EXHIBIT 69 PART 2

Make Your Word Document Look Great
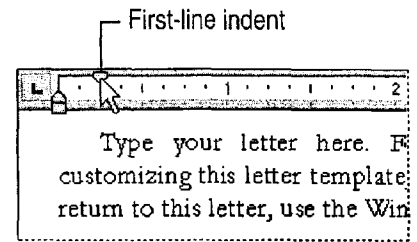
Apply formats without selecting an entire paragraph Just click in the paragraph, or select any part of it, and then apply the formats you want by clicking **Paragraph** (**Format** menu).

Apply quick and easy indents If your indent doesn't have to be precise, you can use the indent markers on the ruler. For example, instead of pressing TAB to indent the first line of each paragraph, drag the first-line indent marker to where you want the paragraph to be indented.

Did your paragraph lose its formatting and merge with the next paragraph? You probably deleted the hidden paragraph mark (¶) at the end of the paragraph. This mark stores the paragraph's alignment, indents, and other paragraph formats. To restore the mark—and your paragraph's original formatting—click the **Undo** button.

**Want to know more?** Look up **Getting Results - Look of Document** in Help.

— First-line indent

Type your letter here. F customizing this letter template return to this letter, use the Win

Undo button

Office Assistant button

MS 113873

Custom Margins

You can reduce the margins to fit more text on the page, or expand them to create a custom design for letterhead or a publication.

To set margins, click **Print Preview** (**File** menu) or **Page Layout** (**View** menu), and then drag the gray margin boundaries on the horizontal and vertical rulers.
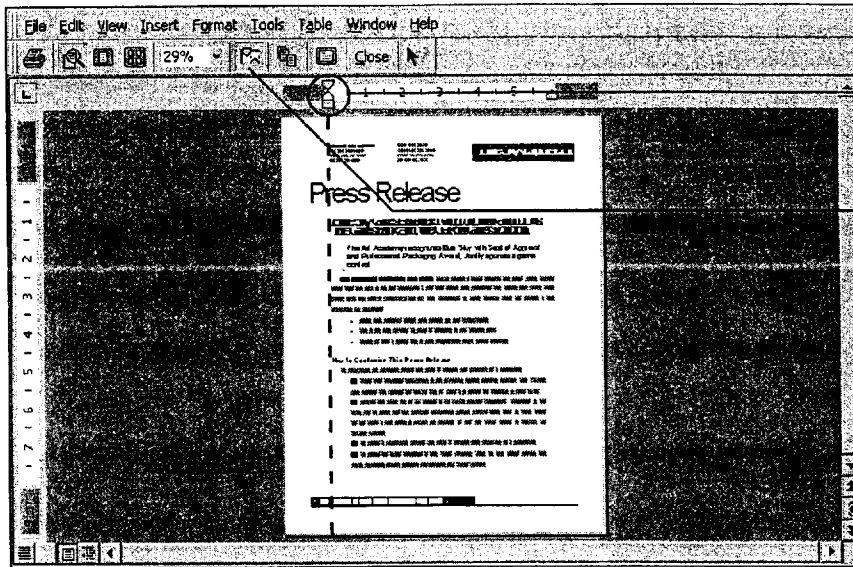
In print preview, drag this boundary to set the left margin.

If you don't see the rulers, click here.

Having trouble getting a grip on the margin boundary? When you drag the left margin, it's easy to grab the indent markers by mistake. Make sure the pointer is a double-headed arrow (like this ↔) before you start dragging.

Need to set margins precisely? Click **Page Setup** (**File** menu). On the **Margins** tab, select the options you want.

Pointer for dragging margin boundaries

Fix Awkward Page Breaks

Insert a manual page break Click **Break** (**Insert** menu).

Prevent page breaks in the middle of a paragraph Select the paragraph, and then click **Paragraph** (**Format** menu). On the **Line and Page Breaks** tab, select the **Keep lines together** check box.

MS 113874

Page Numbers, Headers, and Footers

A header or footer is text—such as a page number, chapter title, or date—that appears at the top or bottom of every page. To add headers and footers, click **Header And Footer** (**View** menu). You'll see boxes for entering the headers and footers.

You can use an AutoText entry to insert a header or footer for you. Click the **Insert AutoText** button, and then click the Autotext entry that you want.

If you don't want to use an AutoText entry, type your header here.

Header
Confidential   Page 1   6/18/97

To add a page number, press TAB, type **Page**, and then click the **Page Numbers** button on the **Header and Footer** toolbar.

To add a date, press TAB again and then click the **Date** button.

To add a footer, click here.

Insert AutoText
- PAGE -
Author, Page #, Date
Created by
Created on
Filename
Filename and path
Last printed
Last saved by
Page X of Y

Page 1   Sec 1   1/1   At 0.5"   Ln   Col 1

Don't see your headers and footers?   Click **Page Layout** (**View** menu).

Add the file name and path, author's name, or running page numbers (such as page 2 of 5)   Click the **Insert AutoText** button on the **Header and Footer** toolbar, and then click the AutoText entry you want.

Want to leave the header and footer off the first page?   Click the **Page Setup** button on the **Header and Footer** toolbar, and then click **Different First Page** on the **Layout** tab of the **Page Setup** dialog box.

For Help on dialog box options, click this button and then click the option.

MS 113875

Case 1:13-cv-00919-LPS   Document 312-5   Filed 03/10/21   Page 5 of 142 PageID #: 30198

Part 1   Your First Day at the Office

A Shortcut for Inserting Page Numbers

Click **Page Numbers** (**Insert** menu), and then select the options you want.

What if you end up with two sets of page numbers?   Your template might already have preset page numbers. To fix this problem, click **Header And Footer** (**View** menu), and then delete the unwanted page number.

Want to know more?   Look up **Getting Results - Look of Document** in Help.

Office Assistant button

MS 113876

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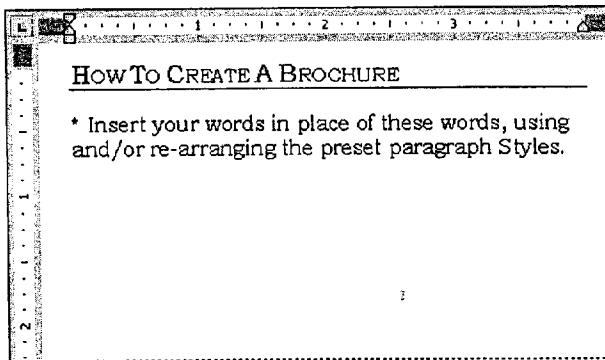
ARENDI-DEFS00001585

Bulleted and Numbered Lists

To organize your information, you can add a simple bulleted list or create a numbered list like this: 1, 2, 3; or a), b), c); or i., ii., iii.

Create a numbered list   Type the first number or letter in the sequence plus a period or right parenthesis, such as **1.** or **A)** or **i.** Then, type the first item and press ENTER.

Create a bulleted list   Type * or > and then start typing the list. Word automatically "bullets" the list as you go.

Type an asterisk (*), press SPACEBAR, type the first item, and then press ENTER.

Word "bullets" the item, and inserts another bullet so you can continue typing the list.

HOW TO CREATE A BROCHURE

* Insert your words in place of these words, using and/or re-arranging the preset paragraph Styles.

HOW TO CREATE A BROCHURE

● Insert your words in place of these words, using and/or re-arranging the preset paragraph Styles.

● Print pages 1 and 2 back-to-back onto sturdy, letter-size paper.

● Fold the paper like a letter to create a three-fold brochure (positioning the panel with the large picture on the front).

To end the list, press ENTER twice.

You pressed ENTER, but nothing happened   Click **AutoFormat (Format menu)**, and then click **Options**. On the **AutoFormat as You Type** tab, make sure that the check boxes for **Automatic bulleted lists** and **Automatic numbered lists** are selected.

Want to remove bullets or numbering from a list?   Select the list, and then click the **Numbering** button or **Bullets** button.

Use a different bullet style   Click **Bullets and Numbering (Format menu)**. On the **Bulleted** tab, click one of the preset bullet styles, or click **Customize**, and then select a custom bullet.

Numbering button   **Bullets** button

Need More Numbering Options?

If you're writing a legal contract, scientific paper, or script, you can number headings, paragraphs, or items within paragraphs. For more information, see "Add Numbering to Headings and Paragraphs," page 614.

MS 113877

Tables for Side-by-Side Information

To create side-by-side columns (for example for a phone list, invoice, or catalog), use a table. The table's cells keep your information lined up neatly, no matter how often you edit the text.

For the basics of inserting and formatting a table, see the following illustration. For more information on modifying a table—such as inserting rows, changing column widths, or centering the table— look up **Getting Results - Look of Document** in Help.

Click the **Insert Table** button ...

... then drag to highlight the number of rows and columns you want.

Click in a cell and start typing. To move to the next cell, press TAB.

Competitor Ranking	Current Share	Share in 3 Yrs.
Largest competitor	50%	30%
Second largest competitor	25%	20%
Third largest competitor	15%	

To format the table, click in it and then click **Table AutoFormat** (**Table** menu).

Competitor Ranking	Current Share	Share in 3 Yrs.
Largest competitor	50%	30%
Second largest competitor	25%	20%
Third largest competitor	15%	12%

Use tables for desktop publishing effects   When you want to create a sidebar or masthead, for example, use the **Draw Table** button on the **Tables and Borders** toolbar to create a table. For more information, see "Create a Flyer," page 222.

Draw Table button

Add a table of contents or sidebar.

Masthead with a left-aligned title beside a right-aligned subtitle

Quickly draw rules and borders, or add "fill-in-the-blanks" lines.

The Gazette

The Newsletter of Inspired Technologies
Volume 1 • Issue 7
September 1998

Home delivery service unites with retailers
Offers added value and convenience without increasing cost of goods; sales explode

Insert a picture beside multiple lines of text.

MS 113878

Clip Art, Graphics, and Drawings

To illustrate your points, browse the ready-to-use clip art that comes with Word, import graphics from other programs, or draw your own pictures.

Add clip art or another type of graphic   Click **Picture** (**Insert** menu), and then click **Clip Art** to add clip art, or click another command to add the picture you want.

Create your own drawings   Click the **Drawing** button, and then use the buttons on the **Drawing** toolbar.

Drawing button

For more information on all the things you can do with graphics, see "Get Your Point Across with Graphics," page 159.

To add interesting text effects, click the **WordArt** button.

To add ready-made shapes, such as arrows, banners, and stars, click the **AutoShapes** button on the **Drawing** toolbar, and then choose the shape you want.

Position art anywhere you want.

Use buttons on the **Drawing** toolbar (such as the **Rectangle** button, **Oval** button, **Fill Color** button, **Font** color, and **Shadow** button) to create the drawing or text effect you want.

Use symbols for graphics   Click **Symbol** (**Insert** menu), double-click the symbol you want, and then give it a large font size. To create a "reverse" symbol, change the symbol's text color to white and shade the paragraph with black or gray. To crop the shading around the symbol, adjust the indents. For more information on shading, see "Lines, Boxes, and Shaded Backgrounds," page 138.

Regular and "reverse" symbols

MS 113879

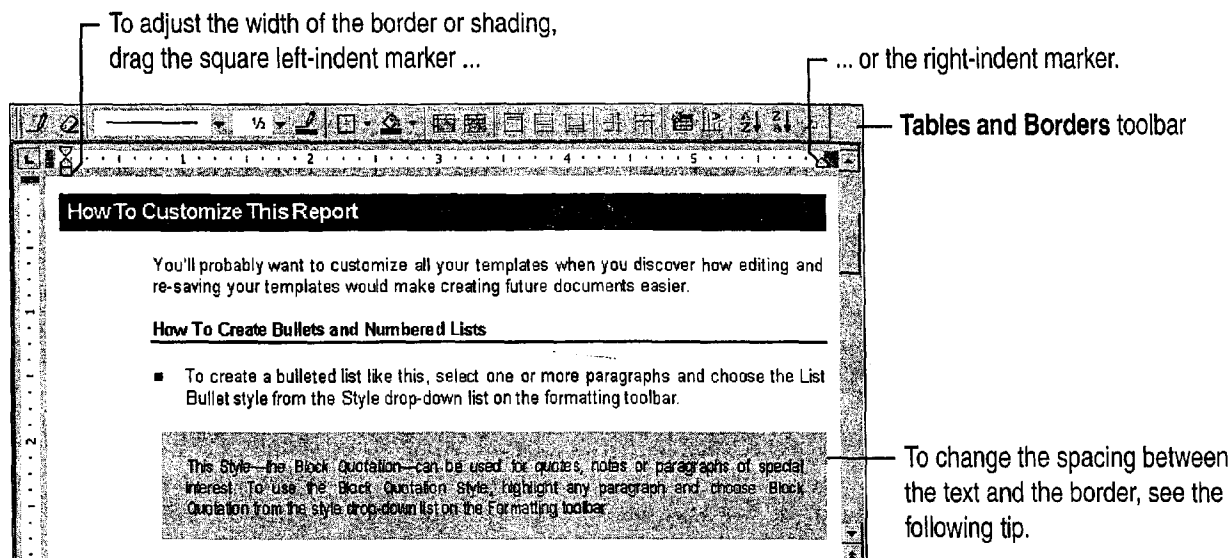# Lines, Boxes, and Shaded Backgrounds

You can add lines, boxes, or shaded backgrounds to paragraphs, tables, and pictures. For example, include a line under the header, shade sidebar text, create a heading with "reverse" text, or add a border to the entire page.

Add borders or shading   Select an item, and then click the **Tables and Borders** button. On the **Tables and Borders** toolbar, click the options you want, such as line style, border color, or shading color.

Tables and Borders button

Add page borders   Click **Borders and Shading (Format** menu). On the **Page Border** tab, click the options you want.

— To adjust the width of the border or shading, drag the square left-indent marker ...

— ... or the right-indent marker.

— **Tables and Borders** toolbar

How To Customize This Report

You'll probably want to customize all your templates when you discover how editing and re-saving your templates would make creating future documents easier.

How To Create Bullets and Numbered Lists

- To create a bulleted list like this, select one or more paragraphs and choose the List Bullet style from the Style drop-down list on the formatting toolbar.

This Style—the Block Quotation—can be used for quotes, notes, or paragraphs of special interest. To use the Block Quotation Style, highlight any paragraph and choose Block Quotation from the style drop-down list on the Formatting toolbar.

— To change the spacing between the text and the border, see the following tip.

Adjust the distance from the text to the edge of the border or shaded area   If you're working with a shaded area, first apply a border. (If you don't want the border to show, color it white after you make adjustments.) Drag the border to adjust the distance. To make exact adjustments, click **Borders and Shading**. On the **Borders** tab, click **Options**. Use the controls to set the distance between the text and the border.

Draw quick and easy lines   At the start of a new paragraph, type three dashes and then press ENTER. Word automatically adds a line above the paragraph. If you don't see the line, click **AutoFormat (Format** menu), and then click **Options**. On the **AutoFormat as You Type** tab, click **Borders**.

Want to remove borders or shading?   Select, for example, a table with borders, click the **No Border** button. To remove shading, for example, from a paragraph, select the paragraph and click **Borders and Shading (Format** menu). On the **Shading** tab, under **Fill**, click **None**.

No Border button

Multiple Columns

Word makes it easy to create newspaper-style columns for catalogs or other documents in which text flows continuously from one column to the next. If you're doing a newsletter with a story that jumps from page 1 to page 4, for example, see "Text Boxes for 'Desktop Publishing' Effects," page 141.

Click the **Columns** button, and then drag to highlight the number of columns you want. If you want to format only part of the document in columns—just the glossary, for example—select that text and then click the **Columns** button.

Columns button

To adjust the column widths, drag the column boundaries on the ruler. Columns can be of equal or unequal width.
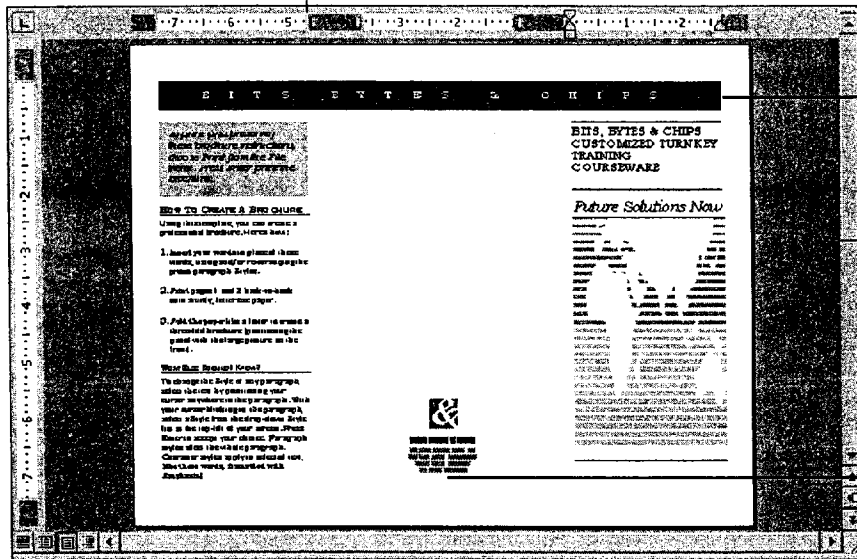
To create a banner heading that spans the columns, see the following tip.

To force a column break, click **Break (Insert** menu), and then click **Column Break**.

Create a banner heading   At the beginning of the leftmost column, type your heading and press ENTER. Select the heading, click the **Columns** button, and then select the single-column layout.

See only one column?   Switch to page layout view or to print preview.

MS 113881

Part 1   Your First Day at the Office

Create a "Document Within a Document"

You may have noticed the dotted section breaks (visible in normal view) that separate a banner heading from the multiple-column layout. In Word, you can use section breaks to create different layouts within the same document. For example, from section to section you can modify the margins, headers and footers, page numbers, page orientation, and so on.

? **Want to know more?**   Look up **Getting Results - Look of Document** in Help.

Office Assistant button

MS 113882

Text Boxes for "Desktop Publishing" Effects

Suppose you're creating a newsletter, and you want a story that begins on page 1 to continue on page 4. To make this happen, you place the text in text boxes and then create text box links between them so that the story will flow from one text box to another in the order you want. (For more information on creating newsletters, see "Create a Newsletter," page 218.)

To add text boxes to a document click **Text Box** (**Insert** menu), and then click and drag to create a text box the size you want. Insert additional text boxes where you want the text to flow.

To link text boxes select the first text box and then click the **Create Text Box Link** button on the **Text Box** toolbar. If the toolbar doesn't appear, when you create text boxes, click **Text Box** (**View** menu, **Toolbars** submenu).

Click in the text box that you want the text to flow to. (When you move the upright pitcher over a text box that can receive a link, the pitcher turns into a pouring pitcher.) To link to additional text boxes, select the text box that you just created the link to, click the **Create Text Box Link** button, and click in the text box that you want the text to flow to.

To move a text box, click the border and then drag it to a new location.

To resize a text box, click a size handle and then drag.

