13 Working with Other Microsoft Office Programs

In this chapter, you will learn how to

- ✔ Include Office documents in workbooks.
- ✔ Store workbooks as parts of other Office documents.
- ✔ Create hyperlinks.
- ✔ Paste charts into other documents.

By itself, Microsoft Excel 2010 provides a broad range of tools so that you can store, present, and summarize your financial data. When you use other Microsoft Office 2010 programs, you can extend your capabilities even further, creating databases, presentations, written reports, and custom Web pages through which you can organize and communicate your data in print and over networks.

All the Office programs interact with each other in many useful ways. For example, you can include a file created with another Office program in an Excel workbook. If you use Microsoft Word 2010 to write a quick note about why a customer's shipping expenditures decreased significantly in January, you can include the report in your workbook. Similarly, you can include your Excel workbooks in documents created with other Office programs. If you want to copy only part of a workbook, such as a chart, to another Office document, you can do that as well.

Excel integrates well with the Web. If you know of a Web-based resource that would be useful to someone who is viewing a document, you can create a hyperlink, or connection from a document to a place in the same file or to another file anywhere on a network or the Internet that the user's computer can reach.

In this chapter, you will learn how to include an Office 2010 document in a worksheet, store an Excel workbook as part of another Office document, create hyperlinks, and paste an Excel chart into another document.

> **Practice Files** Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter13 practice file folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

Including Office Documents in Workbooks

One benefit of working with Excel 2010 is that because it is part of Office 2010, it is possible to combine data from Excel and other Office programs to create informative documents and presentations. Just as you do when you combine data from more than one Excel document, when you combine information from another Office file with an Excel workbook, you can either paste the other Office document into the Excel workbook or create a link between the workbook and the other document.

There are two advantages to creating a link between your Excel workbook and the other file. The first benefit is that linking to the other file, as opposed to copying the entire file into your workbook, keeps your Excel workbook small. If the workbook is copied to another drive or computer, you can maintain the link by copying the linked file along with the Excel workbook or by re-creating the link if the linked file is on the same network as the Excel workbook. It is also possible to use the workbook if the linked file isn't available. The second benefit of linking to another file is that any changes in the file to which you link are reflected in your Excel workbook.

You create a link between an Excel workbook and another Office document by clicking the cell where you want the document to appear, clicking the Insert tab and then, in the Text group, clicking Object to display the Object dialog box. In the Object dialog box, click the Create From File tab.
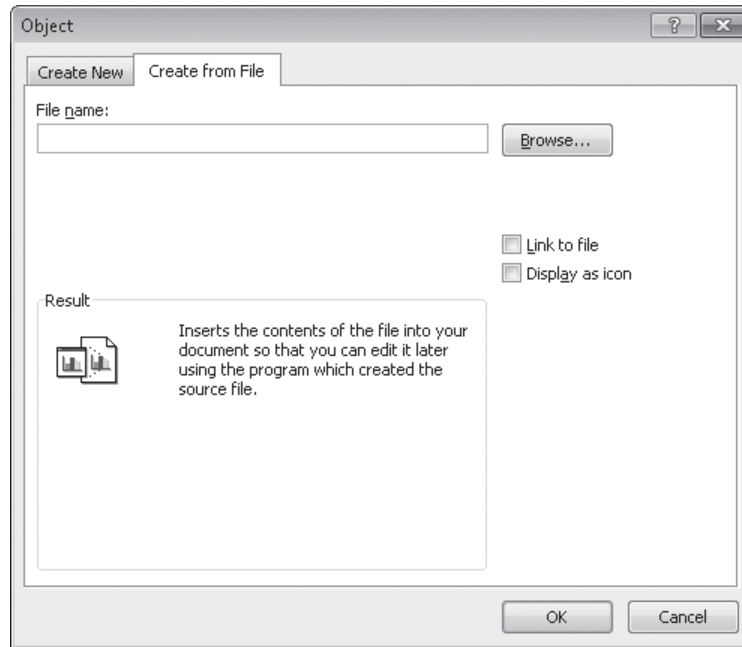
Clicking the Browse button on the Create From File page opens the Browse dialog box, from which you can browse to the folder containing the file you want to link to. After you locate the file, double-clicking it closes the Browse dialog box and adds the file's name and path to the File Name box of the Object dialog box. To create a link to the file, select the Link To File check box, and click OK. When you do, the file appears in your workbook near the active cell.

If you want to link a file to your workbook but don't want the file image to take up much space on the screen, you can also select the Display As Icon check box. After you select the file and click OK, the file will be represented by the same icon used to represent it in Windows. Double-clicking the icon displays the file.

