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Introducing the Excel Presentation Kit

Thanks for purchasing the Excel Presentation Kit, a tool I designed to enable Excel 2007 users to create persuasive, data-driven presentations from within the comfortable confines of Excel.

In this chapter, I'll discuss my goals for the Excel Presentation Kit, provide an overview of how the Excel Presentation Kit works, describe the new features in Excel 2007, lay out what I assumed about my typical reader, and refer you to other books to flesh out the instructions found in this manual.

Goal of the Excel Presentation Kit

My goal in creating the Excel Presentation Kit is to enable you to deliver effective business presentations without leaving Excel and without fumbling through your notes to remember how to create a particular workbook configuration.

PowerPoint is a wonderful tool for text- and graphics-based presentations. And, yes, you can even embed Excel workbooks in a PowerPoint slide, but if you want to work with the data you're still faced with the unenviable task of manipulating a workbook while you're sweating in front of your bosses. And their bosses.

The Excel Presentation Kit lets you to record an Excel Presentation that removes much of the uncertainty and potential slips from your work. You're working in a live Excel workbook, so you can always break away from your script, manipulate your workbook, and return to the script as if nothing happened.

How the Excel Presentation Kit Works

Excel Presentations are based on positions you record using automated routines (*macros*) that I built into the Excel Presentation Kit template. The following image represents a workbook configuration you could record as an Excel Presentation position.

	A	B	C	D
1	Year	Quarte	Month	Sales
2	2008	1	January	83166
3	2008	1	February	51105
4	2008	1	March	69168
14	2009	1	January	63836
15	2009	1	February	64427
16	2009	1	March	56468
26	2010	1	January	56960
27	2010	1	February	88008
28	2010	1	March	54054

Here's how the Excel Presentation Kit stores that position in a table on the workbook's Positions worksheet.

H	I	J	K	L	M	N
Position	Worksheet	Table	Column	Criteria1	Operator	Criteria2
Review_Quarter01	Sheet1	Table3	1			
Review_Quarter01	Sheet1	Table3	2	=1		
Review_Quarter01	Sheet1	Table3	3			
Review_Quarter01	Sheet1	Table3	4			

The basic idea is that you create and record workbook positions, arrange those positions into a script, and move through the Excel Presentation script one position at a time. Here's what a simple Excel Presentation script might look like.

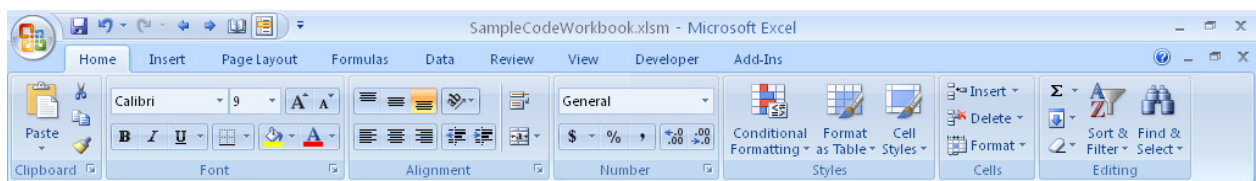
	A	B	C	D
1	Cue	Type	Position	Description
2	10	PT: Show PivotTable Position	yer_YearThenMonth	Show sales arranged by year, then month.
3	20	PT: Show PivotTable Position	yer_MonthRowYearCol	Show data in crosstab arrangement
4	30	PT: Apply Selected Items PT Filte	yer_2009Only	Filter data to show 2009 sales.
5	40	PT: Apply Selected Items PT Filte	yer_2009and2010	Add 2010 for comparison.
6	50	PT: Clear a PT Field Filter	yer_Clear2009and2010Filter	Remove the filter and show all sales data.
7	60	PT: Apply PT Conditional Format	yer_SalesBars	Add red data bars to highlight relative values.
8	70	PT: Clear All PT Conditional Form	yer_ClearSalesBars	Remove the conditional format

You can move forward and backward through your Excel Presentation, manipulate your workbook without calling the next position, and even switch to

other programs without dropping out of Slide Show mode as you must do when you're running a PowerPoint presentation.

What's New in Excel 2007

The most noticeable new aspect of Excel 2007 is the user interface. Officially named the Microsoft Office Fluent user interface, but commonly called the Ribbon, the new user interface is designed to make the capabilities of Excel, Word, and PowerPoint more discoverable for the average user.



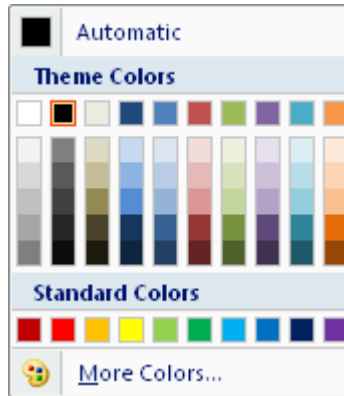
For the most part, the Ribbon meets that goal by bringing many more Excel capabilities to the top level of the user interface. Yes, it does take time to figure out where some things are. For example, you get at saving, printing, and similar features by clicking the Office Button at the top left corner of the program window.



One negative aspect of the new user interface is that users have lost the ability to create custom toolbars that you can move around the program window. You can still create custom menu groups on the Ribbon, and add buttons to the Quick Access Toolbar (found beside the Office Button), so some of the previous functionality is still there.

If you've installed an add-in, such as Solver or a third-party solution, you'll find those items by clicking the Add-Ins tab on the Ribbon.

In addition to the Ribbon, Office 2007 comes with new conditional formatting, graphics, charting, and drawing capabilities. That's right, the 56-color limit of Excel 97-2003 restricts you no longer!



Finally, Excel 2007 uses a new file format that's based on the Microsoft Open Office XML (OOXML) standard. The Excel Presentation Kit is a macro-enabled workbook template, a new file type in Excel 2007, so you must use the kit with Excel 2007 or later.

What I Assume about You, the Reader

The Excel Presentation Kit uses macros to record basic and not-so-basic Excel 2007 workbook configurations, so I assumed that the typical reader is an intermediate or advanced Excel user. That means you should know how to enter data, save files, create formulas, format cells, create charts and graphs, and sort and filter data. More advanced users will be familiar with conditional formats, PivotTables, and scenarios.

Because I assumed a fair bit of knowledge from you, the reader, I felt comfortable ending some of the procedures in Chapter 3 end with steps such as:

4. Use the controls in the dialog box to define your conditional format.

Even if you've never created a conditional format in your life, you'll be able to read the write-up in the section above the procedure to get help on what you need to do. The same is true for the other procedures in Chapter 3.

Further Reading

This documentation covers everything you need to know to build workbook positions, record those positions, and replay the recorded steps as part of an Excel

Presentation. I didn't go into detail on techniques that weren't directly related to creating recordable workbook positions, but there are lots of great books available that cover a wide range of useful Excel 2007 skills. I happen to have written several of them:

- *Microsoft Office Excel 2007 Step By Step*, from Microsoft Press
- *Microsoft Office Excel 2007 Plain & Simple*, from Microsoft Press
- *Excel 2007 Pocket Guide*, from O'Reilly Media

I also highly recommend several other books that will help you use and program Excel 2007 to meet your business needs:

- *Dashboard Reporting With Excel*, by Charley Kyd, available directly from Charley through his website at <http://www.exceluser.com>
- *RibbonX: Customizing the Office 2007 Ribbon*, by Robert Martin, Ken Puls, and Teresa Hennig
- *Excel 2007 VBA Programmer's Reference*, by John Green, Stephen Bullen, Rob Bovey, and Michael Alexander

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Creating Excel Presentation Content

A presentation is only as good as the content it contains. Once you get your data into an Excel 2007 workbook, you can apply formats, limit data using filters, and summarize your data dynamically in PivotTables.

This chapter details the procedures you'll use to create the Excel 2007 workbook elements you record as positions for an Excel Presentation.

Worksheet Tasks

Excel 2007 worksheets are the largest unit of organization within a workbook. By default, Excel workbooks come with three worksheets: Sheet1, Sheet2, and Sheet3.

You should think of a worksheet as a container for data on a given subject, such as sales, a project budget, or visitors to a facility. Attempting to combine too much data onto a single worksheet leads to confusion, so be sure to create a new worksheet whenever you want to store data on a new subject.

In this section, you will learn how to:

- Create a new worksheet.
- Rename a worksheet.
- Delete a worksheet.
- Change a worksheet's zoom level.

Creating a New Worksheet

The Excel Presentation Kit template comes with three standard worksheets and two pre-formatted worksheets named Positions and Control. You use these two to record and manage your presentation positions. If you need more than three worksheets to record your data, PivotTables, and so on, you can create more as required.

To create a new worksheet:

- On the tab bar, click the Insert Worksheet button (or press Shift+F11.)

To create a new worksheet based on a worksheet template:

1. Right-click the sheet tab of any worksheet and click Insert.
2. In the Insert dialog box, click the Spreadsheet Solutions tab.
3. Click the type of worksheet you want to add to your workbook.
4. Click OK.

Note

To find more templates online, click the Templates on Office Online button.

Renaming a Worksheet

Excel 2007 worksheets come with default names such as Sheet1, Sheet2, and Sheet3. Those names don't help you remember which worksheet contains production data for your Philadelphia factory, so you should change the worksheets' names to reflect the data they contain.

Be Careful!

The Excel Presentation Kit template comes with five worksheets: Sheet1, Sheet2, Sheet3, Positions, and Control. Renaming one or both of the Positions and Control worksheets will cause the template's macros to fail, so don't do it!

To rename a worksheet:

1. Right-click the sheet tab of the worksheet you want to rename.

2. Click Rename.
3. Type a new name for the worksheet, and press Enter.

Deleting a Worksheet

When you're done using the data on a worksheet, you can delete the worksheet quickly. Be aware, though, that you can't bring a worksheet back after you delete it.

Be Careful!

Be sure not to delete the Positions or Control worksheets. If you do, the Excel Presentation Kit's macros will fail.

To delete a worksheet:

1. Right-click the sheet tab of the worksheet you want to delete.
2. Click Delete.

Changing Worksheet Zoom Level

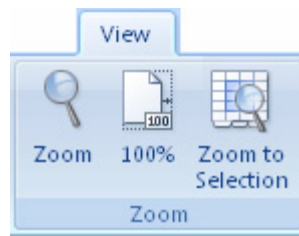
Excel 2007 is designed to be displayed on monitors at a resolution of 1024 x 768 pixels. The standard cell and font sizes make worksheet data easy to read up close, but if you're a few feet from the monitor, or in the back of a conference room where someone is giving a presentation, a worksheet's contents can be very hard to read.

If you want to focus on a set of cells, or just make the worksheet's contents larger on the screen without changing the font size, you can change the worksheet's zoom level. Increasing the zoom level from the default 100% makes the worksheet's contents larger; decreasing the zoom level makes the contents smaller.

One way to control a worksheet's zoom level is by using the Zoom controls at the bottom right corner of the Excel program window.



You can also display the View tab of the Ribbon and use the controls in the Zoom group to set more precise zoom levels or zoom to a selection.



Please Note

The maximum zoom level is 400%; the minimum is 10%.

To zoom in or out of a worksheet:

- Click the Zoom In button to increase magnification by 10%.
- Click the Zoom Out button to decrease magnification by 10%.
- Drag the Zoom slider control to set a magnification level quickly.

Excel Table Tasks

Excel Tables, which are new in Excel 2007, are structured collections of data that have a defined number of columns and rows. Each table column has a column header, whether defined by you or assigned by Excel when you create the table, and the table's rows and columns can be added and deleted without getting rid of the table.