Create Text Box Link button on the **Text Box** toolbar
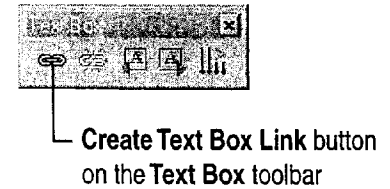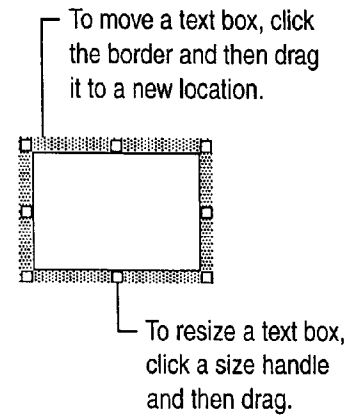
The text box on page 1 is linked to a text box on page 4.
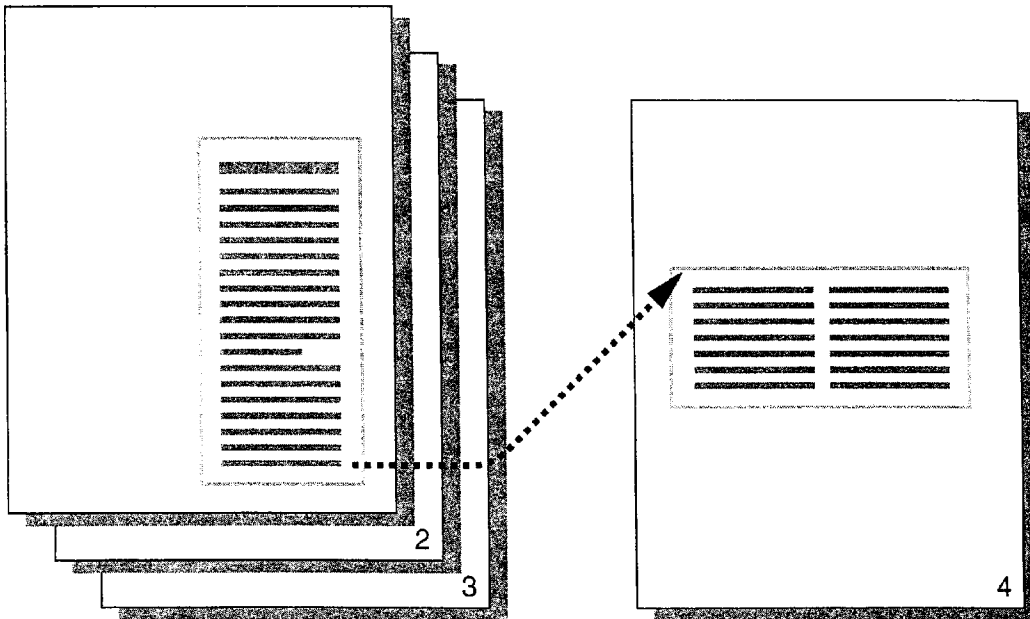
MS 113883

When you use linked text boxes, text flows from one text box to another, even if the text boxes aren't adjacent.

Part 1   Your First Day at the Office

Let Word Do the Formatting for You

If you want Word to "clean up" the formatting in your document, you can—with the AutoFormat feature. AutoFormat applies consistent styles to headings, body text, bulleted lists, and so on. AutoFormat also makes other minor fixes, such as turning "straight" quotation marks into "smart" quotation marks.

AutoFormat behind the scenes   AutoFormat "as you type" is already turned on by default. For example, if you've enclosed a word in asterisks to indicate that it should be bold, or have typed three hyphens to create a line across the page, you've seen AutoFormat in action. To control the changes AutoFormat makes, click **AutoFormat (Format** menu) and then click the **Options** button. On the **AutoFormat as You Type** tab, make sure the check boxes are selected for all the options you want.

AutoFormat on demand   You can also apply additional formatting to your documents by clicking **AutoFormat** to accept or reject each proposed change. After your document is formatted, you can use the **Style Gallery (Format** menu) to quickly switch between different document designs.
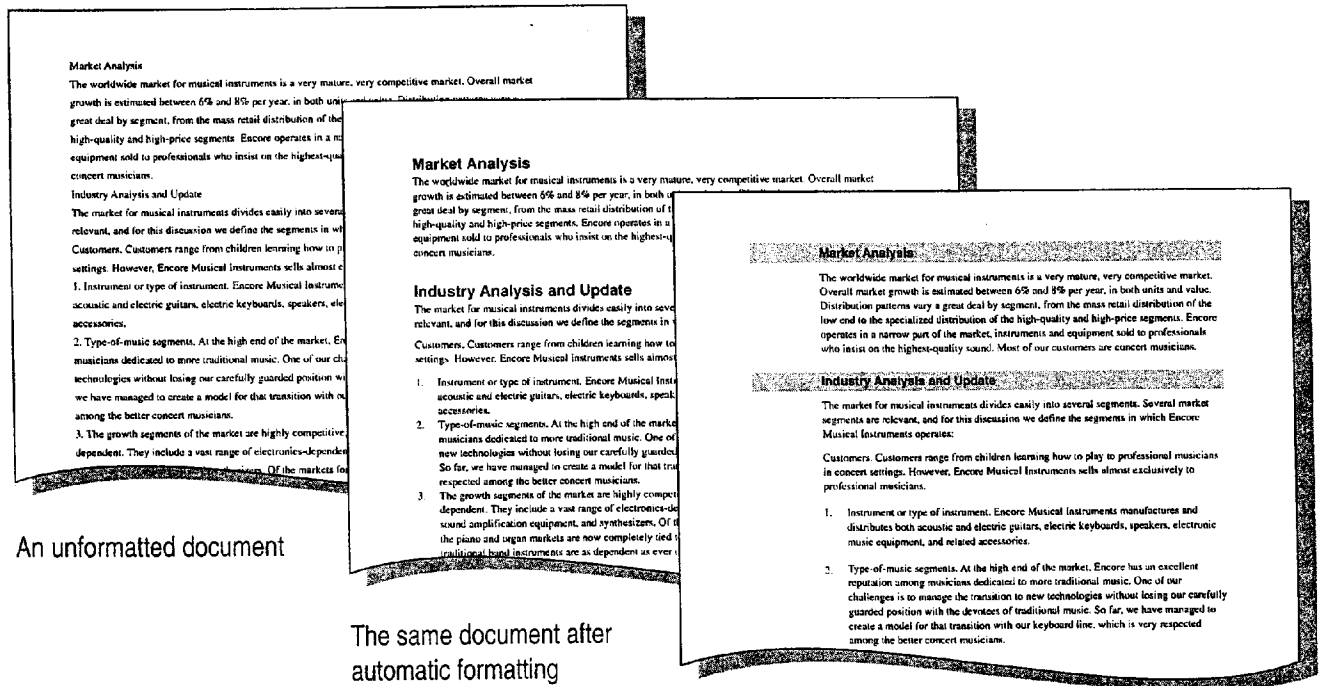
An unformatted document

The same document after automatic formatting

The document after applying the contemporary report template in the **Style Gallery (Format** menu)

MS 113884

Make Your Word Document Look Great

Don't want Word to format automatically as you type? You can turn off this formatting by clicking **AutoFormat** and then clicking **Options**. On the **AutoFormat** and **AutoFormat as You Type** tabs, clear check boxes for actions that you do not want completed.

MS 113885

Getting Results with Microsoft Office   **143**

Part 1   Your First Day at the Office

Reuse Your Custom Formatting

You've probably already created custom formatting. For example, suppose you've created your own heading format with white text on a black background. Instead of recreating this formatting each time you want to add another heading, just check the **Style** box. Word automatically saves your custom formats as styles so that you can reuse them.

To create a new style, format a paragraph the way you want, and then press ENTER.

Introduction
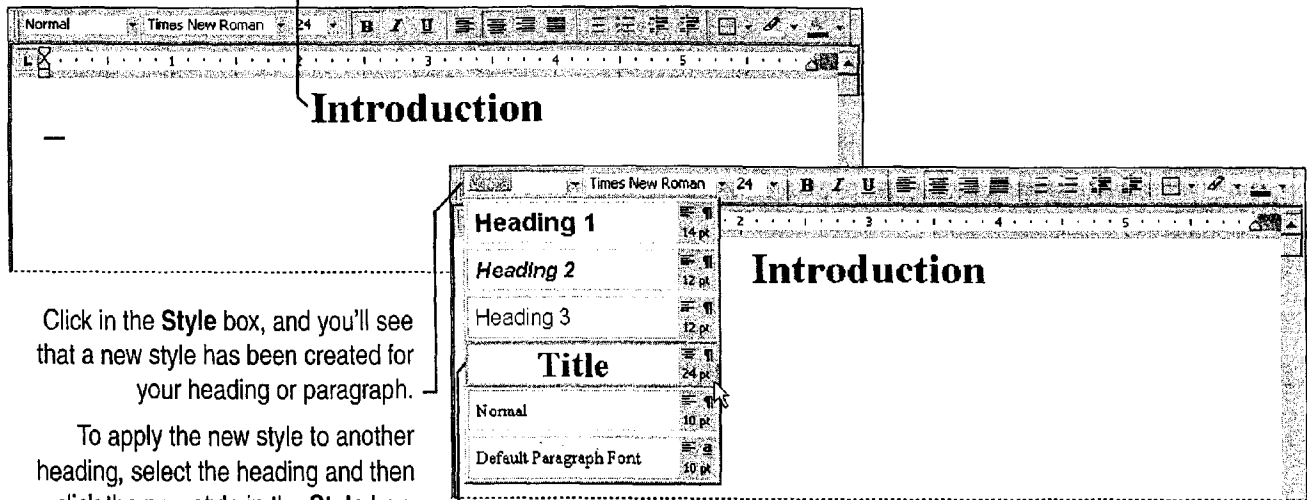
Click in the **Style** box, and you'll see that a new style has been created for your heading or paragraph.

To apply the new style to another heading, select the heading and then click the new style in the **Style** box.

Heading 1	14 pt
Heading 2	12 pt
Heading 3	12 pt
Title	24 pt
Normal	10 pt
Default Paragraph Font	10 pt

Introduction

Want to reformat a built-in style?   First, select a paragraph that has the style you want to change. Then, apply the new formats. Double-click in the **Style** box and press ENTER. When the **Modify Style** dialog box appears, select the option to update the style. Word then automatically reformats all other text in your document that has the same style.

Don't want styles to be defined automatically by your formatting? Click **AutoFormat** (**Format** menu), and then click the **Options** button. On the **AutoFormat as You Type** tab, make sure that the **Define styles based on your formatting** check box is cleared.

Copy Formatting in a Flash

If you don't want Word to create styles based on your formatting, you can still copy character formats and reuse them. Just select text with the formats you want to copy, click the **Format Painter** button, and then drag over the destination text to "paint" the formats onto it.

Want to copy formatting to more than one area of text?
Double-click the **Format Painter** button, and then drag over each area of text you want. When you finish copying formats, click the **Format Painter** button.

Format Painter button

Want to know more? Look up **Getting Results - Look of Document** in Help.

Office Assistant button

MS 113887

Next Steps

To	See
Find out more about multiple columns and graphics	"Create a Newsletter," page 218
Include a chart	"Add a Chart to a Document or Presentation," page 266
Add a watermark	"Create Letterhead and Matching Envelopes," page 195
Learn about formatting text for viewing online	"Create an Online Manual," page 417

MS 113889

Put It All Together: Design a "Facing Pages" Layout

Do you plan to print a document, such as a handbook, on both sides of the page and then bind it? If so, you might want to optimize the design for a "facing pages" layout (also called a "two-page spread").

Create "mirror" margins   You can create documents in which the margins on the left page exactly mirror the margins on the right page. Click **Page Setup** (**File** menu). On the **Margins** tab, select the **Mirror margins** check box, and then set the inside and outside margin values. To include a "gutter," or extra space that's added to the inside margins to allow for binding, set the gutter value on the **Margins** tab.

Specify different headers and footers for odd and even pages   Click **Header and Footer** (**View** menu), and then click **Page Setup**. On the **Layout** tab of the **Page Setup** dialog box, click **Different odd and even**. Then create the headers and footers as usual.

Create styles for side heads or margin notes   To position these items, use text boxes. Click **Text Box** (**Insert** menu). To format the text box, right-click the text box, and then click **Format Object**. Here, for example, you can set the line style, color, size, and position.

Use "negative" indents to push the headers out into the margins, and then align the even header on the left and the odd header on the right.

Include the part title in the even-page header and the chapter title in the odd-page header.
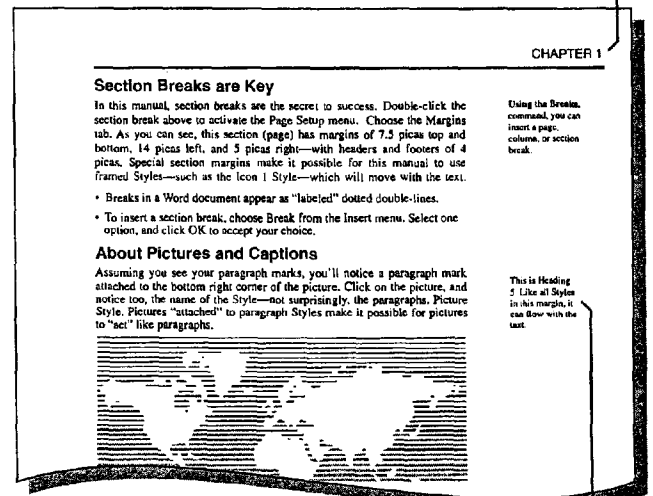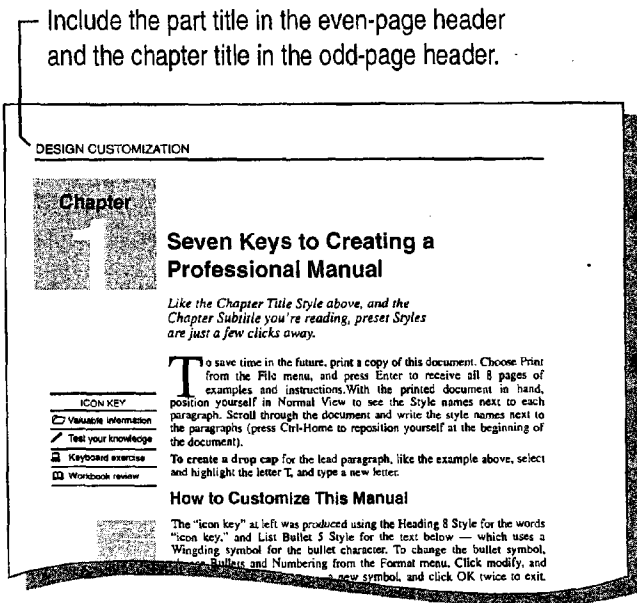
With mirror margins, you can create extra-wide outside margins and position side heads, pictures, and margin notes in them.

Make Your Microsoft Excel Worksheet Look Great

Plain text and numbers on a worksheet do the job, but additional formatting can make your worksheet much more presentable. There are many ways you can change the appearance of your worksheet, including:

- Formatting text, numbers, spacing, and alignment in cells for increased readability
- Formatting cell colors, patterns, and borders for better organization
- Copying formatting from one range of cells to another
- Saving your custom formatting to apply to other worksheets
- Applying an autoformat for utmost efficiency

	A	B	C	D	E
1	1997 Book Tour Results				
2	City	Date	Fee		
3	New York	1/23/97			
4	Boston	1/25/97			
5	Washingto	1/27/97			
6	January Total				
7	Miami	2/4/97			
8	Memphis	2/6/97			
9	Atlanta	2/8/97			
10	February Total				
11	Los Angele	3/5/97			
12	San Franc	3/7/97			
13	Seattle	3/11/97			
14	March Total				

	A	B	C	D	E
1	1997 Book Tour Results				
3	City	Date	Fee	Attendance	Books Sold
4	New York	23-Jan-97	$ 1,180	205	147
5	Boston	25-Jan-97	$ 821	385	146
6	Washington, D.C.	27-Jan-97	$ 1,724	499	151
7	January Total		$ 3,725	1089	444
8	Miami	4-Feb-97	$ 757	221	41
9	Memphis	6-Feb-97	$ 910	93	45
10	Atlanta	8-Feb-97	$ 1,880	149	95
11	February Total		$ 3,547	463	181
12	Los Angeles	5-Mar-97	$ 941	265	47
13	San Francisco	7-Mar-97	$ 904	171	145
14	Seattle	11-Mar-97	$ 936	279	109
15	March Total		$ 2,781	715	301
16	Tour Grand Totals		$ 10,053	2267	926

A formatted worksheet communicates more clearly.

MS 113890

Use the Best Number Format

There are several ways to apply specific formats to numbers in Microsoft Excel.

Cells command   Select a cell or range of cells, and then click **Cells** (**Format** menu). On the **Number** tab, select the format you want.

Toolbar buttons   Click one of the number formatting buttons.

Formatting in place   Type a number or date in the format you want, including numeric punctuation. If there's a built-in number format that corresponds to what you have typed, Microsoft Excel automatically applies it to the selected cell or cells.

$	%	,
Currency Style button	**Percent Style** button	**Comma Style** button

Date format with abbreviated months

	A	B	C	D	E
1	1997 Book Tour Results				
2	City	Date	Fee	Attendanc	Books Sold
3	New York	23-Jan-97	$ 1,180	205	147
4	Boston	25-Jan-97	$ 821	385	146
5	Washingto	27-Jan-97	$ 1,724	499	151
6	January Total		$ 3,725	1089	444
7	Miami	4-Feb-97	$ 757	221	41
8	Memphis	6-Feb-97	$ 910	93	45
9	Atlanta	8-Feb-97	$ 1,880	149	95
10	February Total		$ 3,547	463	181
11	Los Angel	5-Mar-97	$ 941	265	47
12	San Franc	7-Mar-97	$ 904	171	145
13	Seattle	11-Mar-97	$ 936	279	109
14	March Total		$ 2,781	715	301

Currency format without decimals

General format (no specific number format applied)

MS 113891

Number too wide for cell?   If you see #### in a cell, it contains a number that is too long to display. You can either widen the column by dragging the border in the column heading, or have the font size adjusted automatically to fit the cell. See "Adjust the Spacing and Alignment of Data," page 152.

Format special data   If you need to format cells to display postal codes, phone numbers, or social security numbers, click **Cells (Format** menu). On the **Number** tab, click the **Special** category. To create your own custom number formats, click the **Custom** category.

Use conditional formatting   You can create special number formats to be displayed only when a cell contains a specific value or falls within a specified range of values. To apply a conditional format, click **Conditional Formatting (Format** menu). For more information, see "Build Alarms into Your Model," page 485.

Want to know more?   Look up **Getting Results - Worksheet** in Help.

Office Assistant button

MS 113892

Make the Data Readable

You have complete control over the fonts used in your worksheets. The **Formatting** toolbar contains most of the tools that you need to apply font styles to selected cells. For more options, click **Cells** (**Format** menu), and then click the **Font** tab.

Make the font larger.

Font Size box

Bold button

Italic button

	A	B	C	D	E
1	1997 Book Tour Results				
2	City	Date	Fee	Attendance	Books Sold
3	New York	23-Jan-97	$ 1,180	205	147
4	Boston	25-Jan-97	$ 821	385	146
5	Washingto	27-Jan-97	$ 1,724	499	151
6	January Total		$ 3,725	1089	444
7	Miami	4-Feb-97	$ 757	221	41
8	Memphis	6-Feb-97	$ 910	93	45
9	Atlanta	8-Feb-97	$ 1,880	149	95
10	February Total		$ 3,547	463	181
11	Los Angel	5-Mar-97	$ 941	265	47
12	San Franc	7-Mar-97	$ 904	171	145
13	Seattle	11-Mar-97	$ 936	279	109
14	March Total		$ 2,781	715	301
15	Tour Grand Totals		$ 10,053	2267	926

Change the font and make it bold.

Make the font italic.

Format individual characters   You can format selected characters within a cell. Just select characters in the cell and make the changes you want by using the toolbar or the **Cells** command.

Create subtotals and outlines   You can use the **Subtotals** command (**Data** menu) to help you automatically insert rows for subtotals, add subtotal formulas, and create an outline of your worksheet. For more information, see "Create a Detailed Sales Report," page 556.

	A	B
1	1997 *Book Tour Resul*	

Normal   Italic

MS 113893

Part 1   Your First Day at the Office

Adjust the Spacing and Alignment of Data

To help distinguish different types of information in cells, adjust the alignment of cell contents using the alignment buttons. You can insert rows and columns to set data or labels apart by using the **Rows** and **Columns** commands (**Insert** menu). Adjust the width and height of rows and columns by dragging or double-clicking the line to the right of the column letter or below the row number in the header.

Center aligned text

Double-click here to adjust the width of a column to fit its widest entry.

