



WHAT'S NEW IN EXCEL 2003?

CHAPTER 5



CHAPTER 5 SUMMARY

Advanced Lists

SharePoint Services

Improved Statistical Functions

XML Support

Smart Documents

Document Work Spaces

Information Rights Management

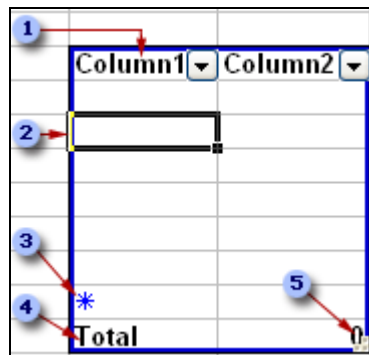
Compare Workbooks Side-By-Side

Other New Features

ADVANCED LISTS

In Microsoft Office Excel 2003, you can create lists in your worksheet to group and act upon related data. You can create a list on existing data or create a list from an empty range. When you specify a range as a list, you can easily manage and analyze the data independent of other data outside of the list. Additionally, information contained within a list can be shared with others through integration with Microsoft Windows SharePoint Services.

A new user interface and a corresponding set of functionality is exposed for ranges that are designated as a list.



1 Every column in the list has AutoFilter enabled by default in the header row which allows you to quickly filter or sort your data.

2 The dark blue list border clearly outlines the range of cells that compose your list.

3 The row in the list frame that contains an asterisk is called the insert row. Typing information in this row will automatically add data to the list.

4 A total row can be added to your list. When you click on a cell within the total row, you can pick from a drop-down list of aggregate functions.

5 You can modify the size of your list by dragging the resize handle found on the bottom right corner of the list border.

SHAREPOINT SERVICES

Excel lists allow you to collaborate the information contained within a list with seamless integration with Windows SharePoint Services. You can create a SharePoint list based on your Excel list on a SharePoint site by publishing the list. If you choose to link the list to the SharePoint site, any changes you make to the list in Excel will be reflected on the SharePoint site when you synchronize the list.

You can also use Excel to edit existing Windows SharePoint Services lists. You can modify the list offline and then synchronize your changes later to update the SharePoint list.

As an organization creates and collects information, people spend increasing amounts of time searching, organizing, and managing that information. SharePoint Portal Server provides the ability to create corporate Web portals with search functions, document management features, and collaboration options. It is integrated with commonly used tools such as Windows Explorer, Office applications, and browsers. Web portals are becoming a popular means of aggregating information from many different sources into one convenient place. SharePoint Portal Server provides an way to create these corporate Web portals. The Dashboard Site amounts to a “Portal in a Box”. The dashboard site offers a centralized access point for finding and managing information. By using a browser to view the dashboard site, users can perform document management tasks and find information. The dashboard site allows users to:

- Browse through information by categories.
- Search for information.
- Subscribe to new or changing information.
- Check documents in and out.
- Review a document’s version history.
- Approve documents for publication.
- Publish documents.

The dashboard site can provide access to information stored both inside and outside your organization, allowing users to find and share documents regardless of location or format. In addition, you can customize the home page of the dashboard site to display organizational news and other important information. The dashboard site uses Microsoft Digital Dashboard technology to organize and display information. A digital dashboard consists of reusable, customizable Web Parts that can



present information from a wide variety of sources, including Office documents and Web sites. You can add or remove Web Parts to customize the dashboard site for your organization.

In addition to providing a default, organization-wide dashboard site, you can allow users to create customized “personal” dashboards to organize and present information that is especially relevant to them, such as project- or workgroup-specific information. Users can add content to dashboards by creating Web Parts directly from Office XP or by importing Web Parts from a catalog. A sample of the portal is shown to the right.

IMPROVED STATISTICAL FUNCTIONS

Many CPAs deal in statistics, especially auditors. Excel 2003 includes improvements to many statistical functions. For example, rounding results, and precision have been enhanced. Presented below is a list of the functions that have been enhanced:

BINOMDIST	CHIINV	CONFIDENCE	CRITBINOM	DSTDEV
DSTDEVP	DVAR	DVARP	FINV	FORECAST
GAMMAINV	GROWTH	HYPGEOMDIST	INTERCEPT	LINEST
LOGEST	LOGINV	LOGNORMDIST	NEGBINOMDIST	NORMDIST
NORMINV	NORMSDIST	NORMSINV	PEARSON	POISSON
RAND	RSQ	SLOPE	STDEV	STDEVA
STDEVP	STDEVPA	STEYX	TINV	TREND
VAR	VARA	VARP	VARPA	ZTEST

XML SUPPORT

Industry-standard XML support in Microsoft Office Word 2003, Microsoft Office Excel 2003, and Microsoft Office Access 2003 improves the process of accessing and capturing information between PCs and back-end systems, unlocking information, and allowing for the creation of integrated business solutions across the organization and between business partners. With XML support in Excel, your data can be exposed to external processes, in a business-centric XML vocabulary. For example, XML enables you to organize and work with workbooks and data in ways that were previously impossible or at least, very difficult. By using your XML schemas, you can identify and extract specific pieces of business data from ordinary business documents. You can attach a custom XML schema to any workbook. Then, you use the **XML Source** task pane to map cells to elements of the schema. Once you have mapped the XML elements to your worksheet, you can seamlessly import and export XML data into and out of the mapped cells.

