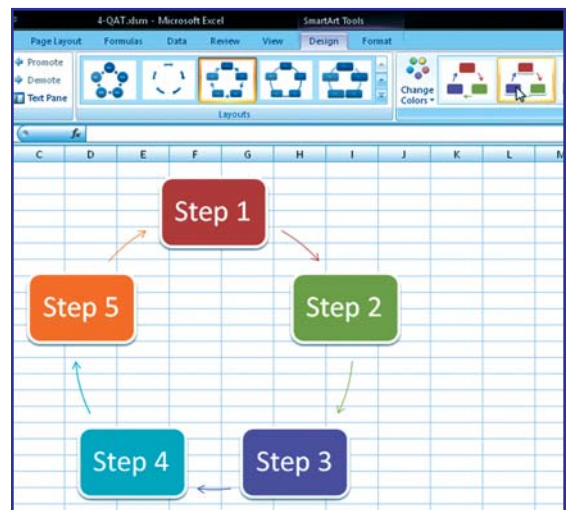
Using Context-Sensitive Ribbons

Occasionally, new tabs will appear on the right side of the ribbon. These ribbons will appear when the current selection includes SmartArt graphics, Charts, Drawings, Pictures, Pivot Tables, Pivot Charts, Worksheet headers, Tables, or Ink, or when you are in Print Preview mode.

These new ribbon tabs will stay visible as long as you are working on the selected object. When you select a cell outside of the object, Microsoft Excel 2007 will immediately put away the ribbon tabs.

Figure 1.7

The SmartArt Tools are controlled using two ribbon tabs: Design and Format

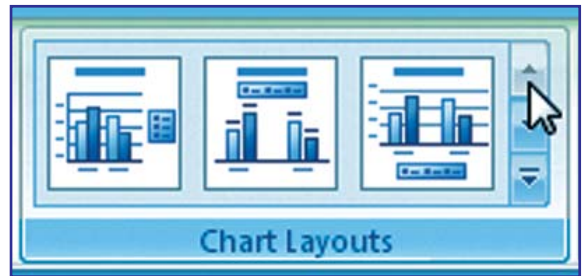


Selecting from a Gallery in the Ribbon

Some ribbon elements are comprised of a gallery of many different options. In Figure 1.8, the Chart Layouts gallery shows three thumbnails at a time.

Figure 1.8

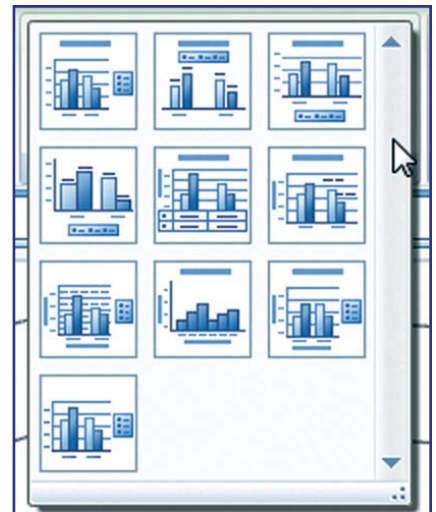
Three buttons at the right side of the gallery allow you to scroll up, down, or to open the entire gallery.



You can use the up and down arrow button to scroll through three thumbnails. Or, click the More button to open the gallery and see all of the options at once (see Figure 1.9).

Figure 1.9

The third button next to the gallery is the More button. Click that button to see all of the choices at once.

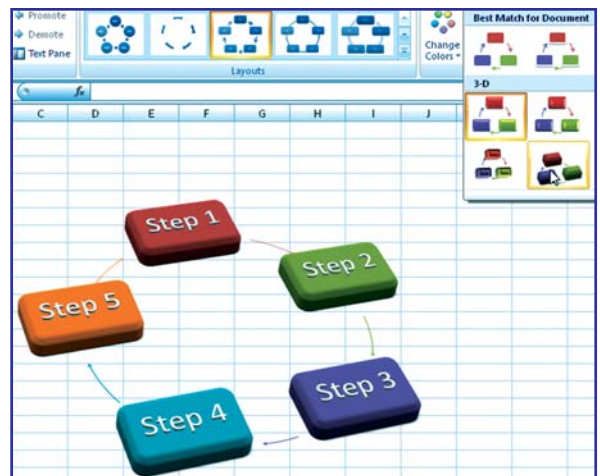


Using Live Preview

Many features of Excel 2007 offer a Live Preview feature. With Live Preview, you can simply hover over a choice and see a preview of that choice in the worksheet. This allows you to quickly browse many settings without actually committing to a change.