	A	B	C	D	E	F
1	1997 Book Tour Results					
3	*City*	*Date*	*Fee*	*Attendance*	*Books Sold*	
4	New York	23-Jan-97	$ 1,180	205	147	
5	Boston	25-Jan-97	$ 821	365	146	
6	Washington, D.C.	27-Jan-97	$ 1,724	499	151	
7	*January Total*		$ 3,725	1089	444	
8	Miami	4-Feb-97	$ 757	221	41	
9	Memphis	6-Feb-97	$ 910	93	45	
10	Atlanta	8-Feb-97	$ 1,880	149	95	
11	*February Total*		$ 3,547	463	181	
12	Los Angeles	5-Mar-97	$ 941	265	47	
13	San Francisco	7-Mar-97	$ 904	171	145	
14	Seattle	11-Mar-97	$ 936	279	109	
15	*March Total*		$ 2,781	715	301	
16	*Tour Grand Totals*		$ 10,053	2267	926	

Heading in cell A1 merged across columns A through E (see next page)

New row

Right aligned text

Look at your work from a different angle   You can rotate cell contents as much as 90 degrees up or down. Select the cell, and then click **Cells** (**Format** menu). On the **Alignment** tab, select the orientation you want.

You can rotate cell contents to any angle.

Shrink cells to fit   The **Shrink to fit** option adjusts the font size in selected cells so that all cell contents are displayed without changing the column width. Click **Cells**. On the **Alignment** tab, select the **Shrink to fit** check box.

Indent within cells   by clicking the indent buttons.

Decrease Indent button

Increase Indent button

MS 113894

Merge Cells Across Columns

You can easily merge headings across the top of a range of cells. Type the title in the leftmost cell in the range, select the range, and then click the **Merge and Center** button. This simultaneously merges the cells and centers the heading in the new, wider cell. You can merge any range of cells by clicking **Cells** (**Format** menu), and then selecting the **Merge cells** check box on the **Alignment** tab.

Merged cells are useful when creating forms or solving special formatting problems. When you merge cells, selected cells are combined into one cell. The resulting cell takes the cell reference of the cell in the upper-left corner of the merged range.

To "un-merge" selected cells, clear the **Merge cells** check box.
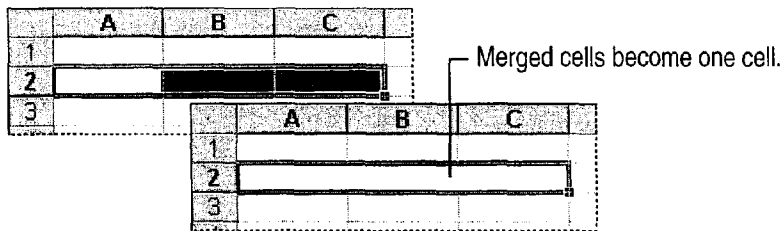
— Merged cells become one cell.

Want to know more?   Look up **Getting Results - Worksheet** in Help.

Office Assistant button

MS 113895

Part 1 Your First Day at the Office

Organize with Colors and Borders

Adding borders, patterns, and shading can enhance the readability and visual appeal of your worksheet.

Apply borders and colors by using the toolbar buttons, or click **Cells** (**Format** menu), and then click the **Border** or **Patterns** tab.

	A	B	C	D	E	F	G
1			**1997 Book Tour Results**				
3	City		Date	Fee	Attendance	Books Sold	
4	New York		23-Jan-97	$ 1,180	205	147	
5	Boston		25-Jan-97	$ 821	385	146	
6	Washington, D.C.		27-Jan-97	$ 1,724	499	151	
7	January Total			$ 3,725	1089	444	
8	Miami		4-Feb-97	$ 757	221	41	
9	Memphis		6-Feb-97	$ 910	93	45	
10	Atlanta		8-Feb-97	$ 1,880	149	95	
11	February Total			$ 3,547	463	181	
12	Los Angeles		5-Mar-97	$ 941	265	47	
13	San Francisco		7-Mar-97	$ 904	171	145	
14	Seattle		11-Mar-97	$ 936	279	109	
15	March Total			$ 2,781	715	301	
16	Tour Grand Totals			$ 10,053	2267	926	

For emphasis, apply colors to cells.

Use borders to make the sheet more readable.

Want to turn off gridlines? The gridlines on your screen are different from borders. Gridlines make it easier to distinguish individual cells on screen, but you can turn them off: click **Options** (**Tools** menu). On the **View** tab, clear the **Gridlines** check box.

Want to print gridlines? Gridlines are normally turned off for printing. If you want to see gridlines in your printouts, click **Page Setup** (**File** menu). On the **Sheet** tab, select the **Gridlines** check box.

Use diagonal borders as unused cell indicators or as worksheet design elements. Click **Cells** (**Format** menu). On the **Border** tab, click one of the diagonal border buttons. To use a diagonal border to create a corner label, split the text horizontally by pressing ALT+ENTER, and position the text horizontally by using spaces.

Diagonal border

	A	B	C	
1				
2		Interest / Date	Jan	F
3		5%		
4		6%		

Make Your Microsoft Excel Worksheet Look Great

Rotated Text and Borders

Often, data in a column is very narrow, but the column label is much wider. Instead of putting up with unnecessarily wide columns or abbreviated labels, you can link right and left cell borders with rotated text.

Select a cell containing a label that you want to rotate, and then click **Cells** (**Format** menu). On the **Border** tab, click the line style you want, and then apply borders to the left and right sides of the cell. On the **Alignment** tab, use the orientation controls to pick the angle you want.

You can use the **Format Painter** button to copy the format of the cell and apply it to other cells with wide labels. Then you can adjust text alignment options and column widths to fine-tune the overall appearance.

Format Painter button

Use rotated text for narrow columns with long labels.

	A	B	C	D	E	F	G	H	I
1									
2		September	October	November	December				
3		12%	9%	6%	11%				
4		5%	8%	4%	7%				
5		10%	9%	7%	9%				
6		8%	12%	8%	5%				
7		5%	8%	4%	7%				

Want to know more?   Look up **Getting Results - Worksheet** in Help.

Office Assistant button

MS 113897

Getting Results with Microsoft Office   **155**

Part 1   Your First Day at the Office

Emphasize Important Data

Call attention to key information on your worksheet. With the Microsoft Excel drawing tools, you can draw and format lines, boxes, circles, and text boxes that "float" over the worksheet. Draw ovals with no fill color to circle worksheet items that you want to highlight.

Click the **Drawing** button to display the **Drawing** toolbar. For more information, see "Get Your Point Across with Graphics," page 159.

Drawing button

The **Drawing** toolbar

	A	B	C	D	E
1	**1997 Book Tour Results**				
3	*City*	*Date*	*Fee*	*Attendance*	*Books Sold*
4	New York	23-Jan-97	$ 1,180	205	147
5	Boston	25-Jan-97	$ 821	385	146
6	Washington, D.C.	27-Jan-97	$ 1,724	499	151
7	*January Total*		$ 3,725	1089	444
8	Miami	4-Feb-97	$ 757	221	41
9	Memphis	6-Feb-97	$ 910	93	45
10	Atlanta	8-Feb-97	$ 1,880	149	95
11	*February Total*		$ 3,547	463	181
12	Los Angeles	5-Mar-97	$ 941	265	47
13	San Francisco	7-Mar-97	$ 904	171	145
14	Seattle	11-Mar-97	$ 936	279	109
15	*March Total*		$ 2,781	715	301
16	*Tour Grand Total*		$ 10,053	2267	926
17					

Add a comment in a box.

Give the box a drop shadow.

12% above projections!

Circle an important value ...

... or point to it with an arrow.

Format graphic objects   You can use the buttons on the **Drawing** and **Formatting** toolbars, or select the object you want to format, and then click **Format Object** (**Format** menu).

Move objects with cells   Objects you draw can be "attached" to their underlying cells. If you want an object to respond to changes such as moving cells or changing the size of rows or columns, click **Format Object**, which is available only when an object is selected. On the **Properties** tab, select one of the **Object Positioning** options.

MS 113898

156   Getting Results with Microsoft Office

Reuse Your Custom Formatting

You've spent a lot of time getting things to look just right, and there's no need to repeat the process for a similar worksheet. There are two ways you can take advantage of formatting you've already done.

- Copy the formatting from one cell or range to another by using the **Format Painter** button. This button enables you to copy any number of cell formats at once. Select a range of cells with different formats, and then click the **Format Painter** button. The Format Painter applies identical formats to the next range you select without disturbing the contents of the cells.

Format Painter button

- Define the formatting of a cell as a *style*. Styles enable you to store all the formatting attributes of a cell by giving them a name, which you can then apply to other cells. Select the cell, click **Style** (**Format** menu), and then give the style a name. To apply a style, select a cell, click **Style**, and then select the style name.

City	Date	Fee	Attendance	Books Sold
New York	23-Jan-97	$ 1,180	205	147
Boston	25-Jan-97	$ 821	385	146
Washington, D.C.	27-Jan-97	$ 1,724	499	151
January Total		$ 3,725	1089	444
Miami	2/4/97	757	221	41
Memphis	2/6/97	910	93	45
Atlanta	2/8/97	1880	149	95
February Total		3547	463	181

— Select a range you want to copy formats from.

— Click the **Format Painter** button, and then select the area you want to format.

Reuse custom cell styles Save yourself from doing all this formatting again. You can use your custom styles in other workbooks. In the **Style** dialog box, click the **Merge** button to select another workbook and copy its style definitions to the current workbook.

Repeat format copying If you double-click the **Format Painter** button, it remains active so that you can paste the copied formats as many times as you want. Press ESC when you're finished.

Want to know more? Look up **Getting Results - Worksheet** in Help.

Office Assistant button

MS 113899

Don't Want to Spend Time Formatting Manually?

Microsoft Excel offers a set of predesigned worksheet formats for you to choose from. When you apply an autoformat, Microsoft Excel analyzes the current region of the worksheet and automatically applies formatting based on the positions of headers, formulas, and data. (A region is a contiguous range of cells defined by a perimeter of empty cells or worksheet boundaries. The current region is the region that surrounds the currently active cell.)

Apply an autoformat by selecting any cell in the current region, clicking **AutoFormat (Format menu)**, and then selecting the style you want from the list.

No formatting

The Simple autoformat

The Classic 2 autoformat

Next Steps

To	See
Create a chart	"Create a Chart from Worksheet Data," page 260
	"Add a Chart to a Document or Presentation," page 266
Create macros to speed up your work	"Automate Repetitive Tasks," page 643

MS 113900

ARENDI-DEFS00001609

Get Your Point Across with Graphics

When you have a lot of complex information to present to a broad audience, representing information graphically is always more effective than using text only. A well-placed graphic can transform a plain-looking document into a compelling visual message.

When it's necessary to reach a broad audience, some of whom might not be familiar with your material, find ways to use visuals to help increase the overall comprehension level.
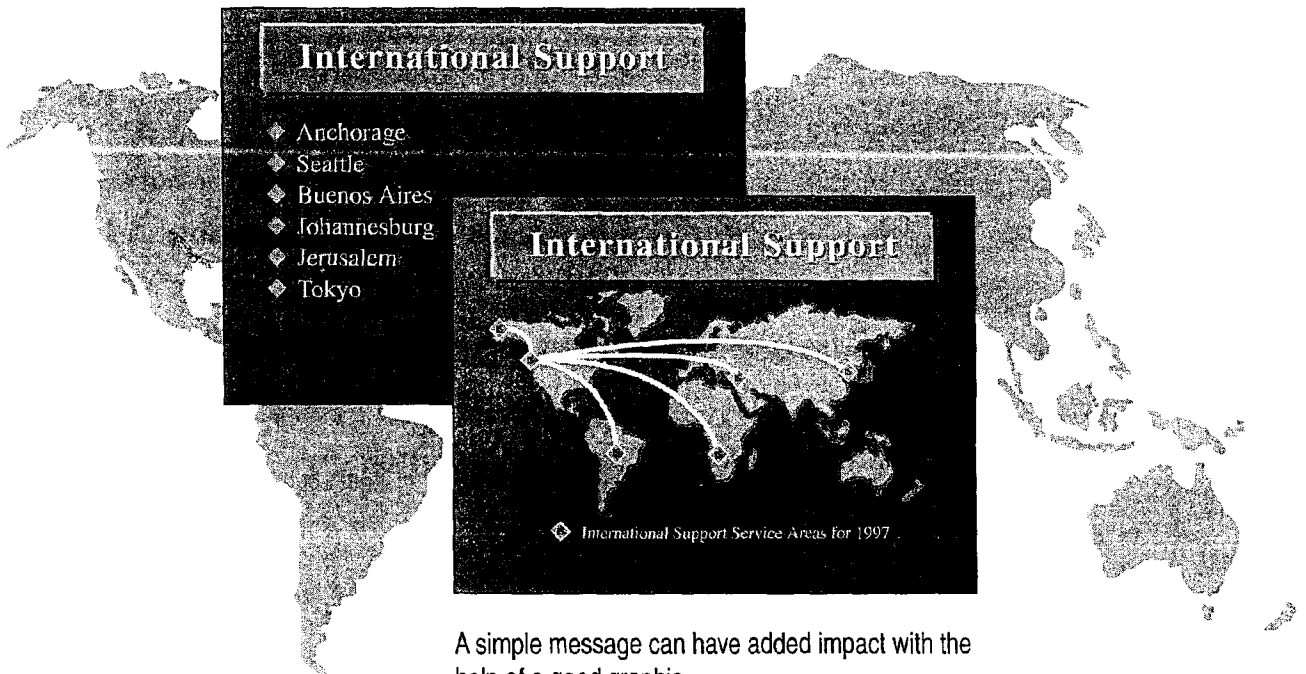
A simple message can have added impact with the help of a good graphic.

What's a graphic object?   In general, graphics are referred to as objects, whether a particular graphic is as simple as a line or as complex as a piece of clip art.

Part 1   Your First Day at the Office

Use the Drawing Toolbar

The **Drawing** toolbar provides a palette of tools and features you can use to add impact. To display the **Drawing** toolbar, click **Drawing** (**View** menu, **Toolbars** submenu).

The **Drawing** toolbar is divided into three sections:

- **General drawing controls**   Use these tools to select and rotate objects and to determine their position and orientation.

- **Object drawing tools**   Use these tools to create objects.

- **Object formatting tools**   Use these tools to change the appearance of objects you create.

└ General drawing controls   └ Object drawing tools   └ Object formatting tools
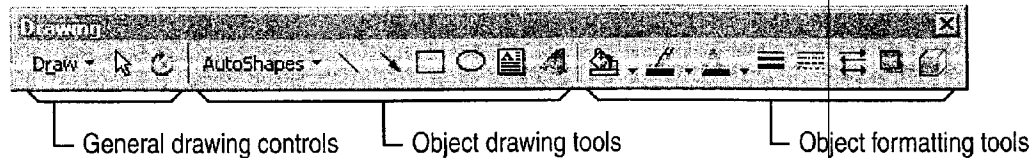
Try it out   Beneath the buttons of the **Drawing** toolbar lies a powerful graphic arsenal. The best way to find out what you can do is to draw a few objects and see what you can create.

Select successive objects   With one object selected, Press TAB to move the selection to each object on the screen in succession. This is handy when you need to select stacked objects that are close together.

Draw curved lines and objects   On the **Drawing** toolbar, Click **Lines** (**AutoShapes** menu) and then click the **Scribble** or **Freeform** button to draw shapes with both straight and curved segments. Click the **Scribble** button to draw shapes that look like they were drawn with a pen.

Scribble button   **Freeform** button

MS 113902

Use Fancy Fills

You can apply special fill effects to a selected object by clicking the **Fill Color** arrow on the **Drawing** toolbar and then clicking **Fill Effects**.

The **Fill Effects** dialog box includes a number of special patterns and textures. You can create gradient fills with one or two colors, use special textures like wood and granite, and even fill objects with pictures.
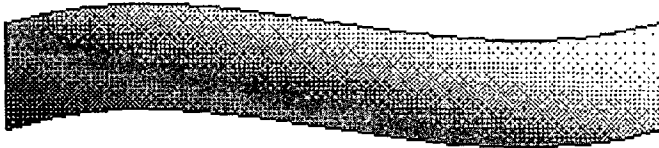
? **Want to know more?**   Look up **Getting Results - Graphics** in Help.

Office Assistant button

MS 113903

Create AutoShapes

The **AutoShapes** menu on the **Drawing** toolbar gives you access to a number of useful shapes, including lines, arrows, stars, banners, and shapes for creating flowcharts. After you draw an AutoShape, you can type text in it.
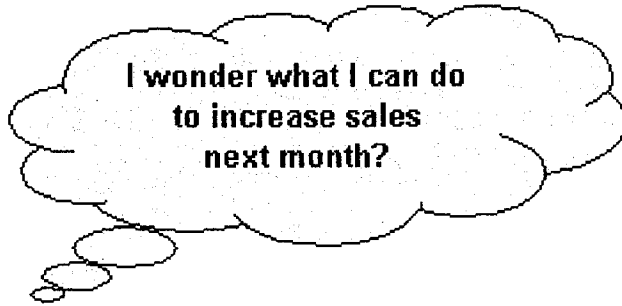
What is a callout? The preceding illustration is an example of a callout. Callouts are special AutoShapes into which you can add text. They include a movable pointer, and you can drag the end of it to an object or to a piece of information you want to emphasize.

Use special handles Many AutoShapes have adjustment handles you can use to adjust a unique aspect of the shape.

This adjustment handle changes the size of the arrowhead.
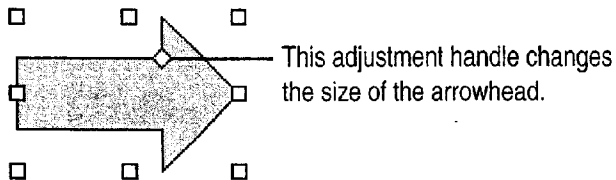
What Are Connectors For?

Want to draw a line between two objects that "sticks" to the objects? On the **Drawing** toolbar, click **Connectors** (**AutoShapes** menu). You can drag connected objects around, and the connector line stays attached to the anchor point on each object and is adjusted automatically.

MS 113904
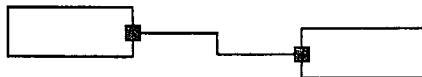
Insert Clips

The Microsoft Clip Gallery contains a variety of useful clip art, as well as pictures, sounds, and video clips. It provides a handy way to browse through and select clips, and you can add your own clips to the gallery and reorganize and categorize your clip art.

Start the Microsoft Clip Gallery by clicking **Clip Art** (**Insert** menu, **Picture** submenu).
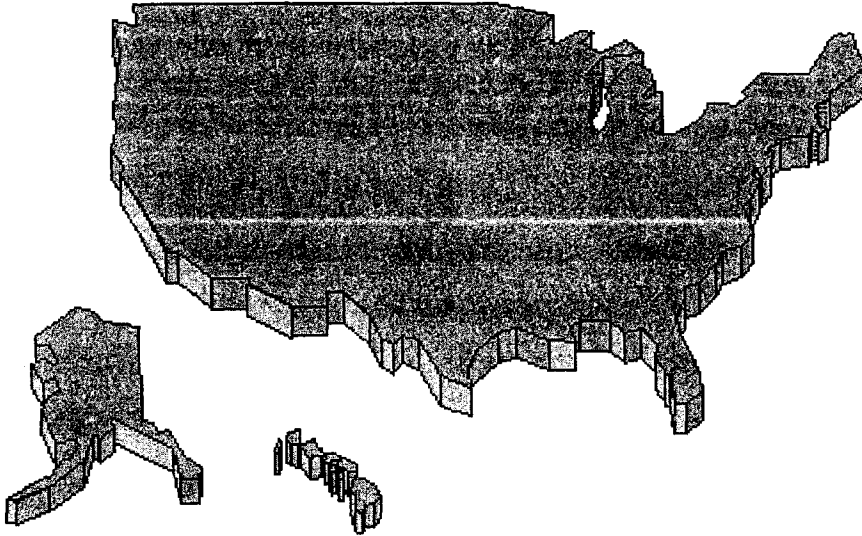
Can't find the clip you need?   The Clip Gallery contains a handy Find feature that you can use to locate clips based on keywords that you provide. For more information, see Clip Gallery Help.

Want to know more?   Look up **Getting Results - Graphics** in Help.

Office Assistant button

MS 113905

Create WordArt

You can create visually compelling text effects by clicking the **WordArt** button on the **Drawing** toolbar. Select the effect you want in the **WordArt Gallery** dialog box, and then type your text in the **Edit WordArt Text** dialog box.

