

Introduction

This document describes how to use the CAP workbook with Excel 2007. It applies to version 6b of the workbook.

Be sure to use the new version 6b of the CAP workbook when using Excel 2007!

Only the new version 6b contains the modifications described below (in section #3).

The operation of the CAP workbook using Excel 2007 is similar to using Excel 2003; however, there are some differences that are important to note. These differences are described in the following four sections (click on the link to go to the section):

1. [Security Settings](#)
2. [Saving the CAP Workbook](#)
3. [Workbook Changes to Accommodate Excel 2007](#). The changes described in this section were made to accommodate Excel 2007; however, they will also be experienced when using Excel 2003.
4. [Excel 2007 Menus and Toolbars](#)

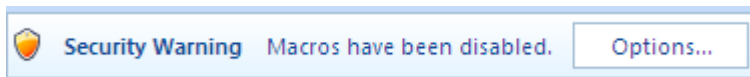
For questions about these changes, please contact Warren Lockwood at wlockwood@tnc.org.

1. Security Settings

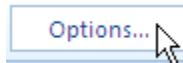
For the CAP workbook to operate, macros must be enabled. There are two Macro Security Settings in Excel 2007 that must be set appropriately for using the workbook:

1. Macro Setting: “Disable all macros with notification.”
2. Message Bar: “Show the Message Bar in all applications when content has been blocked.”

Typically, these are the default settings. When you open the CAP workbook, if the following Message Bar appears below the ribbon...



...the security settings are appropriate and you will be able to enable the macros. To enable the macros, click the Options... button in the Message Bar.

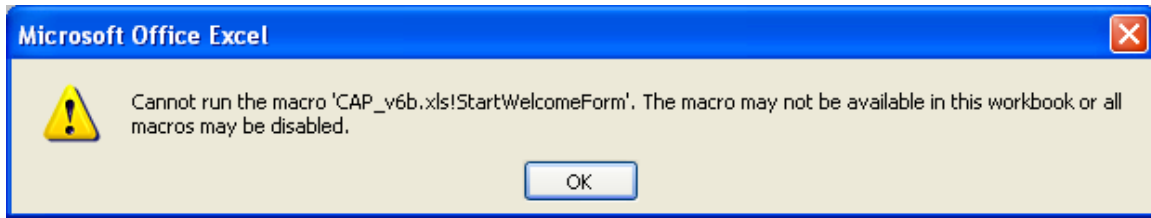


A form will appear. Select the option “Enable this content” and click OK.




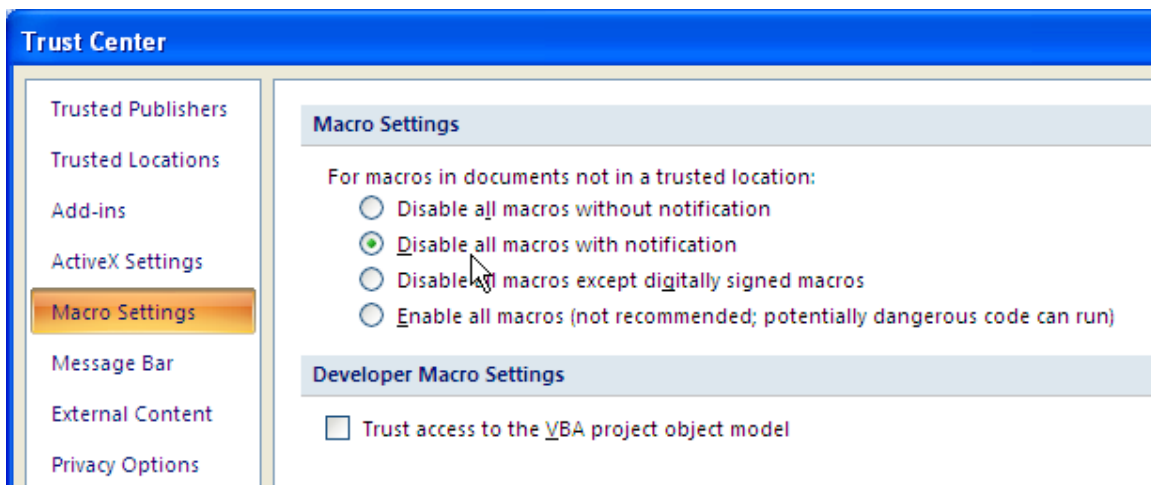
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If the Security Warning Message Bar does not appear and you see a message such as the following when you click one of the buttons in the workbook...