Figure 1.10

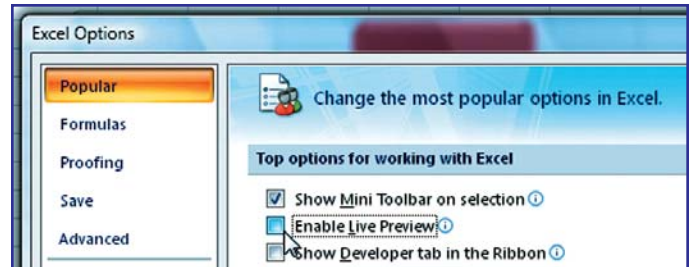
This setting is called Bird's Eye Scene. I think this setting is very hard to read, so I appreciate that I can hover, see how awful it is, and then go on to something better.



Unfortunately, it is an odd mix of features that supports Live Preview. You will have to use trial and error to identify these features.

If your computer is slow, you can turn off Live Preview. Use the Office Icon menu – Excel Options. In the Popular category, uncheck the box for Enable Live Preview.

Figure 1.11
Use the Office Icon menu – Excel Options to disable Live Preview if it bogs down your computer.



Customizing the Ribbon

While it used to be easy to customize any toolbar, Microsoft has removed this functionality from the Excel user interface. To customize the ribbon, you now need to be able to write XML code.

Patrick Schmid has authored a COM add-in that will let you easily customize the ribbon. Patrick plans to offer a freeware and a premium version at <http://pschmid.net>.

Learning Where to Find Things

The most difficult part of the new Ribbon is figuring out where to find commands that you knew from Excel 2003. The next chapter, *Where Can I Find That on the Ribbon?*, provides a mapping to show you how to find the popular commands.



Where Can I Find That on the Ribbon?

The number one problem for someone upgrading to Excel 2007 is figuring out where to find a particular feature in the ribbon.

After upgrading, I found myself wondering, “Where would they have put pivot tables? Are they on the Data ribbon?”. (No – they are on the Insert ribbon!)

This chapter is going to map, in color, where to find all of the menu items from Excel 2003. It will cover the regular menu plus the Standard and Formatting toolbars.

For the purpose of this chapter, I’ve color keyed the Excel 2007 ribbon tabs:

Figure 2.1

The colors used on this graphic correspond to colors used in later figures.



The File Menu

Most of the commands on the legacy File menu are now on the Office Icon button (yellow squares in Figure 2.2). The Workspace functionality is on the View ribbon. Web Page Preview is no longer on the ribbon – you can add it to the Quick Access Toolbar (QAT) if it is a feature that you use. See Taming the QAT & Finding the Mini Bar on page 25 for more information on the QAT.

The Edit Menu

Nearly the entire Edit menu is on the Home ribbon. Undo & Redo are on the QAT. The Links command is now buried deep under Office Icon – Finish. For object editing, watch for context sensitive ribbon tabs to appear when you have selected the object.

View Menu

About half of the old View menu is now located on the View ribbon. The concept of toolbars and the task pane has been removed from the interface. Other commands are spread among the Insert, Review, and Page Layout ribbons.

The Insert Menu

The top selections on the Excel 2003 Insert menu have been promoted to the Home ribbon. Other commands are on the Insert, Page Layout, and Formulas ribbons.

Figure 2.2

Excel 2003 File menu
The pink blocks on the right side corresponds to the Page Layout tab in pink in Figure 2.1.