After you have linked a file—for example, a Microsoft PowerPoint 2010 presentation—to your Excel workbook, you can edit the file by right-clicking its image or icon in your workbook and then, on the shortcut menu that appears, pointing to the appropriate Object command and clicking Edit. For a PowerPoint file, you point to Presentation Object. The file will open in its native application. When you finish editing the file, your changes appear in your workbook.

Tip The specific menu item you point to changes to reflect the program used to create the file to which you want to link. For a Word 2010 document, for example, the menu item you point to is Document Object.

In this exercise, you'll link a PowerPoint 2010 presentation showing a business summary to an Excel workbook and then edit the presentation from within Excel.

**Important** You must have PowerPoint 2010 installed on your computer to complete this exercise.

SET UP You need the SummaryPresentation_start workbook and the 2010YearlyRevenueSummary_start presentation located in your Chapter13 practice file folder to complete this exercise. Start Excel, open the SummaryPresentation_start workbook, and save it as *SummaryPresentation*. Then start PowerPoint, open the 2010YearlyRevenueSummary_start presentation, and save it as *2010YearlyRevenueSummary*. Close PowerPoint, and then follow the steps.
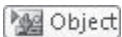
1. In the **SummaryPresentation** workbook, on the **Insert** tab, in the **Text** group, click **Object**.

   The Object dialog box opens.

2. Click the **Create from File** tab.

   The Create From File page is displayed.

3. Click **Browse**.

   The Browse dialog box opens.

4. Browse to the **2010YearlyRevenueSummary.pptx** presentation, and then click **Insert**.

   The Browse dialog box closes, and the full file path of the 2010YearlyRevenueSummary presentation appears in the File Name box.
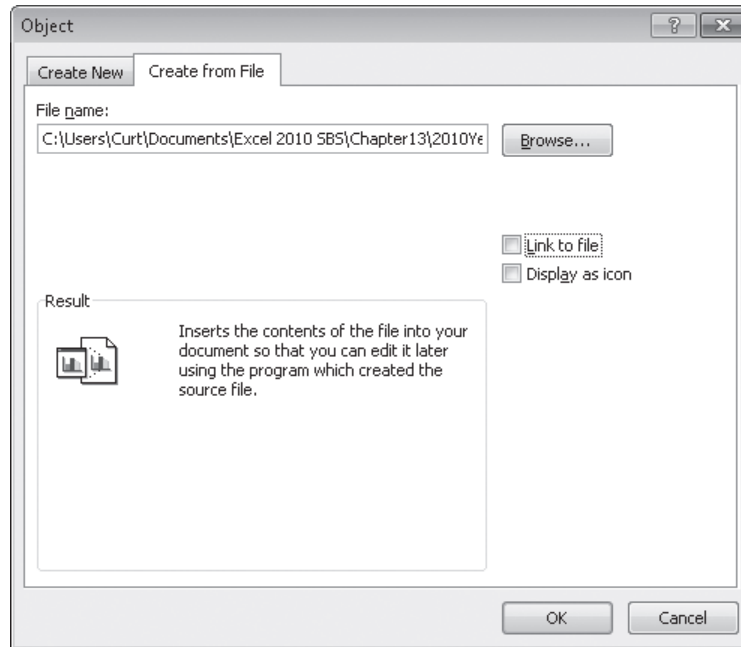
5. Select the **Link to file** check box, and then click **OK**.

   Excel creates a link from your workbook to the presentation.

6. Right-click the presentation, point to **Presentation Object**, and then click **Edit**.

   The presentation opens in a PowerPoint 2010 window.
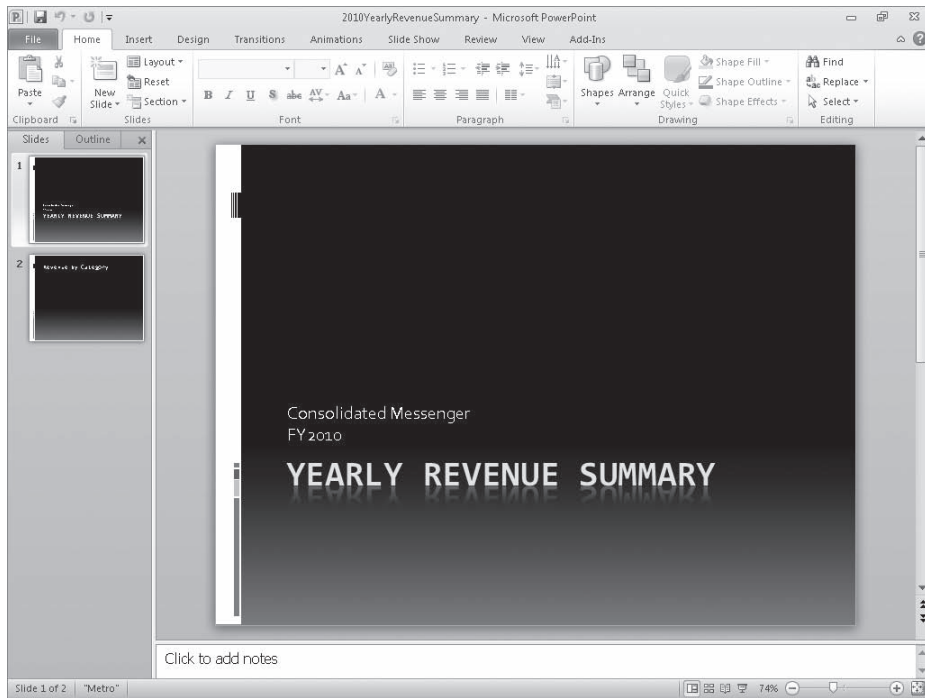
Troubleshooting The appearance of buttons and groups on the ribbon changes depending on the width of the program window. For information about changing the appearance of the ribbon to match our screen images, see "Modifying the Display of the Ribbon" at the beginning of this book.