WordArt button

Use the WordArt toolbar   The **WordArt** toolbar appears automatically whenever you select a WordArt object.

Insert WordArt button   **Vertical Text** button   **Alignment** button
Free Rotate button   **Character Spacing** button

Gallery button   **Same Letter Heights** button
Format Object button   **WordArt Shape** button
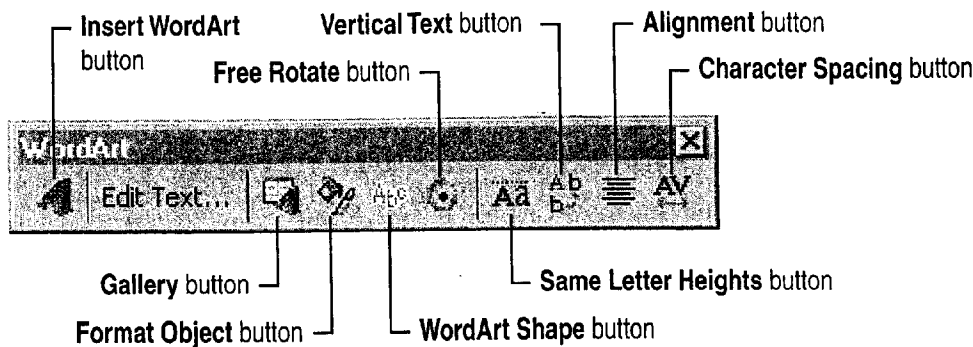
Want a different shape?   You can change a WordArt effect by selecting the object and then clicking the **Gallery** button on the **WordArt** toolbar. Then choose a different effect from the **WordArt Gallery** dialog box. You can also click **WordArt Shape** on the **WordArt** toolbar to select a different overall shape.

MS 113906

Manipulate Objects

Use the following commands and buttons on the **Draw** menu of the **Drawing** toolbar to orient and arrange objects.

Grid submenu You can align drawn or dragged objects to a predetermined grid by using the **Snap To Grid** command, and you can align objects to other objects by using the **Snap To Shapes** command.
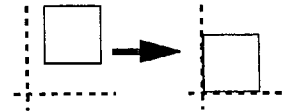
Nudge submenu You can use the four commands (**Up**, **Down**, **Left**, and **Right**) on this submenu to move selected objects with more precision than is normally possible with the mouse.
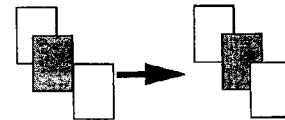
Align or Distribute submenu Use the alignment commands (**Align Left**, **Align Center**, **Align Right**, **Align Top**, **Align Middle**, and **Align Bottom**) to line up selected objects. Use the distribute commands (**Distribute Horizontally** and **Distribute Vertically**) to apply equal spacing to three or more selected objects.
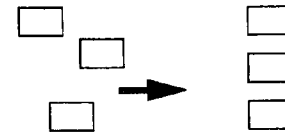
Rotate or Flip submenu Use the **Free Rotate** command to rotate the selected object to any position. Use the **Rotate Left** and **Rotate Right** commands to rotate the selected object 90 degrees at a time. Use the **Flip Horizontal** and **Flip Vertical** commands to change the selected object into a mirror image of itself.
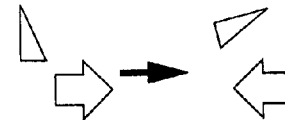
Change AutoShape submenu You can change any existing AutoShape (except lines and connectors) into any other shape using commands on the **Change AutoShape** submenu.
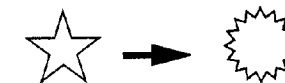
Use the Drawing Toolbar to Edit Lines and Shapes
You can change the shape of objects created with the **Curve**, **Scribble**, or **Freeform** button. Select the object, and then click **Edit Points** (**Draw** menu).
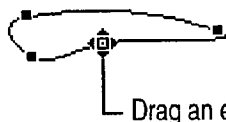
Drag an edit point to change the shape.

MS 113907

Add Graphics from Other Programs

You can use the drawing tools to create complex graphics, but sometimes you might need to use other graphics, such as a company logo created with an illustration program. You can insert objects created by other programs using the **Object** and **Picture** commands (**Insert** menu).
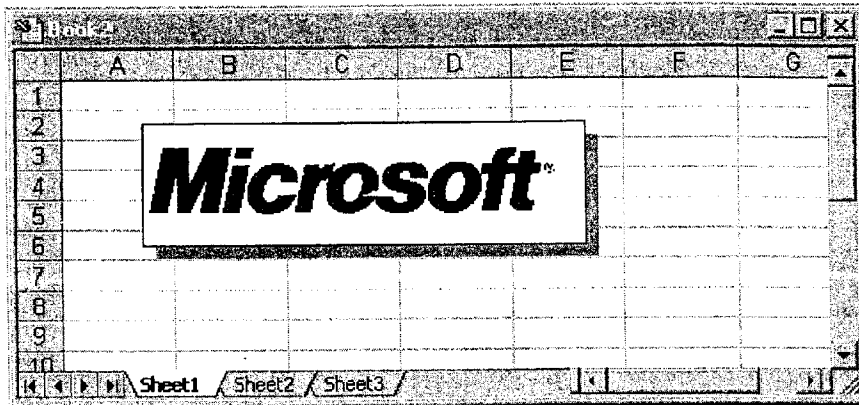
What can you insert? An inserted object is anything (a chart, photograph, or drawing, for example) created by another program and inserted into your document.

Modify inserted pictures The **Picture** toolbar appears automatically whenever you select an inserted picture. Note that your **Picture** toolbar might contain different tools than the one in the following illustration.
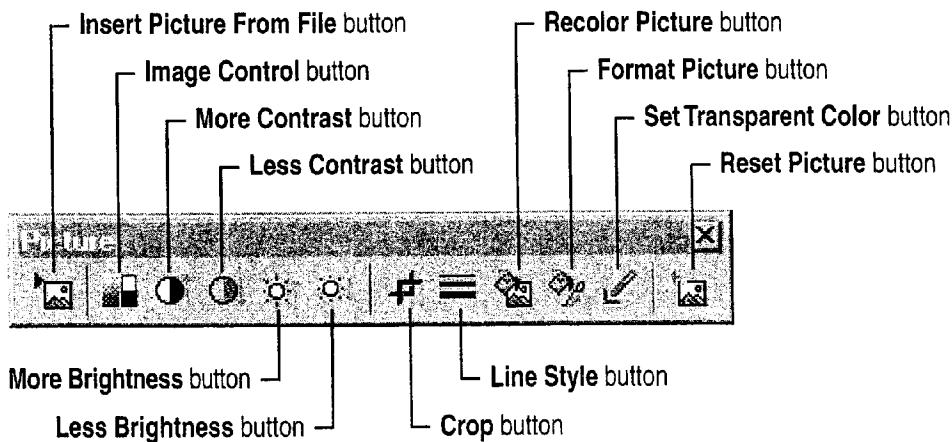
- Insert Picture From File button
- Image Control button
- More Contrast button
- Less Contrast button
- Recolor Picture button
- Format Picture button
- Set Transparent Color button
- Reset Picture button

More Brightness button
Less Brightness button
Line Style button
Crop button

Want to know more? Look up **Getting Results - Graphics** in Help.

Office Assistant button

MS 113908

Special Objects in Office Programs

Insert a Word table   The **Insert Microsoft Word Table** button inserts a Microsoft Word table into a PowerPoint slide. The table appears in a window with the Word ruler bars, and the menus and toolbars change to those of Word. You can use all of the Word features to complete the table. When you're finished, click anywhere on the slide outside the table window to return to PowerPoint.
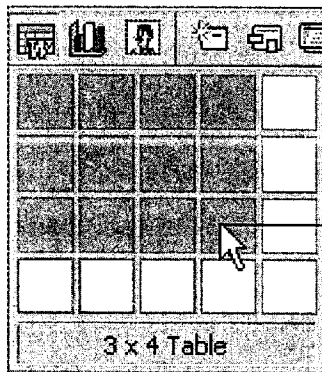
Drag to select the table dimensions you need.

Insert an organizational chart   If you give presentations often, you've probably used organizational charts. PowerPoint includes a special program to make creating these charts easier. Click **Organization Chart** (**Insert** menu, **Picture** submenu) to insert an organizational chart on a slide. For more information, see Help in Microsoft Organization Chart.

Insert a Microsoft Excel worksheet   The **Insert Microsoft Excel Worksheet** button inserts a Microsoft Excel worksheet. The worksheet appears in a window, and the menus and toolbars change to those of Microsoft Excel. You can use all of the Microsoft Excel features to complete the worksheet. When you're finished, click anywhere in the document outside the worksheet window.
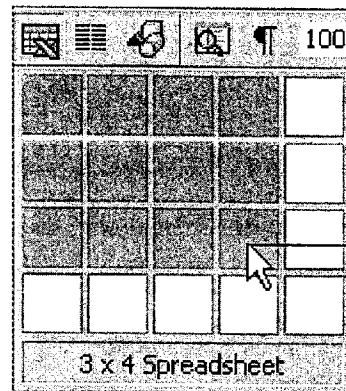
Drag to select the worksheet dimensions you need.

Insert a map   The **Map** button inserts a special type of object into a Microsoft Excel worksheet. You can use maps to automatically plot geographic data based on names of cities, states, provinces, or countries. For more information, see "Display Data on a Map," page 287.

MS 113909

Next Steps

To	See
Add multimedia elements and effects	"Prepare for an Electronic Presentation," page 304
Create charts	"Add a Chart to a Document or Presentation," page 266
Format text	"About Creating and Opening Documents and Databases," page 48

MS 113910

Use Office Applications Together

It's easy to use Office applications together. For example, you can create a Microsoft PowerPoint presentation from a Microsoft Word outline. Probably the most common way to share information between applications is to copy and paste information from one application to another. You can also create a *link* from one application to another or insert objects to include information. In online documents, you can use *hyperlinks* to jump to other files on your organization's internal Web (*intranet*) or sites on the World Wide Web. Combine information from different applications by using the Microsoft Office Binder to organize and print files with continuous page numbers from Microsoft Excel, Word, and PowerPoint as a single unit.

If you're working on an annual report, create your financial information in Microsoft Excel.

Write the report in Word, and create links to include information from Microsoft Excel, so that your report can be automatically updated.

Finally, create a professional-quality PowerPoint presentation from your Word report.
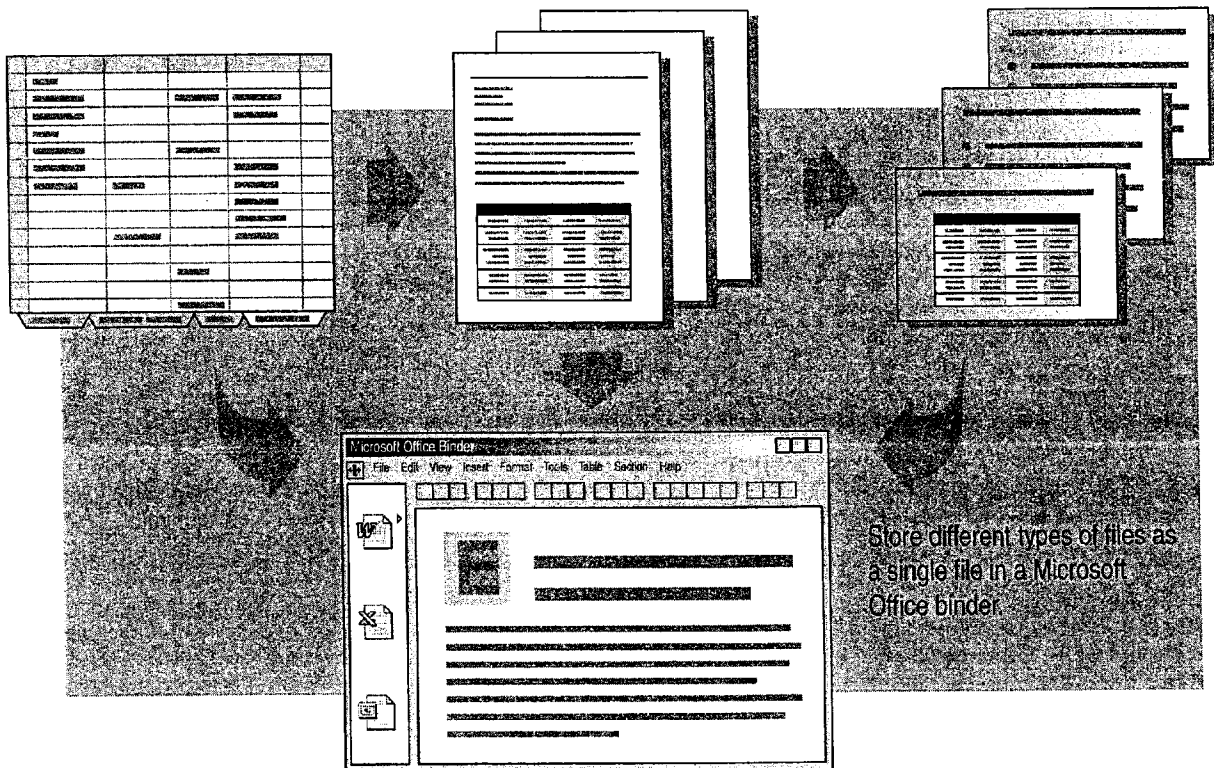
Store different types of files as a single file in a Microsoft Office binder.

MS 113911

Getting Results with Microsoft Office   **169**

Decide How You Want to Share Information

The following table is a quick way to help you decide which method
of sharing information to use.

If you want a copy of the information, and you	Then
Don't need your copy of the information to stay current with the original, or "source," information, and you don't need to edit the source information	Use move or copy and paste commands; or drag-and-drop editing
Want to edit the inserted object in your file by using the source application, but don't need to have changes reflected in the source file Might not have ongoing access to the source file, and you don't care about file size	Insert an object
Want changes to the original information to be reflected in your file Want to edit the original information and know you'll have ongoing access to the source file and application Want to share information among many files, or among files contained within an Office binder Want to minimize file size or save hard disk space	Create a link
Want to make use of information in other online files, but you don't want to duplicate the information in your own online file Want to make it possible for users to jump from your online file to other online files with a single click	Create a hyperlink

MS 113912
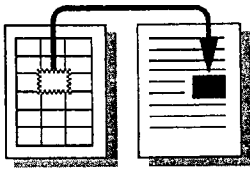
Moving deletes information from one location and inserts it in another location. *Copying* duplicates information. Use either method if you do not need to edit the information.

Inserting an object copies information from one location (the source) to another location (the destination) and allows you to edit the destination copy using the source application. Changes made to the source file will not be reflected in the inserted copy.
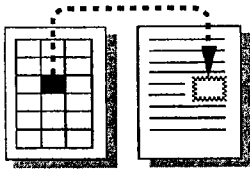
Creating a link stores information in one location (the *source*) and a pointer to the information in another location (the *destination*). The information is connected, so that when it changes in the source, it is automatically updated in the destination.
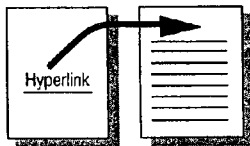
Creating a hyperlink allows you to jump to other files on your intranet or Web sites. The hyperlink does not duplicate (copy) information.

MS 113913

Getting Results with Microsoft Office   **171**

Part 1   Your First Day at the Office
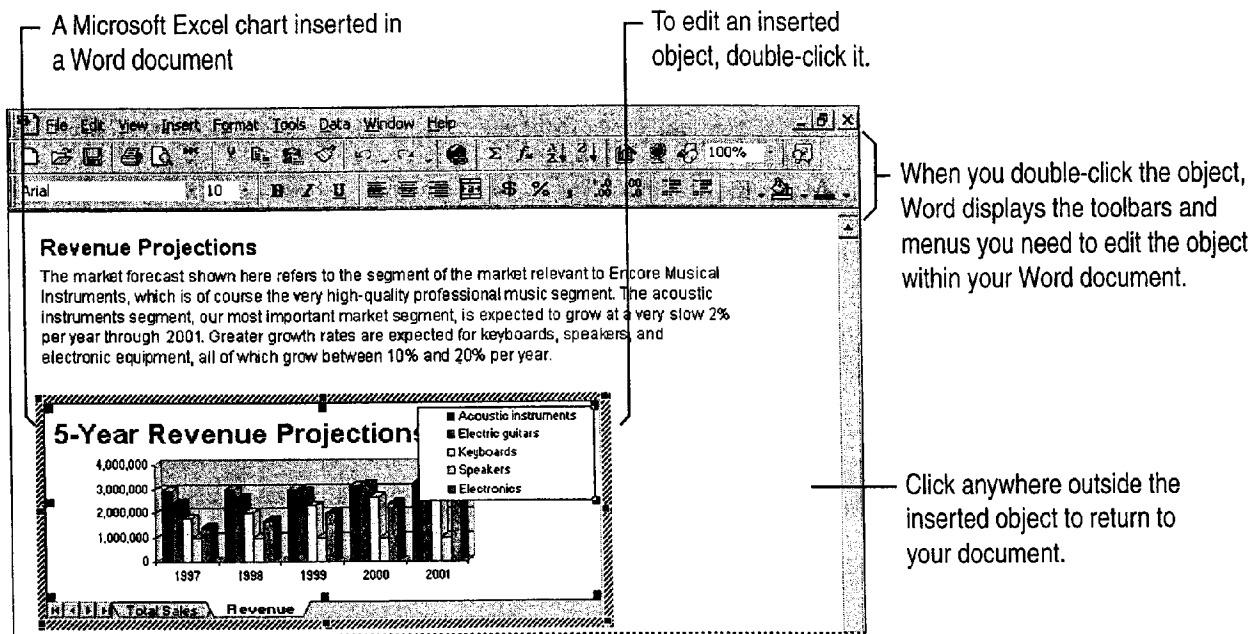
Insert Objects to Copy and Edit Information

Inserting objects makes it easy to edit information that you've copied from another application, assuming you already have the source application on your computer. For example, you can insert a Microsoft Excel pie chart in a Word document. If you decide that a bar chart would show the information more effectively, just double-click the chart and change the chart type.

Insert existing information   You can insert existing information by copying the information from the source document and then switching to the current document. Click **Paste Special** (**Edit** menu). In the **As** list, select the object type, and then click the **Paste** button. Up to one page of the inserted object will be displayed.

Insert new information   You can insert new information, such as a graphic object or an equation, by clicking **Object** (**Insert** menu).

For Help on dialog box options, click this button and then click the option.

A Microsoft Excel chart inserted in a Word document

To edit an inserted object, double-click it.

When you double-click the object, Word displays the toolbars and menus you need to edit the object within your Word document.

Revenue Projections

The market forecast shown here refers to the segment of the market relevant to Encore Musical Instruments, which is of course the very high-quality professional music segment. The acoustic instruments segment, our most important market segment, is expected to grow at a very slow 2% per year through 2001. Greater growth rates are expected for keyboards, speakers, and electronic equipment, all of which grow between 10% and 20% per year.

5-Year Revenue Projections

- Acoustic instruments
- Electric guitars
- Keyboards
- Speakers
- Electronics

Click anywhere outside the inserted object to return to your document.

MS 113914

Need to keep file size to a minimum?   Create links to information instead of inserting it. Inserting objects increases file size because the object itself is stored in your document. A linked object, however, is stored in the source file. Only a representation of it is displayed within your current file.

Move or copy information between applications the easy way   To drag and drop information between Office applications, arrange the application windows so that both the source and destination files are open and visible. Select the information you want to move, and then drag it to where you want to insert it in the other file. To copy information, hold down CONTROL as you drag.

Need Help when editing an inserted object?   Double-click the object, click the appropriate Help command on the **Help** menu, and then choose Help topics relevant to the application in which the object was created.

