MCAS

Microsoft Certified Application Specialist

Exams for Microsoft® Office 2007

Word 77-601 • Excel 77-602 • PowerPoint 77-603
Outlook 77-604 • Access 77-605

CD Features Five
Practice Exams **5**

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MCAS Office 2007 Exam Prep: Exams for Microsoft® Office 2007

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Introduction

Microsoft Office 2007, the latest version of Microsoft's comprehensive personal productivity application software, contains a variety of improvements and enhancements over its previous versions. Even users who have used and mastered the earlier versions of Microsoft Office and one or more of the applications in its application suite might need introduction, training, review, and practice to master the skills and knowledge required to become a Microsoft Certified Application Specialist (MCAS).

It is also common that a user can be an expert in one or two of the Office applications and barely know the others. For these two reasons, this book provides in-depth information and training in all the applications covered in the MCAS exams:

- ▶ Using Microsoft Office Word 2007, Exam 77-601
- ▶ Using Microsoft Office Excel 2007, Exam 77-602
- ▶ Using Microsoft Office PowerPoint 2007, Exam 77-603
- ▶ Using Microsoft Office Outlook 2007, Exam 77-604
- ▶ Using Microsoft Office Access 2007, Exam 77-605

Before you delve into the five parts of this book that are designed to help you to prepare for and successfully pass the MCAS exams, you should also have some knowledge of the Microsoft Business Certifications program, its components, and what it takes to become certified.

The Microsoft Business Certifications

Microsoft includes its certification programs for office workers, business managers, and teachers under the umbrella of Microsoft Business Certifications (MBC). The three certification programs under the MBC umbrella are the Microsoft Certified Application Specialist (MCAS), the legacy Microsoft Office Specialist (MOS), and the Microsoft Certified Application Professional (MCAP). This book focuses on the MCAS exams.

The Microsoft Certified Application Specialist (MCAS) Certification

By earning MCAS credentials, you indicate to your employer or prospective employer that you possess mastery, skills, and knowledge of one or more of the Microsoft Office applications. The MCAS exams measure advanced knowledge, skills, and expertise within a standard set of objectives. Employers know that an employee with MCAS credentials possesses the requisite capabilities to perform at an advanced level with Microsoft Office applications.

The MCAS exams are all essentially at the specialist level in name, but the exams include expert-level content as well. The MCAS exams cover Word 2007, Excel 2007, PowerPoint 2007, Access 2007, Outlook 2007, and the Windows Vista operating system. When you pass any of the MCAS exams, you earn an MCAS application specialist credential for that application or system.

> **NOTE**
>
> If you are an active duty member or veteran, or a family member of an active duty member or veteran of the United States Armed Forces (Army, Navy, Air Force, Marines, and Coast Guard), you might be eligible to receive reimbursement for any of the Microsoft Business Certification exams, whether you pass or not, from the U.S. Department of Veterans Affairs (VA) under the provisions of the Montgomery GI Bill, the Veterans Educational Assistance Program (VEAP), and the Dependents' Educational Assistance Program. Contact your local VA office or visit the following website for more information: www.microsoft.com/learning/mcp/officespecialist/reimbursement.mspx.

Registering for the MCAS Exams

The MCAS testing program is conducted on two levels: the Microsoft Official Pre-Tests and the MCAS application exams. The pretests are recommended to anyone preparing to take one or all of the MCAS exams, but they are not required before taking an MCAS exam.

To register and pay for either a Microsoft Official Pre-Test or an MCAS exam, and to find a Microsoft Certified Exam Provider, visit the Certiport, Inc. website at www.certiport.com. At the time of this writing, the cost of a Microsoft Official Pre-Test voucher is $26 per test, and the cost of the MCAS exams are $89 each.

> **TIP**
>
> Depending on your confidence level of passing a particular application exam, you can also purchase a retake voucher with the exam voucher for an additional $10.

The MCAS exams are offered in a variety of languages, including Arabic, Chinese, German, Greek, Italian, Japanese, Korean, Russian, and Spanish, and tests in other languages are being added continually. For a full list of the languages in which the MCAS exams are offered, visit the MCAS website at www.microsoft.com/learning/mcp/msbc/localexams/.

Preparing to Take an MCAS Exam

Working through the step-by-step lessons and exercises in this book is a good first step in preparing for an MCAS exam. This book covers all the exam objectives of each MCAS exam to ensure that you have the opportunity to fully prepare for the exam.

To enhance your comfort and confidence for any of the MCAS exams, MCAS Pre-Test exams are available to identify the areas in which you might need more practice or knowledge to be successful on the actual MCAS exam. Microsoft also provides a variety of instructor-led and online training courses to help you prepare for the exams. For more information on the Microsoft courses, visit the Microsoft Learning website at www.microsoft.com/learning/mcp/msbc/.

Taking the MCAS Exams

The exam format used in Microsoft exams varies from test to test, but the format used in the MCAS exams is based on simulations, or what Microsoft refers to as performance-based or "live" exams. In this type of test, you are required to enter data, identify the sequence of the steps used to complete a task, or perform a sequence of steps or tasks to demonstrate your knowledge of how a particular activity or event is carried out in the application being tested. For example, you might be called on to create a table in Word 2007 and apply a prescribed series of formatting features to it, or you might

be asked to apply conditional formatting to a table in an Excel 2007 worksheet or create mail folders and apply categorization in Outlook 2007. You might be asked to choose the best answer in a multiple-choice question about how a particular action is carried out.

You are allowed 90 minutes to take each of the MCAS exams. At the end of your exam, your score is immediately provided to you. If you fail the exam, you must wait seven days before reattempting it. See "Getting Ready for the MCAS Exams" (before Chapter 1) for more information on preparing for and taking the MCAS exams.

The Microsoft Office Specialist (MOS) Certification

The Microsoft Office Specialist (MOS) certification is the legacy certification program for Office 2000, Office XP, and Office 2003. The MOS certification program granted three certification levels: Specialist, Expert, and Master. More information is available for the MOS certification tracks at www.microsoft.com/learning/mcp/msbc/requirements/.

Microsoft Certified Application Professional (MCAP) Certification

The Microsoft Certified Application Professional (MCAP) certification provides a credential that verifies your skills and knowledge of the Microsoft Office 2007 application suite and its integration into the Microsoft Office 2007 SharePoint Server (MOSS) system. The objective of the MCAP exams is to measure your skills for working in interindustry and intercompany environments to manage budgets and presentations, facilitate collaboration and cooperation among team members, and to support the information needs of an organization. The MCAP exam requirements are not covered in this book, which concentrates strictly on the MCAS exams.