Excel Tables are excellent data sources for PivotTables, charts, and other data-drive Excel 2007 objects. Unlike regular cell ranges, objects based on Excel Tables will update their data when you add data to the table (in most cases), when you re-open the workbook after saving your changes and closing the workbook (in most other cases), or when you refresh the data from within the program (in the case of PivotTables).

In this section, you will learn how to:

- Create an Excel Table
- Display an Excel Table Total Row
- Filter an Excel Table by rule

- Filter an Excel Table by selection
- Filter a Table to display above or below average values
- Filter a Table to display the top or bottom values
- Clear an Excel Table filter

Creating an Excel Table

When you're ready to create a table based on an existing data list, be sure your list has column headings and that there is no data in the column to the left or right of your list data. If there is, Excel 2007 will include those columns in the table. Yes, you can delete those columns if they're included, but it's better to create the table correctly in the first place.

To create an Excel Table:

1. Define a data list with column headers and at least one row of data.
2. Click any cell in the list.
3. On the Home tab of the Ribbon, in the Styles group, click Format as Table.
4. Select your desired table style.
5. In the Format as Table dialog box, check the My table has headers box.
6. Click OK.

Displaying an Excel Table Total Row

If your Excel Table contains numerical data, you can summarize that data within the body of the table by displaying the table's Total Row.

	A	B	C	D
1				
2		Month ▼	Visitors ▼	
3		January	1418	
4		February	795	
5		March	806	
6		April	1283	
7		May	1986	
8		June	1027	
9		July	1099	
10		August	565	
11		September	1762	
12		October	659	
13		November	948	
14		December	1266	
15		Total	13614	
16				

When you click a cell in a table's Total Row, you can click the down arrow that appears and select which function you want to use to summarize the data in that cell's column. The formulas that appear between the None and More Functions items correspond to the SUBTOTAL function's arguments. In Excel 2007, these functions summarize the visible values only; in Excel 2003 lists, the functions summarized all values in the column.

To display the Total Row of an Excel Table:

1. Click any cell in the Excel Table.
2. If necessary, on the Ribbon, click the Design contextual tab.
3. In the Table Style Options group, check the Total Row box.

Please Note

To hide an Excel Table's Total Row, uncheck the Total Row box.

Filtering a Table by Rule

You can limit the data that appears in an Excel Table by applying a filter to one or more columns. Many filters can be stated as a rule: all values less than 100,000, all values between 100 and 200, all values greater than 50, and so on. To create a rule-based filter, click the filter arrow at the right edge of the column by which you want to filter the table, click Number Filters, and then click the type of filter you want to create.

To filter an Excel Table by rule:

1. Click any cell in the table.
2. Click the filter arrow of the column header representing the field by which you want to filter the table.
3. Point to Number Filters, and then click one of these filter options: Equals, Does Not Equal, Greater Than, Greater Than Or Equal To, Less Than, Less Than Or Equal To, or Between.
4. Specify the criteria in the dialog box that appears.
5. Click OK.

Filtering a Table by Selection

Not all data sets lend themselves to being filtered by rule. When you examine international sales data, for example, it's often most useful to select individual countries from the list of values displayed in the table column.

Please Note

This version of the Excel Presentation Kit can only record selection filters with one or two items selected.

To filter an Excel Table by selection:

1. Click any cell in the table.
2. Click the filter arrow of the column header representing the field by which you want to filter the table.

3. Uncheck the Select All check box.
4. Check the one or two boxes that represent the items you want to display.
5. Click OK.

Filtering a Table to Display Above or Below Average Values

When you examine data stored in an Excel Table, you can filter a value column to display rows where the value is either above or below average. Discovering which sales representatives have below average closing rates, for example, could help you choose who to offer selected training on that important skill.

To filter an Excel Table to display above or below average values:

1. Click any cell in the table.
2. Click the filter arrow of the column header representing the field by which you want to filter the table.
3. Point to Number Filters, and then click either Above Average or below Average.

Filtering a Table to Display the Top or Bottom Values

Successful business analysis often entails discovering your best and worst performers. You can display just the top or bottom values in an Excel Table column by creating a Top 10 filter.

To filter an Excel Table to display the top or bottom values in a table column:

1. Click any cell in the table.
2. Click the filter arrow of the column header representing the field by which you want to filter the table.
3. Point to Number Filters, and then click Top 10.
4. Use the controls in the Top 10 AutoFilter dialog box to set whether you want to show the top or bottom values, how many items to display, and whether the number you set represents the number or percentage of items to display (e.g., the top five items, or the top 5% of all items.)

5. Click OK.

Clearing an Excel Table Filter

After you've focused the data in an Excel Table using a filter, you can remove the filter to display all of the table's data rows.

To clear an Excel Table filter:

1. Click the filter arrow of a filtered Excel Table column.
2. Click "Clear Filter from Field."

Conditional Formatting Tasks

As the name implies, conditional formats change the appearance of a cell based on the cell's value. Excel 2007 comes with a set of conditional formats you can apply but, with the exception of the Icon Sets conditional format, you can bypass the pre-defined conditional format color schemes and define your own format.

When you apply a conditional format to a range of cells, be sure that every cell contains comparable data so the formats reflect the cells' relative values accurately. For example, if your worksheet contains a cell that calculates the sum of sales for a month, the value that cell contains will be much larger than the values that record daily sales. Including the total cell in the conditional format range would make the daily sales values extremely low by comparison and render the formatting irrelevant.

In this section, you will learn how to:

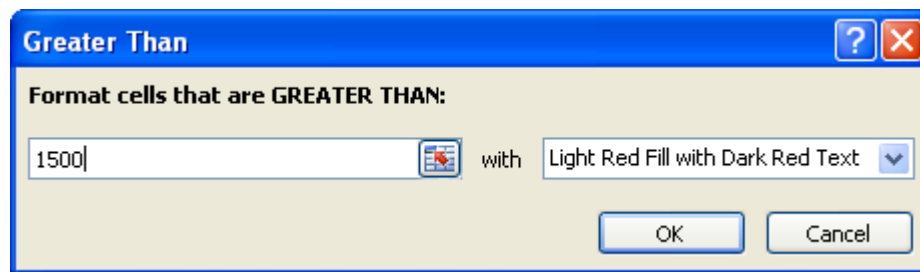
- Create a Highlight Cells conditional format.
- Create a Top 10 conditional format.
- Create a Data Bar conditional format.
- Create a Color Scale conditional format.
- Create an Icon Set conditional format.
- Clear a conditional format.

Creating a Highlight Cells Conditional Format

Highlight Cells conditional formats enable you to highlight cells that contain values which meet a given criteria. For example, you could highlight cells that contain above- or below-average values, all values greater than 100,000, and so on.

To create a Highlight Cells conditional format:

1. Select the cells to which you want to apply the format.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Highlight Cells Rules.
4. Select the type of rule you want to create.
5. Use the dialog box that appears to set the parameters of your rule.



6. Click the right field's down arrow, and either select an existing format or click Custom Format.
7. If you clicked Custom Format, use the controls in the Format Cells dialog box to define the conditional format you want the rule to apply.

Creating a Top 10 Conditional Format

The rule of thumb in many businesses is that 80% of your revenue comes from 20% of your customers. Even though that summary isn't always true, it is usually true that a small subset of customers generate the most revenue for a company. You can identify the top (or bottom) representatives of a list (months, products, customers, sales people, etc.) by applying a Top 10 conditional format to the worksheet column that contains the relevant data.

To create a Top 10 conditional format:

1. Select the cells to which you want to apply the format.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Top/Bottom Rules, and then click the type of rule you want to create.



4. In the dialog box that appears, set the number (or percentage) of items you want to be formatted.
5. Click the Format field's down arrow to select the format you want to apply, or click Custom Format to define your own.
6. Click OK.

Creating a Data Bar Conditional Format

Analyzing data often involves comparing numbers to determine their relative values. You can look at the values themselves, but Excel 2007 also enables you to create a data bar conditional format, which fills the formatted cells with color bars. The size of the bar reflects the relative size of a cell's value as compared to other values in the same range, making it easy to compare cell values visually.

Month	Visitors
January	1418
February	795
March	806
April	1283
May	1986
June	1027
July	1099
August	565
September	1762
October	659
November	948
December	1266
Total	13614

To create a Data Bar conditional format:

1. Select the cells to which you want to apply the format.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Data Bars.
4. Click the color you want to apply to the Data Bars.

Note

If you would rather make your data bars a color other than one of the six pre-defined colors, click More Rules to display the New Formatting Rule dialog box. In that dialog box, click the Bar Color list box's down arrow and use the color picker to select the color you want to apply.

Creating a Color Scale Conditional Format

Color scale conditional formats, often called "heat maps", use color to indicate where values fall relative to the highest and lowest values in a range. For example, you could use a green-to-red color scale to indicate on which day of the week a

health care answer line receives the most calls (white indicates the lower values, and red the higher).

Month	Visitors
January	1418
February	795
March	806
April	1283
May	1986
June	1027
July	1099
August	565
September	1762
October	659
November	948
December	1266
Total	13614

To create a Color Scale conditional format:













1. Select the cells to which you want to apply the format.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Color Scale.
4. Click the color scale you want to apply to your data.

Note

If you would rather apply a color scale other than one of the eight pre-defined choices, click More Rules to display the New Formatting Rule dialog box. In that dialog box, select the Format Style (two- or three-color scale), and then click the Color list boxes' down arrow to display a color picker from which to select the color you want to apply.

Creating an Icon Set Conditional Format

Scorecard-based monitoring systems, such as the Balanced Scorecard approach, have become very popular. The hallmark of such approaches is to create a dashboard that summarizes how a business is performing relative to its goals. Every relevant measure has an easily-identifiable icon next to it so the decision-maker can tell at a glance whether a factor is within the expected tolerances.

Month	Visitors
January	 1418
February	 795
March	 806
April	 1283
May	 1986
June	 1027
July	 1099
August	 565
September	 1762
October	 659
November	 948
December	 1266
Total	13614

To create an Icon Set conditional format:

1. Select the cells to which you want to apply the format.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Icon Sets.
4. Click More Rules.
5. In the New Formatting Rule dialog box, click the Icon Style list box's down arrow and select the icon set you want to use.

6. Using the controls in the Display each icon according to these rules section of the dialog box, set the values for each icon.
7. Click OK.

Please Note

You can check the Reverse Icon Order box if you want lower values to be more desirable than higher values.

Clearing Conditional Formats

Getting rid of a conditional format is even more straightforward than creating it. All you need to do is select a cell that contains the format you want to delete, and follow the directions below to get of some or all of your conditional formats.

To clear one or more conditional formats:

1. If you want to remove a conditional format from a range of cells, select those cells.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Point to Clear Rules.
4. Click the desired clearing operation.

Scenario Tasks

The majority of your business intelligence analysis work will focus on operational data you've collected. The data you capture helps you evaluate your current processes. If your job requires you to estimate future costs or revenues and present those estimates to your fellow decision-makers, you should know about scenarios.

In Excel, a scenario is an alternative set of data that Excel maintains as part of a workbook file. When you create a scenario, you can identify up to 32 cells on a worksheet and record one alternative value for each cell. You can create multiple

scenarios if you want to record more than one alternative for a cell, or if you want to define alternative values for cells on more than one worksheet.