Want to know more?   Look up **Getting Results - Office Applications Together** in Help.
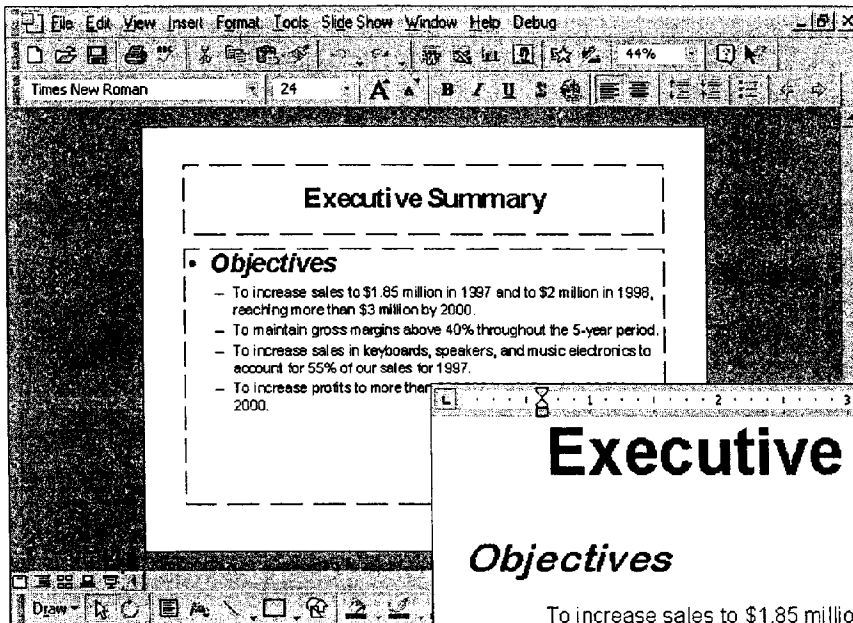
Office Assistant button

MS 113915

Create Links to Automatically Update Information

You can create links to virtually any type of information among
Office applications. For example, to make sure sales figures from
Microsoft Excel are up-to-date in an annual report written with
Word, copy the numbers and create links to them. When the figures
change in the worksheet, they are automatically updated in the Word
document as well.

In Microsoft Excel, copy the cells you want
to create a link to your Word document.

In Word, click **Paste Special** (**Edit** menu). Click the
Paste Link button, and then click the Microsoft
Excel worksheet format.

You can use the same method to create a link
from a Microsoft Excel chart to your Word
document.

Want to control when linked objects are updated?   Linked objects by
default are updated automatically. To create a manual link that will update
only when you specifically request it, click **Links** (**Edit** menu). In Microsoft
Access, click **OLE/DDE Links** (**Edit** menu). Select the name of the linked
object you want, and then click the **Manual** button. To update a manually
linked object, in the **Links** dialog box, select the name of the linked object
and then click the **Update Now** button.

MS 113916

Use Hyperlinks to Jump to Information Online

When you include an inserted or linked object in a file, you duplicate information that exists elsewhere. When you use a hyperlink, you provide online users with a way to jump to information that exists elsewhere. The information could exist elsewhere in the same document or in another document.

The biggest advantage to using hyperlinks is that you can connect to information from any source, not just to information on your local drive or network. For example, you can jump to documents or pages on the World Wide Web or on your intranet.

While working in an Office application, you can click a hyperlink to jump to files on your intranet or to Web sites.
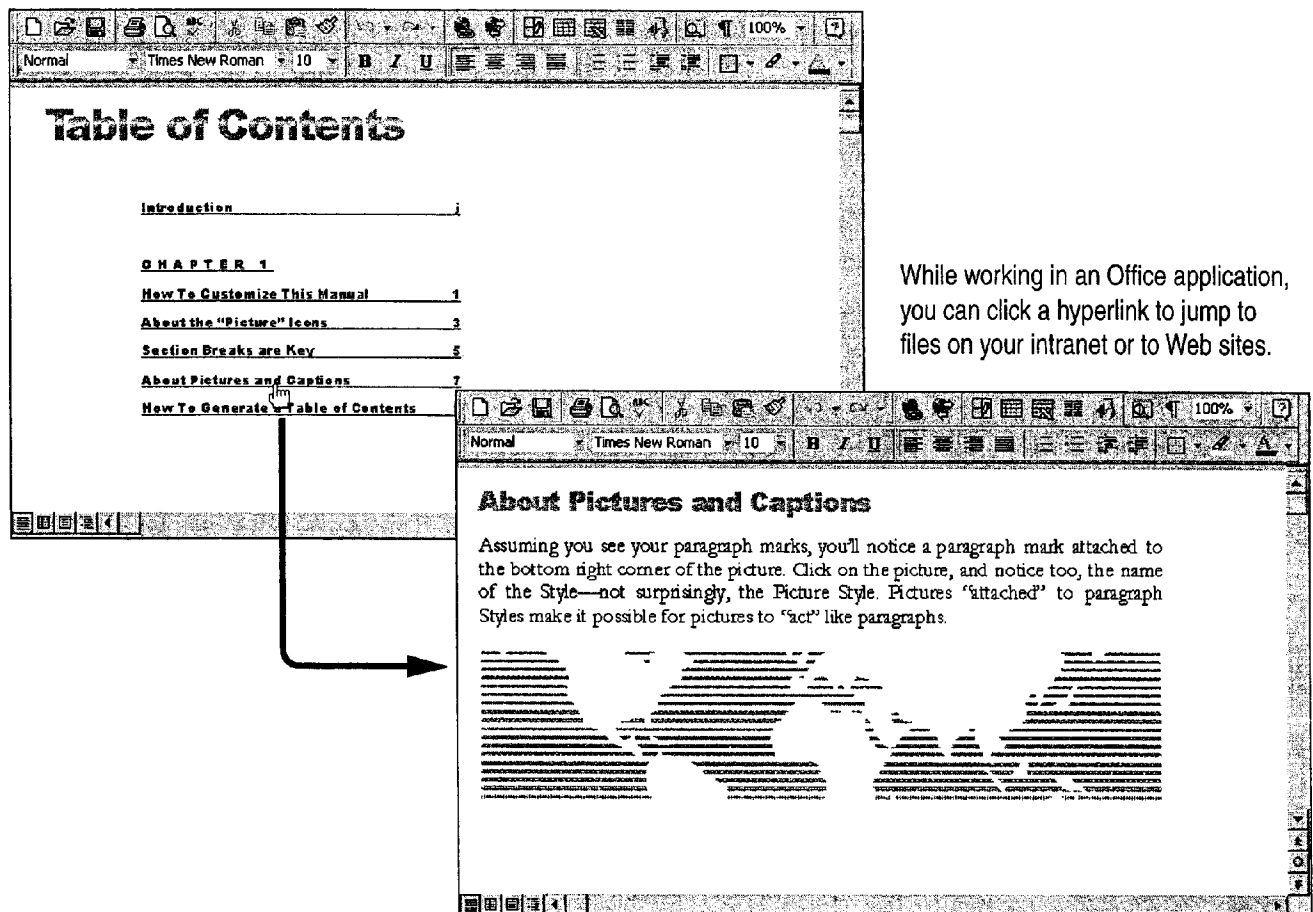
Important How you create a hyperlink and what you can create a hyperlink to vary among Office applications.

MS 113917

Part 1   Your First Day at the Office

Want to create a Web page or learn more about the Web?   For more information, see "Create a Web Page with Word," page 458, "Publish Microsoft Excel Tables and Charts on the Web," page 448, "Create a Web Presentation with PowerPoint," page 452, "Office and the Web," page 442, "Use Microsoft Access to Retrieve and Publish Data," page 464, and "Open Web Addresses from Outlook," page 470.
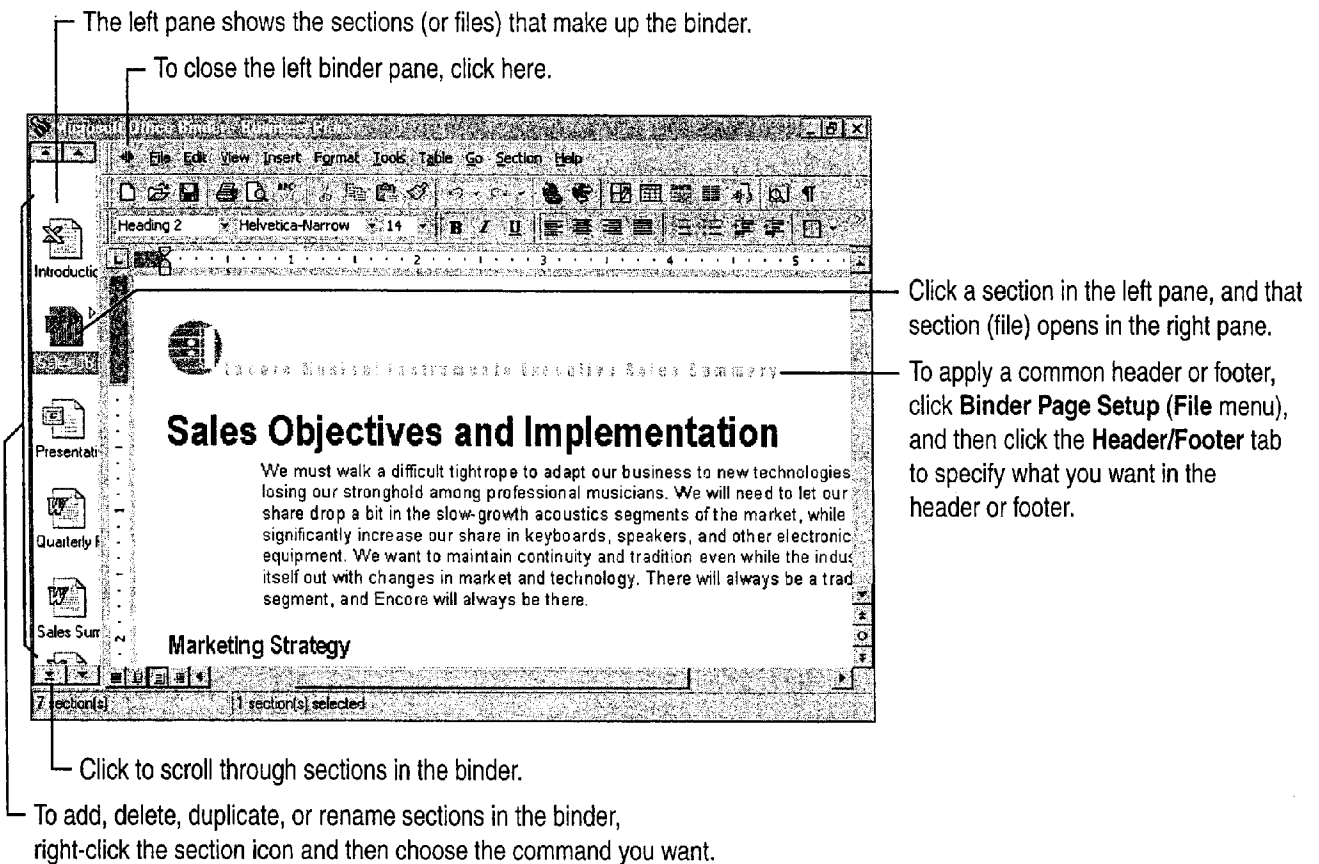
Want to know more?   Look up **Getting Results - Office Applications Together** in Help.

Office Assistant button

Use Office Applications Together

Other Easy Ways to Share Office Information

Each Office application includes convenient ways to transfer information quickly to other applications. In Microsoft Access, you can click the **OfficeLinks** button on the **Database** toolbar to transfer database information to other Office applications. You can also insert information from a Microsoft Excel list into a form, or use the Report Wizard to create reports that incorporate data from Microsoft Excel. Move a list created in Microsoft Excel to Microsoft Access and create a new database by using the **Convert to MS Access** command (**Data** menu) in Microsoft Excel. Or, if you create a PowerPoint presentation and want to transfer it to Word to create speaker notes, in PowerPoint, click **Send To** (**File** menu), and then click **Microsoft Word Outline**.

OfficeLinks button in Microsoft Access

In PowerPoint, use the **Send To** command (**File** menu) to create a Word document that contains text in your slides.

In Word, you can edit your text to show only major points, or you can provide more detail.
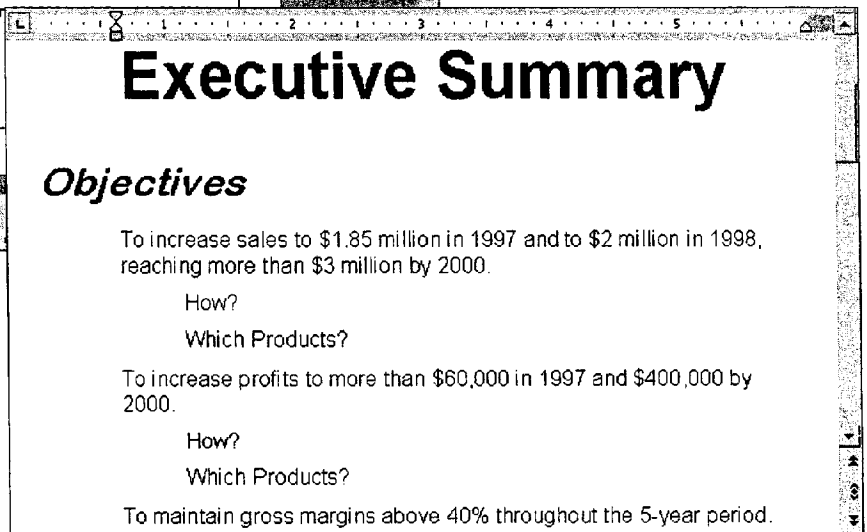
MS 113919

Part 1   Your First Day at the Office

Want another easy way to transfer information between applications?
First, make sure that the file into which you want to transfer information is open, and that its icon appears on the Windows taskbar. In the other application, select the information you want to transfer. Drag the selection onto the application's icon on the taskbar and continue holding down the mouse button until the application opens. Then drag the selection to where you want it.

Want to know more?   Look up **Getting Results - Office Applications Together** in Help.

Office Assistant button

MS 113920

Store and Organize Related Project Files in a Binder

With the Office Binder, you can organize related files in a single electronic binder. These files, called *sections*, stay in the order you place them in, and they can be saved, moved, edited, previewed, and printed as a single file. For example, if you create an annual report, you can put files from Microsoft Excel, Word, and PowerPoint in a single binder. Add a new file based on an Office template, and then apply a common header and footer, check spelling, preview each section, and print sections separately, or print the binder with continuously numbered pages. To create a new, blank binder, click the Windows **Start** button, click **Programs**, and then click **Microsoft Binder**. To use a binder template, click **New** (**File** menu) and then double-click one of the templates on the **Binder** tab.

— The left pane shows the sections (or files) that make up the binder.

— To close the left binder pane, click here.

Click a section in the left pane, and that section (file) opens in the right pane.

To apply a common header or footer, click **Binder Page Setup** (**File** menu), and then click the **Header/Footer** tab to specify what you want in the header or footer.

— Click to scroll through sections in the binder.

— To add, delete, duplicate, or rename sections in the binder, right-click the section icon and then choose the command you want.

Important   A binder is most effectively used as a place to assemble related, finished files. If you have a problem editing a document, use Help to troubleshoot the problem.

MS 113921

Guidelines for Working in an Office Binder

Quickly move information between sections   If you are working in a section, you can select the information you want to move from that section and drag it over the section in the left pane that you want to move it to. To open the new section, hold the mouse button down and press ALT. Without releasing the mouse button, drag the information to where you want it to appear in the new section.

Rearrange section (file) order   In the left pane of the binder window, select the file you want to move, and then drag the file icon to where you want it. For example, if you have a file created with Word that you want to move to the end of your binder, just drag the Word file to the bottom of the left pane, so that it appears after the other files.

Add an existing file to a binder   In Windows Explorer, select the file that you want to add to your binder, and then drag the document into the left pane of the binder window.

Add, delete, duplicate, or rename a binder section   Right-click the section icon that you want to modify in the left pane, and then click the command you want from the shortcut menu.

Save all sections as separate files   In Windows Explorer, find the binder file that contains the sections you want to save as separate files. Right-click that file, and then click **Unbind** on the shortcut menu.

Save a section as a separate file   Drag the section you want to save separately from the left pane to a new location (for example, to the desktop), or you can click **Save As File (Section** menu).

MS 113922

Create Letters, Mailings, and Other Business Communications

Contents
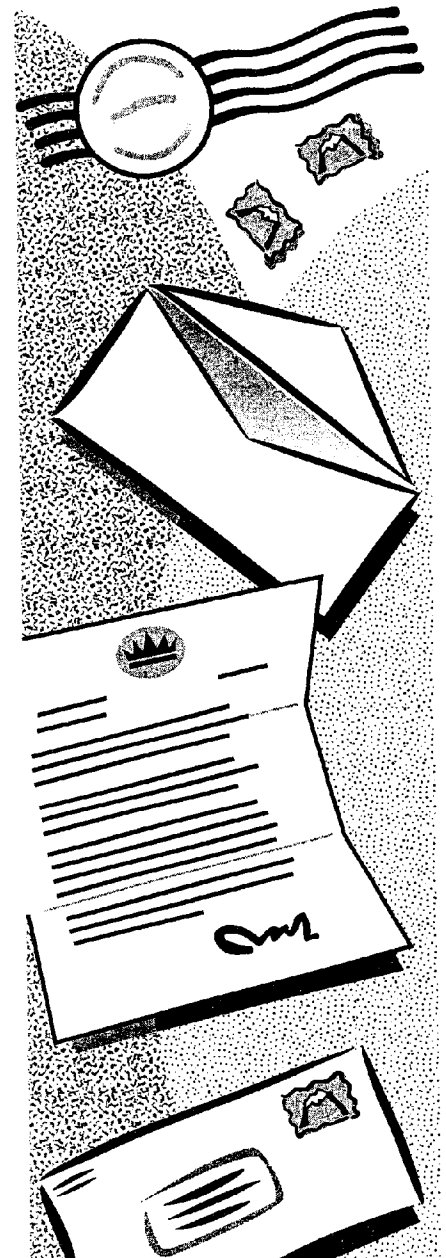
MS 113924

Write a Business Letter

Want some help writing a letter? The Letter Wizard provides an easy way to create a business or personal letter, and you can use the wizard any time you want. The wizard handles formatting and saves time by making it easy to reuse parts of previous letters. That way, you can concentrate on content. After you finish, you can print the letter on plain or letterhead paper, and you can print a matching envelope.