For more information on the MCAP certification, visit the following website: www.microsoft.com/learning/mcp/msbc/mcap/default.mspx.

What's in This Book?

The five MCAS exams (six, if you count the optional Windows Vista for the Business Worker 77-600 exam) each concentrate on a particular Microsoft Office 2007 application with a separate test for Word 2007, Excel 2007, Office 2007, PowerPoint 2007, and Access 2007. Each of the five MCAS exams is covered in a separate part of this book.

To help you in your studies, each part of the book and that part's chapters are aimed at one specific application in the Microsoft Office 2007 suite. Each part covers all the MCAS exam objectives for a particular application. As much as possible, the material in each part is sequenced to present it in the context of a particular exam objective—how particular actions, commands, and features are commonly used. However, some features, functions, or tools in the Microsoft Office 2007 suite do stand on their own, but every attempt was made to keep it relevant and meaningful.

The Organization of the Book

There are six parts to this book. The first part contains a single getting started chapter and the remaining five parts cover the five MCAS applications over many chapters.

Each chapter begins with a list of the MCAS exam objectives covered in that chapter. These objectives are indicated at each major section heading. See the "Exam Objectives Reference" following this introduction for a complete list of the MCAS exam objectives and the pages to find coverage on each.

Aids to Help You Study and Prepare

In addition to the complete coverage of the exam objectives, each chapter contains several tips and notes to provide you with additional information, shortcuts, or other ways to accomplish a particular task. Each chapter also includes a Challenge designed to help you to practice the actions you might be called on to perform during the exam.

The key terms and review questions included at the end of each chapter are provided to help you to understand and remember the context, application, meaning, and relationship of the terms, features, and tools discussed in the chapter.

The Companion CD

This book includes a companion CD so that you can further practice for the MCAS exams. The CD includes the following:

- ▶ An electronic practice exam with 300 new questions—60 for each of the five MCAS exams
- ▶ An electronic copy of the book
- ▶ All the Office files referenced in the Challenge exercises in the book

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Collaborating and Securing Data

Objectives

This chapter helps you prepare for the MCAS: Using Microsoft Office Excel 2007, Exam 77-602, by covering the following Microsoft objectives:

▶ **Manage changes to workbooks.**

▶ **Protect and share workbooks.**

▶ **Prepare workbooks for distribution.**

▶ **Save workbooks.**

▶ **Set print options for printing data, worksheets, and workbooks.**

Outline

Study Strategies

This chapter covers the methods used to prepare, publish, and share Excel 2007 documents with other users on a local or wide area network. Practical hands-on experience working with these Excel 2007 tools is vital to gaining an understanding of how they work and when to use them. To best prepare for the exam, you should make sure you know and understand the use of the features, functions, and tools covered in this chapter.

The best way to study for this section of the MCAS: Using Microsoft Office Excel 2007 exam is to perform the steps involved in each part of these processes. To further prepare yourself for the scenarios contained on the exam, access the Excel 2007 Help resources to gain an understanding of exactly what each process does and why each process is important.

Introduction

Although most Excel 2007 workbooks are created for personal use, sometimes you might want or need to share a workbook with other users on a network. Sharing a workbook can be for purposes of collaboration in which other users might need to have access to the workbook to enter or format data. The sharing could also be just for sharing information in which you want to restrict the access of other users to only certain parts of a workbook or merely to view its contents.

The Collaborating and Securing Data section of the MCAS Using Microsoft Office Excel 2007 exam covers the tools and functions available to protect and share a workbook for information or collaboration purposes, which is the focus of this chapter. This chapter covers the functions and tools used to allow users to edit portions of a workbook and to track any changes made to its contents, password protect a worksheet or an entire workbook, and share a workbook, as well as the steps used to prepare a workbook for distribution to a network. The tools and functions used to set the print options for a workbook are also discussed.

Managing Corrections and Additions Made to Workbooks

Objective:
Manage changes to workbooks.

In situations where it is important to know what changes are made to a workbook and who made the changes, you have the options to track the changes made to workshop data and to restrict access to only certain parts of a workbook. The following two sections discuss each of these options.

Tracking Changes to a Workbook

After a workbook has been completed and is ready for review by other collaborating users, it can be important to know exactly what changes are made to it and by whom, especially on a more complex workbook. This can be vital information in a collaborative environment.

Tracking Changes in a Workbook

Excel 2007 provides the capability to track the changes made to a workbook. To engage this function, follow these steps:

1. Select the **Review** tab of the Excel 2007 ribbon.

2. In the Changes group, click the **Track Changes** button, and then click the **Highlight Changes** option to display the Highlight Changes dialog box (see Figure 14.1).

> **NOTE**
>
> When Track Changes is enabled for an Excel 2007 workbook, the workbook is automatically placed in a shared status. When the Track Changes feature is disabled, the Change History worksheet is removed and the workbook is no longer shared.
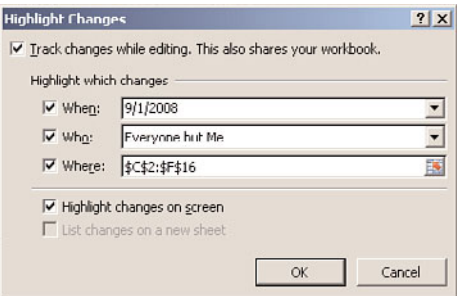
FIGURE 14.1 The Highlight Changes dialog box.

3. On the Highlight Changes dialog box, make sure the check box associated with Track Changes While Editing is checked.

4. In the Highlight Which Changes section, use the check boxes to set the following options:

   ▸ **When:** When selected, this option tracks all changes or those made after a certain milestone: Since I Last Saved, Not Yet Reviewed, or since a specified date. The Since Date option defaults to the current date, but this can be replaced with a date you enter in the When text box.

   ▸ **Who:** When selected, this option tracks changes made by Everyone (meaning anyone), Everyone But Me (meaning all other users), or only those changes made by a specific person (the default is the current user).

   ▸ **Where:** When selected, this option tracks changes made to a specific range of cells on a specific worksheet. To set the range of cells in which you want to track changes, click the worksheet button at the end of the Where text box to open the Highlight Changes Range Selection dialog box and the current worksheet. Select another worksheet if needed, select the cell range to be tracked, and click the **Close** button on the Highlight Changes Range Selection dialog box to return to the Highlight Changes dialog box. If this selection is not used, the default range for tracking changes is the entire active worksheet.

