

# Office 2010 Implementation Notes

## General Information

All workflows and procedures used previously with Office 2007 still hold true for Office 2010 when linking to MicroStation V8. Refer to the revised documentation file **2ndSheetsV8Office2010.pdf** for instructions if needed. That document includes image captures from Office 2010 that vary in some aspects from Office 2007.

All of our Office templates have been converted to Office 2010 and renamed to be more user friendly with spaces, additional descriptive words, etc. The new names include the new file extensions introduced with Office 2007. Listed below is a brief listing of the ones we have in use and what they represent.

Excel template without macros	xltx
Excel document without macros	xlsx
Excel template with macros	xltm
Excel document with macros	xlsm
Word template without macros	dotx
Word document without macros	docx
Word template with macros	dotm
Word document with macros	docm

When Office 2010 was loaded for testing, settings that had been made for Office 2007 were retained. The special settings we use to optimize linking between Office and MicroStation V8 remained in place. It was possible to go straight into using the software for 2<sup>nd</sup> sheet creation. If you feel that your settings may not have been retained, follow the instructions as presented in documentation file 2ndSheetsV8Office2010.pdf.

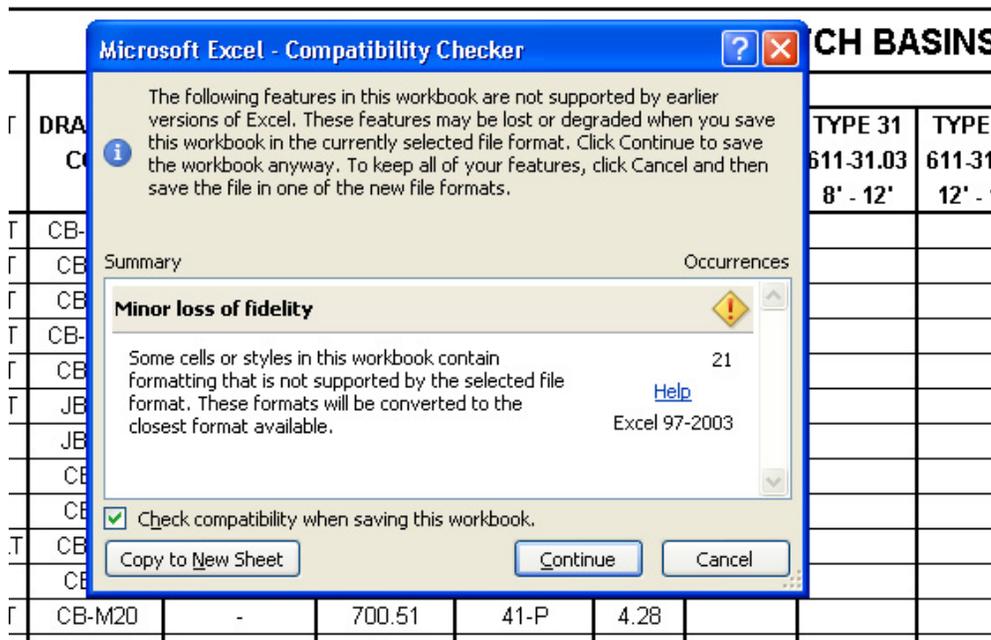
It was necessary to revise some of the macros found in our Excel templates such as the Estimated Roadway Quantities template used by Design and the Survey Contact Letter and ROW Acquisition Create template used by Survey. **If** you need to use these programs, you will need to copy your data into a new document created from our revised templates. The macro from our Convert Excel To V8 template used to update estimated roadway quantities files in the past can be used for this purpose since it copies text only to standard worksheets in those files and simply copies any additional worksheets that have been added. After using that tool, it may be necessary to re-format the item and footnote areas if the item area differs in length from the default length set up in the template.