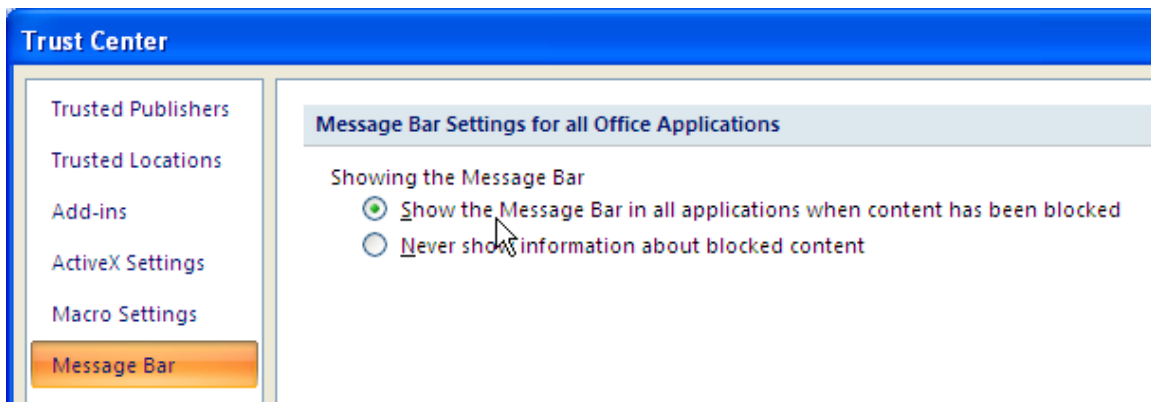


...then you will need to change the macro security settings.

To change the macro security settings, click the Microsoft Office button , and then click Excel Options. In the Trust Center category, click the Trust Center Settings button, and then click the Macro Settings category. Select the “Disable all macros with notification” option and click OK.

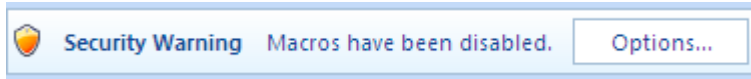


Then click the Message Bar category. Select the first option and click OK.



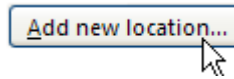
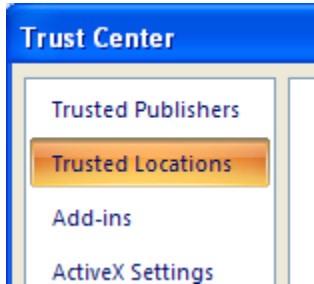
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Note! If you want to avoid seeing the Security Warning...



...every time you open the CAP workbook, store the workbook files in a “Trusted Location”.


When at the Trust Center (above), select ‘Trusted Locations’







...and then click the ‘Add new location...’ button.

From here you can define a ‘trusted’ folder from which you can open CAP workbooks without getting the Security Warning.

2. Saving the CAP Workbook

To save the workbook, click the Microsoft Office button , and then **Save As**. (Keyboard shortcut: Press ALT, F, A to open the **Save As** dialog box.) If you want to rename the file, in the **File name** box, type a new name for the file.

Excel 2007 file formats:

Name	Size	Type
 CAP_v6b_demo.xls	10,286 KB	Microsoft Office Excel 97-2003 Worksheet
 CAP_v6b_demo.xlsm	4,727 KB	Microsoft Office Excel Macro-Enabled Worksheet
 CAP_v6b_demo.xlsb	3,769 KB	Microsoft Office Excel Binary Worksheet
 CAP_v6b_pack_v6b_data1.xls	230 KB	Microsoft Office Excel 97-2003 Worksheet

The first three files above are CAP workbooks. The fourth file is a data pack.

Workbooks can be saved in any of three file formats:

1. **Excel 97-2003 Workbook (.xls)**: Can be opened by all Excel versions. (Binary format)
2. **Excel Macro-Enabled Workbook (.xlsm)**: The “standard” Excel 2007 file format for workbooks with macros. (XML format)
3. **Excel Binary Workbook (.xlsb)**: The “binary” Excel 2007 file format for workbooks with macros. (Binary format)
 - Pros 2 & 3: The file size is significantly smaller. The file saves quickly.
 - Workbooks in these formats are now convertible to the .xls format by Excel 2007 even when not in the compatibility mode.
 - Cons 2 & 3: Workbooks in these formats cannot be read by Excel 2003.
 - Cannot be converted by the Excel 2003 add-in.