5. If you want to have the changed cells indicated on the display of a worksheet, check the check box associated with **Highlight Changes on Screen**. The result of selecting this option is shown in Figure 14.2.

FIGURE 14.2 The cells that have been changed are highlighted and tagged with a explanation of what change was made.

6. To have the changes meeting the criteria entered into the Highlight Which Changes section listed in a History worksheet in the workbook, check the check box associated with the **List Changes on a New Sheet** option. If the List Changes on a New Sheet option is selected on the Highlight Changes dialog box, a History worksheet is created in the same workbook. Figure 14.3 shows the History worksheet relating to the changes shown in Figure 14.2.

> **TIP**
>
> The History worksheet doesn't appear until the worksheet is saved with changes made.

FIGURE 14.3 A History worksheet added to an Excel 2007 workbook.

Managing Tracked Changes

After reviewing the changes made to a shared workbook, you have the options of taking no action and leaving changes marked as changes, accepting a change to incorporate it into the document permanently, or to reject a change and returning the affected cell to its original content.

To accept or reject a tracked change, follow these steps:

1. Select the **Review** tab of the Excel 2007 ribbon.

2. In the Changes group, click the **Track Changes** button, and then click the **Accept/Reject Changes** option to display the Select Changes to Accept or Reject dialog box (see Figure 14.4).
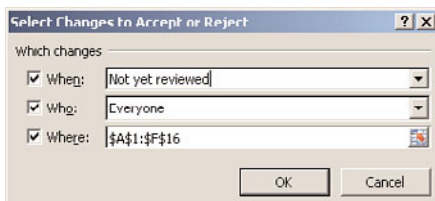
FIGURE 14.4 The Select Changes to Accept or Reject dialog box.

3. Like the Highlight Changes dialog box (refer to Figure 14.1), the Select Changes to Accept or Reject dialog box has a set of check boxes that set the criteria for which changes are to be accepted or rejected in its Which Changes section:

   ▶ **When:** When selected, you have the option of selecting to accept or reject those changes not yet reviewed or to enter a specific date to accept or delete any changes made after that date.

   ▶ **Who:** When selected, this option indicates that the changes made by Everyone (meaning anyone), Everyone but Me (meaning all other users), or only those changes made by a specific person (the default is the current user) are to be accepted or rejected.

   ▶ **Where:** When selected, this option indicates that the changes made to a specific range of cells are to be accepted or rejected.

4. Click the **OK** button on the Select Changes to Accept or Reject dialog box to display the Accept or Reject Changes dialog box (see Figure 14.5).
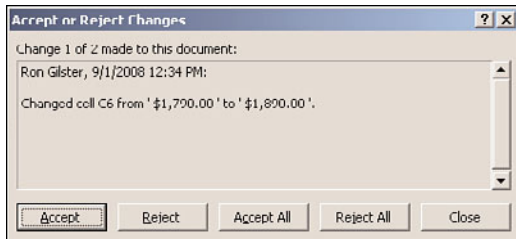
FIGURE 14.5   The Accept or Reject Changes dialog box.

5. The details of each change to the worksheet that met the selection criteria set on the Select Changes to Accept or Reject dialog box are displayed one at a time in the text area of the Accept or Reject Changes dialog box.

6. For each of the changes displayed on the Accept or Reject Changes dialog box, you have the option to Accept or Reject each change. You can also Accept All changes or Reject All changes. To cancel accept or reject action, click the Close button.

7. After the last of the changes has been accepted or rejected, the dialog box closes.

Allowing Users to Edit Selected Ranges

Before you share a workbook (see "Sharing a Workbook" later in the chapter) for other users, you might want to restrict the range of cells other users can edit to one or more specific ranges on selected worksheets. This allows you to prevent changes in content or format in all but the ranges in which you have granted permission to other users to edit.

To allow other users to edit only one or more selected cell ranges in a worksheet, follow these steps:

> **TIP**
>
> Before you can allow users to edit selected cell ranges, you must disengage any share or tracked changes applied to a workbook.

1. On the **Review** tab of the Excel 2007 ribbon, click the **Allow Users to Edit Ranges** button in the Changes group to display the Allow Users to Edit Ranges dialog box (see Figure 14.6).

FIGURE 14.6   The Allow Users to Edit Ranges dialog box.

2. To add a range of cells to the Ranges Unlocked by a Password When the Sheet Is Protected list, click the **New** button, which displays the New Range dialog box (see Figure 14.7).
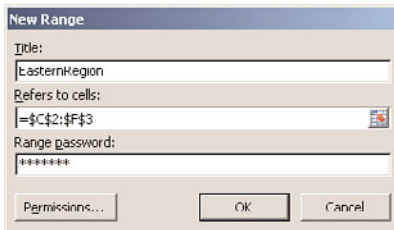
FIGURE 14.7   The New Range dialog box.

3. Enter a title for the range to be identified in the Title text box.

4. In the Refers to Cells text box, enter the cell range you want to allow users to edit, or click the worksheet button at the right end of the text box to return to the worksheet, where you can select the cell range.

5. If you want to enter a password that users will have to enter to access the cells indicated in the Refers to Cells text box, enter it into the Range Password text box. To change the permissions for what allowed users (those who know the password) are able to do to the allowed range, click the **Permissions** button to open the Permissions for Range Title dialog box.

6. Click the **OK** button.

Protecting and Sharing an Excel 2007 Workbook

Objective:
Protect and share workbooks.

You are the lead member of a group charged with producing an important workbook for your organization. After creating the workbook and its worksheets and entering data gathered from a variety of sources, you want to share the workbook in its draft form with the other members of the work group. However, parts of the workbook came from verified or trusted sources and cannot or should not be changed, except by the original author, so you also need to protect those parts of the workbook from modifications.

Excel 2007 provides you with the tools needed to carry out these tasks. Using the features of Excel 2007, you are able to share the workbook and protect all or part of its contents. In the sections that follow, the procedures used to accomplish these two tasks are outlined.

Protecting a Workbook and Its Worksheets

Protecting a workbook and all or some of its elements means that you assign a password to the entire workbook, one or more of its worksheets, or to selected ranges of cells in worksheets. As discussed earlier in the chapter in the section "Allowing Users to Edit Selected Ranges," selected ranges of cells can be protected and accessed only through a password. This type of protection can be applied to the entire workbook as well.