Old Excel links or embedded Word documents still operate the same when accessing them through MicroStation V8. Since these documents are from older versions of Office, they will be in a **Compatibility Mode** when loaded in Office 2010. The following two sections discuss messages that will appear when saving old documents and how to

convert them to full Office 2010 compatibility. **It is not necessary to convert them if you do not wish to.**

### Excel Document Compatibility & Conversion

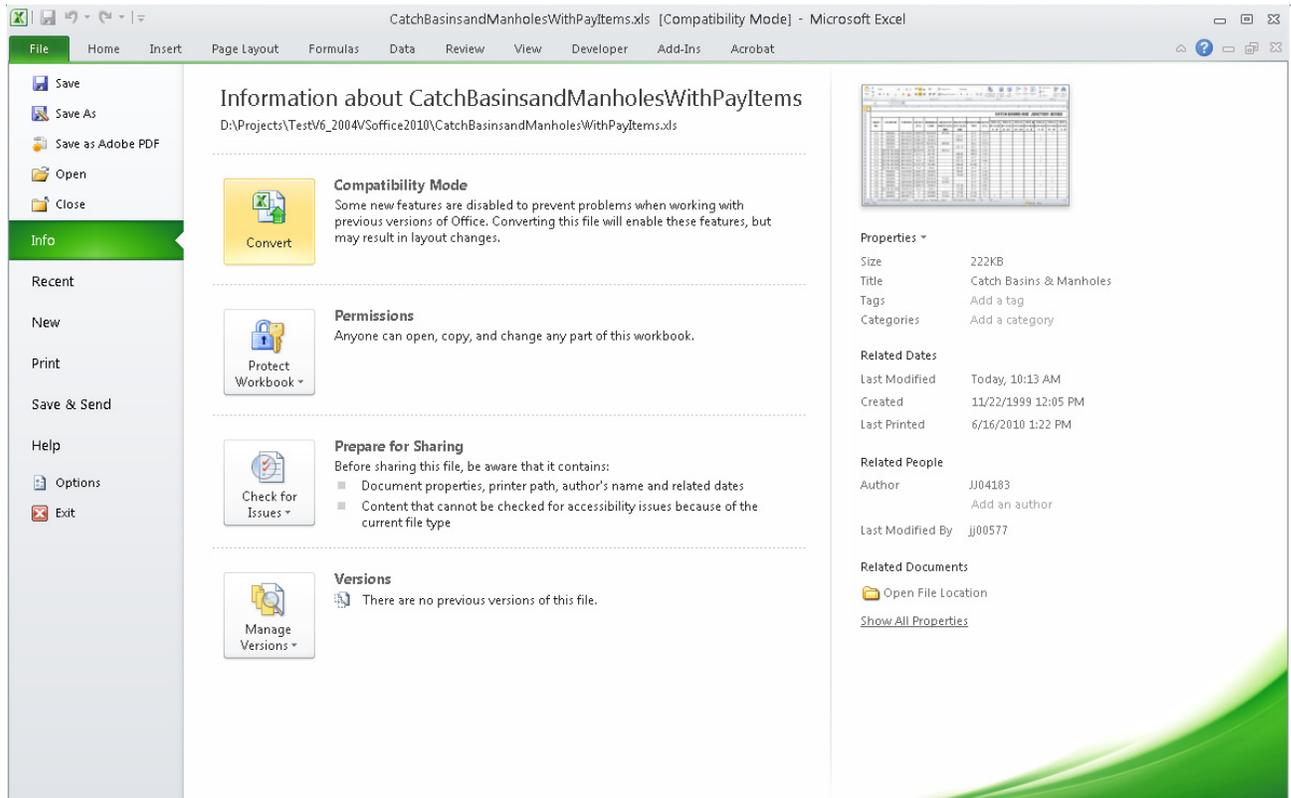
When saving Excel documents from older Office versions, you will probably get the **Compatibility Checker** dialog displayed below.



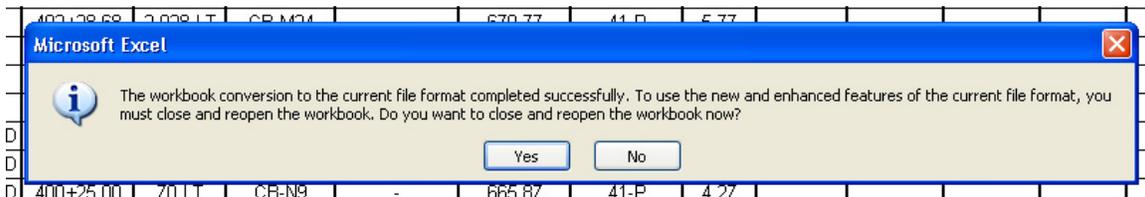
To save the document in its current format, simply click **Continue**. In most cases, this should pose no problems. We encountered no changes in formatting while testing our standard Excel files.

If you wish to upgrade to the Excel 2010 file format, click **Cancel** and then go to the File drop down at the far left of the ribbon to convert the document.

