

Integrate Microsoft Excel Data into Microsoft Word

YOU ARE PREPARING a memorandum for your boss. You would like to describe your positive, quarterly results as well as show the numbers that support the successes. How can you create a short, stunning, and data-based document? Integrate Excel data into a Word memorandum.



Objectives:



1. Link an Excel worksheet and chart to a Word document.
2. Edit a linked Excel worksheet.

Key Terms:



copy and paste
embed

integration
linked

object
source document

Understanding How to Integrate Excel Data into a Word Document

NOTE TO STUDENTS: Ask your instructor to access the Excel file {Cell and Speeding Observations.xls} and the Word files {Memo for Integration.doc} and {Family and Friends Letter.doc} at the MyCOMMUNITY section of MyCAERT so that you can use them with this E-unit.

Several techniques or methods can be used to integrate Excel data into Word documents. It is important to know that the **object** is the item being copied. Three different methods of integrating objects will be examined.

OBJECT COPYING TECHNIQUES

To copy items, you may decide to copy and paste, embed, or use linked files.

Copy and Paste

The first method is **copy and paste**, which is a basic **integration** (the act of joining together) technique that utilizes the Clipboard function. When copy and paste is used, the object or source document becomes part of the destination document. This is an important distinction. It is quick and easy. In addition, it is good for copying text, pictures, and values. However, the source file edits will not show in the destination file. This is important to consider if you have data that changes frequently and is part of a larger data source. Copy and paste is best when you need the object's data but not the object in the source program.



	cuft	selling us\$	conv	duty	van price
	14.86	105.00	131.25	139.13	162.14
	6.58	72.00	90.00	95.40	105.59
	18.98	118.00	147.50	156.35	185.75
	5.9	75.00	93.75	99.38	108.51
	2.84	52.00	65.00	68.90	73.30
	5.11	72.00	90.00	95.40	103.31
0			131.25	139.13	162.14
30			90.00	95.40	105.59
25			123.75	131.18	145.95
40	11.15	105.00	135.00	143.10	160.34
80	5.05	72.00	85.00	90.10	98.20
25	9.54	99.00	123.75	131.18	144.40
40	11.13	108.00	135.00	143.10	160.34
80	5.23	68.00	85.00	90.10	98.20
25	8.54	99.00	122.50	129.85	145.03
40	9.8	98.00	122.50	129.85	145.03
40	9.8	98.00	68.75	72.88	81.56
			42.50	45.05	49.03
			61.25	64.93	71.01
				125.88	135.97
				63.60	68.49
	5.61	34.00	118.75		
	2.57	49.00	60.00		

FIGURE 1. The data in a spreadsheet can be transferred into Word using the copy and paste technique.

Embed

The next integration technique is **embed** (a method similar to a pasted object in that the object becomes part of the destination document). If this file needs to be edited, it would be accomplished using the features of the source program.

Linked File

The final technique is the linked file. When a file is **linked**, the object does not become part of the destination document. Editing is done in the source program with source features. The strongest feature of this technique is that a linked object is automatically updated if the source document is edited.

STARTING THE LINKING PROCESS FOR THE EXCEL WORKSHEET

1. Start Excel and open the Excel workbook, which contains the **source document** (the file from which data will be copied or linked). Locate the file {Cell and Speeding Observations.xls}.



UNDER INVESTIGATION...

LAB CONNECTION: Integrate Excel into a Word Document

It is best to practice your newly acquired skills right away.

Create a list of 20 family and friends and their ages. Put this data into an Excel worksheet. Name the file **{Family and Friends Data.xls}**.

Using the above file, create a chart using the chart function on the toolbar. Any chart style is fine. Save the file as **{Family and Friends Chart.xls}**.

Using the Word file provided **{Family and Friends Letter.doc}**, integrate the Excel worksheet and chart source file objects into the Word destination document.

2. Select the object in Excel by dragging through the cells to select them. Select cells B2 through H13.
3. In the Excel window, click **Copy** on the **Home** tab to copy the selected cells to the **Clipboard**.
4. Open Word (or if it is already open, click on Word in the task bar). Open the Word destination file **{Memo for Integration.doc}**.
5. Position the cursor for the insertion of the object file, and press Enter.
6. In Word, click the paste button arrow on the **Home** tab to display the **Paste** menu. Click in the **Paste Special** command on the **Paste** menu to display the **Paste Special** dialog box.
7. Click the **Paste** link to select the option button.
8. Select MS Excel Worksheet object in the As list.
9. Click the **OK** button to insert the Excel worksheet as a linked object at the location of the insertion point.

STARTING THE LINKING PROCESS FOR THE EXCEL CHART

1. Click on the Excel program button on the task bar (or open from the **Start** menu). Open the source file **{Cell and Speeding Observations.xls}**.
2. Click on the edge of the chart to select it.
3. Click the **Copy** button on the **Home** tab to copy the selected data to the **Clipboard**.
4. Use the Word program button on the task bar to go back to Word.
5. Place the cursor below the previously linked worksheet and press Enter.

6. In Word, click the paste button arrow on the **Home** tab to display the **Paste** menu, and then click the **Paste Special** command on the **Paste** menu to display the **Paste Special** dialog box.
7. Click the **Paste** link to select the option button.
8. Select MS Office Excel Chart object in the As list.
9. Click **OK** to insert Excel chart as a linked object.
10. Switch back to Excel, and then quit Excel.



FIGURE 2. A chart used in Excel can be made into a linked object in Word.

Editing a Linked Worksheet

It will often be the case that once a worksheet or item has been linked, it will need to be edited. These steps outline the process.

STARTING THE EDITING PROCESS

1. Changes made to the source document will be reflected in the destination document if they have been linked.
2. Open the Word destination file {**Memo for Integration.doc**}.
3. Double click the Excel worksheet to start the Excel program, and open the source document that contains the worksheet {**Cell and Speeding Observations.xls**}.
4. Select the cells that need to be changed—cells G13 and G7. In this case, change the Pontiac Grand Am driver's speed from 81 to 85, and change the Toyota Sienna's speed from 58 to 68.
5. Click Save on the Quick Access toolbar to save the changes, and quit Excel.

COMPLETING THE PROCESS

1. With Word now on the screen, update the worksheet with the edited Excel data by clicking the worksheet in the Word document and pressing F9.

2. If the chart also needed updating, it too could be updated by clicking the chart in the Word document and then pressing F9.
3. Click on **Save** to save the document again, and quit Word.

Summary:



Three different techniques or methods can be used to integrate Excel data into a Word document: copy and paste, embed, and linked files. These methods of integrating source object files into destination documents differ. There are advantages to each method, though the linking technique is definitely the best technique to employ when data changes and needs frequent updates.

Checking Your Knowledge:



1. What is the object file?
2. What does the copy and paste integration technique utilize?
3. The editing in the embed technique is accomplished using the features of what?
4. Define the linked file technique.
5. Define the copy and paste technique.

Expanding Your Knowledge:



Visit the administrative assistant or secretary for the business education area of your school. Inquire as to the integration techniques used. Ask which method is used the most, and ask why that is the preferred method.

Web Links:



Integration Tutorial 1: Word and Excel

http://oc.course.com/np/Office2007/data/ppt/Integration_01.ppt#7

Embedding and Linking to Excel Files in Word Documents

<http://wordprocessing.about.com/od/workingwithotherprograms/l/bl Excellink.htm>

Linking Microsoft Excel Data in Your Microsoft Word Documents

http://accountant.intuit.com/colleagues/product_tips/tip.aspx?file=nh_LinkExcel-Word