When protection is applied to a workbook, it can be applied on two levels of workbook elements: Windows or Structure. The Windows level of workbook elements provides protection against users resizing, moving, or closing a worksheet in the workbook. The Structure level of workbook elements provides protection against the following actions:

▶ Inserting a new worksheet or chart sheet

▶ Copying or moving a worksheet to a new workbook

▶ Changing the name of a worksheet

▶ Recording a macro

▶ Viewing hidden worksheets

Protecting a Workbook

To protect all or certain elements of an Excel 2007 workbook, follow these steps:

1. With the workbook to be protected open in Excel 2007, select the **Review** tab and click the **Protect Workbook** button in the Changes section to display the Protect Structure and Windows dialog box (see Figure 14.8).

FIGURE 14.8   The Protect Structure and Windows dialog box.

2. Click the check box associated with the level(s) of protection you want to apply to the workbook, choosing either Structure or Windows, or both. The Structure option prevents users from reordering the worksheets in a workbook, including preventing them from adding new worksheets or deleting existing worksheets. The Windows option prevents users from resizing or moving the Excel workspace window.

3. Enter a password that users must enter to access the workbook if desired. The password is optional, but it can add to protection of the workbook.

4. Click the **OK** button to save the protection settings.

5. If you entered a password in step 3, you are asked to confirm the password in the Confirm Password dialog box.

Protecting a Wordbook at the File Level

To protect a workbook at the filename level, you can assign a password to the file that effectively overrides any of the internally configured security of a workbook. To set a password on a workbook file, follow these steps:

1. Click the **Microsoft Office Button** and click the **Save As** option to display the Save As dialog box.

2. Set the filename, location, and file format type, and then click the **Tools** button in the lower-left corner of the dialog box.

3. From the Tools menu, click **General Options** to display the General Options dialog box (see Figure 14.9).

FIGURE 14.9   The General Options dialog box.

4. If you want to create a backup of the workbook file each time it is opened, check the check box associated with **Always Create Backup**. This option is separate from assigning a password and can be set even when a password isn't assigned to the file.

5. In the File Sharing section, you can assign a password to control either the opening of a file or the modification of a file. For an Excel 2007 workbook on which workbook protection has been activated, the Password to Open option is unavailable (because it's not needed), but you can enter a password in the Password to Modify option.

> **NOTE**
>
> If the workbook has already been shared, the password already assigned to the workbook cannot be changed; therefore, this password will not take effect.

6. If you want users to open the workbook in read-only status, check the **Read-only Recommended** check box.

7. Click the **OK** button to save the General Options settings for the workbook and return to the Save As dialog box.

Protecting a Worksheet

Protecting an Excel 2007 worksheet actually means protecting or locking the worksheet elements you don't want to allow other users to change. The elements of a worksheet are the cells, columns, rows, hyperlinks, illustrations, and other objects.

To protect an Excel 2007 worksheet and its elements, use the following steps:

1. Select the worksheet you want to protect.

2. Unlock any cells or ranges of cells on the worksheet using these steps:

   1. Select the cells or ranges of cells to be unlocked. If you're in doubt exactly which cells are locked, select the entire worksheet or the cells containing data.

   2. Select the **Home** tab of the Excel 2007 ribbon and click the **Format** button in the Cells group to display its menu.

    3. From the Format menu, click the **Format Cells** option to display the Custom Lists dialog box.

    4. Select the **Protection** tab and remove the check mark in the **Locked** check box, if any, and click the **OK** button.

3. If you want to hide any of the formulas in the worksheet, select all the cell ranges containing the formulas you want to hide. Then use these steps to hide the formulas:

    1. Select the **Home** tab and click the **Format** button in the Cells group to display its menu.

    2. From the Format menu, click the **Format Cells** option to display the Custom Lists dialog box.

    3. Select the **Protection** tab and check the **Hidden** check box, if it is not already checked, and then click the **OK** button to hide the formulas in the cell ranges selected.

4. If you want to include protection for the illustrations, charts, or other objects inserted into the worksheet, use the following steps:

    1. Select the **Home** tab and click the **Find & Select** button in the Editing group to display its menu.

    2. From the Find & Select menu, click the **Go To Special** option to display the Go To Special dialog box.

    3. On the Go To Special dialog box, select the **Objects** option and click the **OK** button to select all of the objects in the worksheet.

    4. On the Picture Tools Format tab, click the **Dialog Box** button on the Size group title bar to display the Size and Properties dialog box (see Figure 14.10).
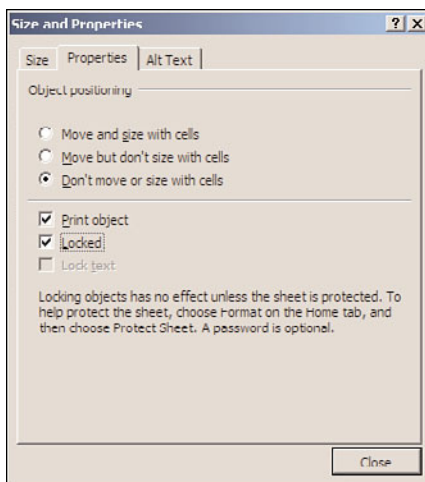
FIGURE 14.10 The Properties tab of the Size and Properties dialog box.

    5. Click the **Properties** tab and remove the check mark in the **Locked** check box.

5. Click the **Review** tab, and click the **Protect Sheet** button in the Changes group to display the Protect Sheet dialog box (see Figure 14.11).
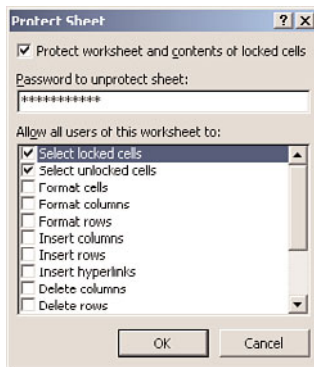
FIGURE 14.11   The Protect Sheet dialog box.

6. Enter the password you want to use to protect the worksheet and its elements in the Password to Unprotect Sheet text box.

7. In the Allow All Users of This Worksheet To text area, check the elements and actions you want to allow all users to perform. If an element or action is not checked, a user must enter the password to access the element or perform the action.

TIP

To select more than one cell range, select the first range and then hold down the Ctrl key while selecting any subsequent range.

NOTE

You should make all necessary protection and sharing settings changes and test them before you actually share the document. Inadvertent changes made innocently by shared users could render the document inaccurate or useless.