In this section, you will learn how to:

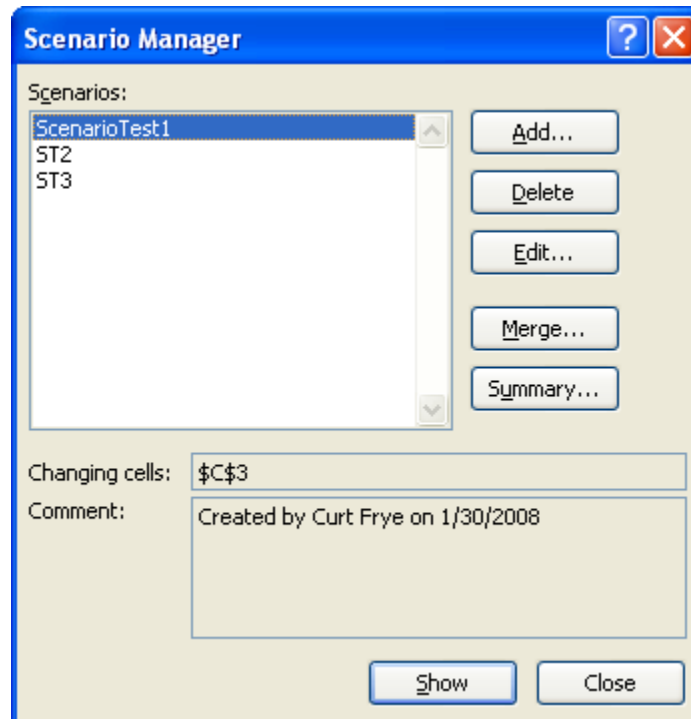
- Create a scenario.
- Edit a scenario.
- Summarize scenarios.
- Delete a scenario.

Be Careful!

Be sure to read the Scenario Gotchas sidebar at the end of this section for important information about working with scenarios.

Creating a Scenario

When you're ready to define an alternative data set for a worksheet, display the Data tab of the Ribbon and then, in the Data Tools group, click the What-If Analysis button, and click Scenario Manager to display the Scenario Manager dialog box.



From within the Scenario Manager dialog box, click the Add button to display the Add Scenario dialog box.

Add Scenario

Scenario name:

Changing cells:

C3

Ctrl+click cells to select non-adjacent changing cells.

Comment:

Created by Curt Frye on 3/14/2008

Protection

☒ Prevent changes

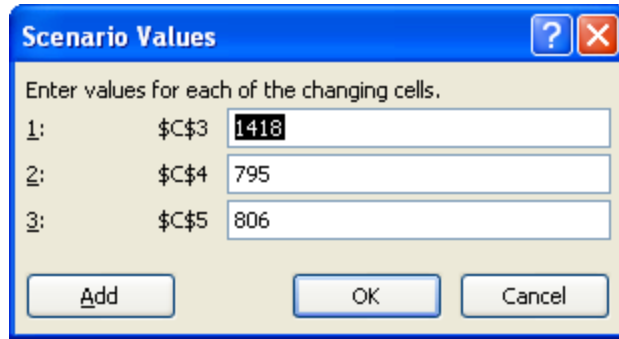
☐ Hide

OK Cancel

Type a name for the scenario, select the cells for which you want to enter alternate values, and click OK. Enter the new values in the Add Values dialog box, and click OK to record the scenario.

To create a scenario:

1. Display the worksheet that contains the cells for which you want to define an alternative data set.
2. On the Data tab of the Ribbon, in the Data Tools group, click the What-If Analysis button, and then click Scenario Manager.
3. Click Add.
4. In the Scenario Name box, type a name for the scenario.
5. Click in the Changing Cells box, and then, in the worksheet, select the cells you want to change.
6. Click OK to display the Scenario Values dialog box.



7. In the Scenario Values dialog box, type the replacement values for the cells you selected.
8. Click OK to close the Scenario Values dialog box, and click Close to close the Scenario Manager dialog box.

Editing a Scenario

If you want to change an existing scenario, perhaps to add or remove cells or to change the replacement values, you can do so quickly from within the Scenario Manager dialog box.

To edit a scenario:

1. Display the worksheet that contains the cells for which you want to define an alternative data set.
2. On the Data tab of the Ribbon, in the Data Tools group, click the What-If Analysis button, and then click Scenario Manager.
3. Click the scenario you want to edit.
4. Click Edit.
5. Use the controls in the Edit Scenario dialog box to edit your scenario's name and the cells to which it refers.
6. Click OK.
7. In the Scenario Values dialog box, type the replacement values for the cells you selected.

- Click OK to close the Scenario Values dialog box, and click Close to close the Scenario Manager dialog box.

Summarizing All Scenarios on a Worksheet

When you define multiple scenarios for a worksheet, it can be difficult to keep track of which scenarios change which data. Rather than rely on paper and pencil, you can have Excel 2007 create a Scenario Summary sheet that lists all of the scenarios, changing cells, original values, and new values for a worksheet.

The screenshot shows the Microsoft Excel 2007 interface with the 'Data' tab selected on the ribbon. The ribbon includes sections for 'Get External Data' (From Access, From Web, From Text, From Other Sources, Existing Connections), 'Connections' (Refresh All, Properties, Edit Links), and 'Sort & Filter' (Sort, Filter, Clear, Reapply, Advanced). The worksheet 'SampleCodeWorkbook.xlsm' is open, showing a grid with columns A through H and rows 1 through 16. A 'Scenario Summary' table is displayed, summarizing the values of changing cells for three scenarios: Current Values, ScenarioTest1, ST2, and ST3.

Scenario Summary				
	Current Values:	ScenarioTest1	ST2	ST3
Changing Cells:				
\$C\$3	a	c	d	a
\$C\$4	b	b	e	b
\$C\$9	a	a	a	c
\$C\$10	b	b	b	d
\$C\$11	a	a	a	e
\$C\$12	b	b	b	f

Notes: Current Values column represents values of changing cells at time Scenario Summary Report was created. Changing cells for each scenario are highlighted in gray.

Make sure your worksheet displays its original values when you create the Scenario Summary worksheet. If you have a scenario applied when you create the summary, Excel will record the replacement values as the originals and the Undo a Scenario and Undo All Scenarios on a Worksheet operations built into the Excel Presentation Kit will place incorrect data into your workbook.

To summarize all scenarios on a worksheet:

1. Display the worksheet that contains the scenarios you want to summarize.
2. On the Data tab of the Ribbon, in the Data Tools group, click the What-If Analysis button, and then click Scenario Manager.
3. Click Summary.
4. Verify that the Scenario Summary option is selected, and click OK.

Deleting a Scenario

If you've decided that you will never need to use a scenario again, you can delete it with a few mouse clicks.

To delete a scenario:

1. Display the worksheet that contains the scenario you want to delete.
2. On the Data tab of the Ribbon, in the Data Tools group, click the What-If Analysis button, and then click Scenario Manager.
3. Click the scenario you want to delete.
4. Click Delete.
5. Click Close to close the Scenario Manager dialog box.

Scenario Gotchas

Scenarios are a valuable tool when you perform what-if analysis on your data, but they do have a few drawbacks you should consider. The first potential problem is that if you save and close a workbook with one or more scenarios applied, Excel overwrites the original data with that of the scenario. You should consider creating a scenario named Normal which contains the original values in every cell changed by a scenario. Scenarios can contain a maximum of 32 changing cells, so you might need to create more than one scenario to "back up" the values of every changing cell.

You should also be aware that the only way to remove a scenario after it's been applied is to click the Undo button on the Quick Access Toolbar (or click Ctrl+Z).

The Excel Presentation Kit's routines to remove a scenario or remove all scenarios add those capabilities, but you must be certain that you've created a Scenario Summary worksheet for each worksheet for which you've defined scenarios.

As always, the best way to protect your data is to back up your Excel workbooks regularly.

PivotTable Tasks

PivotTables, which enable you to rearrange your worksheet data dynamically, are a powerful data presentation and analysis tool. In this section, you will learn how to:

- Create a PivotTable
- Pivot a PivotTable
- Filter a PivotTable
- Define PivotTable Conditional Formats

Creating a PivotTable

As the name implies, PivotTables summarize data arranged in tabular form. In Excel 2003 and earlier versions, you had to create a PivotTable from a data list.

	A	B	C	D
1	Year	Quarter	Month	Sales
2	2008	1	January	83166
3	2008	1	February	51105
4	2008	1	March	69168
5	2008	2	April	86123
6	2008	2	May	85441
7	2008	2	June	99021
8	2008	3	July	54401
9	2008	3	August	50447
10	2008	3	September	72388
11	2008	4	October	57995
12	2008	4	November	55225
13	2008	4	December	55454
14	2009	1	January	63836
15	2009	1	February	64427
16	2009	1	March	56468

Data lists are limited in that a PivotTable created from the list wouldn't display new data added to the list unless you dug into the PivotTable's settings and

changed the data source to reflect the addition. In Excel 2007, you can (and should) define your data list as an Excel Table and create your PivotTable from that.

When you add rows or columns to an Excel Table, you can update the PivotTable by clicking any cell in the PivotTable, clicking the Options contextual tab on the Ribbon, and then, in the Data group, click Refresh.

Please Note

You can still create a PivotTable from a data list in Excel 2007, but Excel Tables provide so much more functionality that there's no reason not to use them.

To create a PivotTable:

1. Click any cell in the Excel Table from which you want to create a PivotTable.
2. On the Insert tab of the Ribbon, in the Tables group, click PivotTable.
3. In the Create PivotTable dialog box, verify that the table you selected appears in the Table/Range box, and that the New Worksheet option is selected.
4. Click OK.
5. In the PivotTable Field List task pane, drag the fields from the Choose Fields to Add to Report section to the desired areas in the Drag Fields Between Areas Below section.

Pivoting a PivotTable

PivotTables enable you to define more than a single, static view of your data; they empower you to rearrange your data dynamically so you can discover important facts and trends to aid process analysis and planning.

The PivotTable in the following graphic shows data organized by month and year. In the PivotTable Field List task pane, notice that the Year field is in the Column Labels area and that the Month field is in the Row Labels area.

The screenshot shows the Microsoft Excel interface with a PivotTable named 'PivotTable2' on the 'SampleCodeWorkbook.xlsm' file. The PivotTable is located in the range D4:K17. The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report:** Year, Quarter, Month, Sales (all checked).
- Report Filter:** Year (dropdown menu).
- Row Labels:** Month (dropdown menu).
- Values:** Sum of Sales (dropdown menu).
- Defer Layout Update:** (checkbox, unchecked).
- Update:** (button).

The PivotTable data is as follows:

Sum of Sales	Column Labels	2008	2009	2010	Grand Total
January	83,166.00	63,836.00	56,960.00	203,962.00	
February	51,105.00	64,427.00	88,008.00	203,540.00	
March	69,168.00	56,468.00	54,054.00	179,690.00	
April	86,123.00	94,891.00	55,824.00	236,838.00	
May	85,441.00	50,612.00	98,853.00	234,906.00	
June	99,021.00	73,230.00	65,182.00	237,433.00	
July	54,401.00	61,518.00	71,020.00	186,939.00	
August	50,447.00	55,918.00	64,597.00	170,962.00	
September	72,388.00	50,756.00	73,381.00	196,525.00	
October	57,995.00	74,663.00	79,148.00	211,806.00	
November	55,225.00	76,449.00	85,415.00	217,089.00	
December	55,454.00	56,857.00	90,199.00	202,510.00	
Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00	

Dragging the Year field's header above the Month header shows all of the data for the months in the first year, and then moves on to the second year.

3	Row Labels	Sum of Sales
4	2008	819,934.00
5	January	83,166.00
6	February	51,105.00
7	March	69,168.00
8	April	86,123.00
9	May	85,441.00
10	June	99,021.00
11	July	54,401.00
12	August	50,447.00
13	September	72,388.00
14	October	57,995.00
15	November	55,225.00
16	December	55,454.00
17	2009	779,625.00
18	January	63,836.00
19	February	64,427.00
20	March	56,468.00
21	April	94,891.00
22	May	50,612.00

Experiment with various PivotTable arrangements to find the layouts that illustrate your points most effectively.