Key Features

Letter Wizard

Letter Templates

Printing Envelopes

Examples of a business letter and matching envelope
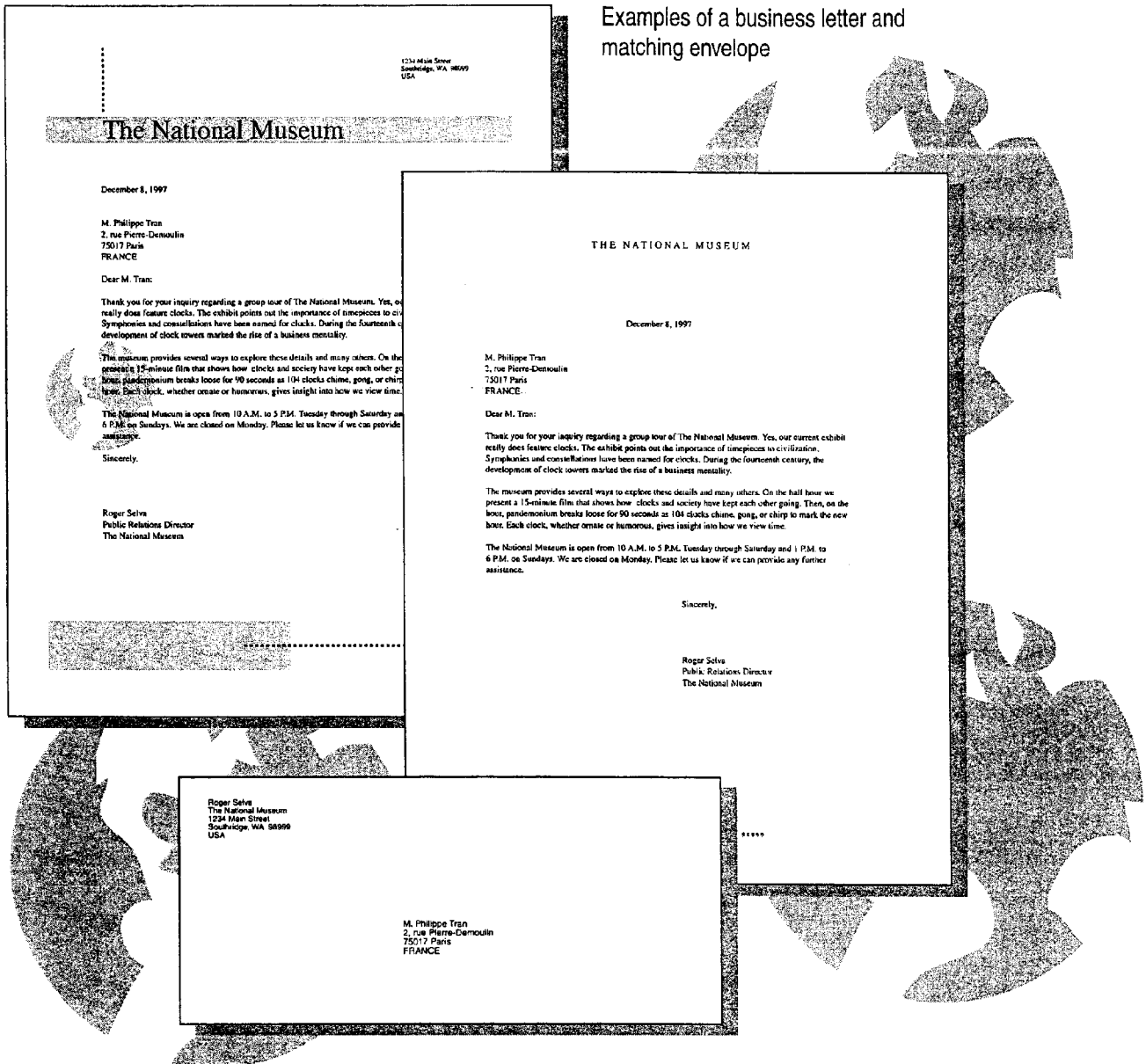
MS 113925

Start the Letter Wizard When You're Ready

Like most people, you probably start a letter by typing "Dear" followed by a name at the beginning of a new document. When you do this in Word, the Office Assistant appears, asking if you want the Letter Wizard to help you write the letter. To get help from the beginning, click **Get help with writing the letter**. If you decide later that you want help, just click **Letter Wizard** (**Tools** menu).

The wizard uses information that you supply to set up the letter's basic content and layout. You can insert addresses directly from your electronic address book, and you can quickly choose elements to be included in the letter, such as the return address and closing. When the wizard finishes, you can print a matching envelope, or complete the letter.
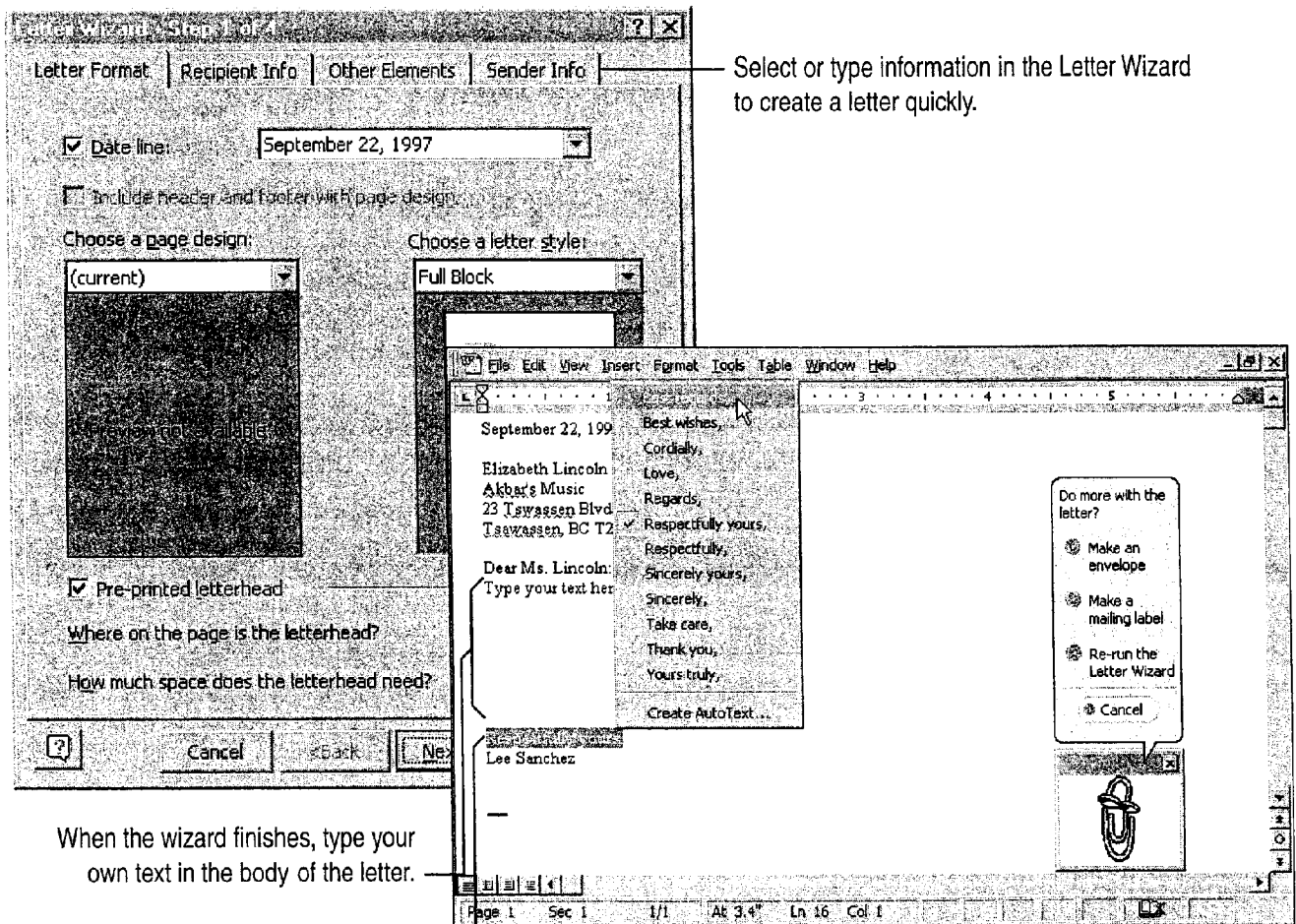
Select or type information in the Letter Wizard to create a letter quickly.

When the wizard finishes, type your own text in the body of the letter.

If you change your mind about one of the letter elements that you've selected in the wizard, just right-click it in your letter, and then select a different option.

MS 113926

Part 2   Create Letters, Mailings, and Other Business Communications

Reuse text from other letters   When you write letters, make sure you have the **AutoText** toolbar displayed, so that you can quickly insert AutoText entries that you've used in other letters. If it is not already displayed, click **AutoText** (**View** menu, **Toolbar** submenu). For information on using AutoText and AutoComplete to reuse text you've already written, see "Make Writing Easier," page 231.

Try a different letter design   Run the Letter Wizard again, and select a different letter style. Click **Letter Wizard** (**Tools** menu).

Center the letter vertically   To balance the letter on the page, click **Page Setup** (**File** menu). Click the **Layout** tab, and then click **Center** in the **Vertical Alignment** box.

Check spelling and grammar before you print   Click the **Spelling and Grammar** button. For more information, see "Check Spelling and Grammar," page 72.
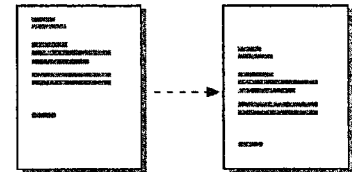
Before and after vertical alignment

Spelling and Grammar button

Should You Use a Template Instead of the Wizard?

The Letter Wizard and the letter templates produce the same result: an attractive, ready-to-complete letter. Here's the difference: The wizard lets you choose formatting and content options, while the templates have a preset layout.

To use a letter template, click **New** (**File** menu). On the **Letters & Faxes** tab, double-click the letter template you want. Then replace the sample text with your own.

Create a personalized template   Add your name, address, and any other standard information you want to include in each letter. Click **Save As** (**File** menu), and then click **Document Template** in the **Save as type** box. Name and save the new template. Then select this template the next time you start a new letter.

MS 113927

Print an Envelope

With your letter on the screen, click **Envelopes and Labels (Tools**
menu). If necessary, edit the delivery and return addresses. Choose
any options you want, insert the envelope into the printer as shown
in the **Feed** box, and then click **Print**.

Word automatically picks up the
delivery address from your letter ...

... and positions it
on the envelope.
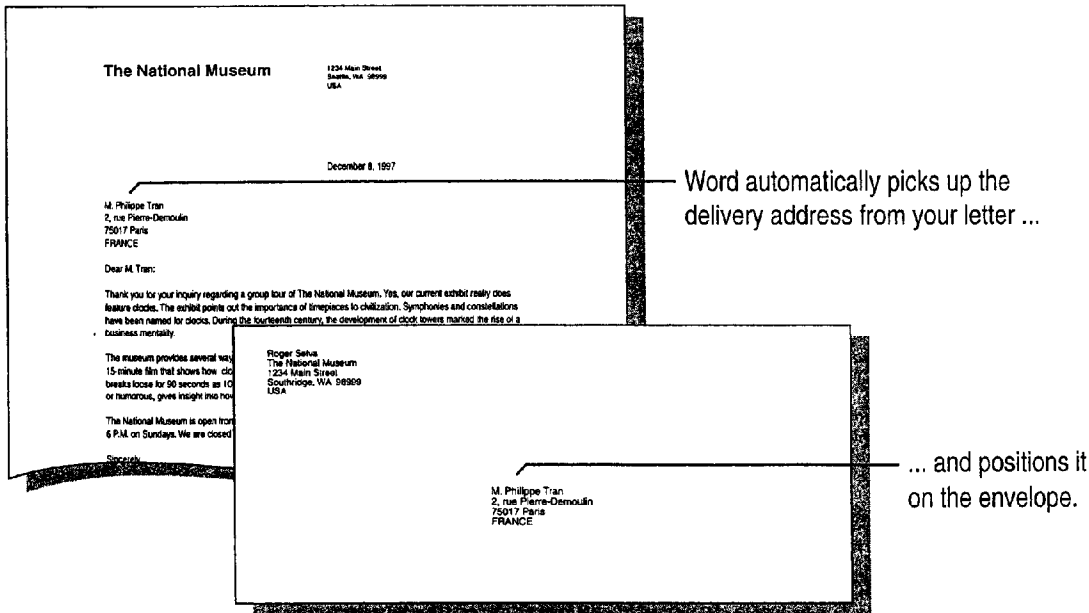
Use custom formatting in the addresses   If you want to make the
recipient name bold or italic or want to change the font in the address, in the
Envelopes and Labels dialog box, click the **Options** button. On the
Envelope Options tab, select the options you want.

Change the position of the delivery or return address   To position
addresses where you want them, in the **Envelopes and Labels** dialog box,
click the **Options** button. On the **Envelope Options** tab, select the options
you want.

Want to know more?   Look up **Getting Results - Letter** in Help.

Office Assistant button

MS 113928

Part 2   Create Letters, Mailings, and Other Business Communications

Next Steps

To	See
Design "electronic" or preprinted letterhead	"Create Letterhead and Matching Envelopes," page 195
Fax a copy of the letter	"Create a Fax Cover Sheet and Send a Fax," page 192
Send form letters to people on your mailing list	"Create a Mailing," page 206

MS 113929

Create a Memo

If it's true that a memo is created more often than any other business document, then it pays to be able to create a memo quickly and to create one that stands out from the rest.

The Memo Wizard is a quick and easy way to create a professional-looking memo. The wizard sets up the page and formatting, so you can focus on the content.

Wizard-created memos come in three design families.

Contemporary memo

Professional memo

Elegant memo

MS 113930

Part 2   Create Letters, Mailings, and Other Business Communications

Set Up the Page and Type the Standard Text

Start the Memo Wizard by clicking **New** (**File** menu). Click the **Memos** tab, double-click **Memo Wizard**, and then answer the questions to create a memo.

Quickly insert names on the To and Cc lines   If you use an electronic personal address book, the wizard automatically provides access to it so you can insert one or more names on the To and Cc lines. If you don't have an address book, just type the names in the spaces provided.

Want to change the memo?   When the wizard finishes, the Office Assistant appears, asking if you want to do more with the memo, for example, change the style of the memo. You can also send your completed memo via e-mail or fax. Whatever you choose, the Office Assistant helps you complete the task.

Click text within brackets, and then type the information you want.
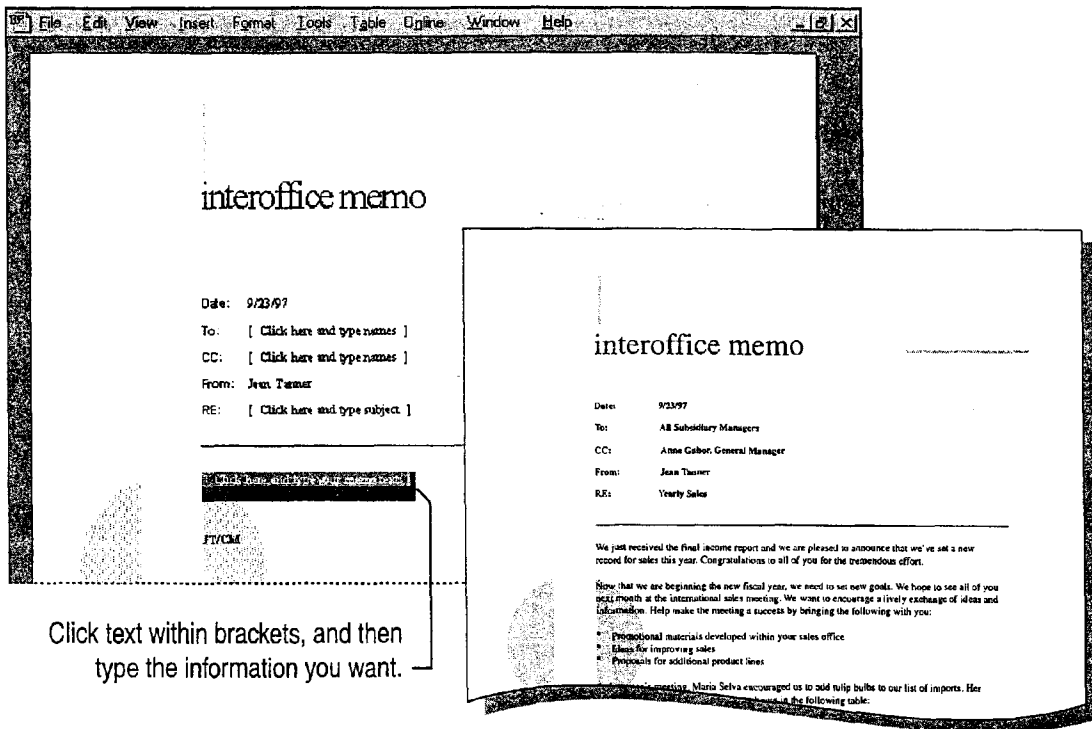
Important   If the Memo Wizard is unavailable, rerun Setup to install it. For more information, see "Add or Remove Components," page 32.

?   **Want to know more?**   Look up **Getting Results - Memo** in Help.

Office Assistant button

MS 113931

Need to set up a meeting?   If the purpose of your memo is to arrange a meeting with people in your workgroup, it might be more efficient to use Microsoft Outlook. That way, you can see which times are open on their calendars. For more information, see "Set Up a Meeting," page 117.

Want to turn off the wavy underlines?   Word automatically marks errors in spelling and grammar with wavy underlines. If you don't want to see them, click **Options** (**Tools** menu). On the **Spelling & Grammar** tab, clear the **Check spelling as you type** and **Check grammar as you type** check boxes.

Highlight what's important   If you distribute your memo electronically, highlight sections you want to emphasize by selecting the text and then clicking the **Highlight** button.

Highlight button

Style box

Should You Use a Memo Template Instead of a Wizard?

The Memo Wizard and the memo templates both produce an attractive, ready-to-complete memo. The difference between the two is that the wizard lets you choose layout options step by step while the templates have a preset layout.

To use a template, click **New** (**File** menu). On the **Memos** tab, double-click the memo template you want. Click or select the instruction text, and then type the text you want.

To change the look of your memo, use the **AutoFormat** command (**Format** menu), or use the **Style** box to apply styles or the **Style** command (**Format** menu) to modify existing styles.

Next Steps

To	See
Change the formatting of the memo	"Make Your Word Document Look Great," page 127
Send the memo electronically	"Create a Fax Cover Sheet and Send a Fax," page 192
	"Distribute Documents Online," page 396

MS 113932

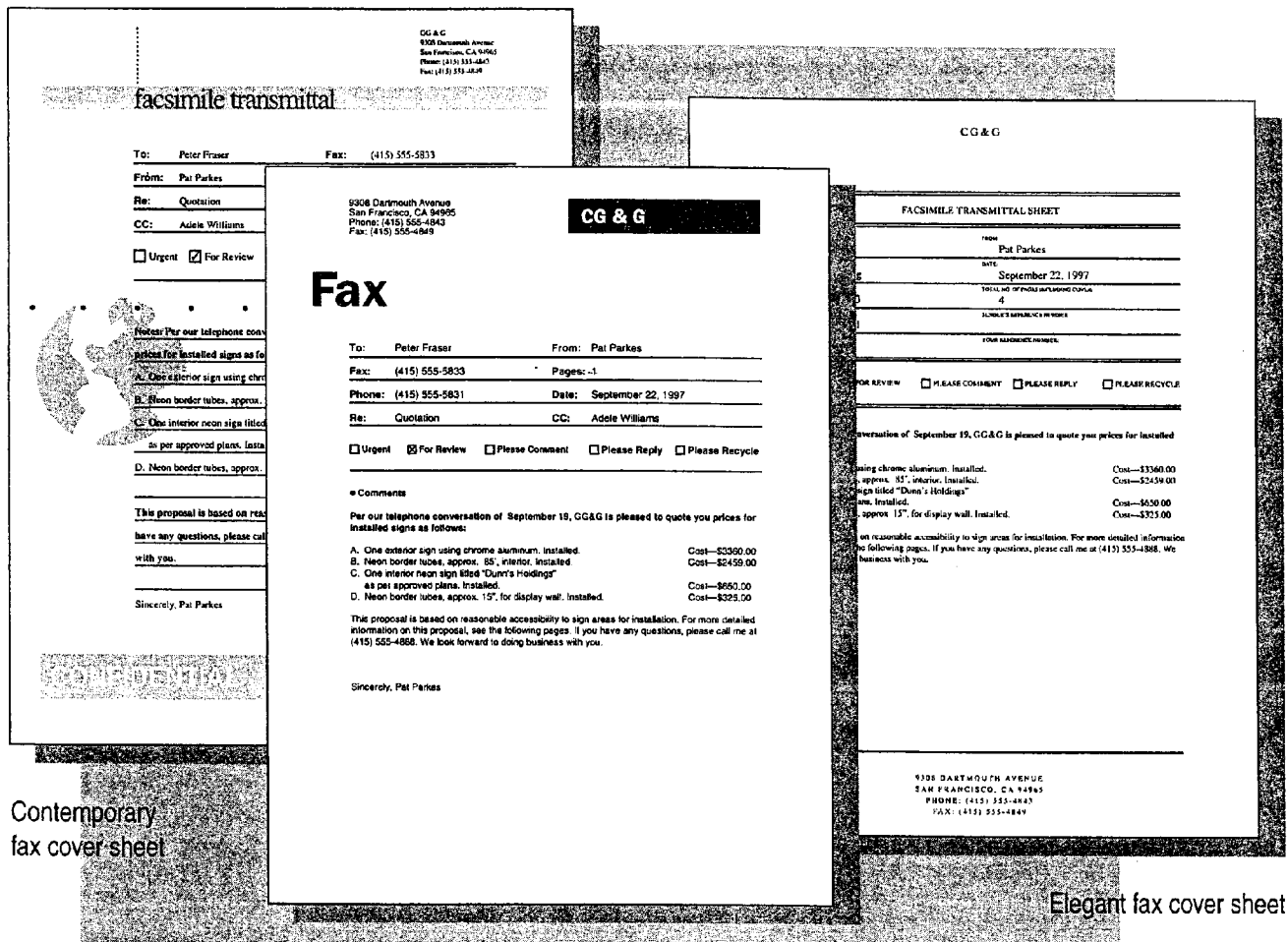# Create a Fax Cover Sheet and Send a Fax

When you want to get your sales bid to a potential client, the fastest way is usually to fax it. Because time is critical, you don't want to spend too much of it creating a fax cover sheet from scratch. You just want your client to get your quotation in the most efficient manner possible.