Sharing a Workbook or Worksheet

When you work in a collaborative environment, it is common to share an Excel 2007 workbook or one or more of its worksheets so that other users can collaborate or review its content. The steps used to share a workbook or a worksheet are similar, but some subtle differences exist, as explained in the following two sections.

Sharing a Workbook

Follow these steps to share an Excel 2007 workbook:

1. Open the workbook to be shared.

2. Select the **Review** tab and click the **Share Workbook** button in the Changes section to display the Share Workbook dialog box (see Figure 14.12).
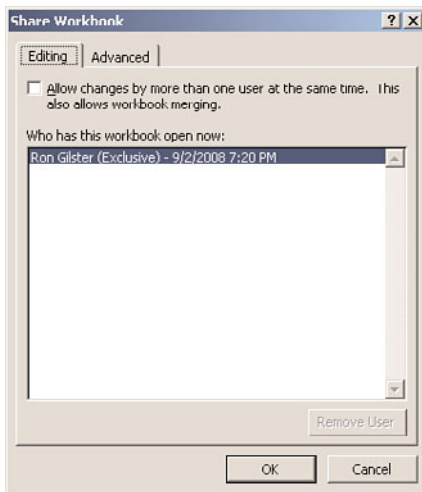
FIGURE 14.12   The Share Workbook dialog box.

3. Select the **Editing** tab. Depending on the dispersion or size of the collaborative group, you might or might not want to allow for multiple users to make changes to the workbook at the same time. If you do, check the check box associated with **Allow Changes by More Than One User at the Same Time. This Also Allows Workbook Merging**. Selecting this option enables the options on the Advanced tab.

4. Select the **Advanced** tab and set the options you want to use to control the changes made to the workbook. The options that can be set are the following:

   ▶ **Track Changes:** If you want to save the change history of the workbook, set the number of days you want to keep (30 is the default value) in the box associated with **Keep History for *nn* Days** or choose the option **Don't Keep Change History**.

   ▶ **Update Changes:** If you want to save all changes when the workbook is saved, select the option for **When File Is Saved**; to be selective of which changes are saved, set the minute value of the Automatically Save option, and then choose between **Save My Changes** and **See Others' Changes** and **Just See Other Users' Changes**.

   ▶ **Conflicting Changes Between Users:** When two changes to a single cell or range of cells are in conflict, one must win. Choose between **Ask Me Which Changes Win** and **The Changes Being Saved Win**.

   ▶ **Include in Personal View:** Check the check box associated with Print settings and Filter settings if you want to share these settings with other users.

5. Click the **OK** button to share the workbook.

Some features and formats cannot be added to a workbook after it has been shared. These features and formats are the following:

   ▶ Charts

   ▶ Conditional formatting

   ▶ Data validation

   ▶ Hyperlinks

▶ Macros

▶ Merged cells

▶ Outlines

▶ Pictures

▶ Protection

▶ Subtotals

▶ Tables

These features and formats cannot be inserted or modified in a shared workbook. If you want to include them in the workbook you must insert, apply, or modify them before you share the workbook.

Controlling Access and Changes to a Shared Workbook

While a workbook is shared, you can both control who can access the workbook and resolve change conflicts. These two actions are explained in the following sections.

Removing a Shared User

If you want to remove a user from sharing a workbook for any reason during a collaborative session, follow these steps:

1. Open the shared workbook.

2. Select the **Review** tab and click the **Share Workbook** button in the Changes group to display the Share Workbook dialog box, shown earlier in Figure 14.12.

3. In the Who Has This Workbook Open Now list, select the user to be removed and click the **Remove User** button.

This procedure breaks the current link of the user to the workbook, but it doesn't prevent the user from accessing and editing the workbook at a later time.

Resolving Change Conflicts

When you and at least one other user are editing a shared workbook at the same time, there are often changes made to the same cell simultaneously. In these situations, the owner (the user who shared the workbook) controls which changes are kept. When the workbook is saved with conflicting changes by other users, the Resolve Conflicts dialog box is displayed. On the Resolve Conflicts dialog box, you can review the conflicting changes and choose either **Accept Mine** or **Accept Other** to resolve the conflict.

Stop Sharing a Workbook

When you no longer want to share a workbook, you can remove the sharing status of the workbook using the following steps:

1. Open the shared workbook.

2. Select the **Review** tab and click the **Track Changes** button in the Changes group to display its menu.

3. Click the **Highlight Changes** option to display the Highlight Changes dialog box (shown earlier in the chapter in Figure 14.1).

4. For the When option, select **All** from the pull-down list.

5. Clear the check boxes associated with **Who** and **Where**.

6. Check the check box associated with **List Changes on a New Sheet** to create a History worksheet for the changes made to the shared workbook.

7. Click the **OK** button to remove the share on the workbook.

Preparing a Workbook for Distribution

Objective:
Prepare workbooks for distribution.

Microsoft Office 2007 provides a common set of tools and features to help you prepare a document for distribution, regardless of the application in which the document was created, including Excel 2007. As outlined in Chapter 9, "Sharing and Securing Content," you can use a series of steps to ensure that a document published or distributed to network users is protected and that no personal information is released. Perform the following steps to prepare an Excel 2007 workbook for distribution:

1. Edit workbook properties.

2. Inspect the workbook document.

3. Encrypt the workbook document.

4. Add an optional digital signature.

5. Run a compatibility check.

6. Mark the workbook document as final.

For the details on each of the preceding actions, see Chapter 9, remembering that you are working with an Excel 2007 workbook instead of a Word 2007 document.

After you have marked an Excel workbook as final, you'll likely want to publish (distribute) the workbook for other users to use, see, or reference. The Publish and Send selections on the Microsoft Office Button enable you to send the finalized document as an email attachment (as an Excel document, a PDF file, or an XPS file) or publish the document to an Excel Services or SharePoint library, or to a created document workspace.

Saving a Workbook

Objective:
Save workbooks.

In addition to the capability of saving an Excel 2007 workbook as an Excel 2007 workbook (with an `.xlsx` extension), you can use several other file format options to save a workbook. The Save option

on the Microsoft Office Button menu is used to save a workbook using the same filename and location used in previous save actions. The one exception is the first time the document is saved, the Save option invokes the Save As option.

The Save As option on the Microsoft Office Button menu is used to save a workbook to a different location, change the filename, or change the file format in which the workbook is saved.