Note! *Don't save a CAP workbook in the .xlsx format!*

Data packs: With data packs, you don't need to worry about the file format!

Data packs that are created by the CAP workbook are saved automatically in the

Excel 97-2003 Workbook (.xls) file format, regardless of the file format of the CAP workbook.

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3. Workbook Changes to Accommodate Excel 2007

Prior versions of the CAP workbook work with all versions of Excel including Excel 2007; however, there are significant differences in Excel 2007 that have made it worthwhile to make some changes to the workbook. These changes are effective in the workbook currently available on ConserveOnline.

The changes are because Excel 2007 no longer employs “toolbars” in the same manner as prior versions. They are summarized in the below table:

Go to...	Toolbar	Change	Affects Excel 2003?
A	CAP Toolbar	For Excel 2007, toolbar no longer can be docked on the right side of the screen.	No
		Toolbar can now be accessed with right-click. Toolbar can now be cleared from screen.	Yes
B	Target Entry in Viability	Toolbar is replaced with new entry form.	Yes
	Category Entry in Viability	Toolbar is replaced with the existing entry form for key attributes and categories.	Yes
C	Target Entry and Stress Entry in Stress/Source	Toolbars are replaced with new entry form.	Yes
D	CAP Help Toolbar	Removed. (This was a toolbar embedded in the instructions to explain the functions of the CAP Toolbar.)	Yes
E	Size Toolbar	For Excel 2007, toolbar no longer can “float” on the screen.	No

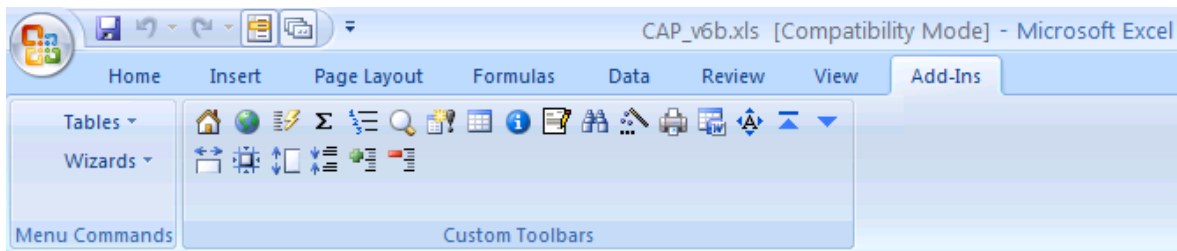
To learn more about the above changes, read the next section.

A. CAP Toolbar

The CAP Toolbar is the set of buttons that users have seen docked along the right side of the screen.



In Excel 2007, the placement of this toolbar is moved to the “Add-Ins” tab:

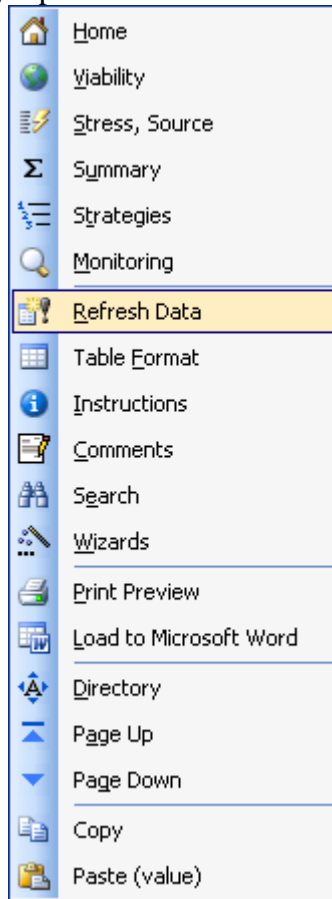


Users can click the buttons of the ‘Add-Ins’ toolbar in the same manner as the old toolbar.

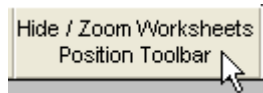
The Excel 2007 placement of the toolbar is not quite as accessible as with Excel 2003. To maintain easy accessibility to this toolbar regardless of whether you are using Excel 2003 or 2007, the toolbar is now available with a right-click of the mouse.