To pivot a PivotTable:

- Drag a field to a new area in the layout.
- Drag a field to a new position within an area.

Filtering a PivotTable

Just as you can focus on specific data contained in an Excel Table, you can limit the data displayed in a PivotTable by creating a filter. The processes for creating PivotTable filters are identical to those for Excel Table filters.

To filter a PivotTable:

1. In the **PivotTable Field List** task pane's Choose Fields to Add to Report area, hover the mouse pointer over the field by which you want to filter the PivotTable, and click the down arrow that appears at the far right edge of the field's name bar.
2. Use the controls in the menu that appears to define your filter.

Defining PivotTable Conditional Formats

Excel 2007 introduced the ability to apply conditional formats to PivotTable cells, which greatly enhances the program's power as a business intelligence presentation tool. You use the same techniques to create a conditional format for a PivotTable as you do for a regular cell range; the only difference is in how you apply the format to the PivotTable's contents.

When you apply a conditional format to a PivotTable cell, a Formatting Options smart tag appears. Clicking the Formatting Options button displays three choices for how you can format the PivotTable's cells.

3	Sum of Sales	Column Labels					
4	Row Labels	2008	2009	2010	Grand Total		
5	January	83,166.00	63,836.00	56,960.00	203,962.00		
6	February	51,105.00	64,427.00	58.00	203,540.00		
7	March	69,168.00	56,468.00				
8	April	86,123.00	94,891.00				
9	May	85,441.00	50,612.00				
10	June	99,021.00	73,230.00				
11	July	54,401.00	61,518.00				
12	August	50,447.00	55,918.00				
13	September	72,388.00	50,756.00	73,381.00	196,525.00		
14	October	57,995.00	74,663.00	79,148.00	211,806.00		
15	November	55,225.00	76,449.00	85,415.00	217,089.00		
16	December	55,454.00	56,857.00	90,199.00	202,510.00		
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00		

Apply formatting rule to ...

- ☒ Selected cells
- ☐ All cells showing "Sum of Sales" values
- ☐ All cells showing "Sum of Sales" values for "Month" and "Year"

Clicking the Selected Cells option, as the name implies, formats just the selected cells. Clicking the All Cells Showing "Sum of <field1>" Values option formats every data cell, including summary cells in subtotal and grand total columns and rows. Selecting this option doesn't result in a useful conditional format because the Grand Total row and column values are much larger than the values in the body of the data area.

3	Sum of Sales	Column Labels					
4	Row Labels	2008	2009	2010	Grand Total		
5	January	83,166.00	63,836.00	56,960.00	203,962.00		
6	February	51,105.00	64,427.00	58,008.00	203,540.00		
7	March	69,168.00	56,468.00	54,054.00	179,690.00		
8	April	86,123.00	94,891.00	55,824.00	236,838.00		
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11	July	54,401.00	61,518.00	71,020.00	186,939.00		
12	August	50,447.00	55,918.00	64,597.00	170,962.00		
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14	October	57,995.00	74,663.00	79,148.00	211,806.00		
15	November	55,225.00	76,449.00	85,415.00	217,089.00		
16	December	55,454.00	56,857.00	90,199.00	202,510.00		
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00		

Clicking the All Cells Showing "Sum of <field1>" Values for "<fields...>" option formats every data cell in the body of the PivotTable except for cells in summary rows.

3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	54,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	April	86,123.00	94,891.00	55,824.00	236,838.00
9	May	85,441.00	50,612.00	98,853.00	234,906.00
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15	November	55,225.00	76,449.00	85,415.00	217,089.00
16	December	55,454.00	56,857.00	90,199.00	202,510.00
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00

When you record a PivotTable conditional format for your Excel Presentation, you format a single cell and the Excel Presentation Kit applies the conditional format using the third option (which excludes any summary rows and columns).

To define a PivotTable conditional format:

1. Click any cell in the PivotTable.
2. On the Home tab of the Ribbon, in the Styles group, click Conditional Formatting.
3. Create the conditional format you want to create.
4. Click the Formatting Options smart tag that appears beside the active cell.
5. Click the option representing the group cells to which you want to apply the conditional format.

3

Recording Excel Presentation Positions

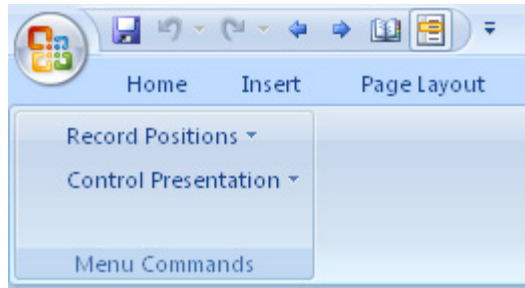
Positions are the basic building blocks of any Excel Presentation. Each position represents a workbook state that you preserve and later recreate as part of your presentation. After you arrange and format the data in your workbook to create the look you want to save, you can record the position and recall it at any time.

In this chapter, you will learn how to:

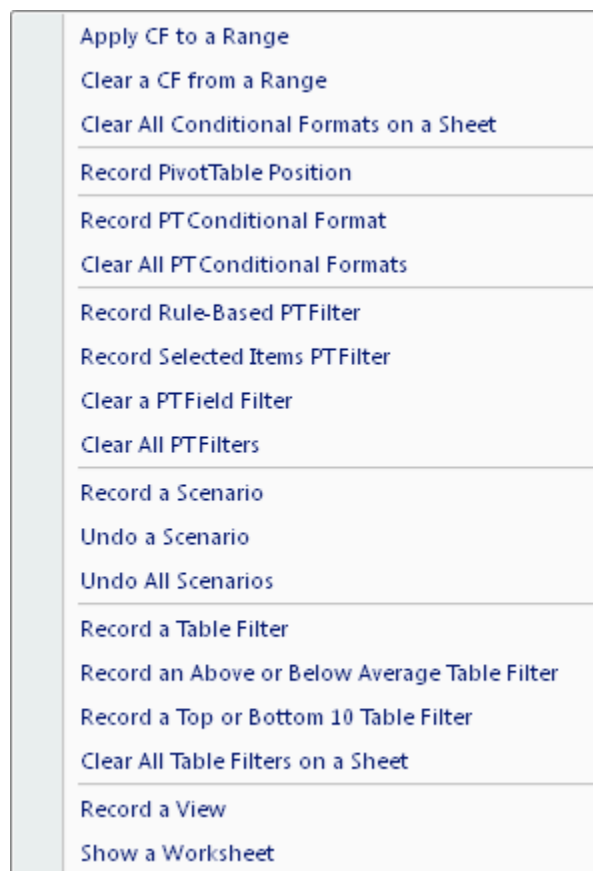
- Find the Record Positions item on the Ribbon
- Prepare the Quick Access Toolbar
- Record workbook views
- Record Excel Table positions
- Record scenario positions
- Record conditional format positions
- Record PivotTable positions

Finding the Record Positions Item on the Ribbon

When you open the Excel Presentation Kit workbook and allow the workbook to run the macros it contains, the workbook's code adds two menus named Record Positions and Control Presentation to the Add-Ins tab of the Ribbon. You'll find those menus in the Add-Ins tab's Menu Commands group.



Clicking the Record Positions menu displays items representing the types of positions you can record.



You can go through the Add-Ins tab of the Ribbon to record positions and control your presentation, but you'll find it's much easier to record positions and move through your presentation by adding buttons that run the Excel Presentation Kit's macros to the Quick Access Toolbar.

Preparing the Quick Access Toolbar

The Excel Presentation Kit's custom macros extend the native capabilities of Excel 2007 to enable you to communicate your business intelligence analysis results without leaving Excel.

You should add the following four items to the Quick Access Toolbar:

- A button representing the PreviousStep macro
- A button representing the NextStep macro
- A button representing the ListPositions macro
- A button representing the Menu Commands group on the Add-Ins tab of the Ribbon

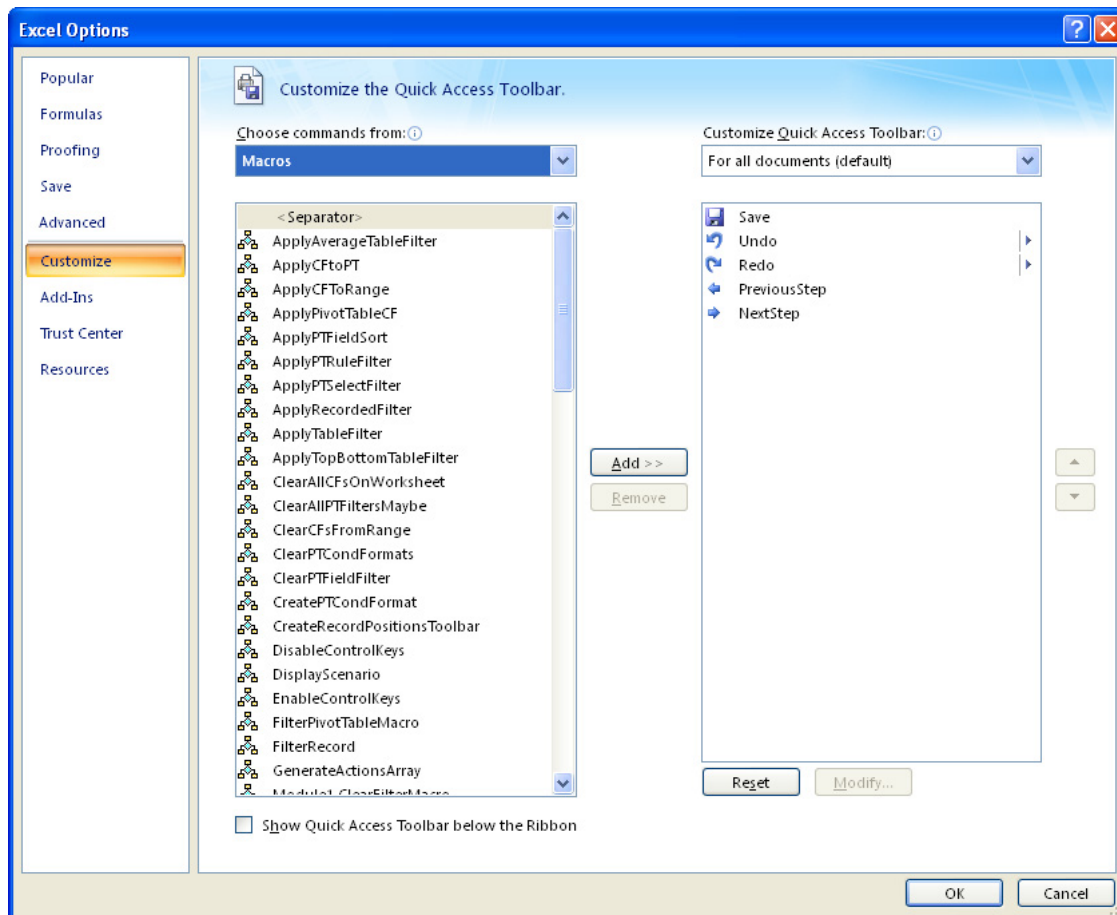
The tasks in this section show you how to add your macros to the Quick Access Toolbar, which enables you to move through your presentation efficiently.

Adding a Macro to the Quick Access Toolbar

There is a long, convoluted method of running Excel macros using the standard Ribbon controls, but it's much easier to add a button representing the macro to the Quick Access Toolbar. When you click the button, Excel runs the macro immediately.