Saving a Workbook with the Same Filename and Location

To save an Excel 2007 workbook using the same filename, location, and file format, follow these steps:

1. Click the **Microsoft Office Button**.

2. Click the **Save** option.

3. Unless the Check Compatibility When Workbook Is Saved option was selected when the Compatibility Inspector was used on the workbook, the file is saved without any other interventions; otherwise, the results of the Compatibility Inspector are displayed.

> **NOTE**
>
> For more information on the Microsoft Office Compatibility Inspector, see Chapter 9, "Sharing and Securing Content."

Saving a Workbook with a Different Name, Location, or Format

Use the Save As option of the Microsoft Office Button when you want to change the workbook's name, location, or file format. To save a workbook changing any of these characteristics, use the following steps:

1. Click the **Microsoft Office Button**.

2. Move the mouse pointer over the Save As option to display the Save As menu (see Figure 14.13).
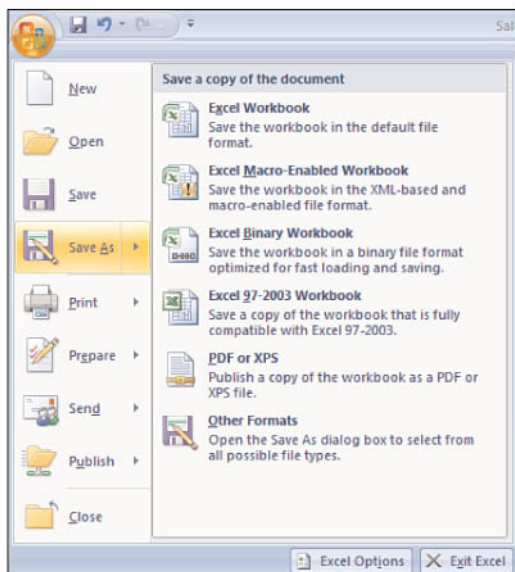
FIGURE 14.13   The Save As menu of the Microsoft Office Button.

3. Use the Excel Workbook option of the Save As menu to save the document as an Excel 2007 workbook. Clicking this option displays the Save As dialog box (see Figure 14.14), on which you can navigate to a new file location, change the filename, and if desired select a new file format from the Save as Type pull-down list. The following file formats are available on the Save as type pull-down list:
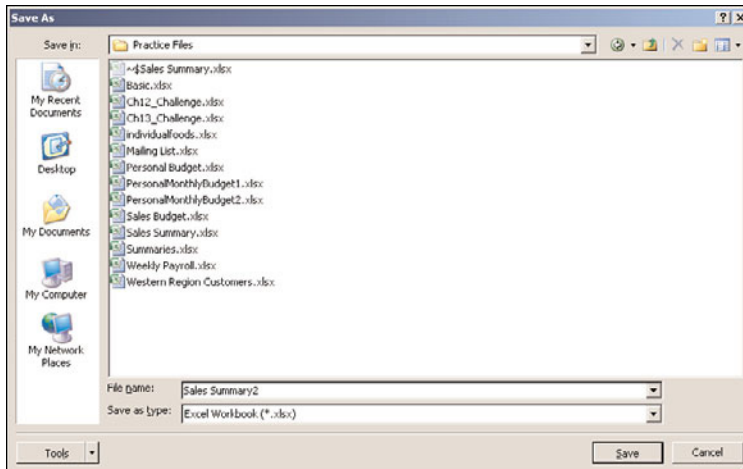
FIGURE 14.14   The Save As dialog box.

▶ The Excel Workbook option saves the workbook in its default file format, which is the Office Open XML file format and the primary reason Office 2007 document files aren't backward compatible to previous versions of Office or its applications. This file format is indicated with the `.xlsx` file extension.

▶ The Excel Macro-Enabled Workbook option saves the workbook in an Extensible Markup Language (XML) format and retains any macros embedded in the workbook. This file format is indicated with the `.xlsm` file extension.

▶ The Excel Binary Workbook option saves the workbook in an XML style file format but converts the contents of the workbook into binary strings. This file format is indicated with the `.xlsb` file extension.

▶ The Excel 97-2003 Workbook option saves the workbook in compatibility mode using a file format compatible with earlier versions of Excel. This file format is indicated with the `.xls` file extension. Some features of Excel 2007 are not backward compatible, and a message box might warn you of this fact.

▶ The XML Data option saves the workbook in an XML file format, providing the workbook has had XML mappings applied to it, which is a fairly extensive process but one you don't need to worry about for the exam. This file type is saved with the `.xml` file extension.

▶ The Single File Web Page option saves the workbook as a Multipurpose Internet Mail Extensions (MIME) encapsulated file coded as Hypertext Markup Language (HTML). This file format captures the entire workbook into a single `.mht` or `.mhtml` file that can be sent by email. Figure 14.15 shows the source code of an Excel workbook saved using the Single File Web Page option.

FIGURE 14.15 The source code for an Excel 2007 worksheet saved using the Single File Web Page option.

NOTE

To demonstrate a comparison of at least one aspect of the different file formats that can be used to save an Excel workbook, Figure 14.16 illustrates the same Excel workbook saved to five of the available file formats. Notice the differences in the sizes of the saved files.

FIGURE 14.16 A comparison of the file sizes resulting from saving the same Excel workbook in different file formats.

4. After entering the filename, selecting **Save as Type**, and navigating to the location in which you want to place the workbook, click the **Save** button to save the workbook.

Setting Print Options

Objective:

Set print options for printing data, worksheets, and workbooks.

Excel 2007 supports printing for partial worksheets, entire worksheets, and entire workbooks (meaning all the worksheets). Each of these processes uses essentially the same actions, with one or two options differentiating what is printed.

Changing Active Printer

On the Print dialog box that displays when the Microsoft Office Button's Print option is selected, you can choose to change the active printer from the default printer to any other printer to which you have permission and access to use. Follow these steps to change the active printer:

1. Click the **Microsoft Office Button** to display its menu.

2. Move the mouse pointer over the Print option to display the Print menu.

3. Click the **Print** option to display the Print dialog box (see Figure 14.17).
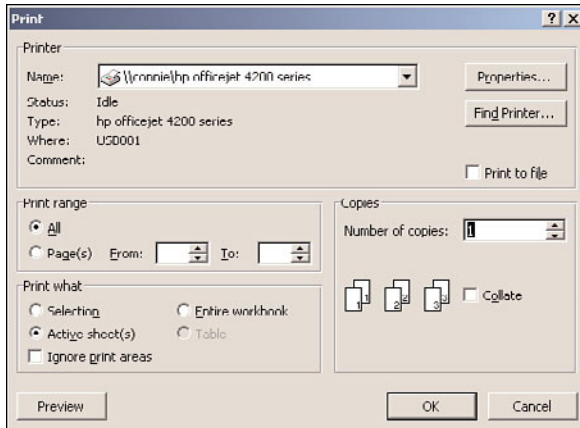
FIGURE 14.17 The Print dialog box.