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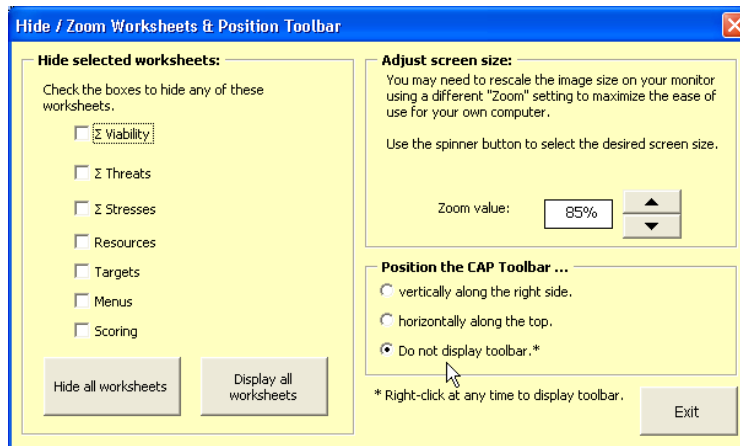
Right-click now brings up the CAP toolbar as a shortcut menu:



Excel 2003 users: If you decide that the new right-click access is all you need, you can now clear the toolbar from the right side of the screen. Click the 'Hide / Zoom Worksheets' button found at the Home worksheet:



A form will appear. Click the 'Do not display toolbar.' option in the lower right of the form to hide the toolbar.

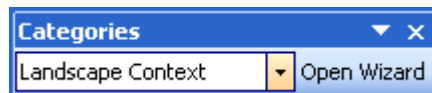


B. Target and Category Toolbars in the Viability Worksheet

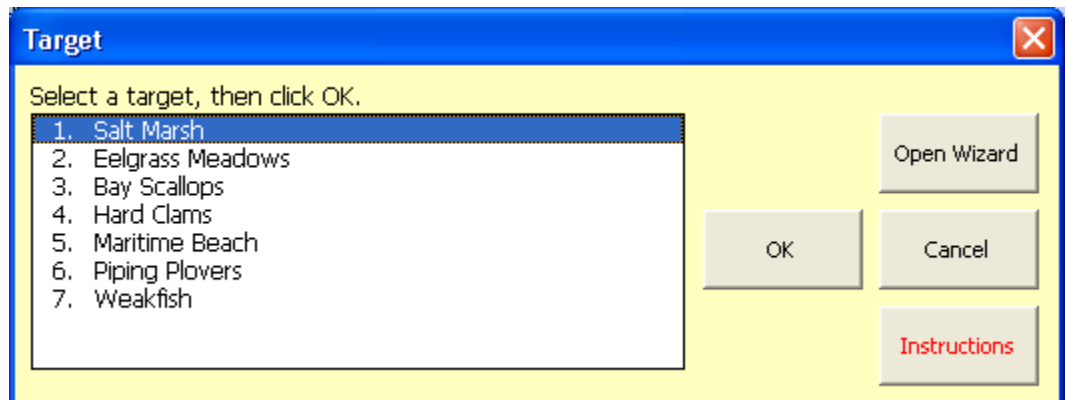
In the past, users could enter targets in the Viability worksheet with the following toolbar:



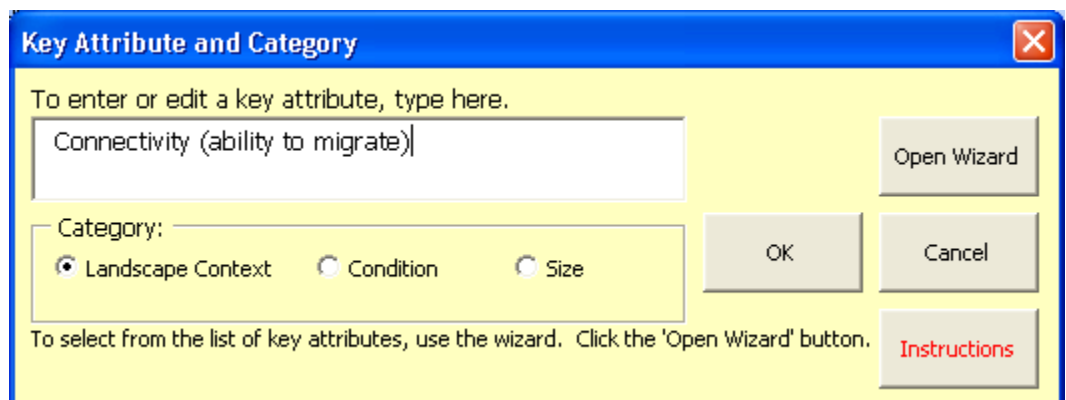
...and categories with this toolbar:



The targets toolbar has been replaced with the following form, which can be used in all versions of Excel:



...and categories will use the existing attributes toolbar:



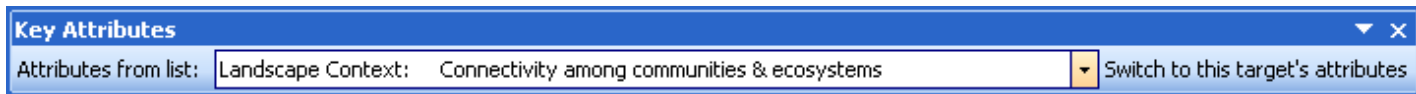
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C. Target and Stress (altered key attributes) Toolbars in the Stress/Source Worksheet

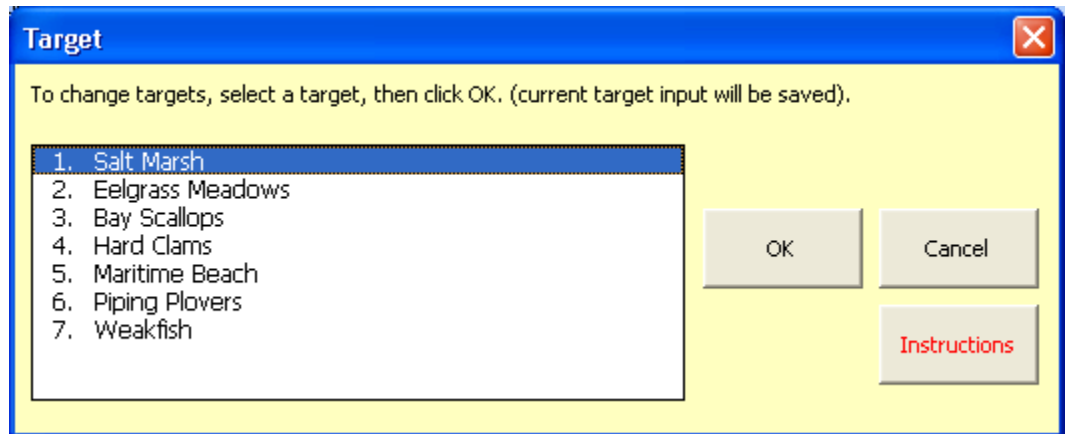
The changes to the Stress/Source toolbars are similar to those in the Viability worksheet. In the past, users could enter targets in the Stress/Source worksheet with the following toolbar:



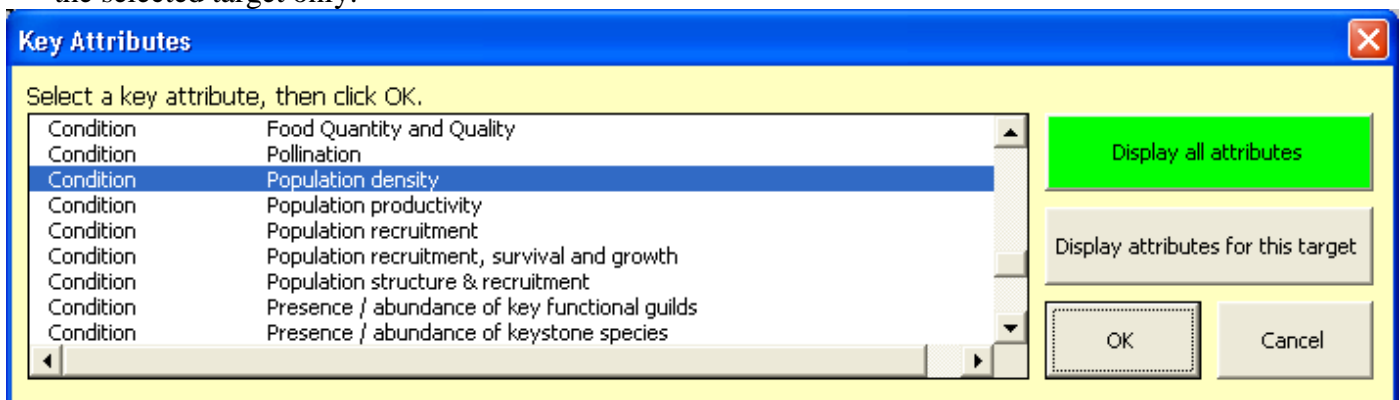
...and stresses (altered key attributes) with this toolbar:



The targets toolbar has been replaced with the following form, which can be used in all versions of Excel:



...and users can use the following new toolbar to enter key attributes for the stresses. Users can use the two buttons at the right to switch between all key attributes and attributes for the selected target only:



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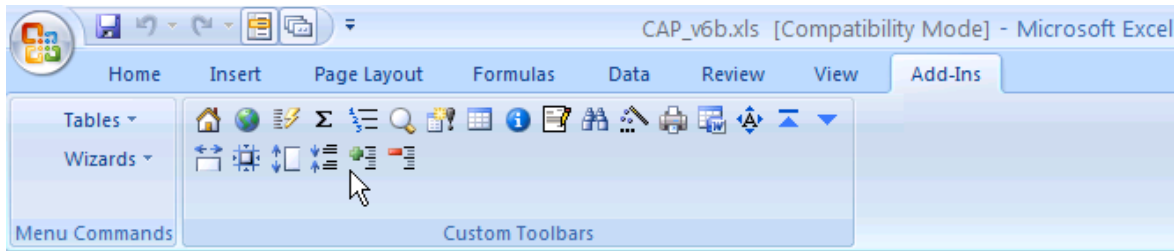
D. CAP Help Toolbar

Within the Instructions was embedded the following little-used toolbar. It described what each selected button did; the explanation was displayed at the right. It has been removed.



E. Size Toolbar

For Excel 2007 users, the **Size toolbar** appears automatically in the 'Add-Ins' tab.



The Size Toolbar allows you to change the width of columns and the height of rows.

	Increases column width for the selected column or columns.*
	Decreases column width for the selected column or columns.*
	Increases row height for the selected row or rows.**
	Decreases row height for the selected row or rows.**
	AutoFit row heights. Affects all rows in the displayed table.
	Uniform row heights. Affects all rows in the displayed table.

*Multiple columns may be changed if the columns are all of the same width.

- If columns are different widths, then select only one column at a time.

**Similarly, multiple rows may be changed if the rows are all of the same height.

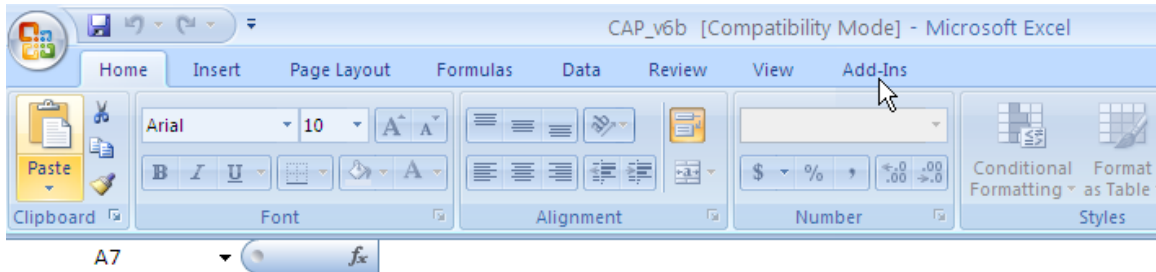
- If rows are different heights, then either:
 1. Select only one row at a time, or
 2. First click the **Uniform row heights** button, then click the **Increase row height** or **Decrease row height** button to resize multiple row heights.

For more on how Excel 2007 displays menus and toolbars, read the next section.

