



Choosing One Microsoft® Program Over Another

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Choosing One Program Over Another (Advantages/Disadvantages)

Choosing one program over another can be one of the most important decisions you make in the process of creating a document. Each program has unique strengths and advantages for different types of documents. For example, you may wish to create a simple telephone list with a name and extension. To save room on the page, you might want to set up multiple columns. If you choose a Word table, you could create columns on the page and keep your text alphabetical. If you chose Excel however, you would not be able to wrap the columns. Each addition would force you to cut and paste to make the columns line up. Access would enable you to modify this report layout to work, but it might be overkill if the name and extension were all you planned to include. If however, you wanted a complete database that included name/address/phone and had hundreds of records, Access would give you much more flexibility than Excel or a Word table. If you wanted to do mathematical functions, such as calculating pay raises, etc., Excel or Access would be better suited for the task. Planning out in advance what you will do with the information and how you will use it will help you to choose the most appropriate method. Some questions to ask yourself up front:

- ◆ Who will be using this information?
- ◆ What format do they need it to be in?
- ◆ Will it be published to the Web?
- ◆ Will it be printed out or only utilized electronically?
- ◆ How often will it be updated?
- ◆ Will someone need to manipulate the data (i.e. create different types of reports or summarize information?)
- ◆ Will more than one person be providing the input? Do they need to work on it concurrently?
- ◆ Do you need to develop a form that will allow easier input of the data?
- ◆ Will you need to be able to select only certain parts of the list (certain zip codes or all clients in Chicago that paid your company over \$500,000 last year)?

Copy and Paste Options

Word - The most common Paste Special (Home Ribbon – Paste – Paste Special) options you would use in Word would be unformatted text (especially if you are copying something from a website) or picture. Note that just about any time you paste using Paste Special, you can choose to change it to Paste Link (which will update your data whenever your original data is updated).

Excel - Excel has many pasting options built in. First copy whatever is going to be copied, then select the cells that will have paste special applied. Click Home - Paste-Paste Special. Your options include pasting only formats, values, formulas and math functions. This is also where you

can go to transpose your range (make the rows into column headings and the columns into row headings). You can also click paste link from this window to have your copied data linked back to your original data. Therefore, when you change your original data, your copied data will automatically update.

In addition, Excel offers the option to copy/paste as a picture too. To do this, click Paste on the Home Ribbon and note the As Picture link at the bottom of the menu. This menu gives you the option to Paste As Picture (which posts a static picture – when original data is updated, picture does not update) and Paste Picture Link (which maintains the link to the original data for updates).

Note when copying a list from Word into Excel – if you click once on the cell in Excel, it will paste the list into subsequent cells in the column. If however you first click in the formula bar and then click paste, it will paste the list in one cell instead. You can force a break in a particular spot by pressing Alt-Enter while in cell edit mode.

Transferring Data Between Programs

If you discover that you have created your document in the wrong program, all is not lost. Office has numerous methods of support for transferring data between programs.

The most common and normally the easiest method, is to copy the data and then paste it. This may have the desired results. Choosing Home Ribbon - Paste - Paste Special gives you more control over how the data is pasted. This control varies by program. Each of the programs however provide Paste as a Link as one of the options. Pasting as a link will enable you to update your original source document and have the second document synchronize automatically.

Other methods include (from the correct program) Insert Ribbon -Object-Object, and then selecting the tab to Create From File.

Links

You can choose to insert an object with a link to the original source file (for example Excel). Then when your document is updated in the original source program, the links can be automatically or manually updated in Word. You can link pictures, files, URLs, etc.

You can create an Excel table/spreadsheet inside a Word Document, by clicking on the Insert Ribbon - Table - Excel Spreadsheet. You will notice that when you are editing the cells, Excel commands will show on your ribbons, even though you are still in Word. This allows you to take advantage of Excel's functionality on the fly in Word.

Sorting

In Excel, select the rows that you want sorted (note you can also sort individual cell ranges). Press tab to put the white cursor cell in the column you want the rows sorted by. Click the Sort and Filter button on the Home Ribbon. Alternatively, with your cursor selecting any cell inside your range, click Data Ribbon-Sort. Note if your range has a header row or not (column heading

names). Select what you want Excel to sort your data by first, then second, then third (note that in 2007, you can have more than three levels of sorting).

