

# Working together with Word, Excel and PowerPoint

Have you ever wanted your Word document to include data from an Excel spreadsheet, or diagrams you've created in PowerPoint? This note shows you how to use copy and paste and linking and embedding to get the best results.

## Using the right tool for the job

Microsoft Office applications each have a specific purpose. There is a certain amount of cross-functionality – for example, you can use formulas in Word and type text into Excel – however, you should always use the best tool for the job. But what if you want to bring together elements from different applications? Microsoft Office makes it easy to combine text, data and graphics in a single document.

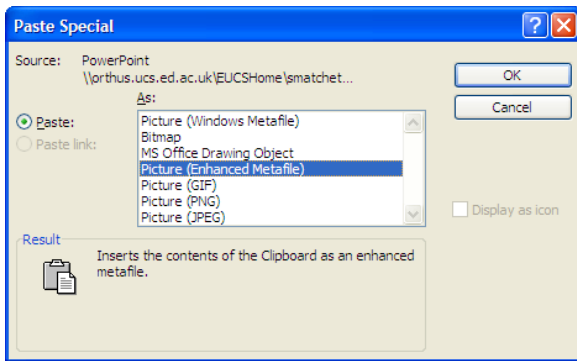
## Copying images from PowerPoint into Word

A well-chosen image can help you get your point across, and although Word does have a range of drawing tools, it is easier to create your diagram or image in PowerPoint and copy it. However, sometimes when you copy and paste an image or a diagram from PowerPoint into Word, it does not look exactly the same as the original. To produce documents with images that look right and stay where you want them, keep these guidelines in mind:

- Size graphic images in the original application rather than try to scale them after copying and pasting them. This avoids problems with distortion.
- Paste images as 'pictures' rather than 'objects'.
- Use the **In Line with Text** layout option to position your image in Word.

To copy and paste an image:

- Select your PowerPoint image. If the image is made up of a number of elements, it helps to group them (select the objects, or choose **Edit – Select All**, then click on **Draw** on the Drawing toolbar and select **Group**).
- Select **Edit – Copy** (or Ctrl + C).
- Open your Word document and place the cursor where you want the image to appear.
- Select **Edit – Paste Special**. This option is more flexible than the regular Paste function.



➔ In the **Paste Special** dialog box, select the option **Picture (Enhanced Metafile)** and click **OK**.

**Note:** This option usually produces the best results. Don't select **MS Office Drawing Object** (the default) because your image will appear on a drawing canvas which can be difficult to work with. You may also find that elements do not look exactly as they did in PowerPoint.

## Anchoring an image

The image will be pasted into Word as a 'floating' graphic, i.e. it is not anchored to the surrounding text and is therefore likely to move out of position as you make changes to your document.

Change this to an 'inline' graphic that will remain attached to the paragraph and will move with it:

- ➔ Right-click on the image and select **Format Picture**.
- ➔ Click on the **Layout** tab, select **In line with text** and click **OK**.

An inline graphic can be formatted in the same way as text; for example, you can change the alignment or the spacing before and after. Click on the image and select **Format – Paragraph** then enter your options.




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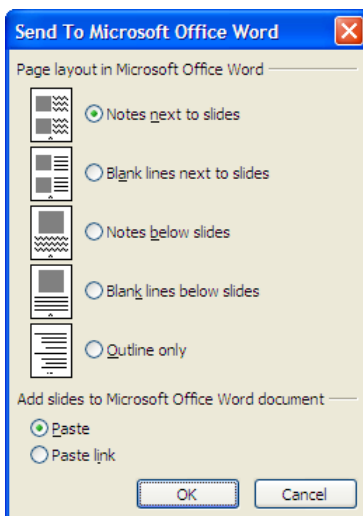
If you want a layout where you have text next to your graphic, consider using tables for layout rather than have text flow around a floating image. You will find this method easier to manage in a complex document. Click in a table cell and follow the steps above to place the image. Remember to remove the table borders.

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## Creating Word handouts from PowerPoint slides

If you have produced handouts to accompany a PowerPoint presentation, you are likely to have used the **File – Print** option. However, there is a way to export your slides to a Word document so that you can apply any formatting options you wish.

- ➔ With your presentation open, select **File – Send To – Microsoft Office Word**.



- ➔ Choose a page layout and click **OK**.

Word will open and your slides will be exported into a table.

You can make a professional-looking handout by applying the formatting you need, such as page numbers, headers and footers, or a title page.

**Note:** You can only send the whole presentation, not selected slides. Delete any unwanted slides from the Word document by deleting the table row.

# Copying Excel data into Word

If you are creating numerical data that needs to be presented as part of a report, you can perform all your calculations in Excel then copy the data and charts into your Word document.