4. In the Printer section, use the **Name** pull-down list to select the printer on which you want to print. If the printer you want to use is not listed on the Name pull-down list, click the **Find Printer** button to locate the printer (Directory Services must be active for this function to be used).

5. Click the **Properties** button to set the print options for the printer, which vary by type of printer.

Printing a Partial Worksheet

If you want to print only a selected range of cells from an Excel 2007 worksheet, you can use two options. The first option is to print a range of selected cells and the second is to set a print area in a worksheet.

Printing a Range of Selected Cells

To print a range of selected cells from a worksheet in an Excel 2007 workbook, follow these steps:

1. Select the range of cells you want to print.

2. Click the **Microsoft Office Button** and move your mouse pointer over the Print option to display the Print menu.

3. Click the **Print** option to display the Print dialog box (refer to Figure 4.17). In the Printer section, choose the printer you want to use.

4. In the Print What section, select the **Selection** option.

5. Click **OK** to print the selected range on the selected printer.

Setting a Print Area in a Worksheet

If you want to designate a range of cells as the default selected range of cells that are the only cells printed anytime the worksheet is printed, follow these steps:

1. Select the range of cells to be designated as a print area.

2. Select the **Page Layout** tab of the Excel 2007 ribbon.

3. Click the **Print Area** button in the Page Setup group to display its menu.

4. Click the **Set Print Area** option to set the selected range of cells as the print area.

5. To add one or more selected ranges of cells to the print area, select each range of cells and open the Print Area menu from the Page Setup group. Click the **Add to Print Area** option to add the selected cells to the print area.

6. To print the print area of a worksheet, select the **Active Sheet(s)** option in the Print What section of the Print dialog box.

Printing a Worksheet

To print the entire contents of a selected worksheet from an Excel 2007 workbook, follow these steps:

1. Select the worksheet you want to print.

2. Click the **Print** option from the Microsoft Office Button to display the Print dialog box.

3. In the Printer section, choose the printer you wish to use.

4. In the Print What section, select the **Active Sheet(s)** option. If you want to print all the content on the worksheet, including the content not in a print area, check the **Ignore Print Areas** option.

5. Click **OK** to print the worksheet on the selected printer.

If you want to print more two or more worksheets from the same workbook, before selecting the **Print** option, hold down the Ctrl key and click the worksheet tabs of the worksheets you want to print.

Printing a Workbook

If you want to print all the content in all the worksheets of an Excel 2007 workbook, follow these steps:

1. With the workbook to be printed open in the Excel 2007 workspace, click the **Print** option from the Microsoft Office Button to display the Print dialog box.

2. In the Printer section, choose the printer you want to use.

3. In the Print What section, select the **Entire Workbook** option. If you want to print all the content of the workbook, including that not designated as part of a print area, click the **Ignore Print Areas** check box.

4. Click **OK** to print the workbook on the selected printer.

Printing Comments by Reviewers

After an Excel 2007 workbook has been reviewed by other users, you might want to print any comments reviewers have inserted into the document. Excel 2007 allows you to print any reviewers' comments just as they appear on each worksheet.

Follow these steps to print comments inserted into an Excel 2007 worksheet:

1. Display the worksheet containing the comments you want to print by clicking its tab.

2. To display one or all of the comments in place, use these steps:

   ▶ To display the comments of a single cell, click in the cell, select the **Review** tab, and then click the **Show/Hide Comment** button in the Comments group.

   ▶ To display all the comments on a worksheet, click the **Show All Comments** option in the Comments group on the Review tab.

3. Select the **Page Layout** tab and click the dialog box launcher button of the Page Setup group to display the Page Setup dialog box.

4. Select the **Sheet** tab on the Page Setup dialog box and use the **Comments** pull-down list to set how you want the comments to print, choosing between **As Displayed on Sheet (in place)** or **At End of Sheet (as a list)**.

5. Click the **OK** button to save the Page Setup settings.

6. Click the **Microsoft Office Button** and click the **Print** option to display the Print dialog box. Click **OK** to print the worksheet and comments.

Challenge

In this exercise, you apply the functions and tools used to track changes made to a workbook, save the workbook, and protect and share an Excel 2007 workbook with other users on a network.

1. Open any workbook from the Practice Files folder on the CD accompanying this book or one of your own. Select a worksheet to use in this challenge project.

2. Enable the Track Changes function so that all changes made by anyone to any part of the workbook are highlighted on the display.

3. Randomly make changes to at least 10 cells in the worksheet, and then change the name of the worksheet. After changing the worksheet name, make another set of random changes to the worksheet.

4. Save the workbook using the filename **Ch14_Challenge.xlsx**.

5. Change the Track Changes function to display all changes made to the document and to list the changes in a History worksheet.

6. Select the **History** worksheet and filter the changes to show only those performed before the worksheet name was changed.

7. Print the filtered History worksheet.

8. Accept all changes made to the worksheet.

9. Answer these questions:

   ▶ What happens to the History worksheet when you accept all changes?

   ▶ What procedure should you use if you want to accept the change made to only one cell and reject all others?

Chapter Summary

This chapter covered the features of Excel 2007 that are used to protect the integrity of a workbook or worksheet. In this chapter, you have learned the steps used to manage changes to a workbook, how to protect a workbook or worksheet, the steps used to share a workbook, and how to prepare a workbook for distribution to a network. In addition, you learned the process and options available when saving a workbook, including the various file formats available, and the options you can use when printing a selected range of cells, a worksheet, or an entire workbook.

This chapter provided you with basic, intermediate, and a few advanced techniques that you can use to protect a shared or distributed workbook, to save a workbook using a variety of file formats, control any changes made to its worksheets, and print its content.