Under the **File** drop down options, go to **Info** and choose the **Convert** option.



After conversion, you will get the following completion message. Unless you are specifically trying to use a new feature that Excel 2010 provides, you can just click **No**.

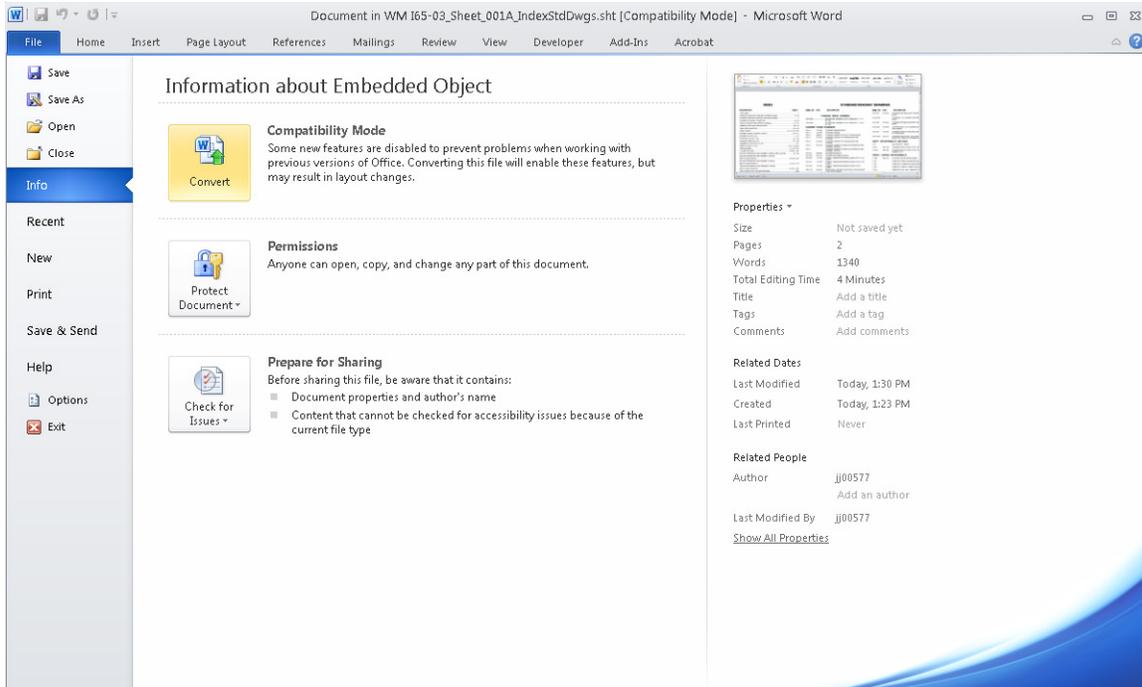


Notice that the filename listed on the Excel title bar at the top now includes a new extension which indicates that it is indeed now an Excel 2010 document. The new extension will be **xlsx** or **xlsm** if it includes macros. The change will become permanent when you save the document.

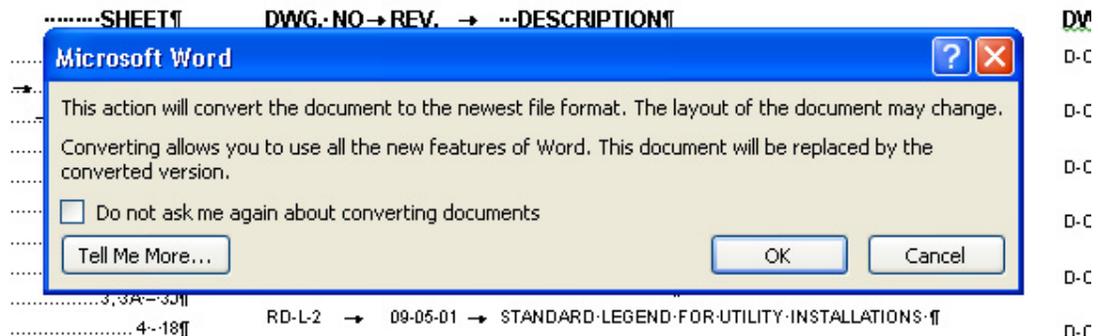
## Word Document Compatibility & Conversion

During testing of old Word document formats in Word 2010, we never encountered a case where saving the document produced any warnings about the loss of functionality as was displayed with all Excel conversions.