To add a macro to the Quick Access Toolbar:

1. Right-click anywhere on the **Quick Access Toolbar**, and then click **Customize Quick Access Toolbar**.
2. On the **Excel Options** dialog box's **Customize** page, click the **Choose Commands From** field's down arrow and then click **Macros**.



3. Click the macro you want to add to the **Quick Access Toolbar**.
4. Click **Add** and then click **OK**.

Adding a Ribbon Group to the Quick Access Toolbar

Just as you can add a button to the Quick Access Toolbar, you can represent all of the controls in a Ribbon group as a button on the Quick Access Toolbar. Rather than waste clicks going to a new Ribbon tab, locating the target group, and clicking the desired control you can add the group to the Quick Access Toolbar, click the group's button, and find the controls far more quickly.

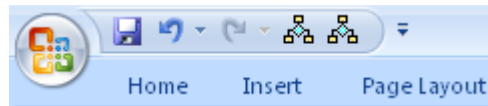
To add a group to the Quick Access Toolbar:

1. On the **Ribbon**, display the tab that contains the group you want to add to the **Quick Access Toolbar**.
2. Right-click the name bar of the **Ribbon** group you want to add.

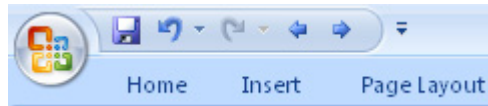
3. Click Add to **Quick Access Toolbar**.

Changing the Appearance of a Quick Access Toolbar Button

Every button you can add to the Quick Access Toolbar comes with an assigned button image. The default images assigned to the macro buttons you add to move forward and backward through your Excel Presentation indicate that the buttons trigger a macro, but it doesn't tell you anything about what the macro does.



The button image collections contains two perfect images for the PreviousStep and NextStep macros: a left-pointing blue arrow and right-pointing blue arrow, respectively.

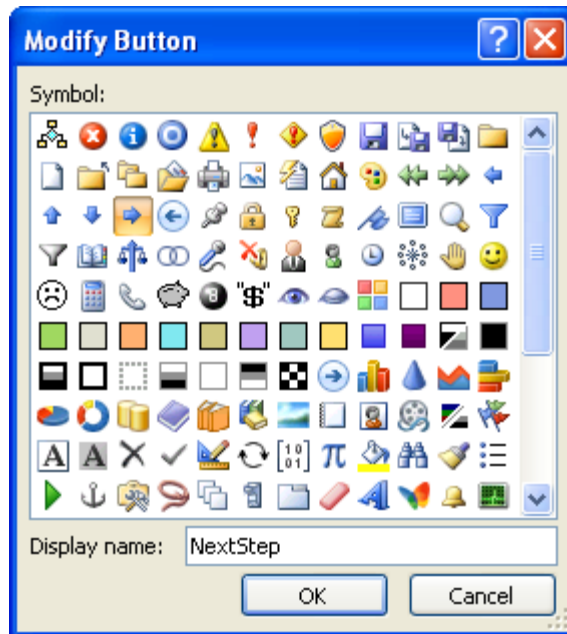


Please Note

You can't change the Quick Access Toolbar button assigned to a Ribbon group.

To change the appearance of a Quick Access Toolbar button:

1. Right-click any spot on the **Quick Access Toolbar**.
2. Click **Customize Quick Access Toolbar**.
3. On the **Customize** page of the **Excel Options** dialog box, in the panel that lists the buttons on the **Quick Access Toolbar**, click the button you want to change.
4. Click **Modify**.



5. In the **Modify Button** dialog box, click the button image you want to assign to the macro button.
6. Click **OK**.

Reordering Buttons on the Quick Access Toolbar

As you continue to work with Excel 2007 and the Excel Presentation Kit, you'll most likely find that you use some Quick Access Toolbar buttons more frequently than others and that some button positions make it easier for you to manipulate your workbooks quickly. By changing the order in which buttons appear, you can configure the Quick Access Toolbar to streamline your workflow.

To reorder buttons on the Quick Access Toolbar:

1. Right-click any spot on the **Quick Access Toolbar**.
2. Click **Customize Quick Access Toolbar**.
3. On the **Customize** page of the **Excel Options** dialog box, in the panel that lists the buttons on the **Quick Access Toolbar**, click the button you want to move.
4. Click the **Move Up** or **Move Down** button.
5. Click **OK**.

Removing a Button from the Quick Access Toolbar

Adding a button to the Quick Access Toolbar isn't a one-way operation. You can remove a button with two mouse clicks.

To remove a button from the Quick Access Toolbar:

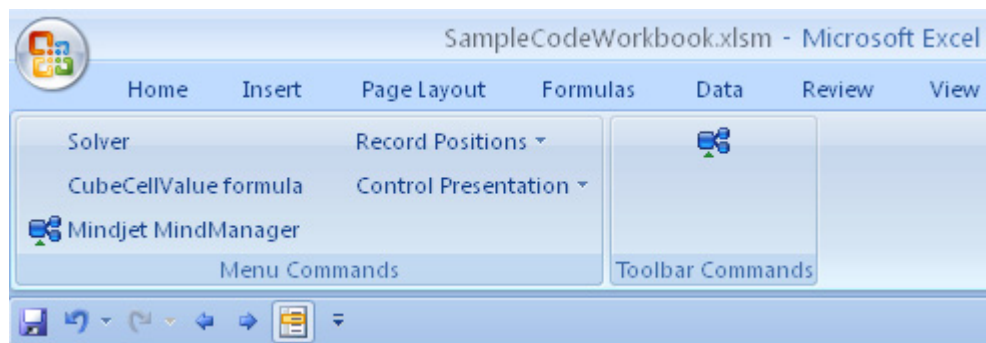
1. Right-click the button.
2. Click **Remove from the Quick Access Toolbar**.

Displaying the Quick Access Toolbar Under the Ribbon

If you add a lot of buttons to the Quick Access Toolbar, the toolbar's contents might crowd the file name and other information at the top of the program window. You can display the Quick Access Toolbar under the Ribbon to give yourself more room to add buttons.

To display the Quick Access Toolbar under the Ribbon:

1. Right-click any spot on the **Quick Access Toolbar**.
2. Click **Show the Quick Access Toolbar Below the Ribbon**.



Recording Workbook Views

One of the most basic operations you can perform during an Excel Presentation is to display a worksheet. As simple as that operation is, it can be difficult to remember which worksheet you wanted to display when you're in the middle of discussing the data contained on another worksheet! Creating a Show Worksheet position makes the transition more certain.

A Saved View position offers a little more control over your workbook than Show Worksheet positions do. Rather than just display a worksheet, the Saved View position records the cell at the top-left corner of the Excel window and remembers the worksheet's magnification, or zoom level, so you can make the worksheet's contents larger or smaller as desired.

In this section, you'll learn how to:

- Record a Show Worksheet position
- Record a Saved View position

Recording a Show Worksheet Position

Excel workbooks can contain two types of sheets: worksheets, which can contain data, graphics, and charts; and chart sheets, which contain a single chart that is the only item on the sheet. However, most users refer to both types of sheets as worksheets, so I used the familiar term in naming this type of position.

When you want to show a worksheet as part of your Excel Presentation, display the custom Ribbon group created by the Excel Presentation Kit, click Record Positions, and click the Show a Worksheet item. In the dialog boxes that appear, type the name of the position and then the name of the worksheet you want to display. When you click OK in the second dialog box, the Excel Presentation Kit records the position for later recall.

Please Note

All of the other Excel Presentation Kit positions record the worksheet referenced by the position, so you don't need to record a Show Worksheet position to get to the proper place in your workbook.

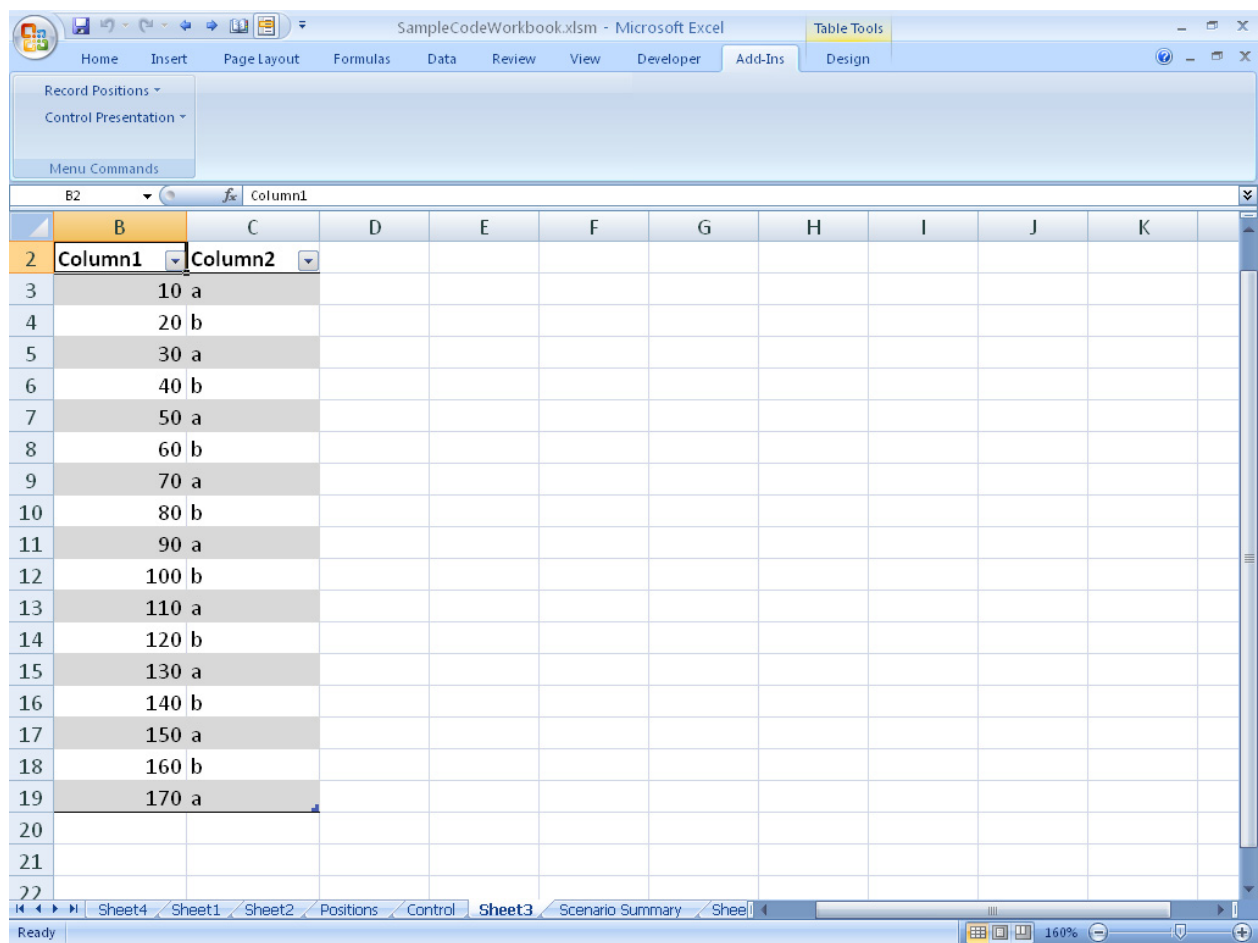
To record a Show Worksheet Position:

1. Display the worksheet you want the saved position to show.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Show a Worksheet**.

4. In the dialog box that appears, type the name of the position, and click **OK**.
5. In the dialog box that appears, type the name of the worksheet you want to display, and click **OK**.