7. Click **Consolidated Messenger FY2010**.

   The text box containing Consolidated Messenger FY2010 is activated.

8. Select the **FY2010** text, and then type **Calendar Year 2010**.

9. In PowerPoint, on the Quick Access Toolbar, click the **Save** button.

   PowerPoint saves your changes, and Excel updates the linked object's appearance to reflect the new text.

10. Click the **File** tab, and then click **Save**.

   CLEAN UP Close the SummaryPresentation workbook and the 2010YearlyRevenueSummary presentation. If you don't plan to work through the next exercise immediately, exit PowerPoint.

# Storing Workbooks as Parts of Other Office Documents

In the preceding section, you linked to another file from within your Excel workbook. The advantages of linking to a second file are that the size of your workbook is kept small and any changes in the second document will be reflected in your workbook. The disadvantage is that the second document must be copied with the workbook—or at least be on a network-accessible computer. If Excel can't find or access the second file where the link says it is located, Excel can't display it. You can still open your workbook, but you won't see the linked file's contents.

If file size isn't an issue and you want to ensure that the second document is always available, you can embed the file in your workbook. Embedding another file in an Excel workbook means that the entirety of the other file is saved as part of your workbook. Wherever your workbook goes, the embedded file goes along with it. Of course, the embedded version of the file is no longer connected to the original file, so changes in one aren't reflected in the other.

Important To view a linked or embedded file, you must have the program used to create it installed on the computer on which you open the workbook.

You can embed a file in an Excel workbook by following the procedure described in the preceding section but leaving the Link To File check box cleared.

It is also possible to embed your Excel workbooks in other Office documents. In PowerPoint, for example, you can embed an Excel file in a presentation by displaying the Insert tab in PowerPoint and then, in the Text group, clicking Object to display the Insert Object dialog box. Then in the Insert Object dialog box, select Create From File.
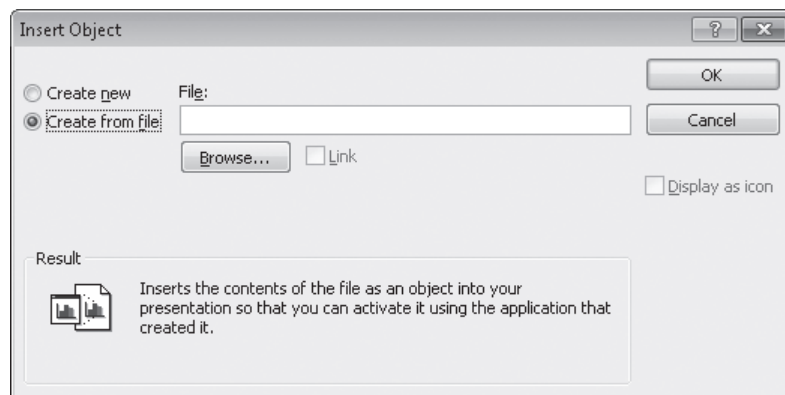
To identify the file you want to embed, click the Browse button and then, in the Browse dialog box that opens, navigate to the folder where the file is stored and double-click the file. The Browse dialog box closes, and the file path appears in the File box. Click OK to embed your workbook in the presentation.

If you want to embed a workbook in a file created with any other Office program but don't want the worksheet to take up much space on the screen, select the Display As Icon check box. After you select the file to embed and click OK, the file is represented by the same icon used to represent it in Windows. Double-clicking the icon opens the embedded document in its original application.

Troubleshooting If your Excel workbook's cells don't have a background fill color (that is, you have the No Fill option selected), PowerPoint treats the cells' backgrounds as if they were transparent. If you were to place cells with black text and no background fill over a dark background, you would not be able to see the text. To make your text visible, fill the cells with a very light gray color so the presentation's background doesn't show through.

