10 things you should know about Office 2007 compatibility issues

Microsoft Office 2007 provides a lot of new features and functionality, but what about compatibility? Here are 10 tips for dealing with compatibility issues when you upgrade to the latest versions of Word, Excel, PowerPoint, and Outlook.

#1: Understanding and using new file formats

All the Office 2007 programs use new default file formats based on the Extensible Markup Language (XML). The new formats are indicated by an "x" in the file extension. For example:

- Word documents: .docx
- Excel workbooks: .xlsx
- PowerPoint presentations: .pptx

XML is an open standard, and the change makes it easier to move files between different applications. It also makes file sizes smaller than those saved in the old binary formats. However, some users with previous versions of Office may not be able to open files in the new formats.

You can still save files in Office 2007 programs in Office 2003 file formats. Just select Word 97-2003 Document (*.doc) from the Save As Type drop-down list in the Save As dialog box, as shown in **Figure A**.
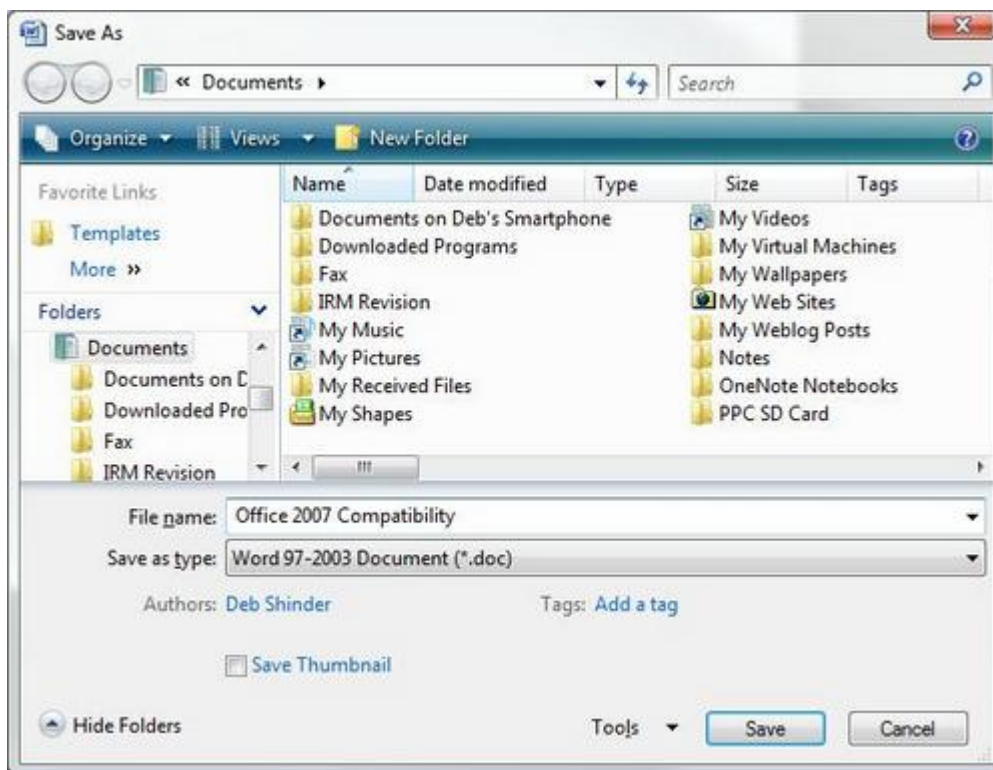

Figure A: You can easily save individual files in the old Office 2003 formats.