Recording a Saved View Position

Like a Show Worksheet position, a Saved View position displays a worksheet. Unlike the Show Worksheet position, though, a Saved View position also records the address of the first cell that is visible at the top left corner of the screen and the worksheet's zoom level. In the worksheet below, the first visible cell is B2, and the worksheet's zoom level is 160%.



When you're ready to record a Saved View position, display the custom Ribbon group created by the Excel Presentation Kit, click Record Positions, and click the

Record a View item. Just type the name of the Saved View in the dialog box that appears and you're done!

To record a Saved View Position:

1. Show the worksheet with the displayed cells and zoom level you want to record.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record a View**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

Recording Excel Table Positions

Excel Tables, which are new in Excel 2007, enable you to store your data effectively. You can also limit the data that appears in a table by applying filters.

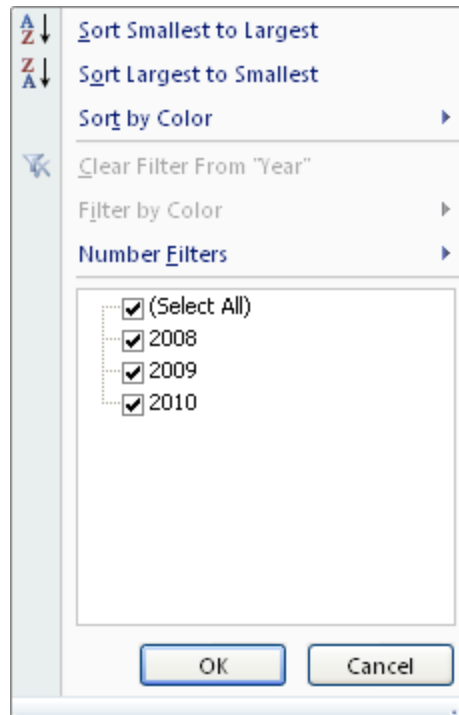
In this section, you'll learn how to:

- Record a Table Filter (by selection or rule) position
- Record an Above or Below Average table filter
- Record a Top or Bottom 10 table filter
- Record a Clear All Table Filters on a Worksheet position

Recording a Table Filter Position

Excel Tables typically contain hundreds or thousands of rows of data. To examine the table's data effectively, you will often need to limit the data displayed in the table by applying a filter. Excel 2007 enables you to create two types of table filters: a selection filter, and a rule-based filter.

As the name implies, a selection filter lets you select the items to be displayed. To create a selection filter, you click a column's filter arrow and select the items you want to appear when the filter's applied. A rule-based filter, by contrast, uses an *operation* (such as *greater than* or *between*) and one or two *arguments* (values used to set the rule's parameters).



Important

Because of the way Excel 2007 records a selection filter's parameters, you may only record selection filters with one or two items selected.

You can create the following rule-based filters in Excel 2007: greater than, less than, greater than or equal to, less than or equal to, equals, does not equal, between, and not between. You can create two other types of filters, Above or Below Average and Top or Bottom 10 filters, but you save them using operations described later in this section.

To record a Table Filter Position:

1. Create the table filter you want to record.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record a Table Filter**.
4. Read the warning in the message box that appears, and click **OK**.
5. Type a name for the position, and click **OK**.

Recording an Above or Below Average Table Filter

When you want to present a view highlighting data that falls above or below the average value in a table column, define and save an Above or Below Average Table Filter.

To record an Above or Below Average Table Filter position:

1. Create the table filter you want to record.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record an Above or Below Average Table Filter**.
4. Type a name for the position, and click **OK**.

Recording a Top or Bottom 10 Table Filter

Top or Bottom 10 Table Filters enable you to display the table rows that contain the highest or lowest values in a column. You can define an exact number of rows to display, such as the top 3 sales days of the month, or define a percentage of rows to display, such as the bottom 5% of a medical school's graduating class.

To record a Top or Bottom 10 Table Filter position:

1. Create the table filter you want to record.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record a Top or Bottom 10 Table Filter**.
4. Type a name for the position, and click **OK**.

Recording a Clear All Table Filters on a Worksheet Position

When you're ready to display all of the data in a worksheet's tables, you can record a Clear All Table Filters on a Worksheet position to restore the worksheet's tables to their unfiltered state.

To record a Clear All Table Filters on a Worksheet Position:

1. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
2. Click **Record Positions**, and then click **Clear All Table Filters on a Sheet**.
3. In the dialog box that appears, type the name of the position, and click **OK**.
4. In the dialog box that appears, type the name of the worksheet that contains the table with the filters you want to clear, and click **OK**.

Recording Scenario Positions

Scenarios store alternative data sets you can call up to examine your enterprise's performance under different conditions. As useful as they are, scenarios take several mouse clicks to apply, affecting your flow and dividing your attention as you give your presentation. The Excel Presentation Kit lets you apply and remove scenarios, each with a single mouse click, so you can concentrate on your message.

In this section, you will learn how to:

- Record an Apply Scenario position
- Record an Undo a Scenario position
- Record an Undo All Scenarios position

Recording an Apply Scenario Position

After you define scenarios for a worksheet, you can apply any of those scenarios by recording an Apply Scenario position. The Apply Scenario macro doesn't record the scenario's positions on the Positions worksheet. Instead, the routine records the name of the scenario (and the worksheet to which it applies) and instructs Excel to apply the scenario to the worksheet during your presentation.

To record an Apply Scenario Position:

1. Display the worksheet with the scenario you want to show.

2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record a Scenario**.
4. In the dialog box that appears, type the name of the position, and click **OK**.
5. In the dialog box that appears, type the name of the scenario you want the position to display, and click **OK**.

Recording an Undo a Scenario Position

When you're done analyzing alternative data set contained in a scenario, you can use an Undo a Scenario position to restore the worksheet's original data. For the Undo a Scenario macro to work, you must create a summary worksheet for the sheet that contains the scenario you want to undo.

Before you summarize a worksheet's scenarios, be sure the worksheet has no scenarios applied to it! If you create a scenario summary worksheet while a sheet has a scenario applied, the scenario summary worksheet will have incorrect values in the Current Values column.

Consider this...

It might be a good idea to create a scenario named OriginalValues, which contains the starting values for each cell you change in a scenario. Scenarios can record the contents of up to 32 cells, so you should have plenty of space to store your worksheet's original data. If not, just create another scenario to record the excess.

To record an Undo a Scenario Position:

1. Display the worksheet with the scenario you want to hide.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Undo a Scenario**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

5. In the dialog box that appears, type the name of the scenario you want the position to hide, and click **OK**.
6. In the dialog box that appears, type the name of the worksheet that summarizes the scenarios on the target worksheet, and click **OK**.

Recording an Undo All Scenarios Position

If you've applied more than one scenario to a worksheet, you can remove all of those changes in one go by recording an Undo All Scenarios position. Each Undo All Scenarios position affects a single worksheet; to begin recording this type of position, display the worksheet you want to restore, open the Record Positions custom menu, and select Undo All Scenarios

Important

For the Undo All Scenarios macro to work correctly, you must create a scenario summary worksheet for the worksheet that contains the scenarios you want to undo. Just like when you record an Undo a Scenario position, be sure your worksheet contains its original values so the summary correctly reflects both the original values and your changes.

To record an Undo All Scenarios Position:

1. Display the worksheet with the scenarios you want to hide.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Undo All Scenarios**.
4. In the dialog box that appears, type the name of the position and click **OK**.
5. In the dialog box that appears, type the name of the worksheet that summarizes the scenarios on the target worksheet and then click **OK**.

Recording Conditional Format Positions

All of the routines that record a conditional format require that you apply the desired conditional format to a cell on the same worksheet as the range you want

to format as part of your Excel Presentation. Rather than attempt the to record every possible element of a conditional format, the Excel Presentation Kit copies the format from the sample cell you create and pastes it into the appropriate table on the Positions worksheet .

BS	BT	BU	BV
Position	Worksheet	Range	Format
CF_GoldDat	Sheet2	\$B\$2:\$B\$5	40

When you reach a conditional format position comes up during your Excel Presentation, the Excel Presentation Kit's macros copy the conditional format you recorded onto the range of cells you selected when you recorded the position.

In this section, you will learn how to:

- Record an Apply Conditional Format to a Range position
- Record a Clear All Conditional Formats from a Range position
- Record a Clear All Conditional Formats on a Worksheet position

Recording an Apply Conditional Format to a Range Position

When you're ready to record an Apply Conditional Format to a Range position, define the conditional format in a cell on the same worksheet as the range you want to format during your Excel Presentation. The formatted cell can, but doesn't have to be, part of the range to be affected during the Excel Presentation.

Be sure to test the conditional format you create by typing several values into the cell where you define the format.

To record an Apply Conditional Format to a Range Position:

1. On the worksheet that contains the range you want this position to affect, format a cell with the conditional format you want to apply to the range.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Apply CF to a Range**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

5. Select the cells to which you want to apply the conditional format, and click **OK**.
6. Select the cell that contains the conditional format you want to apply to the range, and click **OK**.

Recording a Clear All Conditional Formats from a Range Position

Conditional formats can help illustrate the relationships among the data in a range, but the colors can also distract your viewers from the underlying values. When you're done making a point using conditional formats, you can record a position to remove those formats from the affected range.

To record a Clear All Conditional Formats from a Range Position:

1. Display the worksheet that contains the range from which you want to remove all conditional formats.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Clear a CF from a Range**.
4. In the dialog box that appears, type the name of the position, and click **OK**.
5. Select the cells from which you want to remove all conditional formats, and click **OK**.

Recording a Clear All Conditional Formats on a Worksheet Position

Just as you can remove all conditional formats from a range, you can also clear all conditional formats from a worksheet. All you need to do is run the Clear All Conditional Formats on a Sheet macro and select the worksheet you want to clear!

To record a Clear All Conditional Formats on a Worksheet Position:

1. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.

2. Click Record Positions, and then click Clear All Conditional Formats on a Sheet.
3. In the dialog box that appears, type the name of the position, and click OK.
4. In the dialog box that appears, type the name of the worksheet from which you want to clear all conditional formats, and click OK.

Recording PivotTable Positions

If you've used PivotTables to display data as part of a sales or marketing presentation, you've probably written down the PivotTable's field arrangement so you could reconstruct a configuration that helped you illustrate a particular point.

	A	B	C	D	E
1					
2					
3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	88,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	Grand Total	203,439.00	184,731.00	199,022.00	587,192.00
9					
10					

The Excel Presentation Kit enables you to record PivotTable arrangements so you can make your points immediately, without having to look up your PivotTable field orders on a piece of paper and apply the settings by hand.

In this section, you will learn how to:

- Record a PivotTable Position
- Record a PivotTable Filter by Rule position
- Record a PivotTable Selection Filter position
- Record an Undo PivotTable Field Filter position
- Record a Clear All PivotTable Filters position
- Record a PivotTable Conditional Format position
- Record a PivotTable Conditional Format Clearing position

Recording a PivotTable Position

When you're ready to record a PivotTable position, arrange the PivotTable fields to highlight the data and run the Record PivotTable Position macro.

To record a PivotTable Position:

1. Arrange the PivotTable into the desired position.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record PivotTable Position**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

Recording a PivotTable Filter by Rule Position

Excel 2007 PivotTables summarize data collections stored in Excel Tables, SQL Server database tables, and large data collections. Just as you can emphasize a point by filtering the data displayed in an Excel Table, you can use a filter to limit the data displayed in a PivotTable.