To edit an embedded Excel workbook, right-click the workbook (or the icon representing it) and then, on the shortcut menu that appears, point to Worksheet Object and click Edit. The workbook opens for editing. After you finish making your changes, you can click anywhere outside the workbook to return to the presentation.

In this exercise, you'll embed an Excel workbook containing sales data in a PowerPoint presentation.

Important You must have PowerPoint 2010 installed on your computer to complete this exercise.

SET UP You need the 2010YearlyRevenueSummary presentation you created in the previous exercise, and the RevenueByServiceLevel_start workbook located in your Chapter13 practice file folder to complete this exercise. If you did not complete the previous exercise, you should do so now. Open the RevenueByServiceLevel_start workbook, and save it as *RevenueByServiceLevel*. Then, if necessary open the 2010YearlyRevenueSummary presentation. Then follow the steps.

1. In the **Slides** panel of the presentation window, click the second slide.

   The second slide appears.

2. On the **Insert** tab, in the **Text** group, click **Object**.

   The Insert Object dialog box opens.

3. Select **Create from file**.

    The Insert Object dialog box changes to allow you to enter a file name.
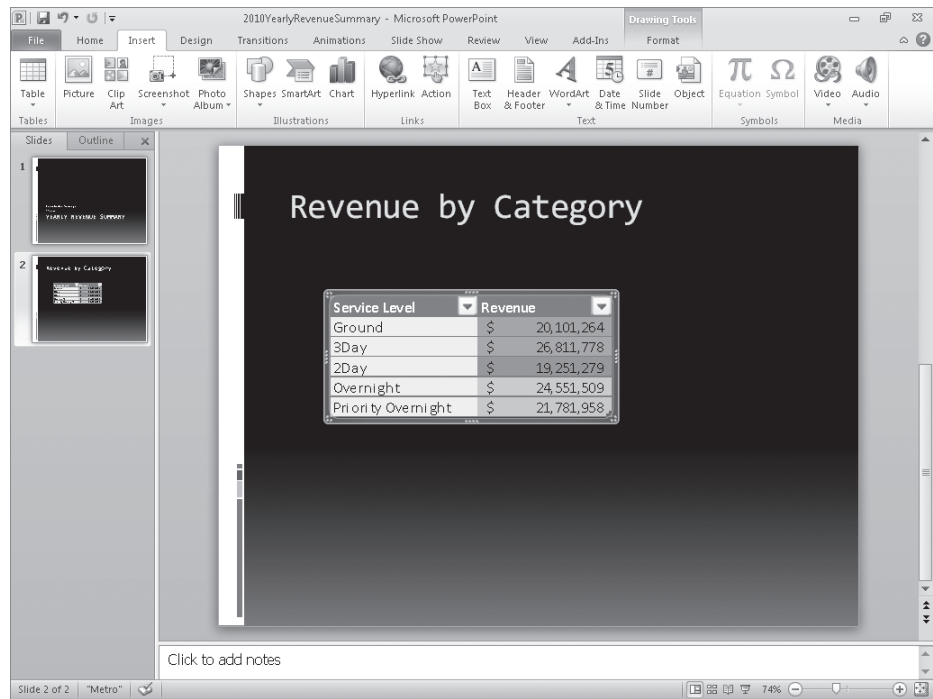
4. Click **Browse**.

    The Browse dialog box opens.

5. Browse to the **RevenueByServiceLevel** workbook and double-click it.

    The Browse dialog box closes, and the file's full path appears in the File box.

6. Click **OK**.

    The workbook appears in your presentation.

CLEAN UP **Save the RevenueByServiceLevel workbook and the
2010YearlyRevenueSummary presentation, and then close those files.
Exit PowerPoint.**

Creating Hyperlinks

One of the characteristics of the Web is that documents published on Web pages can have references, or hyperlinks, to locations in the same document or to other Web documents. A hyperlink functions much like a link between two cells or between two files, but hyperlinks can reach any computer on the Web, not just those on a corporate network. Hyperlinks that haven't been clicked usually appear as underlined blue text, and hyperlinks that have been followed appear as underlined purple text, but those settings can be changed.
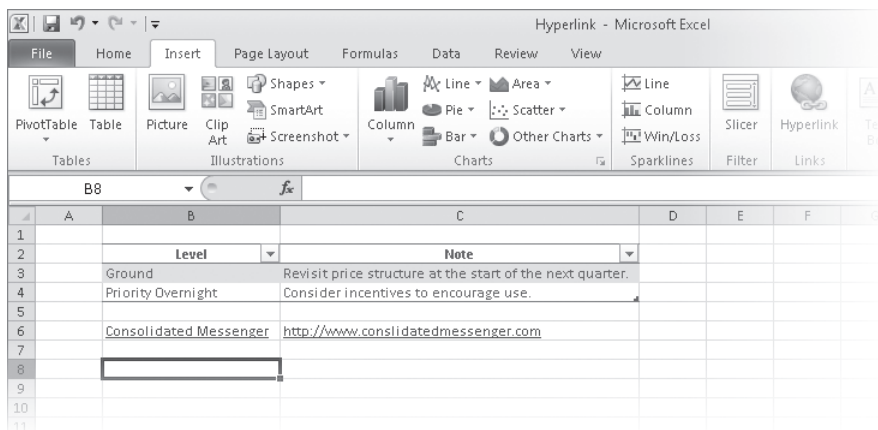
To create a hyperlink, click the cell in which you want to insert the hyperlink and then, on the Insert tab, click Hyperlink. The Insert Hyperlink dialog box opens.

