New Features in Excel 2007

BY BILL JELEN

During my Power Excel seminars, I always poll the audience to see how many have upgraded to Excel 2007. As of the beginning of 2008, about 12% of the typical audience has the new version. With the December 2007 release of Service Pack 1 and several *Fortune* 50

companies making the switch to Excel 2007, however, more employers will be using it soon. In this month's column, I'll take a look at some great new features in Excel 2007.

The Old AutoFilter Becomes Filter

Previous versions of Excel offered the AutoFilter command. The improved feature in Excel 2007 is simply called Filter. Select one cell in your data set, choose Data, Filter. Excel will add a drop-down arrow to each heading cell. As before, you can filter the data set by choosing any value from the Filter drop-down. But Excel 2007 adds several new features:

◆ You can select multiple items from the drop-down. You are no longer limited to two selections from the list. You can now check-mark as many customers as you need.

◆ The drop-down for a column of dates offers a hierarchical view where you can easily filter daily dates by year or month (Figure 1). You can also choose virtual periods, including this quarter, last month, next week, or year to date.
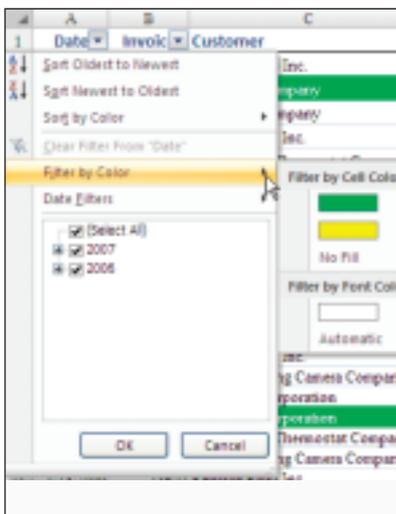

Figure 1

◆ The drop-down for a numeric column offers new options, such as filtering to values that are above average or in the bottom 5%.

◆ You can now filter by color. Ever use a worksheet where someone marked all the important records in red? You can now filter based on the cell background color or the font color.

◆ Once a column has been filtered, hover over the heading for a tooltip detailing the filters that have been applied.

Removing Duplicates

A common situation is the need to produce a list of unique values from a data set. For example, you might need to produce a list of unique customers from an invoice register. While earlier versions of Excel required the arcane Advanced Filter or a pivot table, Excel 2007 now offers the Remove Duplicates command. The icon to open the Remove Duplicates dialog is found on the Data tab of the ribbon. You can choose one or more fields. The dialog shown in Figure 2 will keep one of every combination of customer and product from the data set.
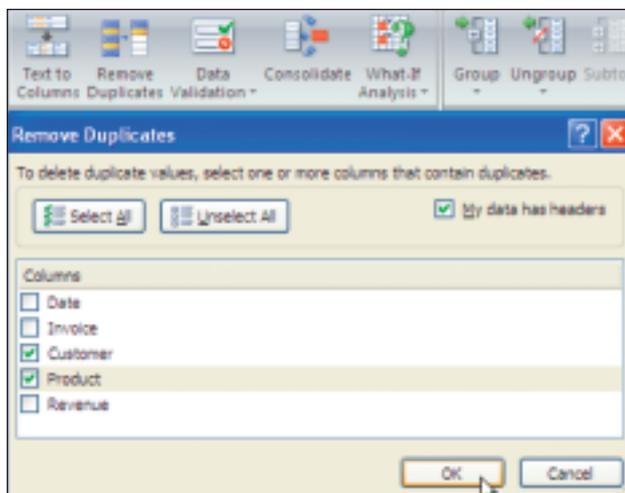
Be careful to use Remove Dupli-

Figure 2

Figure 3

cates on a copy of your original data. The command eliminates duplicates by deleting records. It is a bit alarming to watch 10,000 records be reduced to a few dozen records without any warning. Luckily, the Remove Duplicates command will work with Undo.

SUMIF with Multiple Conditions

For a decade, SUMIF and COUNTIF functions have allowed you to conditionally sum or count based on a single condition. You could write a formula to sum revenue for product R109 or for a particular customer. But SUMIF would fail if you needed to find revenue for sales of a particular product to a particular customer. To solve this, you were stuck with SUMPRODUCT or the confusing Ctrl+Shift+Enter formulas. Excel 2007 adds plural versions of SUMIF, COUNTIF, and AVERAGEIF. When you use SUMIFS, you specify a range

to sum and then enter up to 50 argument pairs. For example, you could ask for SUMIFS to total revenue from E2:E1000 when the products in D2:D1000 are equal to "R109" and the customers in C2:C1000 are equal to customer "XYZ." This is a big improvement over the limited SUMIF function.

Visualizing Data

Many nonfinancial managers react with a glazed stare when confronted with a table of numbers. Excel 2007 offers three new data visualizations that allow the reader to spot trends in the data. The table in Figure 3 shows samples of each visualization. In Column H, the Data Bars provide tiny, in-cell bar charts. The largest numbers get the largest swatch of color, while the smallest numbers get the smallest swatch of color. In Column I, a Color Scale assigns each cell a color from a continuum. In the fig-

ure, colors range from yellow for the smallest to green for the largest. Other built-in color schemes range from red to green, blue to red, or you can invent any two- or three-color gradient. In Column J, each number is assigned an icon. Excel offers 17 different icons. Many use a traffic light pattern, but some are more inventive, such as tiny cell-phone power bars.

Excel 2007 offers 25 amazing improvements over previous versions. While the larger grid (1.1 million rows × 16,000 columns) and the new ribbon interface garner the most attention, the features discussed here will provide greater efficiency with Excel. ■

Bill Jelen is the host of MrExcel.com. Download a free preview of his latest book from www.MrExcel.com/preview IMA.html. Send questions for future articles to IMA@MrExcel.com.