Figure 2.3

Excel 2003 Edit menu

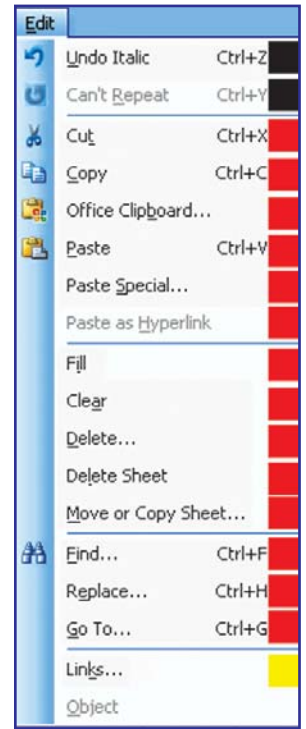


Figure 2.4

Excel 2003 View menu

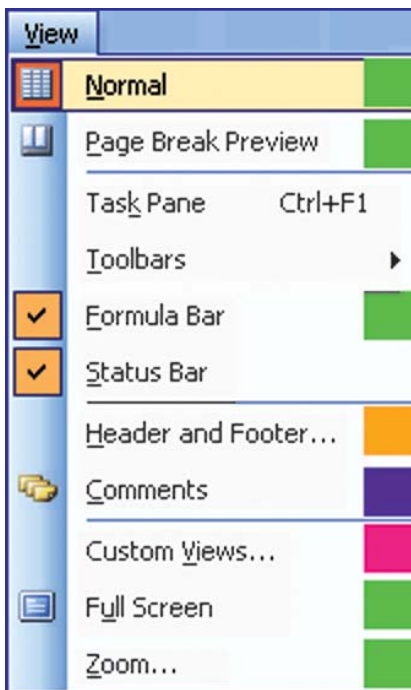


Figure 2.5

Excel 2003 Insert menu

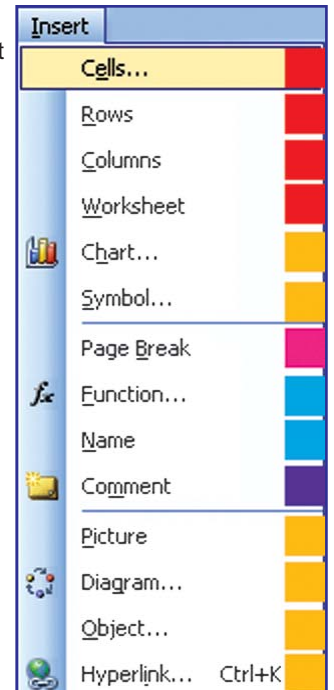


Figure 2.6
Excel 2003
Format menu

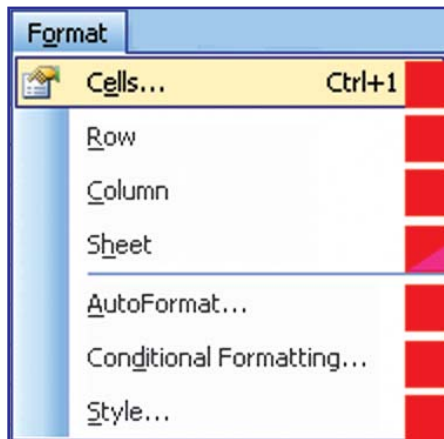


Figure 2.7
Excel 2003 Tools
menu

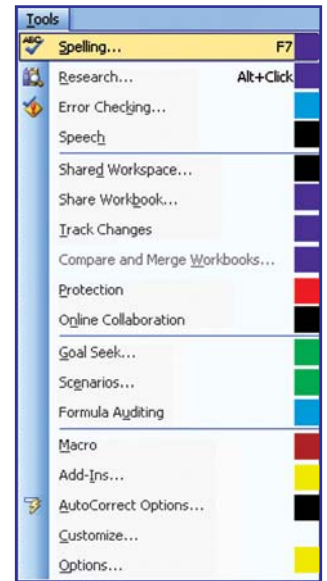


Figure 2.8
Excel 2003 Data
menu

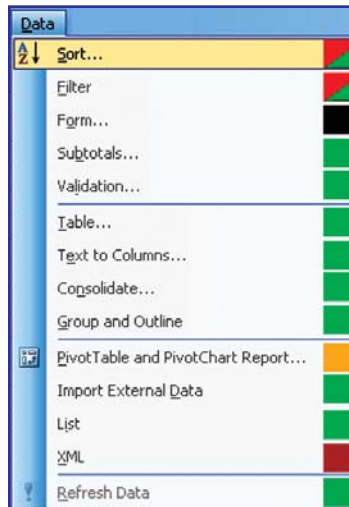
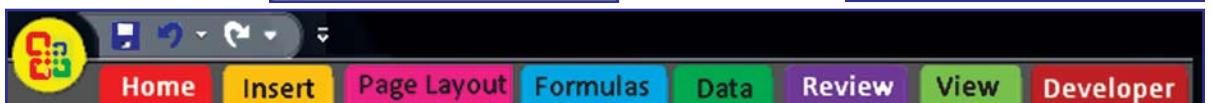


Figure 2.9
Excel 2003
Window menu



The Format Menu

Nearly all of the commands on the Format menu now appear on the Home ribbon. One command, Format – Sheet – Background, is now on the Page Layout ribbon.