Keyboard Shortcut You can also open the Insert Hyperlink dialog box by pressing Ctrl+K.

See Also For more information about keyboard shortcuts, see "Keyboard Shortcuts" at the end of this book.
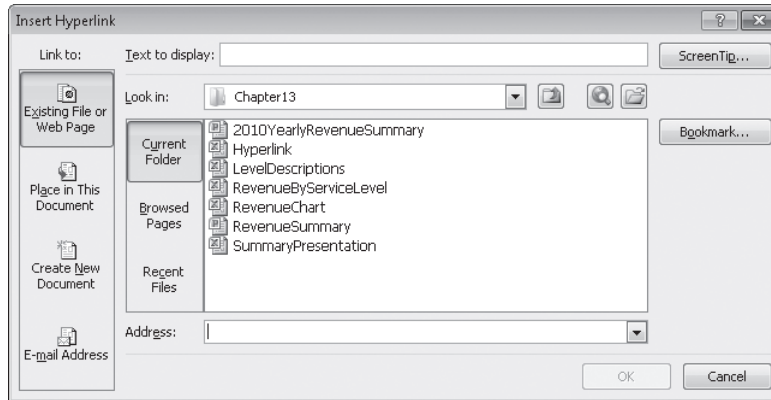
You can choose one of four types of targets, or destinations, for your hyperlink: an existing file or Web page, a place in the current document, a new document you create on the spot, or an e-mail address. By default, the Insert Hyperlink dialog box displays the tools to connect to an existing file or Web page.

To create a hyperlink to another file or Web page, you can use the Look In navigation tool to locate the file. If you recently opened the file or Web page to which you want to link, you can click either the Browsed Pages or the Recent Files button to display the Web pages or files in your History list.

If you want to create a hyperlink to another place in the current Excel workbook, you can click the Place In This Document button to display a list of available targets in the current workbook.
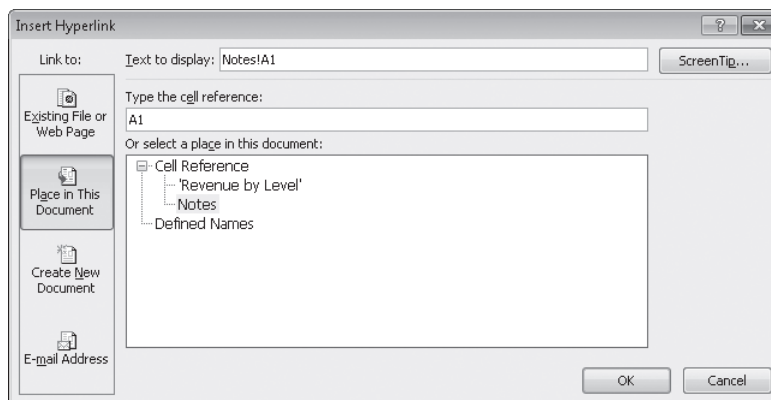
To select the worksheet to which you want to refer, you click the worksheet name in the Or Select A Place In This Document box. When you do, a reference with the name of the worksheet and cell A1 on that worksheet appears in the Text To Display box.
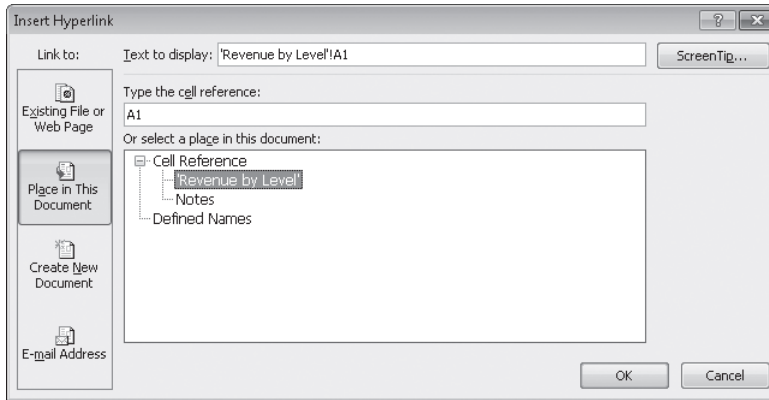
If you want to refer to a cell other than A1 on the selected worksheet, click the worksheet name in the Or Select A Place In This Document box, and then change the cell reference in the Type The Cell Reference box.