SMART DOCUMENTS

Smart documents are documents that are programmed to extend the functionality of your workbook by dynamically responding to the context of your actions. Several types of workbooks, such as forms and templates, work well as smart documents. In other words, smart

documents work especially well for workbooks that are part of a process. For example, your company may have a process for filling out annual employee expense forms, and you may already use an Microsoft Office Excel 2003 template for this purpose. If that template is turned into a smart document, it can be connected to a database that automatically fills in some of the required information, such as your name, employee number, manager's name, and so on. When you complete the expense report, the smart document can display a button that allows you to send it on to the next step in the process. Because the smart document knows who your manager is, it can automatically route itself to that person. And, no matter who has it, the smart document knows where it is in the expense review process and what needs to happen next. Smart documents can help you reuse existing content. For example, accountants can use existing boilerplate templates when creating billing statements. Smart documents can also make it easier to share information. They can interact with a variety of databases and use BizTalk for tracking workflow. They can even interact with other Microsoft Office applications. For example, you can use smart documents to send e-mail messages through Microsoft Outlook, all without leaving the workbook or starting Outlook.

DOCUMENT WORKSPACES

You can use Document Workspaces to simplify the process of co-authoring, editing, and reviewing documents with others in real-time through Microsoft Office Word 2003, Microsoft Office Excel 2003, Microsoft Office PowerPoint 2003, or Microsoft Office Visio 2003. A Document Workspace site is a Microsoft Windows SharePoint Services site that is centered around one or more documents. People can easily work together on the document—either by working directly on the Document Workspace copy or by working on their own copy, which they can update periodically with changes that have been saved to the copy on the Document Workspace site.

Typically, you create a Document Workspace when you use e-mail to send a document as a shared attachment. As the sender of the shared attachment, you become the administrator of the Document Workspace, and all the recipients become members of the Document Workspace, where they are granted permission to contribute to the site. Another common way to create a Document Workspace is to use the **Shared Workspace** task pane (**Tools** menu) in a Microsoft Office 2003 program.

When you use Word, Excel, PowerPoint, or Visio to open a local copy of the document on which the Document Workspace is based, the Office program periodically gets updates from the Document Workspace and makes them available to you. If the changes to the workspace copy conflict with changes you've made to your copy, you can choose which copy to keep. When you are finished editing your copy, you can save your changes to the Document Workspace, where they are available for other members to incorporate into their copy of the document.

INFORMATION RIGHTS MANAGEMENT

Today, sensitive information can only be controlled by limiting access to the networks or computers where the information is stored. Once access is given to users, however, there are no restrictions on what can be done with the content or to whom it can be sent. This distribution of

content easily allows sensitive information to reach people who were never intended to receive it. Microsoft Office 2003 offers a new feature, Information Rights Management (IRM), which helps you prevent sensitive information from getting into the hands of the wrong people, whether by accident or carelessness.

To use this functionality, use the **Permission** dialog box (**File | Permission | Do Not Distribute** or **Permission** on the **Standard** Toolbar) to give users Read and Change access, as well as to set expiration dates for content. You can remove restricted permission from a document, workbook, or presentation by simply clicking **Unrestricted Access** on the **Permission** submenu or by clicking **Permission** again on the **Standard** toolbar.

Additionally, administrators for companies can create permission policies that are available in Microsoft Office Word 2003, Microsoft Office Excel 2003, and Microsoft Office PowerPoint 2003 on the **Permission** submenu and define who can access information and what level of editing or Office capabilities users have for a document, workbook, or presentation. Users who receive content with restricted permission simply need to open the document, workbook, or presentation just as they would with content that doesn't have restricted permission. If users don't have Office 2003 or later installed on their computer, they can download a program that allows them to view this content.

Note You can create content with restricted permission using Information Rights Management only in Microsoft Office Professional Edition 2003, Microsoft Office Word 2003, Microsoft Office Excel 2003, and Microsoft Office PowerPoint 2003.

COMPARE WORKBOOKS SIDE BY SIDE

Using one workbook to view changes made by multiple users can be difficult, but a new approach to comparing workbooks is now available—comparing workbooks side by side. Comparing workbooks side by side (using the **Compare Side by Side with** command on the **Window** menu) allows you to see the differences between two workbooks more easily, without having to merge all changes into one workbook. You can scroll through both workbooks at the same time to identify differences between the two workbooks.

OTHER NEW FEATURES

New look for Office Microsoft Office 2003 has a new look that Microsoft describes as “open and energetic”. Additionally, new and improved task panes are available to you. New task panes include Getting Started, Help, Search Results, Shared Workspace, Document Updates, and Research.

Tablet PC support On a Tablet PC, you can quickly provide input using your own handwriting directly into Office documents as you would using a pen and a printout. Additionally, you can now view task panes horizontally to help you do your work on the Tablet PC the way you want to do your work.

Research task pane The new **Research** task pane offers a wide variety of reference information and expanded resources if you have an Internet connection. You can conduct research on topics using an encyclopedia, Web search, or by accessing third-party content.

Microsoft Office Online Microsoft claims that Office Online is better integrated in all Microsoft Office programs so that you can take full advantage of what the site has to offer while you work. You can visit Microsoft Office Online directly from within your Web browser or use the links provided in various task panes and menus in your Office program to access articles, tips, clip art, templates, online training, downloads, and services to enhance how you work with Office programs. The site is updated regularly with new content based on direct feedback and specific requests from you and others who use Office.

Improving Quality Microsoft claims that they have improved the quality, reliability, and performance of Microsoft software. The Customer Experience Improvement Program has allowed Microsoft to collect information about your hardware configuration and how you use Microsoft Office programs and services to identify trends and usage patterns. Participation has been and still is optional, and data collection is completely anonymous. Error reporting and error messages have been improved so that you are provided with the easiest approach to reporting errors and the most helpful information about alerts at the time you encounter a problem. Finally, with an Internet connection, you can give Microsoft customer feedback about an Office program, help content, or Microsoft Office Online content.