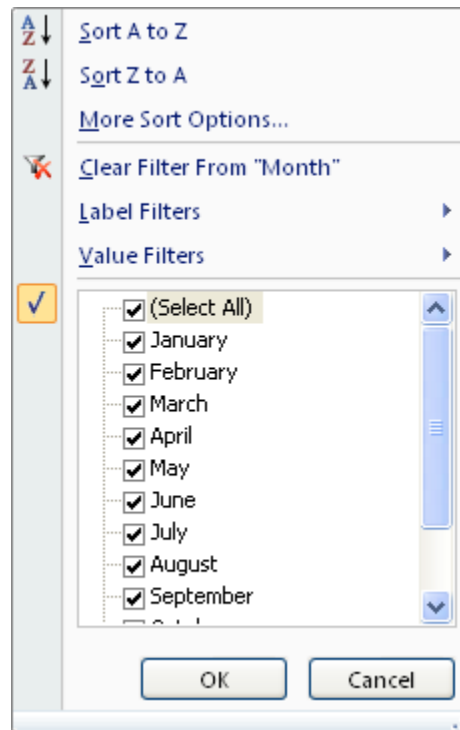
PivotTable filters are stored differently than Excel Table filters, so you can record either a rule-based filter or a selection filter. When you're ready to record a rule-based filter, which apply the filter and record the position by invoking the Record Rule-Based PT Filter macro.

To record a PivotTable Filter by Rule Position:

1. Apply a rule-based filter to a field in the target PivotTable.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record Rule-Based PT Filter**.
4. In the dialog box that appears, type the name of the position, and click **OK**.
5. In the dialog box that appears, type the name of the field you want to filter, and click **OK**.

Recording a PivotTable Selection Filter Position

Just as you can create a rule-based filter, which finds all values that meet a given criteria (e.g., “all days with attendance below 1400”), you can select values from the list of available values that appear when you click a field’s filter arrow.



To record a PivotTable Selection Filter Position:

1. Apply a selection filter to a field in the target PivotTable.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Clear a PT Field Filter**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

Recording an Undo PivotTable Field Filter Position

Regardless of whether you apply a rule-based filter or selection filter to a PivotTable field, you can remove the filter from that field by recording an Undo PivotTable Field Filter position.

To record an Undo PivotTable Field Filter Position:

1. Click any cell in a PivotTable that has a filter applied to one of its fields.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Clear a PT Field Filter**.
4. In the dialog box that appears, type the name of the position, and click **OK**.
5. In the dialog box that appears, type the name of the field from which you want to remove the filter, and click **OK**.

Recording a Clear All PivotTable Filters Position

If you've applied filters to more than one PivotTable field and want to restore the PivotTable to its unfiltered state, you don't need to undo the filters one by one. Instead, you should record a single Clear All PivotTable Filters position to reset your PivotTable.

To record a Clear All PivotTable Filters Position:

1. Click any cell in a PivotTable that has a filter applied to one or more of its fields.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Clear All PT Filters**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

Recording a PivotTable Conditional Format Position

In Excel versions prior to Excel 2007, it wasn't possible to apply a conditional format to the cells in a PivotTable. By introducing that ability in Excel 2007, the Excel product team greatly enhanced your ability to summarize worksheet data visually. Rather than requiring you to copy and paste your PivotTable data into another worksheet, or transform a PivotTable into a range, you can apply a wide

variety of conditional formats directly to your PivotTables and have the conditional formats change as the data arrangements change.

To record a PivotTable Conditional Format Position:

1. Apply a conditional format to any cell in the data area of a PivotTable, and leave that cell selected.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Record PT Conditional Format**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

Recording a PivotTable Conditional Format Clearing Position

When you're ready to remove all conditional formats from a PivotTable, click any cell in that PivotTable and follow the steps below to record a PivotTable Conditional Format Clearing position.

To record a PivotTable Conditional Format Clearing Position:

1. Click any cell in a PivotTable that has a conditional format applied to it.
2. On the **Quick Access Toolbar**, click the button representing the **Menu Commands** group.
3. Click **Record Positions**, and then click **Clear All PT Conditional Formats**.
4. In the dialog box that appears, type the name of the position, and click **OK**.

4

Building Excel Presentations

Combining the positions you record into an Excel Presentation represents the last step you take before you rehearse and deliver your message. The Excel Presentation Kit's control panel enables you to add, remove, reorder, and print a list of positions (a cue list) that takes the guesswork out of your transitions and enables you to focus on the points you want to make.

In this chapter, you will:

- View a sample Excel Presentation
- Manage Excel Presentations
- Prepare the Quick Access Toolbar
- Deliver an Excel Presentation

Viewing a Sample Excel Presentation

Here's what a very simple Excel Presentation might look like. I've included a sample script and captured a screen shot for each of the presentation's seven steps to give you a context for how the Excel Presentation Kit can streamline your talks.

Thanks for coming. I'd like to review our sales figures for 2008, 2009, and 2010.

	A	B	C
1			
2			
3	Row Labels	Sum of Sales	
4	2008	819,934.00	
5	January	83,166.00	
6	February	51,105.00	
7	March	69,168.00	
8	April	86,123.00	
9	May	85,441.00	
10	June	99,021.00	
11	July	54,401.00	
12	August	50,447.00	
13	September	72,388.00	
14	October	57,995.00	
15	November	55,225.00	
16	December	55,454.00	
17	2009	779,625.00	

Here are each month's sales for the last three years. Note that in 2008, we had below average sales in October, November, and December. The next position compares the three years' data more directly.

	A	B	C	D	E
1					
2					
3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	88,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	April	86,123.00	94,891.00	55,824.00	236,838.00
9	May	85,441.00	50,612.00	98,853.00	234,906.00
10	June	99,021.00	73,230.00	65,182.00	237,433.00
11	July	54,401.00	61,518.00	71,020.00	186,939.00
12	August	50,447.00	55,918.00	64,597.00	170,962.00
13	September	72,388.00	50,756.00	73,381.00	196,525.00
14	October	57,995.00	74,663.00	79,148.00	211,806.00
15	November	55,225.00	76,449.00	85,415.00	217,089.00
16	December	55,454.00	56,857.00	90,199.00	202,510.00
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00

As you can see, our sales total dropped in 2009, but rebounded significantly in 2010. However, if we focus on the year 2009, you'll see that the month of March stood out because of the national bid we won.

	A	B	C
1			
2			
3	Sum of Sales	Column Labels <input checked="" type="checkbox"/>	
4	Row Labels	2009	Grand Total
5	January	63,836.00	63,836.00
6	February	64,427.00	64,427.00
7	March	56,468.00	56,468.00
8	April	94,891.00	94,891.00
9	May	50,612.00	50,612.00
10	June	73,230.00	73,230.00
11	July	61,518.00	61,518.00
12	August	55,918.00	55,918.00
13	September	50,756.00	50,756.00
14	October	74,663.00	74,663.00
15	November	76,449.00	76,449.00
16	December	56,857.00	56,857.00
17	Grand Total	779,625.00	779,625.00

The next year, we won three such bids: one in May, one in November, and one in December.

	A	B	C	D
1				
2				
3	Sum of Sales	Column Labels <input checked="" type="checkbox"/>		
4	Row Labels	2009	2010	Grand Total
5	January	63,836.00	56,960.00	120,796.00
6	February	64,427.00	88,008.00	152,435.00
7	March	56,468.00	54,054.00	110,522.00
8	April	94,891.00	55,824.00	150,715.00
9	May	50,612.00	98,853.00	149,465.00
10	June	73,230.00	65,182.00	138,412.00
11	July	61,518.00	71,020.00	132,538.00
12	August	55,918.00	64,597.00	120,515.00
13	September	50,756.00	73,381.00	124,137.00
14	October	74,663.00	79,148.00	153,811.00
15	November	76,449.00	85,415.00	161,864.00
16	December	56,857.00	90,199.00	147,056.00
17	Grand Total	779,625.00	882,641.00	1,662,266.00

Similar high sales months in 2008 (January, April, May, and June) were due in large part to companies spending money at the beginning of their fiscal year or in the second quarter due to significant increases in their own business.

	A	B	C	D	E
1					
2					
3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	88,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	April	86,123.00	94,891.00	55,824.00	236,838.00
9	May	85,441.00	50,612.00	98,853.00	234,906.00
10	June	99,021.00	73,230.00	65,182.00	237,433.00
11	July	54,401.00	61,518.00	71,020.00	186,939.00
12	August	50,447.00	55,918.00	64,597.00	170,962.00
13	September	72,388.00	50,756.00	73,381.00	196,525.00
14	October	57,995.00	74,663.00	79,148.00	211,806.00
15	November	55,225.00	76,449.00	85,415.00	217,089.00
16	December	55,454.00	56,857.00	90,199.00	202,510.00
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00

I'll add some color to the data so you can more easily see how the months compare. April, May, and June are consistently our best sales months on average; August is consistently our worst.

	A	B	C	D	E
1					
2					
3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	88,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	April	86,123.00	94,891.00	55,824.00	236,838.00
9	May	85,441.00	50,612.00	98,853.00	234,906.00
10	June	99,021.00	73,230.00	65,182.00	237,433.00
11	July	54,401.00	61,518.00	71,020.00	186,939.00
12	August	50,447.00	55,918.00	64,597.00	170,962.00
13	September	72,388.00	50,756.00	73,381.00	196,525.00
14	October	57,995.00	74,663.00	79,148.00	211,806.00
15	November	55,225.00	76,449.00	85,415.00	217,089.00
16	December	55,454.00	56,857.00	90,199.00	202,510.00
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00

I'll just clear the formatting to leave the PivotTable data on its own.

	A	B	C	D	E
1					
2					
3	Sum of Sales	Column Labels			
4	Row Labels	2008	2009	2010	Grand Total
5	January	83,166.00	63,836.00	56,960.00	203,962.00
6	February	51,105.00	64,427.00	88,008.00	203,540.00
7	March	69,168.00	56,468.00	54,054.00	179,690.00
8	April	86,123.00	94,891.00	55,824.00	236,838.00
9	May	85,441.00	50,612.00	98,853.00	234,906.00
10	June	99,021.00	73,230.00	65,182.00	237,433.00
11	July	54,401.00	61,518.00	71,020.00	186,939.00
12	August	50,447.00	55,918.00	64,597.00	170,962.00
13	September	72,388.00	50,756.00	73,381.00	196,525.00
14	October	57,995.00	74,663.00	79,148.00	211,806.00
15	November	55,225.00	76,449.00	85,415.00	217,089.00
16	December	55,454.00	56,857.00	90,199.00	202,510.00
17	Grand Total	819,934.00	779,625.00	882,641.00	2,482,200.00

Thanks again for coming. I'll be glad to answer any questions you might have.

Managing Excel Presentations

I've tried to make the mechanics of combining saved positions into a worksheet as simple as possible so you can get up and running with the Excel Presentation Kit right away.

In this section, you will learn how to:

- Create a new Excel Presentation workbook
- Add a cue to an Excel Presentation
- Delete a cue from an Excel Presentation
- Renumber and reorder Excel Presentation cues
- Print the Excel Presentation cue list

Creating a New Excel Presentation Workbook

After you copy the EPK_Template workbook to your computer, you can have Excel 2007 create new workbooks from using it as a template. The procedure for creating a new workbook from a template is a few steps longer than creating a new, blank workbook, but it's not a difficult task.

Be Careful!

Be sure to change only the file you create from the EPK_Template workbook. Changing the EPK_Template file itself means that every edit will appear in every workbook you create from the template.

Even though the EPK_Template workbook is a macro-enabled template, Excel offers to save the file you create using the template as a standard Excel 2007 workbook (*.xlsx). You'll need to change the saved file's type to Excel Macro-Enabled Workbook (*.xlsm) for the Excel Presentation Kit's macros to work.