You can also create a hyperlink that generates an e-mail message to an address of your choice. To create this type of hyperlink, which is called a *mailto hyperlink*, click the E-mail Address button.
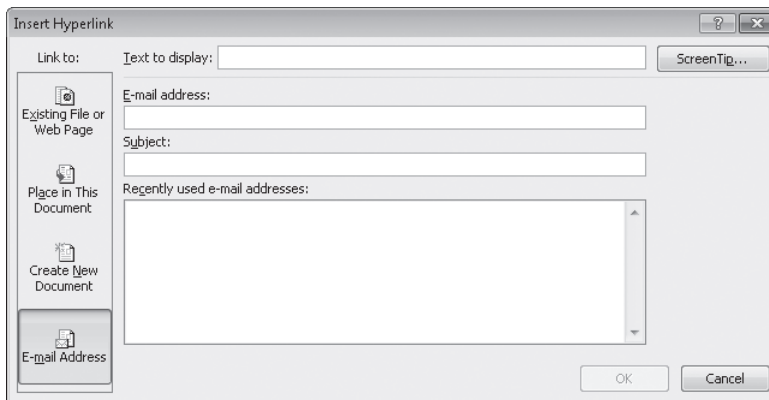
In the dialog box that opens, you can type the recipient's e-mail address in the E-mail Address box and the subject line for messages sent via this hyperlink in the Subject box.

Tip If you use Windows Mail, Microsoft Outlook, or Microsoft Outlook Express as your e-mail program, a list of recently used addresses will appear in the Recently Used E-Mail Addresses box. You can insert any of those addresses in the E-mail Address box by clicking the address.

Clicking a mailto hyperlink causes the user's default e-mail program to open and create a new e-mail message. The e-mail message is addressed to the address you entered in the E-mail Address box, and the subject is set to the text you typed in the Subject box.

Regardless of the type of hyperlink you create, you can specify the text you want to represent the hyperlink in your worksheet. You type that text in the Text To Display box. When you click OK, the text you type there appears in your worksheet, formatted as a hyperlink.

Tip If you leave the Text To Display box empty, the actual link will appear in your worksheet.

To edit an existing hyperlink, click the cell containing the hyperlink and then, on the shortcut menu that appears, click Edit Hyperlink. You can also click Open Hyperlink to go to the target document or create a new e-mail message, or click Remove Hyperlink to delete the hyperlink.

Tip If you delete a hyperlink from a cell, the text from the Text To Display box remains in the cell, but it no longer functions as a hyperlink.

In this exercise, you'll create a hyperlink to another document and then a second hyperlink to a different location in the current workbook.

SET UP You need the Hyperlink_start and LevelDescriptions_start workbooks located in your Chapter13 practice file folder to complete this exercise. Open the Hyperlink_start workbook and save it as *Hyperlink*, and then open the LevelDescriptions_start workbook and save it as *LevelDescriptions*. Then follow the steps.

1. In the **Hyperlink** workbook, on the **Revenue by Level** worksheet, click cell **B9**.

2. On the **Insert** tab, in the **Links** group, click the **Hyperlink** button.

   The Insert Hyperlink dialog box opens.

3. If necessary, click the **Existing File or Web Page** button.

4. If necessary, use the controls to the right of the **Look in** box to navigate to the **Chapter13** practice file folder.

The files in the target folder appear in the Insert Hyperlink dialog box.

5. In the file list, click the **LevelDescriptions** workbook, and then click **OK**.

The workbook's full path appears in the Text To Display box and the Address box.

6. In the **Text to display** box, edit the value so that it reads **LevelDescriptions**.
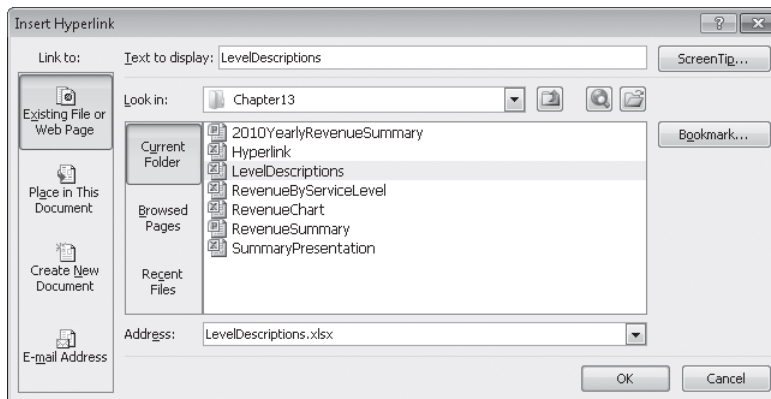
7. Click **OK**.