If you wish to upgrade to the Word2010 file format, go to the File drop down at the far left of the ribbon to convert the document. Under the **File** drop down options, go to **Info** and choose the **Convert** option.



The following dialog is displayed. Click **OK** to proceed with the conversion. We encountered no changes in layout when working with our standard Word files.



The file is converted to Word 2010. The change will become permanent when you save the document. The filename listed on the title bar at the top will specify the new Word extension **docx** or **docm** once it has been saved.

## Office 2010 in Compatibility Mode

We have had reports after Office 2010 implementation that some were not able to use the drop down options in our plans revision letter templates. After some research, we found the reason and solution for the problem.

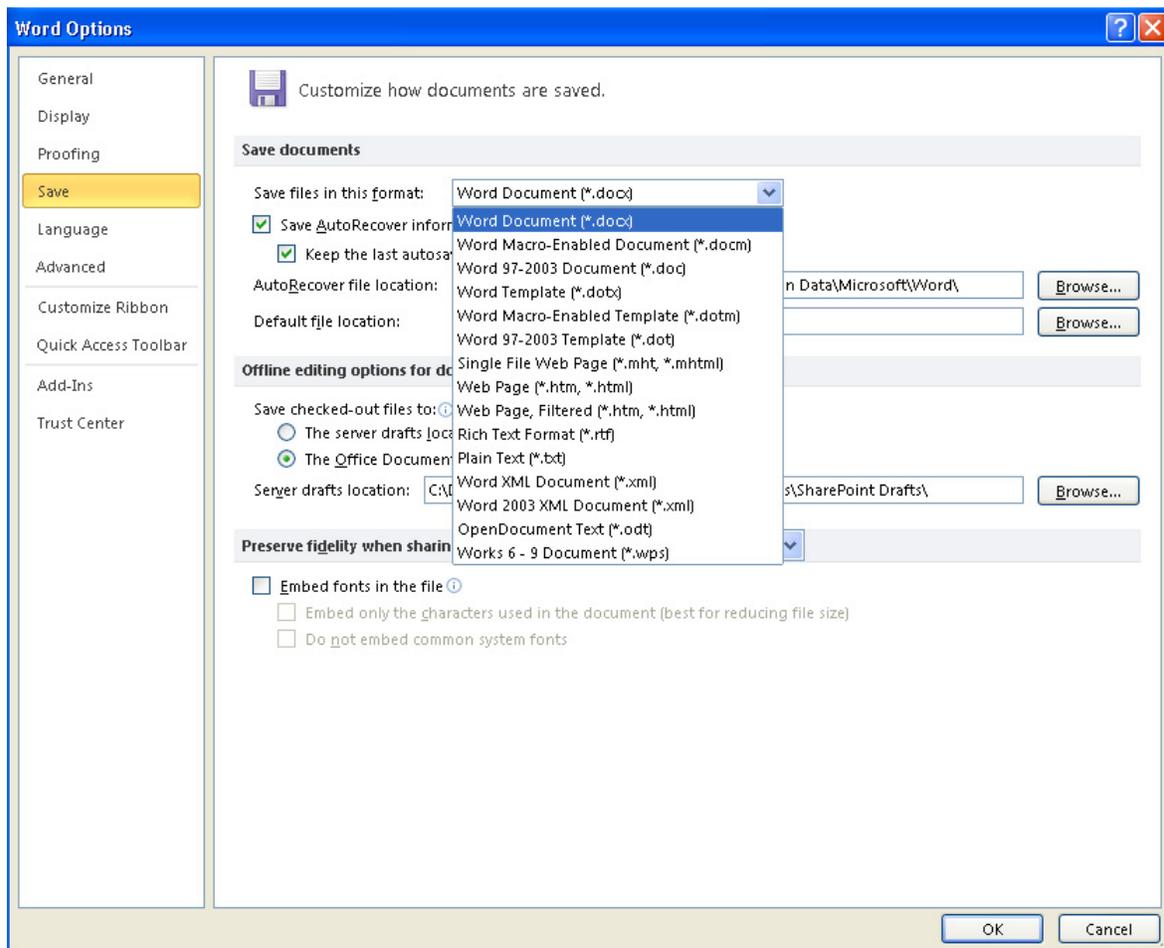
The reason was the fact that you were still in the Office 2003 compatibility mode. You can easily see this because it will say **Compatibility Mode** after the document name at the top of Office. Those revision templates use a type of drop down box that was introduced with Office 2007 so that Compatibility Mode for Office 2003 kills their functionality. Other templates that only use the older forms of entry fields would still work fine.

