



# Microsoft Word and Excel



Working together

Instructor: Kenny Duray

## Course Agenda


- Insert a Chart
- Copy & Paste
- Embedding
- Linking
- Mail Merge
- Resources

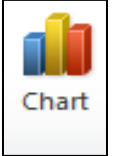
2600 Harnish Drive  
 Algonquin, IL 60102  
 847-458-6060  
 www.aapld.org

Mon-Thur: 9am - 9pm  
 Fri: 9am - 6pm  
 Sat: 9am - 5pm  
 Sun: 12pm - 5pm

### Insert a Chart into Word:

(Word Insert Tab)

1. Click on the **Charts** button and a menu box will open
2. Click on a **Chart Template** that will best work with your data
3. Click on the **Chart** you'd like to insert and click **OK**
4. Excel will open in a new window
5. Fill in data within the Excel Spreadsheet
6. Adjust the Excel selection window to fit around the data
7. Close Excel by clicking the  and the chart will be inserted into Word
8. Resize and reposition chart if needed
9. Click on **Chart Tools: Design** to edit data, change colors and chart style



### Copy & Paste Excel into Word:

1. Highlight the data in Excel (left click and drag)
2. Right click in highlighted area and select **Copy**
3. Go to Word document and left click in location you wish to place data
4. Right click and under **Paste** you'll have several options
  - a. **Keep source formatting:** inserts the data in columns and rows
  - b. **Use destination styles:** inserts the data and the cell outlines
  - c. **Picture:** inserts the data as an image and cannot be edited
  - d. **Keep text only:** inserts data into document as text (cannot be repositioned the same as other options)
5. Click on data to open options to
  - a. **Reposition:** located in upper left corner
  - b. **Resize:** located in lower right corner

### Embed Excel into Word: (Word Insert Tab)

An embedded Excel spreadsheet is different from a table in that it allows you to use formulas and functions.

#### Insert a blank Excel spreadsheet:

1. Click the **Table** button
2. Click **Excel Spreadsheet**
3. A spreadsheet will be inserted into your document

#### Insert an already created Excel file:

1. Click on the **Object** button
2. Click on the **Create from File** button
3. Choose an Excel file and click **Insert** and then **OK**

#### To edit:

1. Right click on embedded Excel worksheet
2. Hover cursor over **Worksheet Object**
3. Click on **Edit**

### Link Excel and Word together:

An Excel file that is linked to a Word document will make changes to both files when you edit.

#### Copy & Paste:

1. Copy using the instructions above
2. Right click and Paste and two of the options will have chain links
  - a. **Link & keep source formatting**
  - b. **Link & use destination styles**

#### Embed an Object:

1. Follow instructions to insert an already created Excel file but before you finalize by clicking OK, mark the box labeled: **Link to File**

## Creating an address list: (Excel)

- Open a blank Excel workbook / spreadsheet and in Row 1, type the following headings in each cell:
  - A. Title (Mr., Mrs., etc...)
  - B. First Name
  - C. Last Name
  - D. Company Name
  - E. Address Line 1
  - F. Address Line 2
  - G. City
  - H. State
  - I. ZIP Code
  - J. Country or Region
  - K. Home Phone
  - L. Work Phone
  - M. Email Address
- Click the **View** tab
- Click **Freeze Panes**
- Click **Freeze Top Row** (this will keep the top row locked in position while your list gets longer and you need to scroll down)
- Type in the information that corresponds to each heading name
- When you've finished typing the lists, click on the Green **File** tab
  - Click **Save As**
  - Choose where you'd like to save the file
  - Name the file "**Address List**"
  - Click **Save**
- You can always re-open this file to add new names or edit the list

## Resources:

### [Algonquin Area Public Library Webpage](http://www.aapld.org/)

<http://www.aapld.org/>

From the home page click through:

- Virtual Library
- Learning Resources
- **LinkedIn Learning** and search for Excel
- **brainfuse JobNow** and use **SkillSurfer**

Both of these services require a valid AAPLD library card. (not sure of your password? Let us know!)

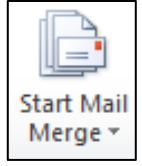
### One-on-One Assistance

847-458-3146

[kduray@aapld.org](mailto:kduray@aapld.org)

## Mail Merge: (Word)

Mail merge makes it easier to send out letters, flyers, or invitations to multiple people by addressing or applying a greeting message specific to each person.



Creating a mail merge is simple with the use of the Mail Merge Wizard!

- Click on the **Mailings** tab
- Click on **Start Mail Merge**
- Click on **Step by Step Mail Merge Wizard**

A menu will open on the right side of the screen giving you choices. There are six steps in this process, clicking the **Next** option located at the bottom of the menu will advance you through the steps. Below are the steps to follow if you are creating a mail merge for a letter.

### Step 1. Select Document Type

- a. Click on the button next to Letters

### Step 2. Select Starting Document

- a. Here you can choose the current document, a template, or an existing document

### Step 3. Select Recipients

- a. Here you will find options to: Use an existing list, Select from Outlook contacts, or Type a new list
- b. Select "Use an existing list"
- c. Click on the browse option
- d. Choose the Excel file "**Address List**"
- e. Choose what sheet it is on

### Step 4. Write Letter

- a. Address Block will place each recipient's name and address on the letter and will appear on the page as <<AddressBlock>>
- b. Greeting Line will place a greeting specific to each name and will appear on the page as <<GreetingLine>>

### Step 5. Preview Letters

- a. Here you will see what the mail merge looks like. If you don't like the spacing or want to change the font, go back to previous step, highlight <<AddressBlock>> or <<GreetingLine>> and make adjustments

### Step 6. Complete the Merge

- a. From here you can print the letters

The instructions above work the same when creating labels, invitations, or addressing envelopes.