8. Click the hyperlink in cell **B9**.

The LevelDescriptions workbook appears.

9. In the **LevelDescriptions** workbook, click the **File** tab, and then click **Close**.

The LevelDescriptions workbook closes.

10. Right-click cell **B11**, and then click **Hyperlink**.

The Insert Hyperlink dialog box opens.

11. In the **Link to** pane, click **Place in This Document**.

The document elements to which you can link appear in the dialog box.
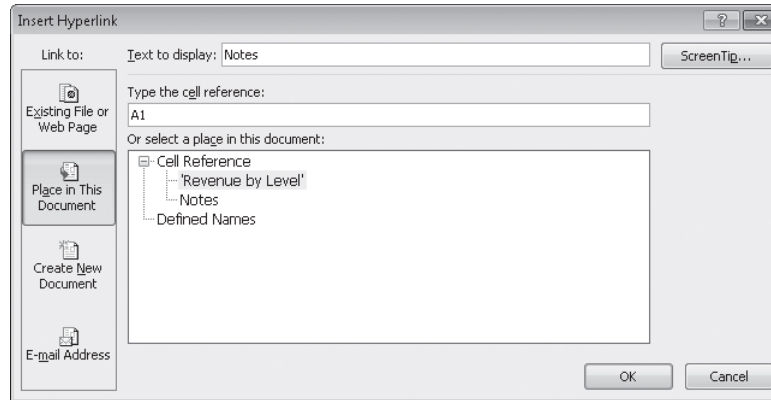
12. In the **Or select a place in this document** pane, click **Notes**.

13. Click **OK**.

    The Insert Hyperlink dialog box closes, and Excel creates a hyperlink in cell B11.

14. Right-click cell **B11**, and then click **Edit Hyperlink**.

    The Edit Hyperlink dialog box opens.

15. Edit the **Text to display** box's value so it reads **Revenue Notes**.

16. Click **OK**.

    The Edit Hyperlink dialog box closes, and the text in cell B11 changes to *Revenue Notes*.

17. On the Quick Access Toolbar, click the **Save** button to save your work.

CLEAN UP **Close the Hyperlink and LevelDescriptions workbooks.**

Pasting Charts into Other Documents

One more way to include objects from one workbook in another Office document is to copy the object you want to share and then paste it into its new location. You can copy Excel charts to Word documents and PowerPoint presentations to reuse your data without inserting a worksheet into the file and re-creating your chart in that new location.

When you want to copy the current appearance of the chart to another document without creating a link back to the chart, you right-click the chart and click Copy on the shortcut menu that appears to copy the chart to the Microsoft Office Clipboard. Then, in the document into which you want to paste the chart's image, on the Home tab of the ribbon, in the Clipboard group, click the Paste button's arrow to display the palette of paste options available. The last option on the right, Picture, pastes an image of the chart in its current state.

In this exercise, you'll copy a chart containing sales information to the Clipboard and paste an image of the chart into a PowerPoint presentation.

**Important** You must have PowerPoint installed on your computer to complete this exercise.

SET UP You need the RevenueChart_start workbook and the RevenueSummary_start presentation located in your Chapter13 practice file folder to complete this exercise. Open the RevenueChart_start workbook and save it as *RevenueChart*. Then open the RevenueSummary_start presentation and save it as *RevenueSummary*. Then follow the steps.

1. In the **RevenueChart** workbook, right-click the chart, and then click **Copy**.

   Excel copies the chart to the Clipboard.

2. Display the **RevenueSummary** presentation, which contains a single, blank slide.

3. Right-click a blank spot in the visible slide, and then, in the **Paste Options** area of the shortcut menu, click the **Picture** icon.