## *Copying worksheet cells as a table*


It is possible to simply copy the cells you need and paste them directly into Word as a table. However, because formatting options in Word and Excel are different, you may not always get the results you want. The main problem occurs if you have used the **Accounting** number format to align currency symbols – this becomes leading spaces in Word.

If you have used the Accounting formatting, follow these steps to avoid having to do a clean-up exercise after pasting your data:

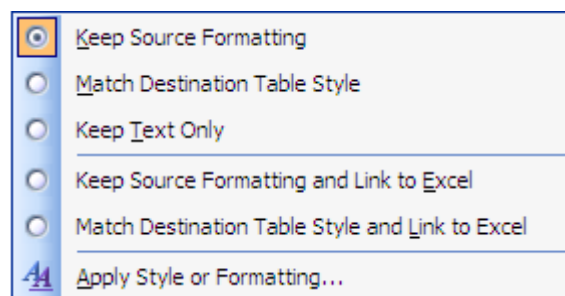
- Save your Excel workbook before proceeding.
- Change cells formatted with the category 'Accounting' to either **Currency** or **Number** (select **Format – Cells** then click the **Number** tab) .

Now you can copy and paste the data:

- Select the cells you need and choose **Edit – Copy** (or Ctrl + C).
- Click in your Word document where the table is to appear and select **Edit – Paste** (or Ctrl V).

By default, the table will display with its Excel formatting. You can use the **Paste Options** button that appears at the bottom right of a pasted image  to change this if you wish:

- Click on **Paste Options**. If you are pasting cells, you will see the following choices:



- Select the formatting option you require:

**Keep Source Formatting** – retains the spreadsheet formatting.  
**Match Destination Table Style** – applies your default Word table formatting.  
**Keep Text Only** – removes the table and inserts tabs between columns.

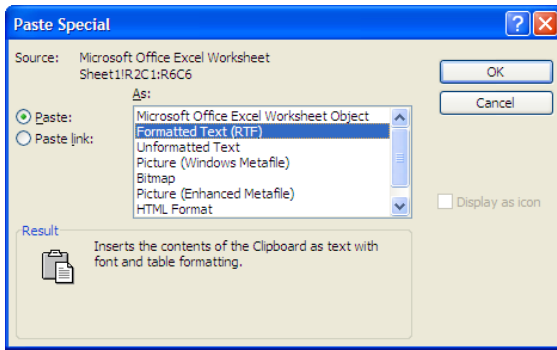
The remaining options on the list will paste the cells as a linked table. See the section on using linked objects for more information.

Note that the Paste Options button only displays when you use the paste function. It will disappear as soon as you resume work on your document.

## *Copying worksheet cells as a picture*

You can copy cells into Word as an image rather than a table:

- Select the cells you need and choose **Edit – Copy** (or Ctrl + C).
- Click in your Word document where the image is to appear and select **Edit – Paste Special**.



➤ In the **Paste Special** dialog box, choose the option **Picture (Enhanced Metafile)** and click **OK**.

Anchor the picture using the **In line with text (Format – Picture – Layout)**.

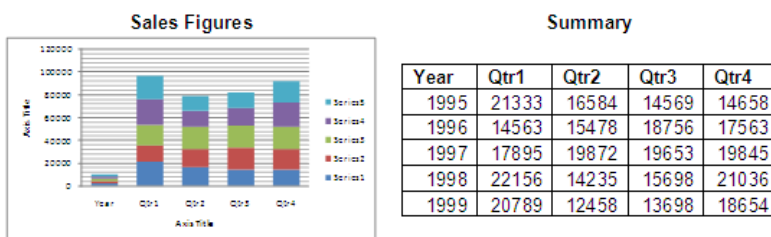
You cannot edit the figures or change the formatting with this option, but it does give you more control over sizing.

## Copying a chart into Word

An Excel chart is an excellent way to present data, but the way you choose to place it in Word can make a difference. As with drawings or diagrams, you can paste the chart as a picture. This is the default setting when you select **Edit – Paste** and usually works satisfactorily. However, if your chart looks distorted, try selecting **Edit – Paste Special**, then choose the **Picture (Enhanced Metafile)** option.

Note that if you paste the chart as an object (**Microsoft Office Excel Chart Object** in the **Paste Special** dialog box), Office doesn't just paste the object but the whole workbook. This has implications for what your readers can see and also the size of the Word file. See the section on using embedded objects for more information.


As mentioned in the section on copying images from PowerPoint, tables are a good way of controlling your layout in Word. For example, you can place a chart in one cell and the data in an adjacent cell, as in the example below:



## Using the Office clipboard

Office includes a clipboard that allows you to store up to 24 copied or cut items in a session (the clipboard is cleared when you shut down or log off). You can then use these items in any Office application. This means that if you have several items you want to copy and paste from one document to another, you can copy them all in one go, then paste them as you need, without having to jump backwards and forwards between documents.