#2: Changing the default format

If you want to always save files in the old format by default, click the Office button, then the <program name> Options button, and select Save in the left pane. Choose Word 97-2003 Document (*.doc) from the Save Files In This Format drop-down list, as shown in **Figure B**.
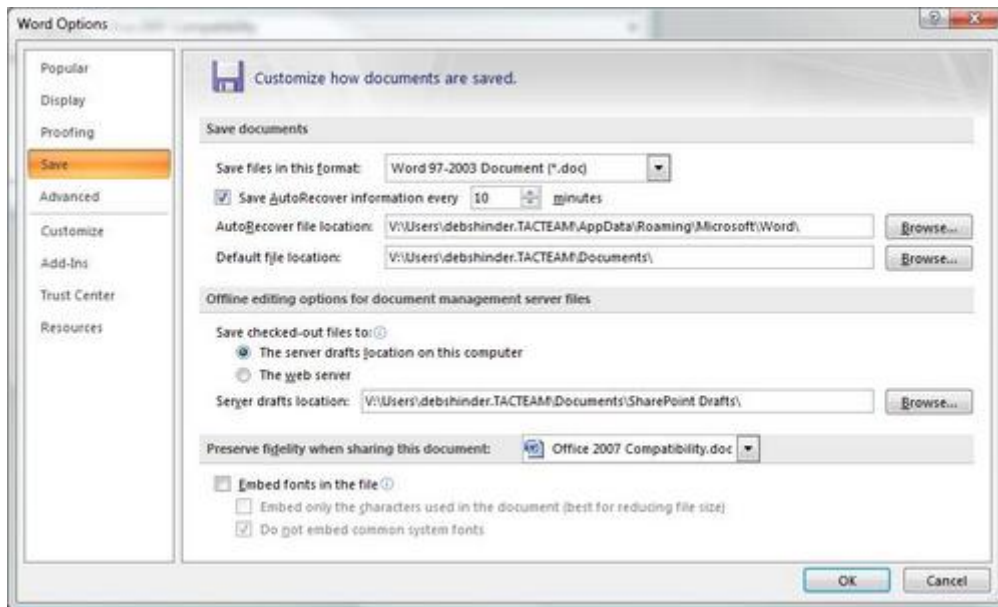

Figure B: You can set the default to always save files in the old Office 2003 format.

When you save a file in the old format that was originally created in the new format, you may get a message advising that some of the formatting and features that are only supported by Office 2007 programs will be lost.

#3: Using Office 2007 compatibility mode

Office 2007 programs introduce a new feature called compatibility mode. If you frequently share files with others who haven't upgraded or you need to work on your files on another computer (for example, a laptop) that doesn't have Office 2007 installed, you can ensure that the files you create in Office 2007 don't contain any features that aren't supported by the previous version of the Office program.

If you place your Office 2007 applications in compatibility mode, incompatible features, such as the SmartArt diagramming tool, won't be available to you. Instead, you'll use the diagramming tool from Office 2003 so that the diagrams you create can be edited in the older version of the program.

Compatibility mode is automatically on when you open a file that was saved in the old file formats, when you convert a file from the XML-based format to the older format, or when you configure the program to save to the old format by default. In Word, compatibility mode also kicks in if you create a new document from an old-format template (.dot).

When the Office 2007 program is in compatibility mode, it will be indicated in the document title bar, as shown in **Figure C**.
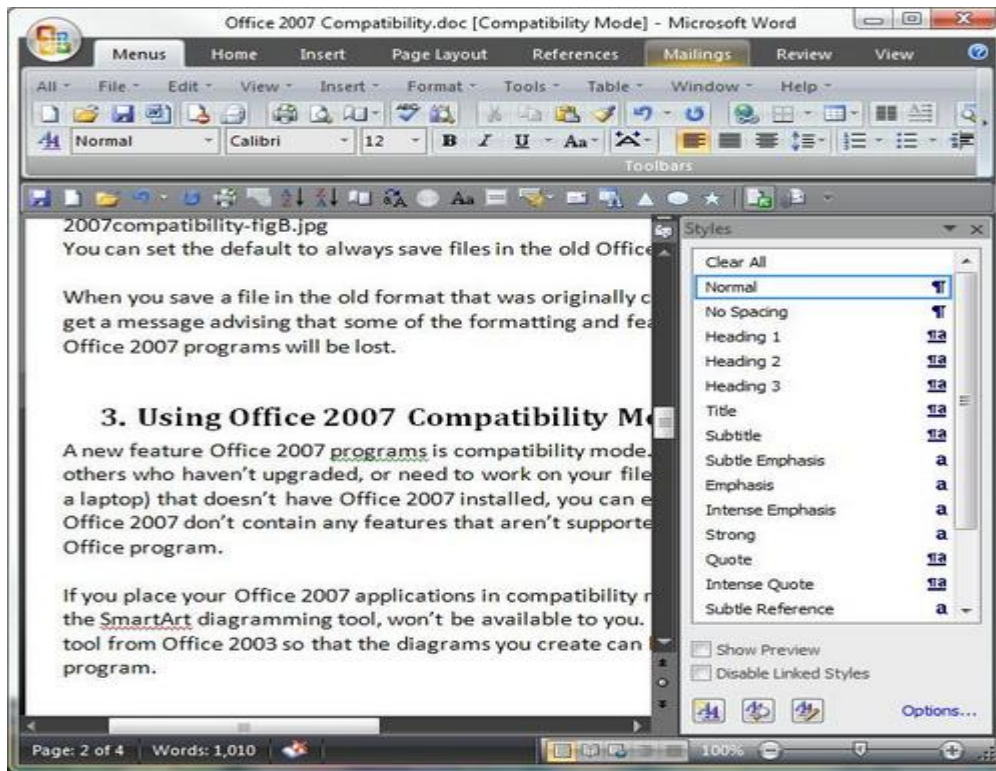