Your solution: Use the Fax Wizard for a ready-made cover sheet, and then have the wizard fax your quotation.

Key Features

Fax Wizard

With the Fax Wizard, you can create a fax cover sheet and then fax a document to one or more recipients.

Contemporary
fax cover sheet

Professional fax cover sheet

Elegant fax cover sheet

Important If you are using Microsoft Windows NT Workstation 3.51 or earlier, you will not be able to send a fax by using Microsoft Fax. However, you can use other fax software to fax documents.

MS 113933

Prepare Your Document for Faxing

Open the document you want to fax by clicking the **Open** button, and then start the Fax Wizard by clicking **Fax Recipient** (**File** menu, **Send To** submenu).

Open button

The Fax Wizard walks you through the steps to set up your document for faxing and to create the cover sheet the way you want it. For example, you can insert recipients' names and fax numbers directly from your electronic address book, and you can choose from three professional designs for your cover sheet. Click the **Finish** button when you have completed the steps.

The Fax Wizard provides a road map of the steps you'll complete to fax a document.

Which document do you want to send?

- The current document [Document1]
- Attach a cover sheet
- No cover sheet
- Just a cover sheet with a note
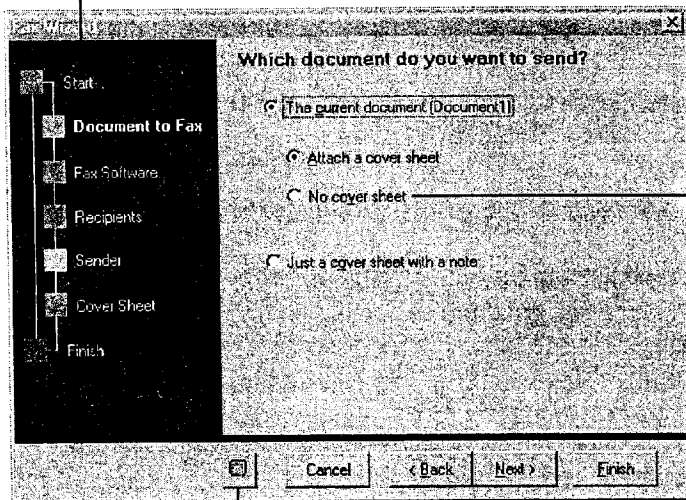
Most of the time you'll include a fax cover sheet in order to identify the sender and the recipient, but you can also send your document without one.

Click here to get Help from the Office Assistant.

Don't want a cover sheet?   Open the document you want to send, and then start the Fax Wizard as described above. In the **Document to Fax** step, click **No cover sheet**. Complete the rest of the steps, and then click **Finish** in the wizard.

Send a form letter by fax   Open the form letter you want to send, and then start the Fax Wizard. In the **Recipients** step, identify which field or fields contain the names of recipients and their fax numbers. Then complete the rest of the steps.

MS 113934

Part 2 Create Letters, Mailings, and Other Business Communications

Complete the Cover Sheet and Send the Fax

When you click **Finish** in the wizard, the new fax cover sheet appears: All you need to do is fill in the details.
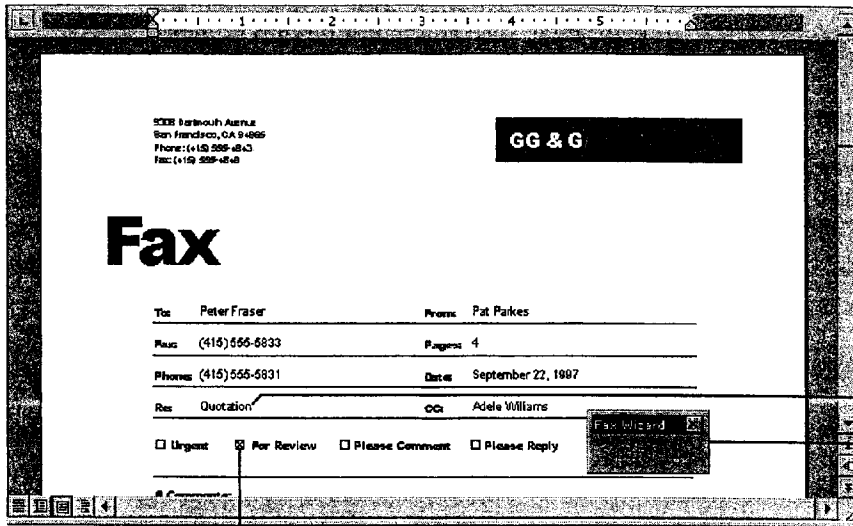
Type your own information.

To send your fax, click the **Send Fax Now** button. (This button automatically appears when you click **Finish** in the Fax Wizard.)

To "check" or "uncheck" a check box, click it.

Add a confidentiality statement Type it at the bottom of the page. If you plan to reuse the statement, save it as an AutoText entry. For more information, see "Make Writing Easier," page 231.

Like the result and want to use it to start your next fax cover sheet? Delete any information you don't plan to include in future fax cover sheets. Click **Save As** (**File** menu), and then click **Document Template** in the **Save as type** box. Name and save the new template. Then select this template in the **New** dialog box (**File** menu) the next time you start a new fax cover sheet.

Want to know more? Look up **Getting Results - Fax** in Help.

Office Assistant button

MS 113935

Create Letterhead and Matching Envelopes

Word makes it easy to create letterhead that projects just the right personal or corporate image. To design letterhead, you can modify the three ready-to-use letter templates, which set up the design, an "automatic" date, and sample text. If you want to get creative, use a complementary design for the second page, add a watermark, and create a matching envelope.

Key Features
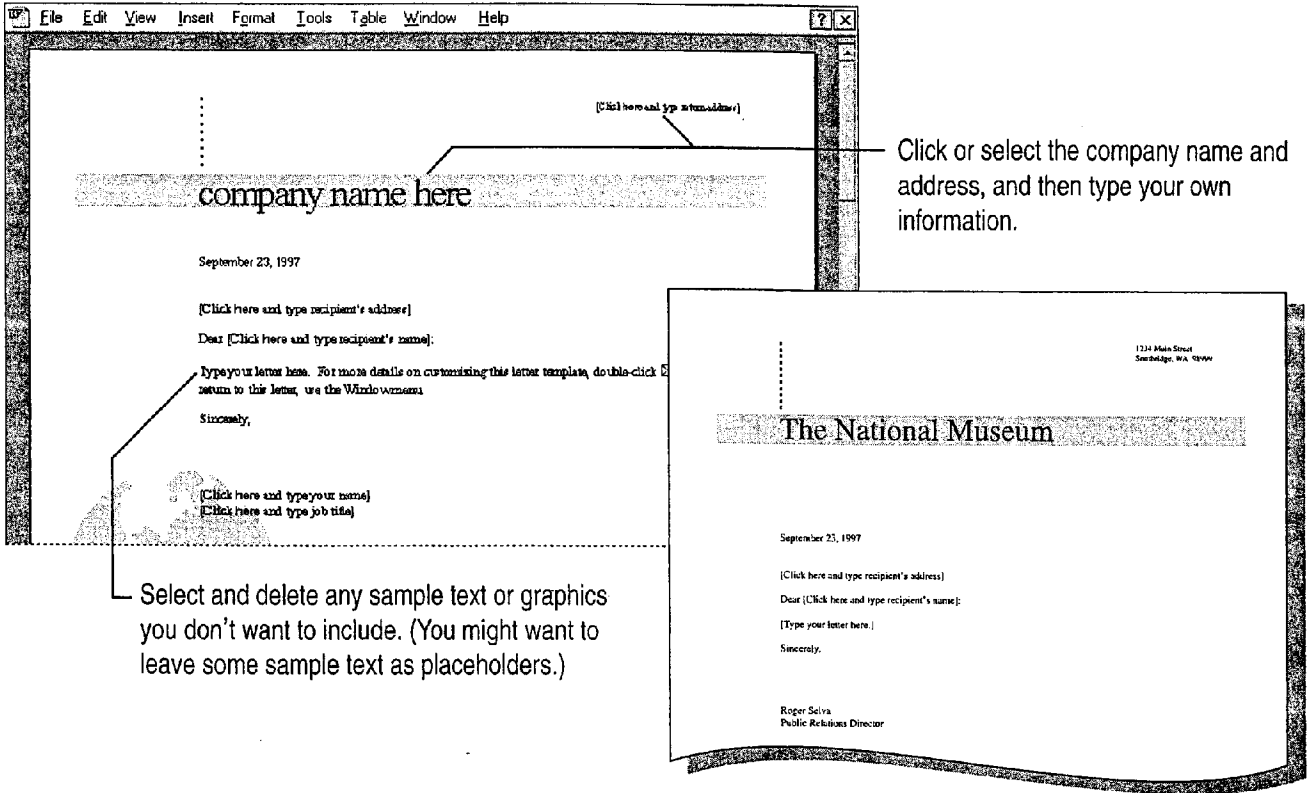
Letter Templates

Headers and Footers

Text Effects

Inserting Graphics
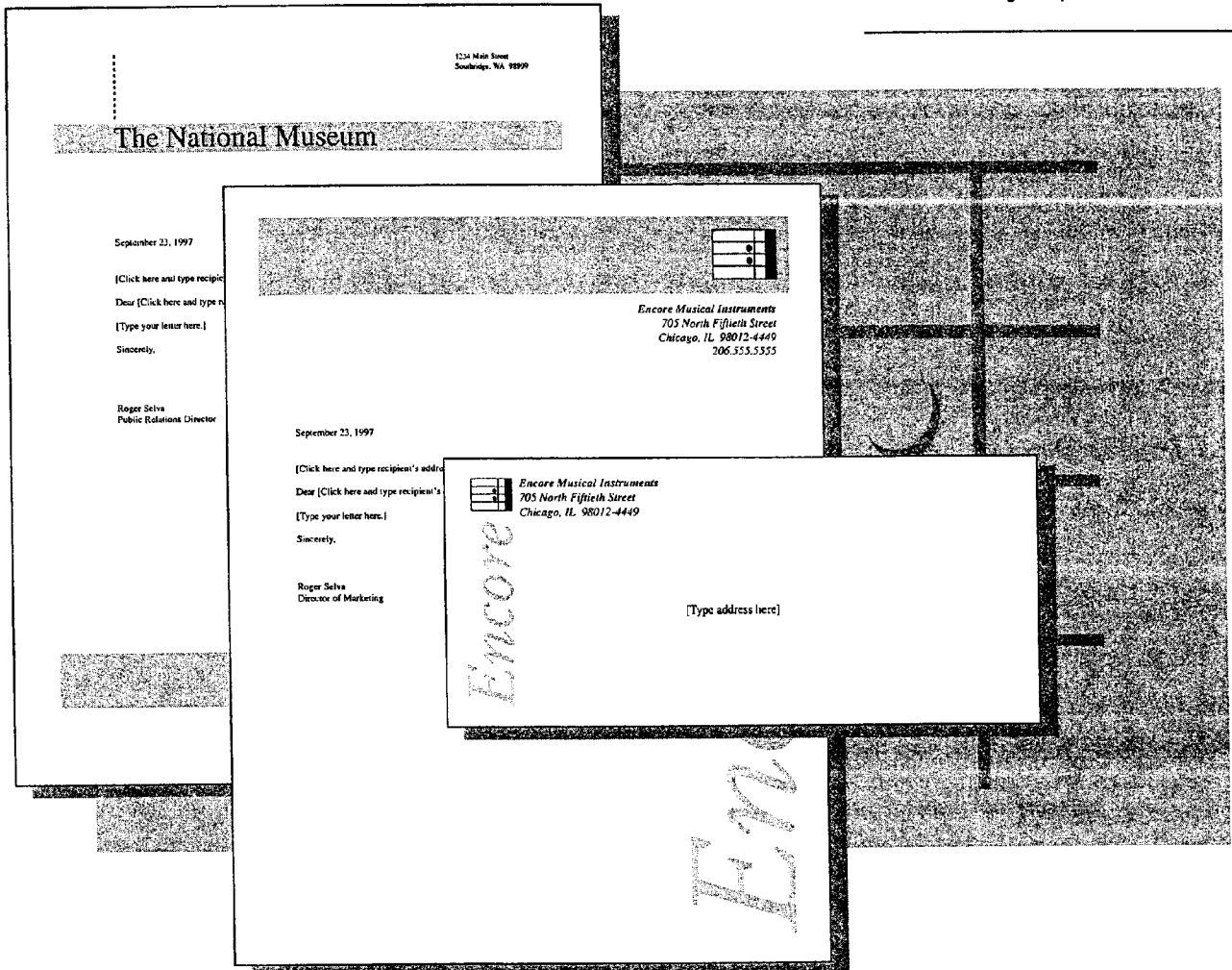
Examples of "electronic" letterhead and matching envelope

MS 113936

Part 2   Create Letters, Mailings, and Other Business Communications

Start with an Existing Letterhead Design

For the fastest and easiest way to create letterhead, start with one of the ready-to-use letter templates. Click **New** (**File** menu), and then click the **Letters & Faxes** tab. Under **Create New**, click **Template**, and then double-click the letter template you want.

Click or select the company name and address, and then type your own information.

Select and delete any sample text or graphics you don't want to include. (You might want to leave some sample text as placeholders.)

Save your letterhead template   Click **Save As** (**File** menu), name the new template, and then save it. If you save your template in the Templates folder, the next time you click **New** your letter template will appear on the **General** tab.

Try on a different letterhead design   Click **Style Gallery** (**Format** menu), and then click a letter template (Contemporary, Elegant, or Professional).

Want to create preprinted letterhead instead of "electronic" letterhead?   If you plan to type or handwrite your letters, make sure you delete all the sample body text before printing your letterhead.

Change the Text Design

If you want to change the way your letterhead text looks, you can do a lot more than just change the font or font size. You can choose from a variety of interesting text effects, including different shapes. You can also add gradient, textured, and patterned fills, and use different line styles, shadows, and 3-D effects.

Click **Header and Footer** (**View** menu), and if you haven't already done so, add your company name, address, and any other information you want.
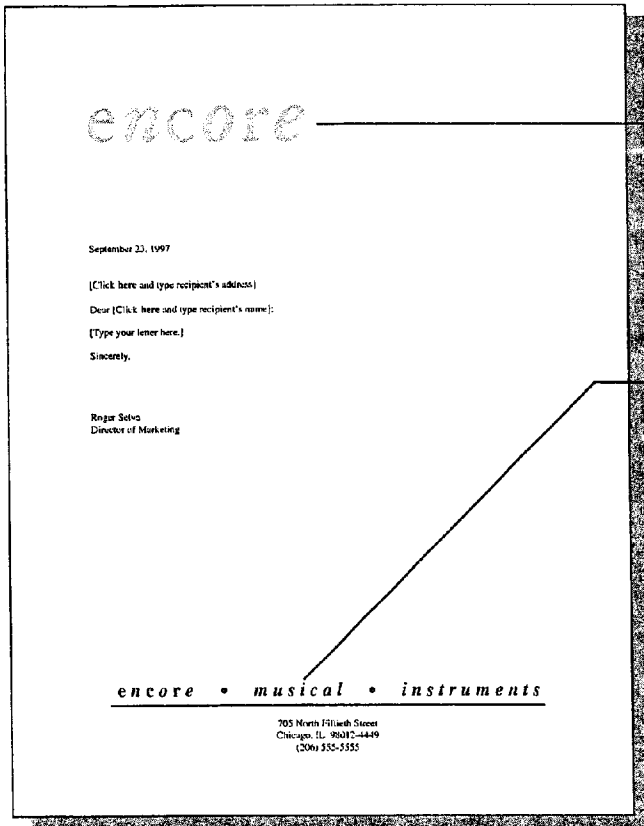
To format the text, select it and then click **Font** or **Paragraph** (**Format** menu). To add a text effect, click **WordArt** (**Insert** menu, **Picture** submenu).

To add your address or slogan to the bottom of the page, click the **Switch Between Header and Footer** button and then type the text.
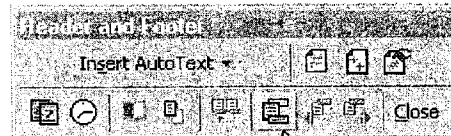
Switch Between Header and Footer button on the **Header and Footer** toolbar

MS 113938

Part 2   Create Letters, Mailings, and Other Business Communications

Create a variety of effects with the Drawing toolbar   Click the **Drawing** button to display the **Drawing** toolbar, and then click the buttons on the toolbar to see the different text effects you can create. Objects that you create can be seen in page layout view, but not in normal view. For more information, see "Get Your Point Across with Graphics," page 159.

Drawing button

Quickly switch between the header/footer and main document   In page layout view, double-click the area you want to edit. When the main document is active, the headers and footers appear dimmed, but they look normal in the printed document.

Add a border or shading   Select a paragraph, click the **Tables and Borders** button. On the **Tables and Borders** toolbar, click a button for the effect you want. For information on page borders, see "Add Borders to Pages," page 226.

Tables and Borders button

Insert symbols, such as • or ♦, to separate the parts of an address Click **Symbol** (**Insert** menu), select a font, and then double-click the symbol you want.

**Want to know more?**   Look up **Getting Results - Letterhead** in Help.

Office Assistant button
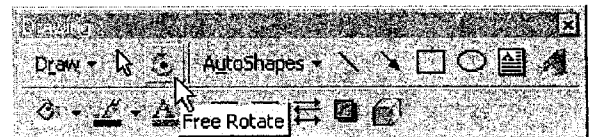
MS 113939

Add a Logo or Other Graphics

To jazz up your letterhead, include graphics from your company's collection of logos and scanned images or from the Microsoft Clip Gallery, or draw your own pictures. With the tools on the **Drawing** toolbar, you can create a variety of shapes, to which you can add color, fills, textures, patterns, shadows, and 3-D effects, and which you can group, align, rotate, and flip. Click the **Drawing** button to display the **Drawing** toolbar.
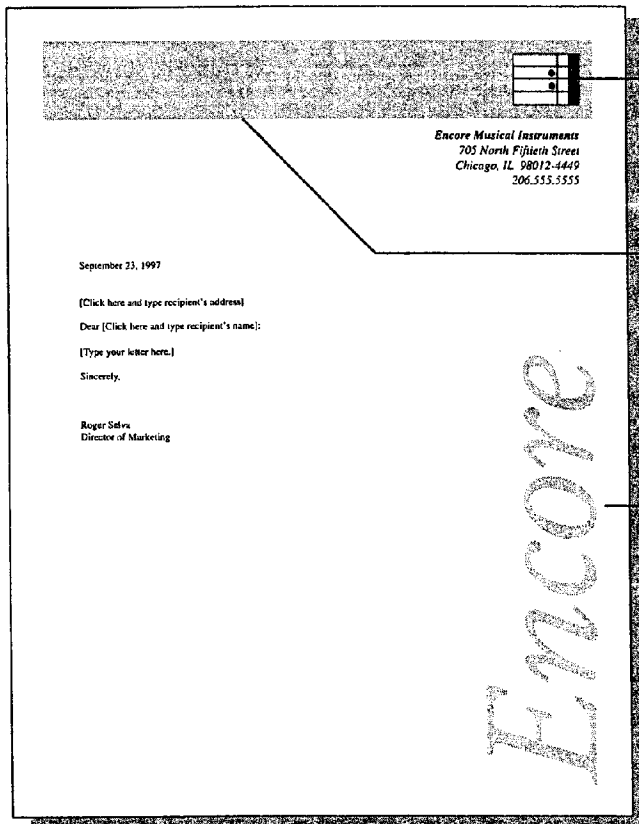
To insert your logo, click **Picture** (**Insert** menu). Then click the command you want, for example, **From File**. Move your logo to the desired location on the page.