To use the clipboard:

- With your application open, select **Edit – Office Clipboard**. The task pane opens on the right of the screen.
- Copy or cut items to place them on the clipboard.
- To paste an item, open the application. If the clipboard is still displayed in another active Office application, you will see the icon  in the taskbar at the bottom. Double-click to open the clipboard in the current application. Otherwise, select **Edit – Office Clipboard**.
- Click where you want the item to appear then click on it on the clipboard.

**Note:** **Paste Special** is not available when pasting from the clipboard. All items are pasted using the regular **Paste** option. If your item does not paste correctly, re-copy and try an option from the **Paste Special** menu.

# Linking and embedding - what's that all about?

When you are using Office applications, you are likely to encounter the terms 'linking' and 'embedding'. Objects created in one application, such as tables or charts (the source) can be *linked* to or *embedded* in another (the destination).

**Linking** places information in a document, but also creates a link between the source and destination files. If you edit data in the source file, the destination file will be updated as well.

**Embedding** places the information from the source file into the destination file in a way that allows you to edit it in the source application. For example, double-clicking on cells from an Excel spreadsheet embedded in a Word document will open Excel. There is however, *no link* between the document and the spreadsheet, i.e. editing the data in the Excel file will not update the Word document.

## Using linked objects

Linking can be useful when you are still working on your figures in an Excel spreadsheet, but want to include the data in your Word document or PowerPoint presentation so that you can see how the layout looks, or you need to send out a report that is updated regularly.

To link Excel data:

- Copy the cells or chart then open your destination document and click where the data is to appear.
- Select **Edit – Paste Special**.
- Click the **Paste link** button on the left. The paste options will change.

If you choose to paste the item as a **Microsoft Office Excel Worksheet Object**, the cells will display with their Excel formatting, and double-clicking on the object will launch Excel. If you want the data to appear as a linked table, choose the **Formatted Text (RTF)** option. This allows you to format the table as you choose. Don't merge or split cells, however; when you update the link Word will attempt to return the cells to their original state.

- Select your option and click **OK**.

When you open an Office document containing linked objects you will be prompted to update them. You can also update links manually as you work:

- Make your changes to the source file.
- In the destination file, right-click on the linked object and select **Update link**.



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If you move or rename a *source* file, the link between source and destination will break. To re-establish the link, open the destination file and select **Edit – Links**. Select the object to be reconnected and click on **Change Source**. Navigate to the source file, select it and click **Open**. Click **OK** to close.

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## Locking the linked object

Remember that you must have both the source and destination files to update linked objects. If other people have access to the files, you may want to prevent changes to your linked data:

- In the destination file, right-click on the linked object.
- Select **Linked Worksheet Object** and choose **Links**.
- In **Update method for selected link**, click **Locked** and **OK**.

Note that this locks the *linked object* only so that it cannot be updated even if the source file is changed; it does not lock the source file itself. If you want to prevent the source file from being changed, you can protect it by using **Tools – Protection**.

### *Distributing the document*

If you distribute the document *without* the source file, your readers will be able to see the linked data in your document, but will receive error messages concerning the missing file. An alternative is to convert linked objects to pictures once the document is complete.

To convert to a picture, all you need to do is break the link:

- Click on the linked object.
- Select **Edit – Links**.
- Select the object and click **Break Link**.
- Click **Yes** to confirm.

If you linked the cells using the **Formatted Text (RTF)** rather than the Microsoft Office Object option, they remain as a Word table.

**Note:** Once you have broken the link you cannot re-establish it. You will have to re-insert a linked object.

### *Using embedded objects*

To embed Excel data in Word or PowerPoint:

- Copy the cells or chart then open your document or presentation and click where the data is to appear.
- Select **Edit – Paste Special**.
- Select **Microsoft Office Excel Worksheet Object** (or **Microsoft Office Excel Chart Object**) and click **OK**.

To edit an embedded object:

- Double-click on the object. It will display as a spreadsheet, and the toolbars will change to Excel toolbars. You can now make changes as though you were in Excel.
- To return to the original application's toolbars, click away from the object.



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When you embed an object, you also embed the whole workbook. Anyone double-clicking on the object can see everything in the workbook – you may not want this to happen. Embedding also has implications for file size since you are effectively combining your original file and your Excel file.

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**Note:** You cannot paste PowerPoint items as either linked or embedded objects because they are classed as Microsoft Office drawing objects, and Word includes a drawing function. However, rather than try to draw your images or diagrams in Word, produce them in PowerPoint and paste them into Word as inline pictures. This is the better option because PowerPoint is more flexible in its editing capabilities than Word. Make sure you retain the PowerPoint file for future editing.