Figure C: Office Compatibility Mode is indicated in the title bar of the document.

Some features can be returned to the document if you reopen it in an Office 2007 program; others can't. For a full list of the features that are lost when you work in compatibility mode and which ones can be refreshed, see the article "Compatibility Mode in the 2007 Office System" on the Microsoft TechNet site.

#4: Installing the Office 2007 Compatibility Pack

If someone with whom you exchange files is still running an older version of Office and you want to be able to send them files in the new XML formats (for instance, so they can see the formatting features that are unique to Office 2007), they can install the Office 2007 Compatibility Pack.

The Compatibility Pack allows users of Office XP or Office 2003 to open, edit, save and even create files in the new XML-based formats. The pack is available as a free 27.1 MB download from the Microsoft Web site. It can be installed on machines running Windows 2000 SP4, Windows XP SP1, and Windows Server 2003.

#5: Using the OMPM File Converter

If you have a large number of Office files saved in the old format that you want to change to the new XML-based format, you don't have to open and save them one at a time in the Office 2007 program. Instead, you can perform a bulk conversion using the Office File Converter that's included in the Office Migration Planning Manager (OMPM).

The OMPM is a free 2.7 MB download available from the Microsoft Web site. It can also be used by administrators in organizations to scan and generate reports about the Office files on the network. You can install it on computers running XP SP2, Vista, or Server 2003.

Once the OMPM is installed, to perform bulk file conversions you use the OFC.EXE tool at the command line. You'll need to create an ofc.ini file with settings defining what you want to convert. Microsoft provides a template for the ofc.ini file that you can edit to indicate the path for the folders you want to convert. For more information on the contents of the ofc.ini file and how to invoke it programmatically, see "Converting Office documents to Open XML."

#6: Viewing PowerPoint presentations with PP Viewer 2007

PowerPoint 2007 provides many cool new graphical features that aren't supported by older versions of PowerPoint. These presentations can be viewed by Office XP/2003 users with the Compatibility Pack installed, but what if you want to see a presentation on a computer that doesn't have any version of Office installed?

You can use the PowerPoint Viewer 2007 to view these presentations will all the new features intact. It also supports opening presentations that have been password-protected in PowerPoint 2007 — however, it does not support viewing presentations that have been protected using Microsoft Information Rights Management technology.

The Viewer is a free 25.8 MB download available from the Microsoft Web site. It can be installed on computers running Windows 2000 SP4, XP SP1, Vista, and Server 2003.

At the time of this writing, viewers for Word and Excel 2007 were not yet available. But you can use the Word and Excel 2003 viewers to view Word and Excel 2007 files if you install the Compatibility Pack. For details, see KB article 925180, "How to view Word 2007 and Excel 2007 files by using Word Viewer 2003 and Excel Viewer 2003."

#7: Using the Compatibility Checker

Before you send a document that was created with an Office 2007 program to someone who's using a previous version of Office, you can run the Compatibility Checker, which is built into Word, Excel, and PowerPoint 2007. It will identify any features or formatting you've used that won't be recognized by older versions of Office.