The Tools Menu

The former Tools menu commands have been broken up between several different ribbon tabs. You will find the commands on the Review, Formulas, Home, Data, and Developer tabs. The Add-Ins and Options commands are now in the Excel Options button, located on the Office Icon menu.

The Data Menu

Most of the Excel 2003 data menu is on the Excel 2007 Data ribbon, but several key elements are elsewhere. Filter & Sort appear on both the Home and Data ribbon. Pivot Tables – the most powerful feature in Excel – are, strangely, located on the Insert ribbon. The XML commands have been moved to the Developer ribbon.

The Window Menu

The entire Excel 2003 Window menu is now on the Excel 2007 View Menu.

The Help Menu

The Help command has been moved to a question mark icon at the right edge of the ribbon. The Office Assistant has been completely removed from the program. All of the remaining items on the Help menu are now in the Resources category of Excel Options.

The Standard Toolbar

The former Standard toolbar has been split between the Office icon, the Review ribbon, the Home ribbon, the QAT, and the Insert tab. Read Taming the QAT & Finding the Mini Bar on page 30 to learn how to put these icons on your Quick Access Toolbar.

The Formatting Toolbar

The entire Formatting toolbar is now on the Home ribbon.

Figure 2.10
Excel 2003 Help menu

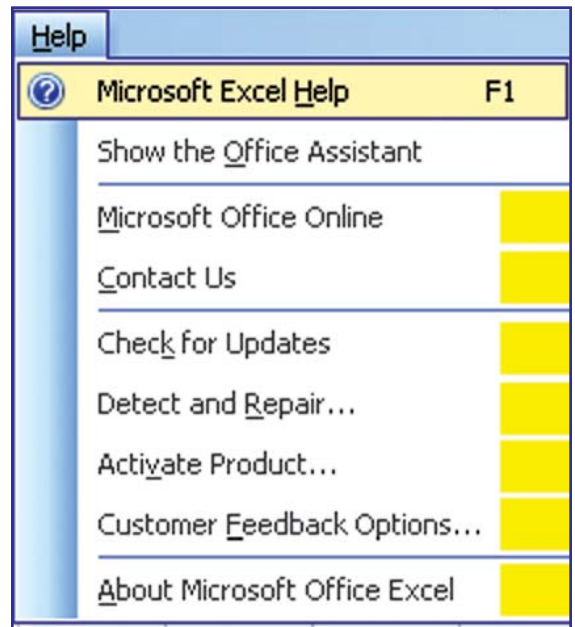


Figure 2.11
Excel 2003 Standard toolbar
– the colors underneath the
toolbar correspond to the tab
colors in Figure 2.1.



Figure 2.12
Excel 2003 Formatting toolbar



The File Menu	
Excel 2003 Menu	Excel 2007 Ribbon
New...	Office Icon – New
Open...	Office Icon – Open
Close	Office Icon – Close
Save	Office Icon – Save
Save As...	Office Icon - Save As - Save As Web Page from Save As dialog options
Save as Web Page...	Office Icon - Save As
Save Workspace...	View - Window - Save Workspace
File Search...	No equivalent
Permission - Unrestricted Access	Office Icon - Finish - Restrict Permission - Unrestricted Access
Permission - Do Not Distribute...	Office Icon - Finish - Restrict Permission - Do Not Distribute
Permission - Restrict Permission As...	Office Icon - Finish - Restrict Permission - Restrict Permission As
Web Page Preview	Add to QAT using Excel Options
Page Setup...	Page Layout - Page Setup
Print Area - Set Print Area	Page Layout - Page Setup - Print Area - Set Print Area
Print Area - Clear Print Area	Page Layout - Page Setup - Print Area - Clear Print Area
Print Preview	Office Icon - Print - Print Preview
Print...	Office Icon - Print – Print
Send To - Mail Recipient	Add to QAT using Excel Options
Send To - Mail Recipient (for Review)...	Add to QAT using Excel Options
Send To - Mail Recipient (as Attachment)...	Office Icon - Send - E-Mail
Send To - Routing Recipient...	No equivalent
Send To - Exchange Folder...	Add to QAT using Excel Options
Send To - Recipient using Internet Fax Service...	Office Icon - Send - Internet Fax
Properties	View - Show/Hide – Properties
1 c:\Filename.xls	Office Icon – 1
Exit	Office Icon - Exit Excel