Key Terms

- ▶ .xls
- ▶ Accept/Reject Changes
- ▶ Allow Users to Edit Ranges
- ▶ Changes group
- ▶ Excel Binary Workbook
- ▶ Excel Macro-Enabled Workbook
- ▶ Excel Workbook
- ▶ Find & Select
- ▶ Go to Special
- ▶ Highlight Changes
- ▶ History
- ▶ Print
- ▶ Protect Workbook
- ▶ Review tab
- ▶ Save
- ▶ Save As
- ▶ Save as Type
- ▶ Share Workbook
- ▶ Share Worksheet
- ▶ Shared user
- ▶ Single File Wage Page
- ▶ Structure protection
- ▶ Track Changes
- ▶ Update Changes
- ▶ Windows protection

Review Questions

Choose the best answer to each question. The answers appear in the section following the questions.

1. To track only certain changes made to an Excel workbook, which of the following parameters can be used? (Choose all that apply.)

   (A) Who

   (B) When

   (C) Why

   (D) Where

2. When a worksheet has been protected, an entry to what list can permit users to edit a certain range of cells using a different password?

   (A) Who

   (B) Permissions

   (C) Ranges Unlocked by a Password When the Sheet Is Protected

   (D) Allow All Users of This Worksheet To

3. The Protection option that prevents a user from adding a new worksheet to a protected workbook is

   (A) Password

   (B) Structure

   (C) Windows

   (D) Custom Lists

4. The option that allows users of a protected worksheet to select locked cells is found in what list?

   (A) Custom Lists

   (B) Allow All Users of This Worksheet To

   (C) Protect Worksheet and Contents of Locked Cells

   (D) Password to Modify

5. On which tab and group (tab, group) of the Excel 2007 ribbon is the Share Workbook function located?

   (A) Review, Proofing

   (B) Data, Connections

   (C) View, Window

   (D) Review, Changes

6. Which one of the following features or formatting options can be performed on a shared workbook?

   (A) Charts

   (B) Macros

   (C) Cell formatting

   (D) Tables

7. What primary element is used to protect a workbook at the file level?

   (A) Password

   (B) Permissions

   (C) Custom Lists

   (D) Protect Worksheet and Contents of Locked Cells

8. Which of the file formats available in Excel 2007 saves a workbook file in an XML framework? (Choose all that apply.)

   (A) Excel Workbook

   (B) Excel Macro-Enabled Workbook

   (C) Excel Binary Workbook

   (D) Single File Web Page

9. What print option should be used to print a selected range of cells from a worksheet in an Excel 2007 workbook that has not been designated as a print area?

   (A) Active Sheet

   (B) Entire Workbook

   (C) Table

   (D) Selection

10. If you want to print all the data in an Excel 2007 workbook, you would choose the Entire Workbook option in the Print What section of the Print dialog box, along with what other setting?

    (A) Collate

    (B) Pages (to specify all of the pages in the workbook)

    (C) Ignore Print Areas

    (D) Selection

Answers to Review Questions

1. **The best answers are A, B, and D.** The Track Changes dialog box enables you to set criteria including who makes the changes, when the changes were made, and in which part of the workbook the changes were made to determine which changes are tracked. Because no Why option is available, answer C is incorrect.

2. **The best answer is D.** Although a worksheet is protected, there might be changes you want to allow users to perform. These types of changes you want to allow are indicated in the Allow All Users of the Workbook To section of the Protect Sheet dialog box. The Who setting is a part of the Track Changes function, so answer A is incorrect. Both the Permissions option and the Ranges Unlocked by a Password When the Sheet Is Protected are associated with the Allow Users to Edit Ranges function, which requires a password, so Answers B and C are incorrect.

3. **The best answer is B.** The structure level option prevents users from changing the structure of the worksheets in a protected workbook, including changing the order of the worksheets and adding or deleting worksheets. The use of a password allows users only to gain access to a workbook, so answer A is incorrect. The Windows level option prevents users only from moving or resizing Excel 2007 windows, so Answer C is incorrect. Custom lists are used primarily with sorts and filters, so Answer D is incorrect.

4. **The best answer is B.** On the Protect Sheet dialog box, you can indicate which functions or formatting you want to allow users to perform on a protected worksheet in the Allow All Users of This Worksheet To area. Custom lists are primarily associated with sorts and filters, so Answer A is incorrect. Protect Worksheet and Contents of Locked Cells is a setting option on the Protect Sheet dialog box that acts like an umbrella protecting anything that is not exempted in the Allow All Users of the Worksheet To area, so Answer C is incorrect. The Password to Modify setting is an option on the Save As General Options, so Answer D is incorrect.

5. **The best answer is D.** The Share Workbook function is located on the Review tab in the Changes group and is used to share a workbook with other users on a network. The Proofing group of the Review tab includes features like the Spelling Checker and Research, so Answer A is incorrect. The Connections group on the Data tab is used to establish links between files and external data sources, so Answer B is incorrect. The Window group of the View tab controls the visual makeup and structure of the active window, so Answer C is incorrect.

6. **The best answer is C.** Unless specifically otherwise allowed, only basic cell formatting can be performed on a shared workbook. Charts, macros, and tables cannot be added to or modified in a shared workbook, so Answers A, B, and D are incorrect.

7. **The best answer is A.** Yes, beware the obvious answers, because sometimes they are correct. At the file level, a password is the primary protection element. File permissions restrict the action that can be taken by a user on an open file, so Answer B is incorrect. Custom lists are primarily used with sorts and filters, so Answer C is incorrect. The Protect Worksheet feature doesn't protect the entire workbook and especially not at the file level, so Answer D is incorrect.

8. **The best answers are A, B, and C.** The default file format for an Excel 2007 worksheet is the Office Open XML format. The Macro-Enabled Workbook format and the Binary Workbook format both use an XML format as well. The Single File Web Page format uses a MIME-encapsulated HTML format, so Answer D is incorrect.

9. **The best answer is D.** The Selection option prints only whatever cells are selected in an Excel 2007 worksheet. The Active Sheet option prints the entirety of currently selected worksheet(s), but if print areas are designated, the data printed is limited to the print areas, so Answer A is incorrect. The Entire Workbook option prints, as its name suggests, the entirety of the active workbook but, if print areas are designated, the data printed is limited to the print areas, so Answer B is incorrect. If a worksheet contains a table, the Table option prints only the table selected, so Answer C is incorrect.

10. **The best answer is C.** Unless the print area boundaries are ignored, only the print areas are printed on the Active Sheet or Entire Workbook selections. Activating the Ignore Print Areas option allows all the data in the workbook to print. Collate is a printer command that instructs the printer that when printing multiple copies of a workbook to print the pages as a set, so Answer A is incorrect. The Pages option sets a range of page numbers you want to print, so Answer B is incorrect. The Selection option prints only a range of cells currently selected, so Answer D is incorrect.

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