**To get your Office software out of Compatibility Mode take the following steps ...**

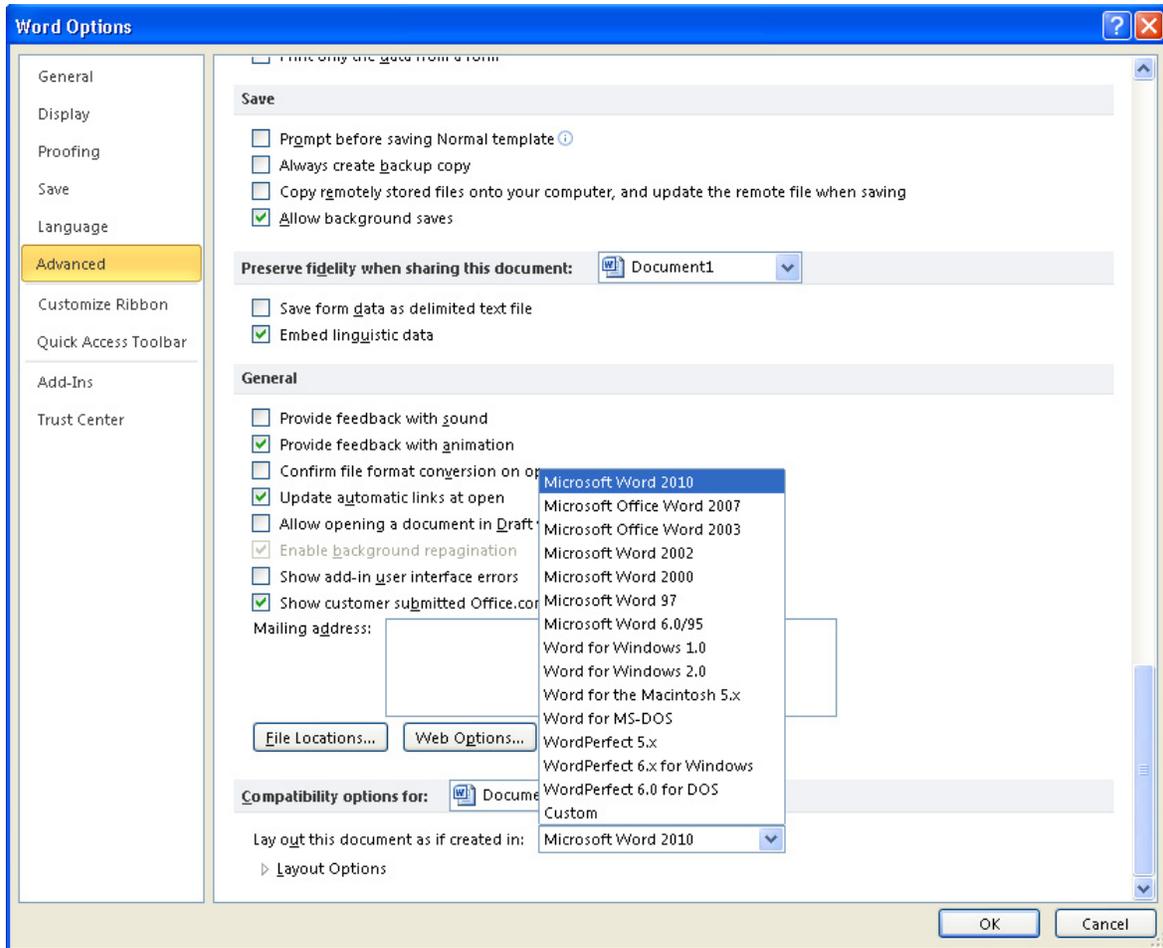
In Word and Excel, go to the **File** tab on the left and choose **Options** from the list on the left.

Under Options go to **Save** and change the **Save Files in this format:** to **Word Document (\*.docx)**.

In Excel set it to **Excel Workbook (\*.xlsx)**.



Then go to **Advanced** under Options and go to the very bottom. Change the **Layout this document as if created in:** to **Microsoft Word 2010**. This is not required in Excel.



Click **OK** at the bottom of the Options dialog to save these changes and then close the software. When you start it back up you should no longer see Compatibility Mode at the top and everything should work as expected.