The Edit Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Undo	QAT - Undo
Repeat	QAT - Repeat
Cut	Home - Clipboard - Cut
Copy	Home - Clipboard - Copy
Office Clipboard...	Home - Clipboard
Paste	Home - Clipboard - Paste
Paste Special...	Clipboard - Paste - Paste Special
Paste as Hyperlink	Home - Clipboard - Paste - Paste as Hyperlink
Fill - Down	Home - Editing - Fill - Down
Fill - Right	Home - Editing - Fill - Right
Fill - Up	Home - Editing - Fill - Up
Fill - Left	Home - Editing - Fill - Left
Fill - Across Worksheets...	Home - Editing - Fill - Across Worksheets
Fill - Series...	Home - Editing - Fill - Series
Fill - Justify	Home - Editing - Fill - Justify
Clear - All	Home - Editing - Clear - Clear All
Clear - Formats	Home - Editing - Clear - Clear Formats
Clear - Contents	Home - Editing - Clear - Clear Contents
Clear - Comments	Home - Editing - Clear - Clear Comments
Delete...	Home - Cells - Delete
Delete Sheet	Home - Cells - Delete - Delete Sheet
Move or Copy Sheet...	Home - Cells - Format - Move or Copy Sheet
Find...	Home - Editing - Find & Select - Find
Replace...	Home - Editing - Find & Select - Replace
Go To...	Editing - Find & Select - Go To
Links...	Office Icon - Finish - Edit Links to Files
Object	Context specific ribbon tabs

The View Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Normal	View - Workbook Views - Normal
Page Break Preview	View - Workbook Views - Page Break Preview
Task Pane	No equivalent
Toolbars - Standard	No equivalent
Toolbars - Customize...	Office Icon - Excel Options - Customization

Formula Bar	View - Show/Hide - Formula Bar
Status Bar	No equivalent
Header and Footer...	Insert - Text - Header & Footer
Comments	Review - Comments - Show All Comments
Custom Views...	Page Layout - Sheet Options - Custom Views
Full Screen	View - Workbook Views - Full Screen
Zoom...	View - Zoom - Zoom

The Insert Menu

Excel 2003 Menu	Excel 2007 Ribbon
Cells...	Home - Cells - Insert - Insert Cells
Rows	Home - Cells - Insert - Insert Rows
Columns	Home - Cells - Insert - Insert Columns
Worksheet	Home - Cells - Insert - Insert Sheet
Chart...	Insert - Charts
Symbol...	Insert - Text - Symbol
Page Break	Page Layout - Page Setup - Breaks - Insert Page Break
Function...	Formulas - Function Library - Function Wizard
Name - Define...	Formulas - Named Cells - Name Manager
Name - Paste...	Formulas - Named Cells - Use In Formula - Paste
Name - Create...	Formulas - Named Cells - Create from Selection
Name - Apply...	Formulas - Named Cells - Name a Range - Apply Names
Name - Label...	Formulas - Named Cells - Name a Range
Comment	Review - Comments - New Comment
Picture - Clip Art...	Insert - Illustrations - Clip Art
Picture - From File...	Insert - Illustrations - Picture
Picture - From Scanner or Camera...	Insert - Illustrations - Picture
Picture - AutoShapes	Insert - Shapes - Shapes
Picture - WordArt...	Insert - Text - WordArt
Picture - Organization Chart	Insert - Illustrations - SmartArt
Diagram...	Insert - Illustrations - SmartArt
Object...	Insert - Text - Object
Hyperlink...	Insert - Links - Hyperlink

The Format Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Cells...	Home - Cells - Format - Cells
Row - Height...	Home - Cells - Format - Height
Row - AutoFit	Home - Cells - Format - AutoFit
Row - Hide	Home - Cells - Hide & Unhide - Hide Rows
Row - Unhide	Home - Cells - Hide & Unhide - Unhide Rows
Column - Width...	Home - Cells - Format - Width
Column - AutoFit Selection	Home - Cells - Format - AutoFit Selection
Column - Hide	Home - Cells - Hide & Unhide - Hide Columns
Column - Unhide	Home - Cells - Hide & Unhide - Unhide Columns
Column - Standard Width...	Home - Cells - Format - Standard Width
Sheet - Rename	Home - Cells - Format - Rename Sheet
Sheet - Hide	Home - Cells - Hide & Unhide - Hide Sheet
Sheet - Unhide...	Sheet - Unhide...
Sheet - Background...	Page Layout - Page Setup - Background
Sheet - Tab Color...	Home - Cells - Format - Tab Color
AutoFormat...	Home - Style - Format as Table
Conditional Formatting...	Home - Style - Conditional Formatting
Style...	Home - Style - Cell Styles