To Sort paragraphs in Word, click the AZ arrow button on the Home Ribbon – Paragraph group.

Word

Mail Merges

The full features of Mail Merges are beyond the scope of this class (and would be a class in itself). Word allows you to create mail merge files using data from other programs (Outlook contacts, Excel spreadsheets, Access data, etc.). To access the mail merge menu, click Mailings, Start Mail Merge, then Step by Step Mail Merge Wizard... First you need to determine what kind of mail merge you are going to do. The most common mail merges would be letters or mailing labels. Next you have to identify the starting document. The third step is to select the recipients. Click Browse if you want to use an existing Excel file. Once your data is selected, you can edit the recipient list to exclude people. The next step is to write your primary merge document (set up the address labels, write the letter you are going to personalize, etc.). You will insert appropriate fields into the mail merge document. After that is done, you can preview your document and then perform the actual merge.

Note some tips:

- 1) Don't use blank lines in your Excel spreadsheet. It will interfere with the mail merge.
- 2) Do use column headings to make your life easier when inserting mail merge fields.
- 3) Always merge to a new document instead of direct to a printer. Save yourself a lot of time, effort and labels by printing ONE page first (preferably on plain paper) to test it first.

Putting an Excel File Into Word

To enter an Excel worksheet into a Word file, you have a number of options. You can create a new Excel worksheet by clicking Insert-Object-Object - Microsoft Excel worksheet. At that point, Excel operates as a mini window within Word. When you click off the Excel spreadsheet, the object has a grey text box appearance, but this doesn't print that way. It looks like a regular table when you print it. The advantage of this method over a Word table is that you can use the full force and power of Excel mathematical formulas versus the limited basic math functions of Word tables.

You can copy and paste your Excel data into Word. Doing so will paste the data as a static Word table, just as if you had created the data in Word in the first place.

If you copy the Excel data and then choose Home Ribbon - Paste - Paste Special instead, you can choose to paste it as an Excel Worksheet Object and/or linked to the Excel Worksheet Object or

as regular table, but still linked to the Excel data. Thus when you update your Excel spreadsheet, your Word table would update.

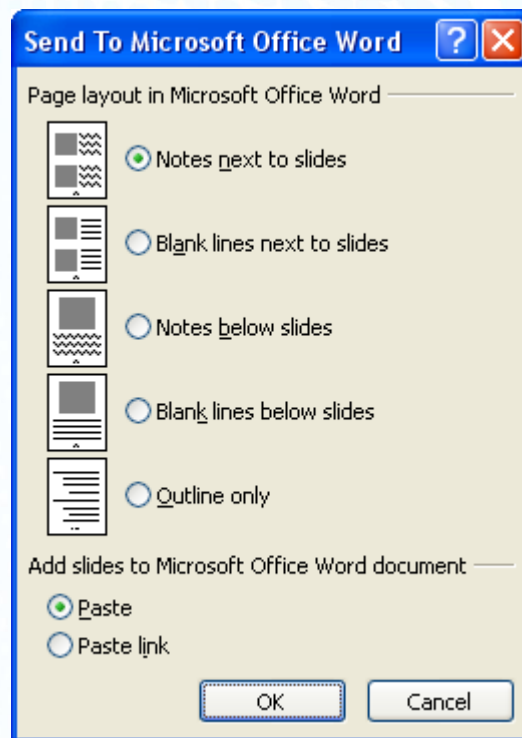
See Copy and Paste options on page 1 for more information.

Bringing a PowerPoint Presentation to Word

Sending A Presentation To Word – You can send a presentation to Word to edit the text or to print custom handouts by choosing Office Button-Publish – Create Handouts in Microsoft Office Word (File, Export, Create Handouts). The window that comes up allows you to choose to include blank lines next to the slides or just the text. Note that you can also send it with speaker notes (nice alternative to one slide per page).