A list of the incompatible content will be displayed, and you'll be advised that such content may not be fully editable in the previous version. The Compatibility Checker runs automatically when you save a file in the old format. You can also run it manually from the Office | Prepare menu, as shown in **Figure D**.
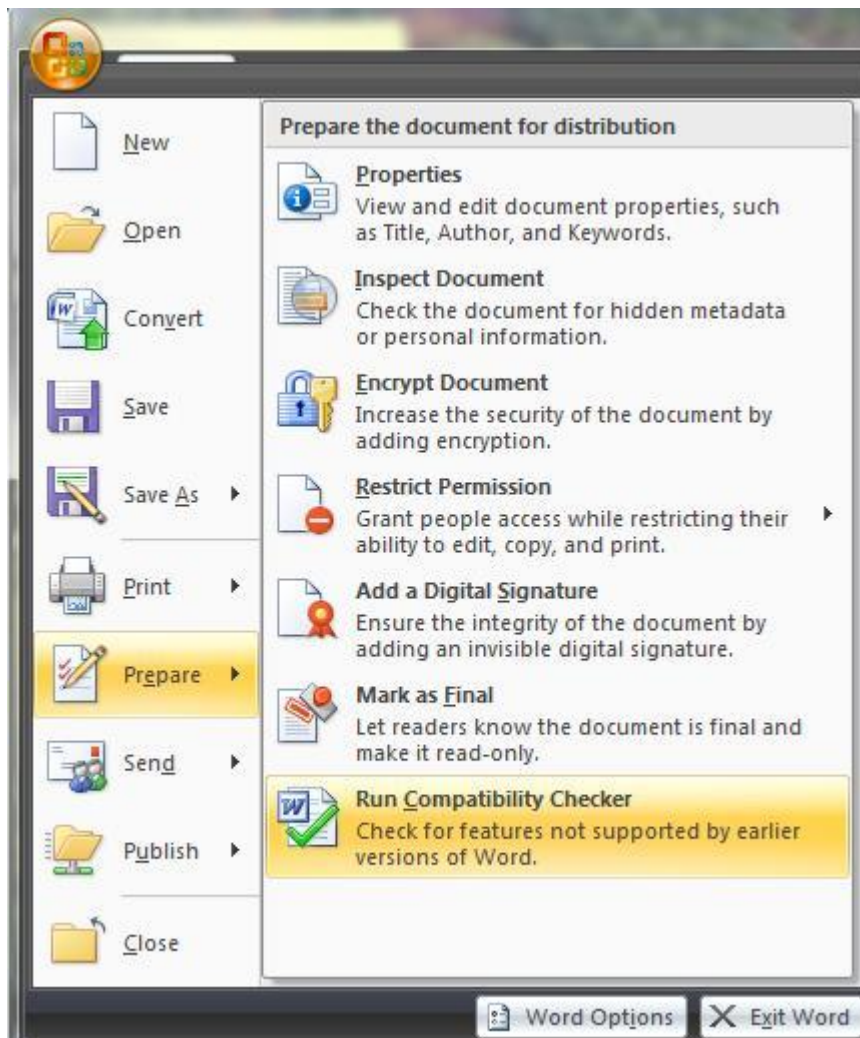

Figure D: You can run the Compatibility Checker from the Office Logo | Prepare menu.

#8: Outlook 2007 and Exchange 5.5

Outlook 2007 works only with Exchange 2000 or later. Users who attempt to connect to an Exchange 5.5 Server will get a message that Outlook is unable to log onto the Exchange server. Extended lifecycle support for Exchange 5.5 ended in January 2006, and Microsoft intentionally designed Outlook 2007 to prevent it from connecting to Exchange 5.5 servers to avoid data loss and other problems that were anticipated with this combination.

Be sure you know what version of Exchange server your organization is running before you update to Outlook 2007.

#9: Office 2007 file formats and mobile devices

The new XML-based file formats can't be opened with current Pocket Office programs on Windows mobile devices running Windows Mobile 2003 and Windows Mobile 5.0. The newest version, Windows Mobile 6, supports the XML-based file formats.

Microsoft is expected to release an update for Windows Mobile 5 in mid- or late 2007 that will allow it to open Office 2007 documents, but those still using WM2003 devices are apparently just out of luck.

#10: Adding on a "classic" user interface

Although not exactly a compatibility issue, many users find Office 2007's new user interface incompatible with their way of doing things. The Ribbon replaces the old-style menus, and while this new tabbed Ribbon seems to be easier to learn for new users (who haven't used previous versions of Office), many longtime Office users have complained that they miss the old menus.

If you want, you can install a third-party add-on that gives you back the old menu bar without sacrificing the new Ribbon. Classic Menu for Office 2007 installs easily and costs $29; it's available from www.addintools.com. After it's installed, an extra tab appears on the Ribbon called Menus, as shown in **Figure E**.

Figure E: If the new Ribbon interface is incompatible with the way you like to work, you can add back the Classic Menu.