The Tools Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Spelling...	Review - Proofing - Spelling
Research...	Review - Proofing - Research
Error Checking...	Formulas - Formula Auditing - Error Checking
Speech - Show Text To Speech Tool-bar	No equivalent
Shared Workspace...	Add to QAT using Excel Options
Share Workbook...	Review - Changes - Share Workbook
Track Changes - Highlight Changes...	Review - Changes - Track Changes - Highlight Changes
Track Changes - Accept or Reject Changes...	Review - Changes - Track Changes - Accept or Reject Changes
Protection - Protect Sheet...	Home - Cells - Format - Protect Sheet
Protection - Allow Users to Edit Ranges...	Review - Changes - Allow Users to Edit Ranges
Protection - Protect Workbook...	Review - Changes - Protect Workbook
Protection - Protect and Share Workbook...	Review - Changes - Protect Sharing
Online Collaboration - Meet Now	Add to QAT using Excel Options

Online Collaboration - Schedule Meeting...	Add to QAT using Excel Options
Online Collaboration - Web Discussions	No equivalent
Goal Seek...	Data - Data Tools - What-If Analysis - Goal Seek
Scenarios...	Data - Data Tools - What-If Analysis - Scenario Manager
Formula Auditing - Trace Precedents	Formulas - Formula Auditing - Trace Precedents
Formula Auditing - Trace Dependents	Formulas - Formula Auditing - Trace Dependents
Formula Auditing - Trace Error	Formulas - Formula Auditing - Error Checking - Trace Error
Formula Auditing - Remove All Arrows	Formulas - Formula Auditing - Remove All Arrows
Formula Auditing - Evaluate Formula	Formulas - Formula Auditing - Evaluate Formula
Formula Auditing - Show Watch Window	Formulas - Formula Auditing - Show Watch Window
Formula Auditing - Formula Auditing Mode	Formulas - Formula Auditing - Show Formula
Formula Auditing - Show Formula Auditing Toolbar	No equivalent
Macro - Macros...	Developer - Code - Macros
Macro - Record New Macro...	Developer - Code - Record Macro
Macro - Security...	Developer - Code - Macro Security
Macro - Visual Basic Editor	Developer - Code - Visual Basic
Macro - Microsoft Script Editor	No equivalent
Add-Ins...	Office Icon - Excel Options
AutoCorrect Options...	Add to QAT using Excel Options
Customize...	No equivalent
Options...	Office Icon - Excel Options

The Data Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Sort...	Data - Sort & Filter – Sort
Filter - AutoFilter	Home - Editing - Sort & Filter - Filter
Filter - Show All	Home - Editing - Sort & Filter - Clear
Filter - Advanced Filter...	Home - Editing - Sort & Filter - Advanced
Form...	Add to QAT using Excel Options
Subtotals...	Data - Outline - Subtotal
Validation...	Data - Data Tools - Data Validation
Table...	Data - Data Tools - What-If Analysis - Data Table