Creating a PowerPoint Presentation From Inside Word

Word - To enter a PowerPoint presentation or slide into a Word file, you can click Insert-Object-Microsoft PowerPoint presentation (or slide). PowerPoint operates as a mini windows within Word. When you click off the PowerPoint window, it looks like a picture of a PowerPoint slide in your document, but you can double click on the slide to edit it. This object can be resized like any other picture.



Find and Replace Options

Find will simply find the next occurrence of your text. Choose Home Ribbon-Find to use this feature.

Replace will replace the text with alternate text. Choose Home Ribbon-Replace to use this feature. Click on More to see additional options. You can choose the following:

Match Case – have the find pay attention to capital letters (finds Rob, but not rob for instance)

Find Whole Words Only – by default, rob would find rob and robber. If this option were checked, it would not find robber.

Use Wildcards – allows you to use a question mark or asterisk to indicate that it could be any letter. Therefore, s?ng would find sang, sing, song, sung. s*ng would find those words plus string, but it would also highlight from the first occurrence of s through the next occurrence of ng (which is not likely to be what you want).

Sounds Like – will find hare, here, hair and heir.

Find All Word Forms – will find is, are, am, and be.

In addition, you can also choose to find special characters by clicking on Special. This would include tab, paragraph markers, white space, etc.

Excel

Creating a Word Document From Inside Excel

To enter a Word document into an Excel file, you can click Insert-Object-Object-Microsoft Word Document. At that point, Word operates as a mini window within Excel. When you click off the Word window, it looks like a picture of a text box in your document, but you can double click on the picture to edit it. This object can be resized like any other picture.

See page 1 for Copy and Paste options, where it talks about how to paste data into Excel to get different results.

Importing Text Into Excel

Sometimes you need to import plain text (ASCII) files into Excel. These files have the extension .txt or .rtf. You can simply open the text file (as though you were opening an Excel worksheet) to do this. A wizard will pop up to walk you through the steps of importing the data. The steps in general are:

- 1) Determine if delimited or Fixed width columns. This refers to how the columns will be separated. Most text files separate columns either with spaces (rare), tabs, or commas. A fixed width column usually would apply when you know every entry is a certain length (like phone numbers or two-digit state abbreviations).
- 2) For Delimiter option - Advise what the delimiter is (tab, comma, semicolon, other character, space, etc.). It gives you the option to click to treat consecutive delimiters as one, but most of the time you DON'T want to do this (as it means your columns are wrong if you have any blank squares).
For Fixed Width option – click and drag the arrow to the appropriate location for the column break.
- 3) The final step allows you to set formatting for the various columns (like date, text, general, etc.). You can also choose to skip importing certain columns if you wish.

Bear in mind that sometimes it is easier to paste the data into Word and use Find/Replace to insert tabs or do other editing first, then copy and paste it back into Excel.

Data Manipulation Functions in Excel

Often times when you import data, it needs to be “fixed” once it is in Excel. Some examples of the kinds of fixes you will need to do include:

- 1) **Join two columns into one:** You can do this easily with a formula. For example, if cell A1 has first name and cell B1 has last name, you can make a formula in cell C1 that would be =A1&“&B1 (note – ampersands, NOT plus symbols!). What’s the point of the double

quote-space-double quote in the middle? Well, you want a space between the first and last name, right? You have to tell Excel that. Double quotes are a way of specifying text to include (in this case a blank space). If you need to export this data and want the formula results to be values instead of a formula, copy the formula and then Home Ribbon – Paste – Paste Special – Values on the cells (see the section on Paste Special for information).

- 2) **Separate one column into two (or more) columns:** One common error that happens during importing is that the address field comes over with the city/state/zip all as one column. You may want to do a multi-step process to separate these. First ensure that you have sufficient blank columns to the right to hold all the data (or the existing data will be overwritten when you separate the columns). Second, click on the column heading (the letter at the top of the column) you want to separate. Then click Data Ribbon - Text to Columns. The window that comes up should look familiar – it's the import text wizard we used when we opened a text file and it works the same way (see page 5 to refresh your memory). For a city/state/zip code feature, you would separate on the comma first, which would create one column with the City and a second column with the State/zip code. Then you would do Data Ribbon - Text to Columns a second time and separate by the fixed width (if two letter states) or by a space (if states are spelled out). Again, make sure you had a blank column to do this or the zip codes would overwrite the column to the right of where you are when it separates.
- 3) **Put in leading zeros** – It is not uncommon that when you import numbers, the formatting gets changed- either to dates when you didn't want them to be dates or to drop the leading zeros in zip codes. You can apply custom formatting to correct this (Home Ribbon - Format-Format Cells -Number). Use special or custom for phone numbers, zip codes, etc. They are already in Excel. To create your own, you will use 0 to force a zero and # if the numbers are optional (i.e. zip code is 00000 whereas currency might be \$#,##0)