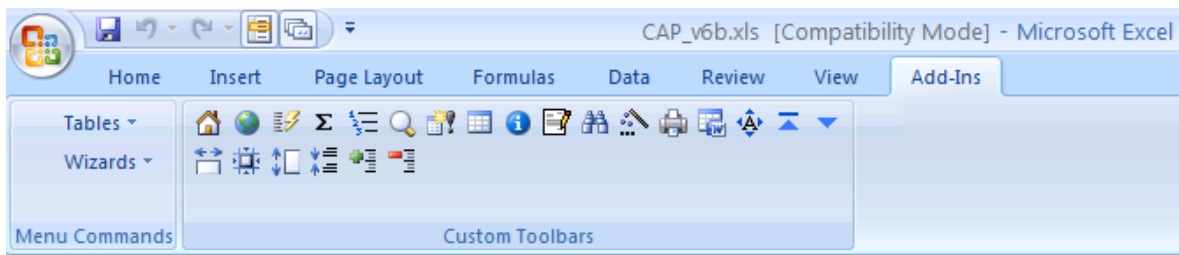
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4. Excel 2007 Menus and Toolbars

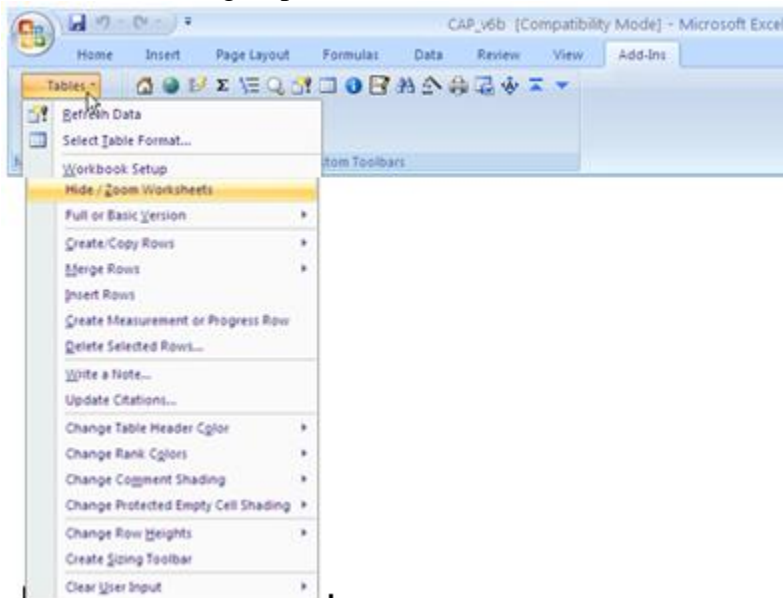
Excel 2007 employs a “ribbon” within which the CAP workbook menus and toolbar are found. When the CAP workbook is first opened, the ribbon may look like this:



Note in the top row that the file is in [Compatibility Mode]. To view the toolbar and the custom menu options, click the Add-Ins tab.




With the Add-Ins tab selected, the custom menus – Tables and Wizards – are displayed in the Menu Commands group, and the CAP Toolbar and Size Toolbar are visible in the Custom Toolbars group. Click Tables to view the Tables menu options.

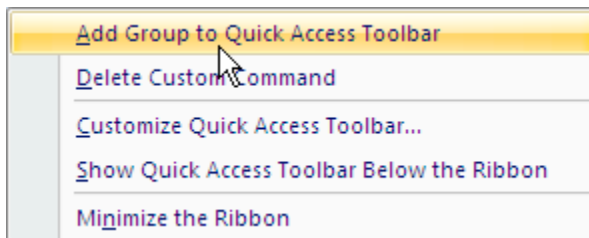



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To access the custom menus without worrying about navigating the new ribbon, you may prefer to use the keyboard shortcuts.

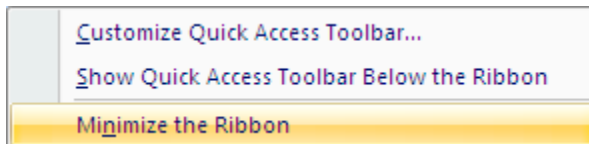
- **Type Alt – X, A to open the Tables menu.**
- **Type Alt – X, S to open the Wizards menu.**

To access the custom menus and toolbars without displaying the ribbon, use the Quick Access Toolbar (QAT). When empty, it looks like this:  and can be placed either above or below the ribbon (right-click the QAT to position it.) Right click the Menu Commands group, and select “Add Group to Quick Access Toolbar.”



Do the same with the Custom Toolbars group. Two icons will be added to the QAT that represents the Menu Commands and the Custom Toolbars: 

To hide the ribbon, right click in the top row of the ribbon, and select the last option:



This will maximize the screen area for the workbook and allow access to the custom menus and toolbars via the icons in the Quick Access Toolbar.