Text to Columns...	Data - Data Tools - Convert Text to a Table
Consolidate...	Data - Data Tools - Consolidate
Group and Outline - Hide Detail	Data - Outline - Hide Detail
Group and Outline - Show Detail	Data - Outline - Show Detail
Group and Outline - Group...	Data - Outline - Group
Group and Outline - Ungroup...	Data - Outline - Ungroup
Group and Outline - Auto Outline	Data - Outline - Group - Auto Outline
Group and Outline - Clear Outline	Data - Outline - Group - Clear Outline
Group and Outline - Settings...	Data - Outline - Settings
PivotTable and PivotChart Report...	Insert - Tables - Pivot Table
Import External Import Data...	Add to QAT using Excel Options
Import External New Web Query...	Data - Get External Data - From Web
Import External New Database Query...	Add to QAT using Excel Options
Import External Edit Query...	Add to QAT using Excel Options
Import External Data Range Properties...	Data - Manage Connections - Properties
Import External Parameters...	Add to QAT using Excel Options
List - Create List...	Data - List - Create List
List - Resize List...	Design - Properties - Resize Table
List - Total Row	Design - Table Style Options - Total Row
List - Convert to Range	Design - Tools - Convert to Range
List - Publish List...	Design - External Table Data - Export - Export to List
List - View List on Server	Design - External Table Data - View on Server
List - Unlink List	Design - External Table Data - Unlink List
List - Synchronize List	Add to QAT using Excel Options
List - Discard Changes and Refresh	Add to QAT using Excel Options
List - Hide Border of Inactive Lists	No equivalent
XML - Import...	Developer - XML - Import
XML - Export...	Developer - XML - Export
XML - Refresh XML Data	Developer - XML - Refresh XML Data
XML - XML Source...	Developer - XML - XML Source
XML - XML Map Properties...	Developer - XML - Map Properties
XML - Edit Query...	Developer - XML - Edit Query
XML - XML Expansion Packs...	Developer - XML - Expansion Packs
Refresh Data	Data - Manage Connections - Refresh

The Window Menu	
Excel 2003 Menu	Excel 2007 Ribbon
New Window	View - Window - New Window
Arrange...	View - Window - Arrange All
Compare Side by Side with Macro to List MenuBars.xls	View - Window - View Side by Side
Hide	View - Window - Hide
Unhide...	View - Window - Unhide
Split	View - Window - Split
Freeze Panes	View - Window - Freeze Panes
1 Book1	View - Window - Switch Window

The Help Menu	
Excel 2003 Menu	Excel 2007 Ribbon
Microsoft Excel Help	Question mark at right end of ribbon
Show the Office Assistant	No Equivalent
Microsoft Office Online	Office Icon - Excel Options - Resources - Microsoft Office Online
Contact Us	Office Icon - Excel Options - Resources - Contact Us
Check for Updates	Office Icon - Excel Options - Resources - Check for Updates
Detect and Repair...	Office Icon - Excel Options - Resources - Detect & Repair
Activate Product...	Office Icon - Excel Options - Resources - Activate Product
Customer Feedback Options...	Office Icon - Excel Options - Resources - Customer Feedback Options
About Microsoft Office Excel	Office Icon - Excel Options - Resources - About Microsoft Excel

The Standard Toolbar	
Excel 2003	Excel 2007 Ribbon
New	Office Icon - New
Open	Office Icon - Open
Save	Office Icon - Save
Permission	Office Icon - Finish - Restrict Permission - Unrestricted Access
E-Mail	Office Icon - Send - Email
Print	Office Icon - Print - Quick Print
Print Preview	Office Icon - Print - Print Preview
Spelling	Review - Proofing - Spelling
Research	Review - Proofing - Research
Cut	Home - Clipboard - Cut

Copy	Home - Clipboard - Copy
Paste	Home - Clipboard - Paste
Format Painter	Home - Clipboard - Format Painter
Undo	QAT - Undo
Redo	QAT - Repeat
Insert Hyperlink	Insert - Links - Hyperlink
AutoSum	Home - Editing - Sum
Sort Ascending	Home - Editing - Sort & Filter - Sort Ascending
Sort Descending	Home - Editing - Sort & Filter - Sort Descending
Chart Wizard	Insert - Charts
Drawing	No Equivalent
Zoom	View - Zoom - Zoom
Help	Question mark at right end of ribbon

The Formatting Toolbar	
Excel 2003	Excel 2007 Ribbon
Font	Home - Font - Font
Font Size	Home - Font - Font Size
Bold	Home - Font - Bold
Italic	Home - Font - Italic
Underline	Home - Font - Underline
Align Left	Home - Alignment - Align Left
Align Center	Home - Alignment - Align Center
Align Right	Home - Alignment - Align Right
Merge & Center	Home - Alignment - Merge - Merge & Center
Currency Style	Home - Number - Accounting Number Format
Percent Style	Home - Number - Percent Style
Comma Style	Home - Number - Comma Style
Increase Decimal	Home - Number - Increase Decimal
Decrease Decimal	Home - Number - Decrease Decimal
Increase Indent	Home - Number - Increase Indent
Decrease Indent	Home - Number - Decrease Indent
Borders	Home - Font - Border
Fill Color	Home - Font - Fill Color
Font Color	Home - Font - Font Color