Text Selection

To select cells, press down the Ctrl button while clicking on the cells to select nonadjacent cells. To select a range, click the first (top left) cell, then hold down the Shift button and click the bottom right corner of the range.

Home Ribbon – Find & Select-Go-To Special gives you numerous options for selecting certain types of cells (i.e. blanks, non-blanks, formulas, values, etc.). Note that you can also select certain types of data from the Find & Select drop down menu (such as all formulas, all constants, etc.)

PowerPoint

Creating a PowerPoint presentation From a Word File

You can import slides from a Word file (which PowerPoint calls an outline). Choose Home Ribbon – New Slide – Slides from Outline, locate the file (must not be already open in Word at the time)

and open it. PowerPoint will automatically set up the slides, however, ONLY if you used heading styles in the Word document. Heading One text will become slide titles. Heading two and three text will become bullet points on the slide. Plain “normal” text in Word is ignored in the transition. You can also create a shortcut in Word to do this by adding a “Send to PowerPoint” button to your Quick Access Toolbar. Click the Office Button - Word Options - Customize - All Commands- Send to Microsoft Office PowerPoint and click to add it to your Quick Access Toolbar. Click OK. Same process – one pushes from Word, the other pulls from PowerPoint.

Creating a Table in PowerPoint

Typing a Table in PowerPoint

One of the slide layout options in PowerPoint is a table (Home Ribbon – New Slide – Title and Content, then click on the mini icon of a table). You will be prompted for the number of rows and columns. You can then type your data into the cells. You do have some control over the text after you have typed it. You can resize it for instance or edit it. However, it is somewhat limited and can be frustrating to work with. When you resize the table the text does not always automatically resize to fit (though they have improved it in 2007), so you need to modify that text size manually at times.

Inserting an Excel Spreadsheet

An alternative method of entering something that looks like a table is to insert an Excel spreadsheet. You can create a new Excel worksheet by clicking Insert Ribbon-Object-Microsoft Excel worksheet. At that point, Excel operates as a mini window within PowerPoint. You need to resize the spreadsheet during Excel edit mode if you want fewer cells to show in PowerPoint. If you resize the spreadsheet from the PowerPoint window, it just resizes the “picture” of the spreadsheet but includes all the rows and columns. You can utilize the Excel mathematical functions by using this method. The default will show the spreadsheet gridlines. You need to click View Ribbon – Gridlines to turn them off.

Copy and Pasting an Excel Spreadsheet or a Word Table

You can copy an Excel spreadsheet or Word table and paste it into PowerPoint. This generally will work well. It will copy the data in as if you had typed it in PowerPoint in the first place. You can edit the text and columns. You can also resize the table inside PowerPoint.

Creating a PowerPoint Chart

Embedding a Chart

PowerPoint has a chart capability built into it. It’s somewhat rudimentary, but for many of the most common charts it works just fine. You access it by clicking the Insert Ribbon - Chart button. You type in your text (in an Excel spreadsheet that opens) and PowerPoint generates a chart based on your data.

Inserting an Excel Chart as an Object

You can create a new Excel chart by clicking Insert-Object-Microsoft Excel Chart. At that point, Excel operates as a mini window within PowerPoint. You can utilize the Excel mathematical functions by using this method. This gives you more powerful capabilities than PowerPoint's chart features, but not quite full Excel functionality.

Using Excel to Create the Chart

Excel has much more powerful functionality available for charts. An alternative would be to create your data and chart in Excel, then copy and paste it (paste link if you want to be able to refresh the data periodically, paste picture if you don't want others to be able to edit that data).

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