   The chart appears as a static image.
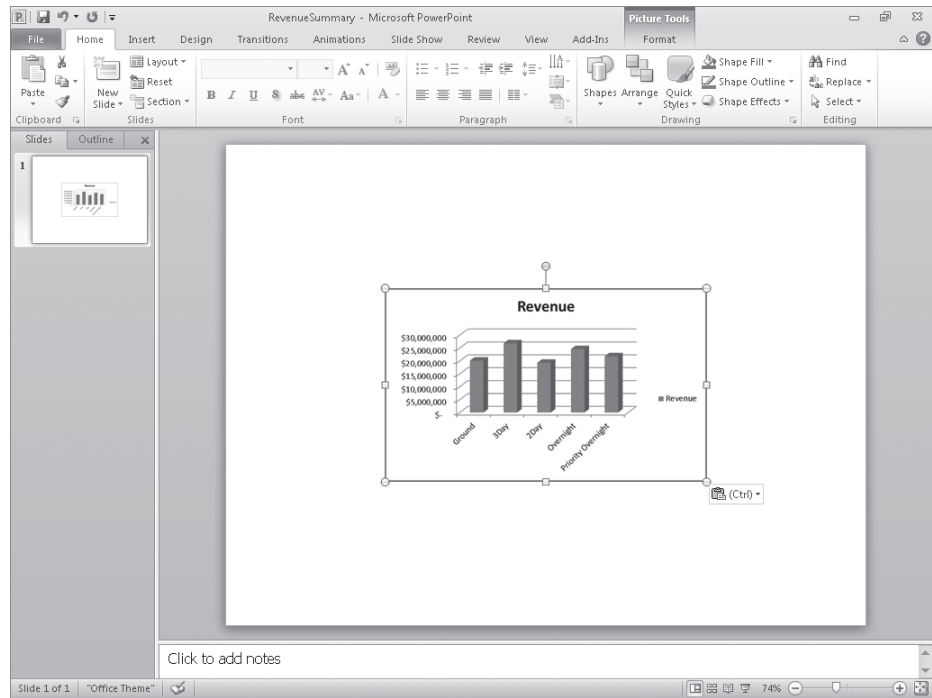
✖ **CLEAN UP** Save the RevenueChart workbook and the RevenueSummary presentation, and exit PowerPoint. If you are not continuing directly to the next chapter, exit Excel.

Key Points

- Excel is a versatile program. You can exchange data between Excel and other Office programs in just a few steps.

- One benefit of Excel is that, because it is part of Microsoft Office 2010, you can embed Excel worksheets in other Office documents and embed other Office documents (such as PowerPoint presentations) in Excel workbooks.

- Excel works smoothly with the Web; adding hyperlinks to Web pages, other documents, or specific locations in the current workbook is possible through the Insert Hyperlink dialog box.

- After you create a hyperlink, you can edit it to reflect changes in the target site's design and layout.

- Excel is the easiest Microsoft Office system program in which to create charts. After you create a chart in Excel, you can paste it directly into another Office document.
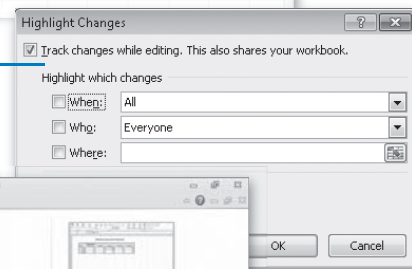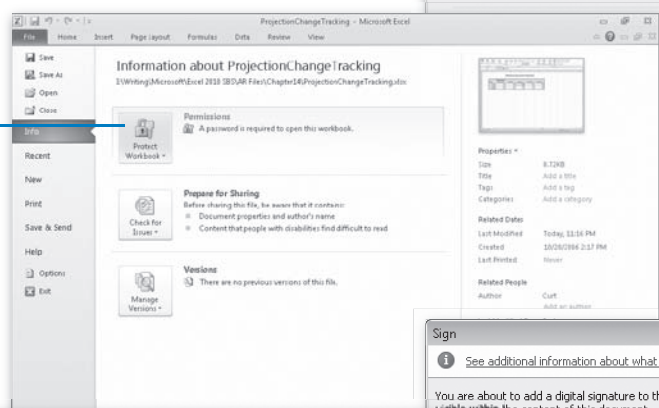
Chapter at a Glance
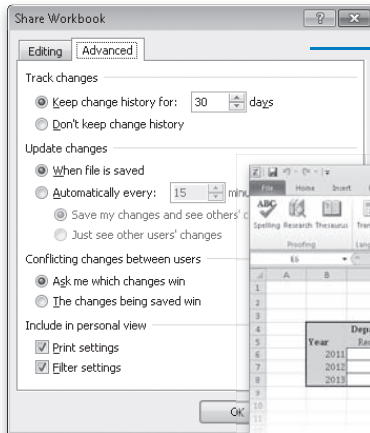
Share workbooks,
page 368
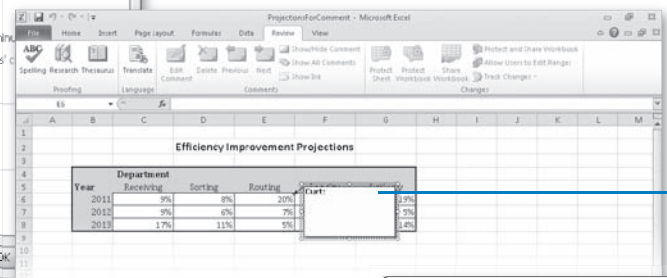
Manage comments,
page 372

Track and manage
colleagues' changes,
page 375

Protect workbooks
and worksheets,
page 379

Authenticate workbooks,
page 386

Save workbooks
for the Web,
page 388