To create a new Excel Presentation workbook from the EPK_Template.xlsm template file:

1. Click the **Office Button**, and then click **New**.
2. In the **New Workbook** button, in the **Templates** section, click **New From Existing**.
3. In the **New from Existing Workbook** dialog box, navigate to the folder that contains the *EPK_Template.xlsm* workbook.
4. Click the workbook, and then click **Create New**.
5. Click the **Office Button**, and then click **Save As**.
6. In the **Save As** dialog box, navigate to the directory where you want to save the Excel Presentation workbook.
7. In the **File Name** field, type a name for the Excel Presentation workbook.
8. Click the **Save as Type** field's down arrow, and then click **Excel Macro-Enabled Workbook (*.xlsm)**.
9. Click **Save**.

Adding a Cue to an Excel Presentation

When you've saved the positions you want to be part of your Excel Presentation, you can begin adding those positions to your cue list. You add positions to your presentation by adding rows to the ControlPanel table, found on the Control worksheet.

	A	B	C	D
1	Cue	Type	Position	Description
2	10	PT: Show PivotTable Position	yer_YearThenMonth	Show sales arranged by year, then month.
3	20	PT: Show PivotTable Position	yer_MonthRowYearCol	Show data in crosstab arrangement.
4	30	PT: Apply Selected Items PT Filter	yer_2009Only	Filter data to show 2009 sales.
5	40	PT: Apply Selected Items PT Filter	yer_2009and2010	Add 2010 for comparison.
6	50	PT: Clear a PT Field Filter	yer_Clear2009and2010Filter	Remove the filter and show all sales data.
7	60	PT: Apply PT Conditional Format	yer_SalesBars	Add red data bars to highlight relative values.
8	70	PT: Clear All PT Conditional Format	yer_ClearSalesBars	Remove the conditional format.

The ControlPanel table contains four columns:

- *Cue*, which contains position numbers.
- *Type*, which allows you to select the type of position to add to the presentation.
- *Position Name*, which contains the name of the position to add.
- *Description*, which contains a brief summary of the position.

Don't overlook the importance of adding a description for each position. Even if you print out your cue list, which you should do as a matter of course, the position's name might not jog your memory.

Be Careful!

The list of available position types appears in the AvailableActions table, which is stored in the Control worksheet's column H. The Excel Presentation Kit's macros expect the Type column's cells to contain one of the nineteen pre-defined position types. Feel free to take a look if you must, but please don't change anything!

To add an Excel Presentation cue:

1. Display the **Control** worksheet.
2. In the first blank cell in the **Cue** column of the **Control Panel** table, type a number that is ten greater than the number in the cell above it.
3. In the same row, click the cell in the **Type** column, click the down arrow that appears, and select the type of position you want to add to the presentation.

	A	B	C
1	Cue	Type	Position
2	10	PT: Show PivotTable Position	ver_YearThenMonth
3	20	PT: Show PivotTable Position	ver_MonthRowYearCol
4	30	PT: Apply Selected Items PT Filter	ver_2009Only
5	40	PT: Apply Selected Items PT Filter	ver_2009and2010
6	50	PT: Clear a PT Field Filter	ver_Clear2009and2010Filter
7	60	PT: Apply PT Conditional Format	ver_SalesBars
8	70	PT: Clear All PT Conditional Form	ver_ClearSalesBars
9	80		
10		CF: Apply Conditional Format to a R	
11		CF: Clear a Conditional Format from	
12		CF: Clear All Conditional Formats on	
13		PT: Apply PT Conditional Format	
14		PT: Apply Rule-Based PT Filter	
15		PT: Apply Selected Items PT Filter	
16		PT: Clear a PT Field Filter	
17		PT: Clear All PT Conditional Formats	

4. In the same row, in the **Position** column, type the name of the position you want this cue to display. You may also click the ListPositions macro button on the Quick Access Toolbar and then copy the desired position name from the Selection Items list displayed in column F of the Control worksheet.
5. Type a summary of the position the same row's **Description** column.
6. Press the **Tab** key to start a new table row.

A Cue Numbering Trick

You probably noticed that the first cue in the ControlPanel table is numbered 10 instead of 1. It's not an oversight. You should number the first cue 10, the second 20, and so on. Here's why.

When the computerized boards that control the lights in a theater were in their early stages of development, you ran a great risk of having to re-do a lot of work if you missed adding a cue to your program. For example, if you add cues 1-99 and realize you missed out cue number 4, you'd have to renumber or (more likely) recreate the cues that are now numbered 5-100.

Subsequent light boards enabled you to create what were called point cues, which meant you could create cue 3.5 to insert the lighting cue you missed without spending a couple of hours recording the other 96 cues again.

Numbering your Excel Presentation Kit cues in increments of 10 gives you plenty of room to add cues at the last minute without blowing away your numbering scheme or forcing you to add cues to the middle of the table and risk making a mistake and deleting a cue you wanted to keep. Just add the new cue to the bottom of the table, give it a number between those of the cues you want it to occur between, sort the table from smallest to largest by cue value, and you're on your way.

Deleting a Cue from an Excel Presentation

Getting rid of a cue that no longer fits into your presentation is as straightforward as deleting the table row that contains the cue.

To delete an Excel Presentation cue:

1. Right-click any cell in the row that contains the cue you want to delete.
2. Point to **Delete**, and then click **Table Rows**.

Renumbering and Reordering Excel Presentation Cues

As you review your Excel Presentation, you might decide to refine the order of positions within the presentation. Changing the order of Excel Presentation positions requires nothing more than editing the positions' cue numbers and sorting the ControlPanel table's rows from the lowest cue number to the highest.

Be Careful!

Be sure not to assign the same cue number to more than one cue. You won't break the presentation, but the Excel Presentation Kit might not display the cues in the order you want.

To renumber an Excel Presentation cue:

- Edit the value in the *Cue* column of the cue's row.

To renumber all Excel Presentation cues:

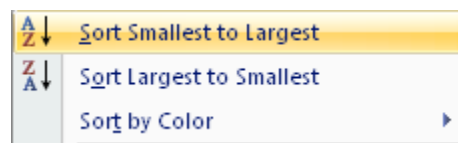
1. Renumber the cues to reflect the desired order.
2. If necessary, in cell A2, type 10.

3. If necessary, in cell A3, type 20.
4. Select the cell range A2:A3.
5. Grab the **Fill Handle** at the bottom right corner of cell A3 (the mouse pointer changes from a white Greek cross to a black crosshairs), and drag it until the selected region covers the last cell in the **Control Panel** table's **Cue** column.



To sort Excel Presentation cues so the table's order reflects the current cue numbers:

1. Display the **Control** worksheet.
2. In the **ControlPanel** table, click the **Cue** column's filter arrow.



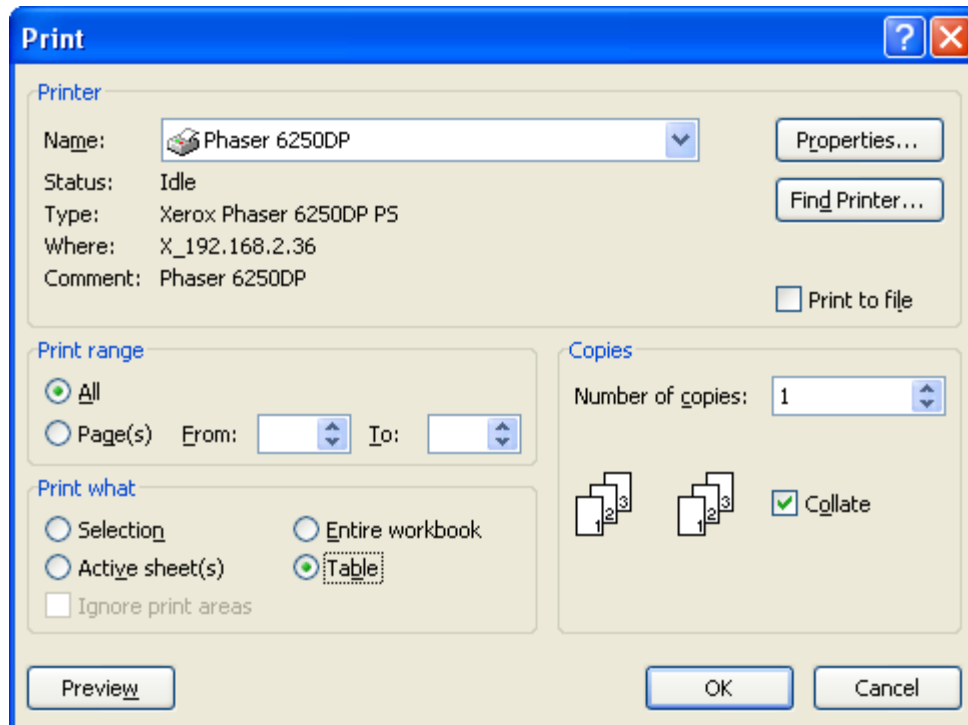
3. Click **Sort Smallest to Largest**.

Printing the Excel Presentation Cue List

When I designed the Excel Presentation Kit, I wanted to keep the mechanics of the kit in the background so your audience can focus on your message. As the presenter, you must manage both your message and the technology you use to deliver your presentation. One good way to keep your bearings during an Excel Presentation is to print out your cue list.

To print an Excel Presentation cue list:

1. Click any cell in the **ControlPanel** table.
2. Click the **Office Button**, and then click **Print**.
3. In the **Print** dialog box, click the **Table** option button.



4. Click **OK**.

Delivering an Excel Presentation

When you open a workbook created using the Excel Presentation Kit template file, you should find the Record Positions and Manage Presentation menus in the Menu Commands group on the Add-Ins tab of the Ribbon.

Starting an Excel Presentation

Once you're ready to start an Excel Presentation, run the StartPresentation macro to display the first position in the presentation.

To start an Excel Presentation:

- If you haven't added the **Menu Commands** group to the **Quick Access Toolbar**, display the **Add-Ins** tab of the **Ribbon**. Then, in the **Menu Commands** group, click **Control Presentations** and then click **Start Presentation**.

- If you have added the **Menu Commands** group to the **Quick Access Toolbar**, click the button representing the group, click **Control Presentations** and then click **Start Presentation**.
- If you want to use a presentation remote or move between positions by pressing the N or P keys, click the **Quick Access Toolbar** button representing the **Menu Commands** group, click **Control Presentations**, and then click **Enable Control Keys**. When you're done with your presentation, click **Disable Control Keys**.

Be Careful!

If you have enabled control keys, typing the letter **n** or **p** will move you forward or backward one position!

Displaying the Next Position

After you've completed discussing the point illustrated by a position, you can move to the next position quickly.

To move forward one position in an Excel Presentation:

- If you've added a **Quick Access Toolbar** button for the NextStep macro, click the button.
- If you've enabled the presentation control keys, press the **N** key or click the **Next** button on your presentation remote.

Displaying the Previous Position

If you realize you forgot to make a point during your discussion of a previous position, you can use the PreviousStep macro to revisit positions you've already displayed.

To move back one position in an Excel Presentation:

- If you've added a **Quick Access Toolbar** button for the PreviousStep macro, click the button.
- If you've enabled the presentation control keys, press the **P** key or click the **Previous** button on your presentation remote.

Displaying a Specific Position

If a member of your audience asks a question that can be best answered by displaying a specific position in your Excel Presentation, you can use the cue list on the Control worksheet to move directly to that position. The only consideration is that you need to select the number of the cue before the one you want to display, and then click the NextStep macro button.

To display a specific position:

1. Display the **Control** worksheet.
2. Click the cell in the **ControlPanel** table's *Cue* column above the cue you want to display.
3. Display the next position by clicking the NextStep macro's button on the **Quick Access Toolbar**.