To create a shaded area, use the **Tables and Borders** toolbar. Or use the **Rectangle** button on the **Drawing** toolbar to draw a solid rectangle or other object, and then add a fill by clicking the **Fill Color** button.

To rotate text or graphics, select the item, click the **Free Rotate** button on the **Drawing** toolbar, and then make the change you want.

MS 113940

Part 2   Create Letters, Mailings, and Other Business Communications

Position your name, address, and logo side by side   Click in the header or footer, type your name and address, select the text, and then click **Text Box** (**Insert** menu). Click **From File** (**Insert** menu, **Picture** submenu) to insert your logo, and then drag it to align it with your name and address or vice versa.

Add space between your letterhead design and the letter text   Click **Page Layout** (**View** menu), and then drag the gray border on the vertical ruler.
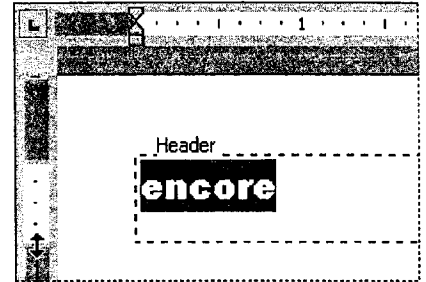
Drag down to increase the space between the design and text in your letter.

Mix Graphics with Text Effects

If you want your letterhead design to really get attention, use text effects.

The example below is one of the preset text effects you can use by clicking the **WordArt** button on the **Drawing** toolbar. If this effect isn't exactly what you want, you can change it. For more information on making the most of graphics, see "Get Your Point Across with Graphics," page 159.
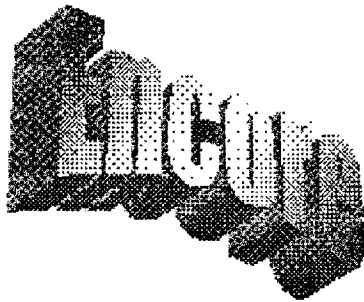
Text effect using WordArt

Want to know more?   Look up **Getting Results - Letterhead** in Help.

Office Assistant button

MS 113941

Create a Different Design for the Second Page

If you write multiple-page letters, you might want to create a simpler, complementary design for the second and subsequent pages of the letterhead.

If your letterhead template doesn't already have two pages, insert a page break: Click **Break** (**Insert** menu), and then click **Page Break**. Then click **Header and Footer** (**View** menu). The header and/or footer for the second page already contains the date and page number, but you can modify the header or footer the way you want.
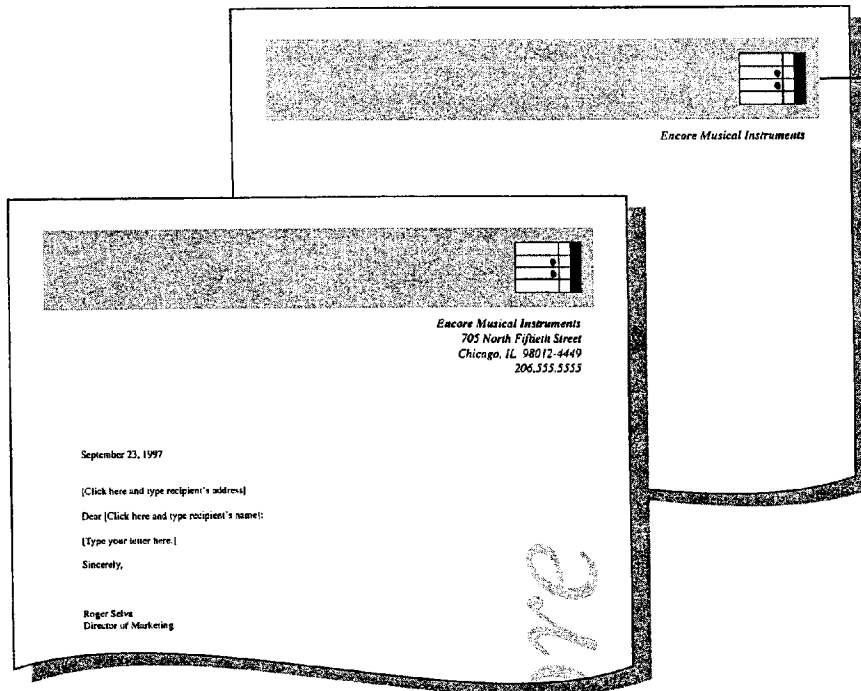
For example, copy some of the design elements from the first page header to the second page header.

MS 113942

Part 2   Create Letters, Mailings, and Other Business Communications

Need a faster way to switch between headers and footers?   Click these buttons on the **Header and Footer** toolbar to switch between the header and footer on the same page, or between headers or footers on different pages.
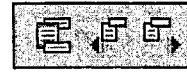
Header and Footer toolbar buttons

Does the second page have the same header and footer as the first page?   Click **Page Setup (File** Menu). On the **Layout** tab, select the **Different first page** check box.

Want to know more?   Look up **Getting Results - Letterhead** in Help.

Office Assistant button

MS 113943

202   Getting Results with Microsoft Office

Add a Watermark

For a professional look, add a watermark—a logo, decorative graphic, or word (such as "draft" or "confidential") that appears to be stamped into the page.

Click **Header and Footer** (**View** menu), and, if necessary, click the **Drawing** button to display the **Drawing** toolbar. To add text or graphics and position it where you want, click **Text Box** (**Insert** menu) and then size the box by dragging the sizing handles. Type the text in the box. To insert a graphic for a watermark, click **Picture** (**Insert** menu) and then click a command, for example, **Clip Art**. Move the graphic where you want it.
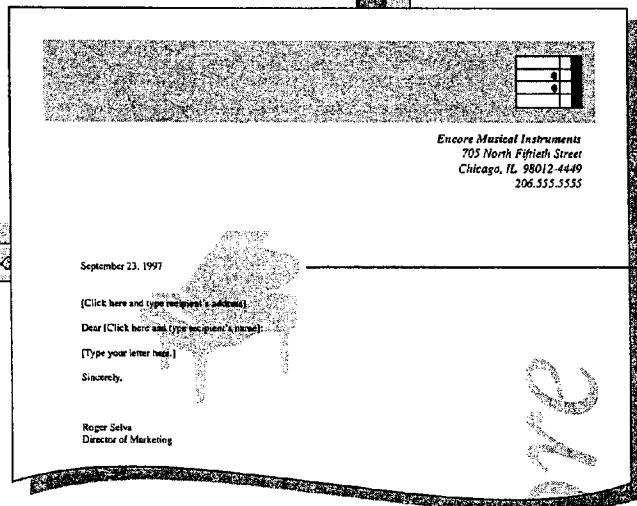
Drawing button   **Text Box** button

Select the text box or picture and move it anywhere you want on the page. On the **Drawing** toolbar, click **Draw**, click **Order**, and then click **Send Behind Text**.
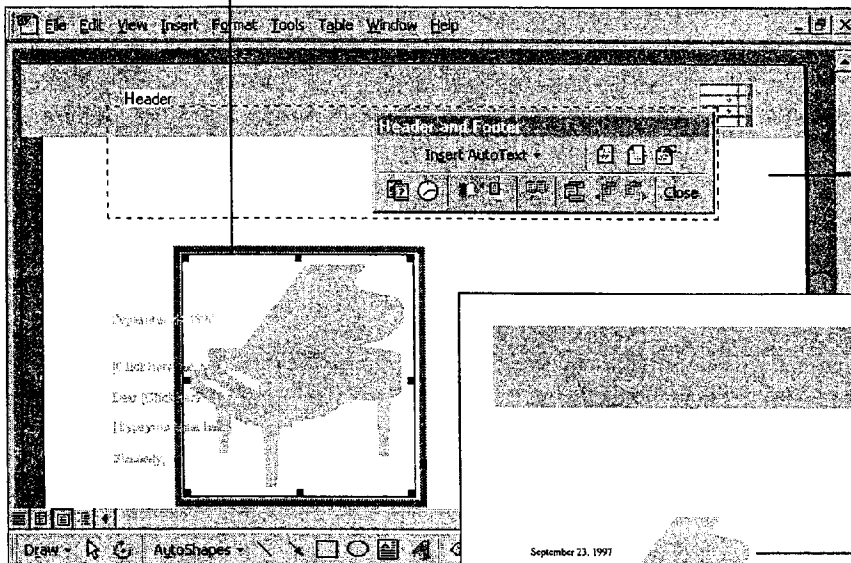
To return to the main document, double-click it. The watermark will appear dimmed on the screen ...

... but it will look normal in the printed letter.

MS 113944

Part 2   Create Letters, Mailings, and Other Business Communications

Hide the document text while you're creating the watermark   Click the **Show/Hide Document Text** button on the **Header and Footer** toolbar.

Want the watermark to appear on the second page?   If you want the watermark to appear on the second and subsequent pages, click **Header and Footer** (**View** menu), copy the watermark, switch to the header for the second page, and then paste the watermark.

Make sure the watermark doesn't obscure any text   Even though the watermark has been "sent behind text," the original graphic or text may be sufficiently dark to obscure text on your page. To get the best results, experiment with various shades of gray—or even colors, which print as shades of gray on a black-and-white printer—to see which work best with your printer.

Want to know more?   Look up **Getting Results - Letterhead** in Help.

Show/Hide Document Text button

Office Assistant button

MS 113945

Create a Matching Envelope

Click **Envelopes and Labels** (**Tools** menu), and then type some placeholder text for the delivery address, such as [**Type address here**]. Fill in your return address, and then click **Add to Document**. Then click **Page Layout** (**View** menu). For information on positioning a graphic where you want it, see "Add a Logo or Other Graphics," page 199.
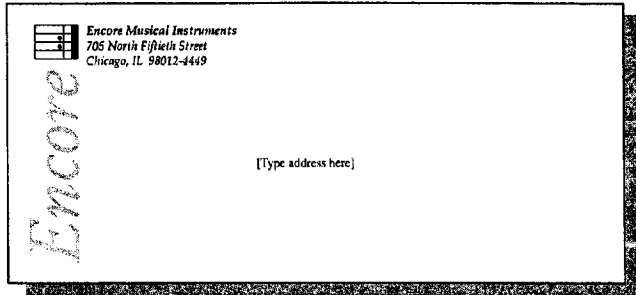
Ready to print the envelope?   When you use the letterhead template to start a new letter, you can fill in the delivery address on the envelope and print it. To print just the envelope, click **Print** (**File** menu), and then print page 0 (zero).

Plan to change other envelope options, such as envelope size?   If you open the **Envelopes and Labels** dialog box and make changes, Word won't preserve the graphic you added to the envelope. To solve this problem, save the graphic as an AutoText entry named "EnvelopeExtra1" or "EnvelopeExtra2." For more information, look up **Getting Results - Letterhead** in Help.

Next Steps

To	See
Add even more visual impact	"Make Your Word Document Look Great," page 127
See other examples of how you can use graphics in your letterhead	"Get Your Point Across with Graphics," page 159
Use the "electronic" letterhead to start a new letter	"Write a Business Letter," page 184
Send a form letter to a mailing list	"Create a Mailing," page 206
Fax a copy of the letter	"Create a Fax Cover Sheet and Send a Fax," page 192

MS 113946

Create a Mailing

Send a Form Letter to People on Your Mailing List

You probably need to send out lots of letters to promote your products or services, raise funds, collect payments, keep club members or employees informed, and so on. You don't have time to type a personalized letter for each person, but you don't want to send out a generic "Dear Valued Customer" letter either.
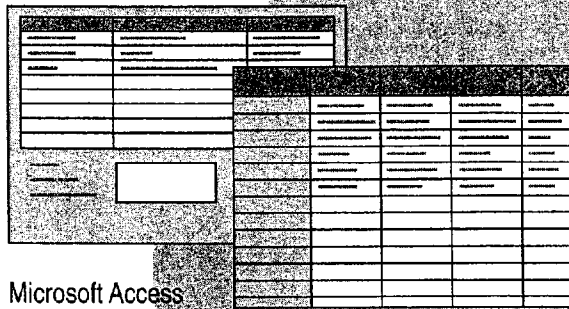
Word has the solution: It's a snap to use the Mail Merge Helper to set up and print form letters and matching mailing labels in a matter of minutes.

Key Features

Mail Merge Helper

Get addresses from these sources, or create a simple mailing list in Word.

Write a generic letter, and then merge the addresses to create personalized form letters—one for each person.

Microsoft Access database
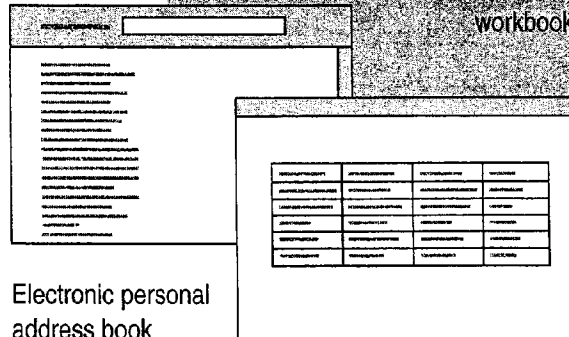
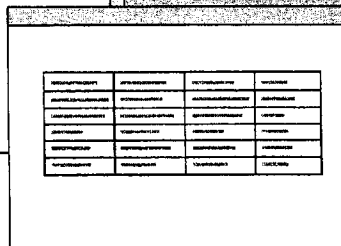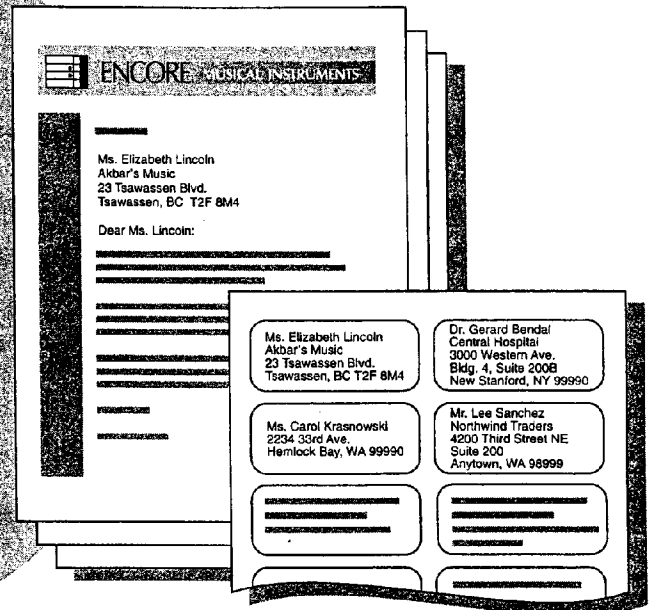Microsoft Excel workbook

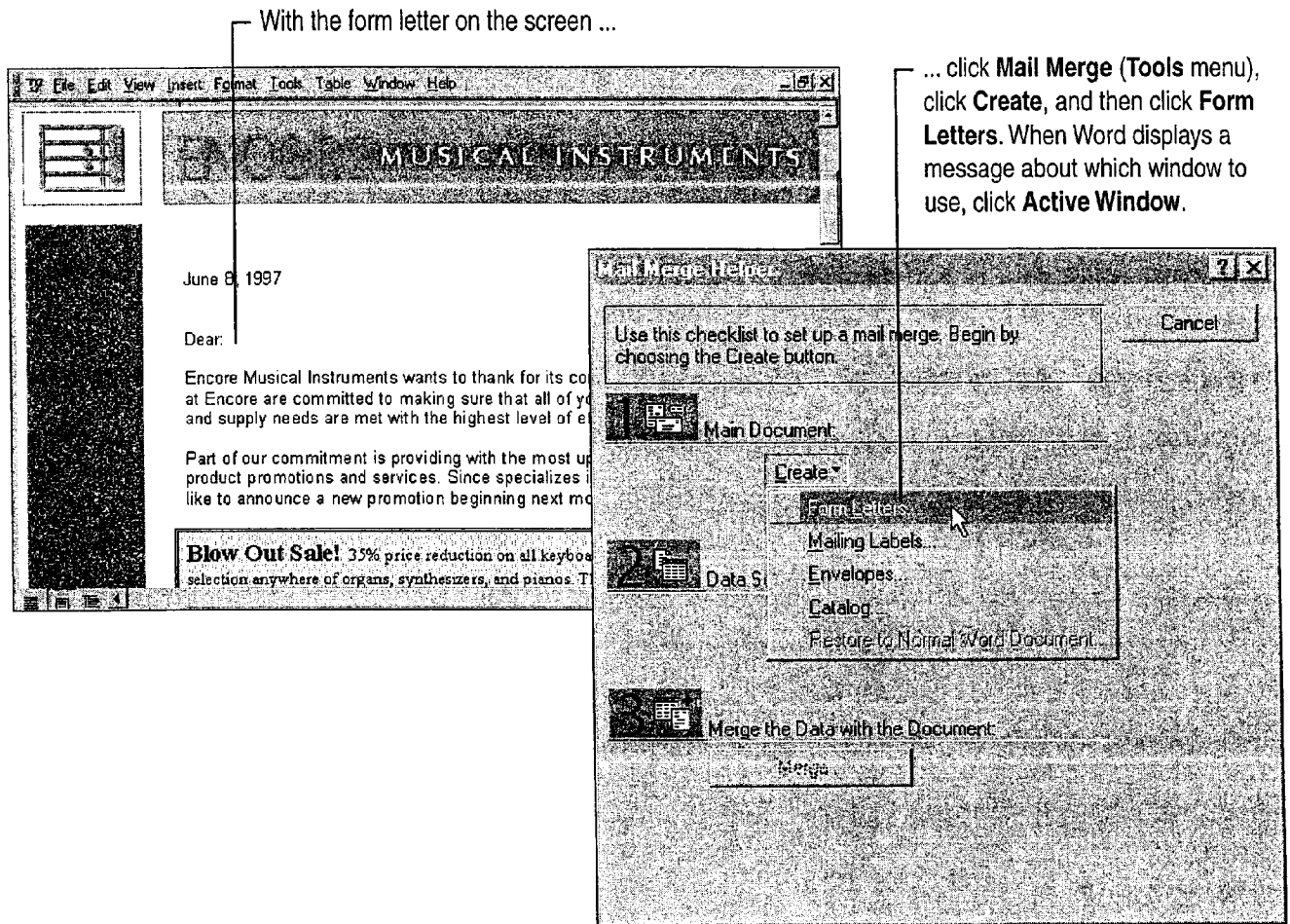Electronic personal address book

Table in a Word document

You can also merge the addresses to create a mailing label for each letter.

MS 113947

Write the Form Letter

Start by writing the basic form letter—the generic text you want to send to each person on your mailing list. Don't include names and addresses, since they'll be inserted automatically from the mailing list. To write the letter, you can use the Letter Wizard or a letter template, or start from scratch. For more information, see "Write a Business Letter," page 184.

Click **Mail Merge** (**Tools** menu) to start the Mail Merge Helper.

— With the form letter on the screen ...

... click **Mail Merge** (**Tools** menu), click **Create**, and then click **Form Letters**. When Word displays a message about which window to use, click **Active Window**.

Want to know more?   Look up **Getting Results - Word Mailing** in Help.

Office Assistant button

MS 113948

Part 2   Create Letters, Mailings, and Other Business Communications

Specify or Create the Mailing List

In the **Mail Merge Helper** dialog box, click **Get Data**. (For information on which application you should use to create a new mailing list, see the sidebar at the end of this section.)

> [?] For Help on dialog box options, click this button and then click the option.

- If you already have addresses in your Microsoft Exchange personal address book or other address book, click **Use Address Book**, select the list you want, and then skip ahead to "Insert Merge Fields into the Form Letter," page 210.

- If you already have a mailing list in Microsoft Excel, Microsoft Access, or another data source, click **Open Data Source**, select the mailing list, and then skip ahead to "Insert Merge Fields into the Form Letter," page 210.

- If you want to create the mailing list from scratch using Word, click **Create Data Source**.

Use the *fields*, or categories, that Word provides or make your own. Click **OK**, and then save your mailing list.
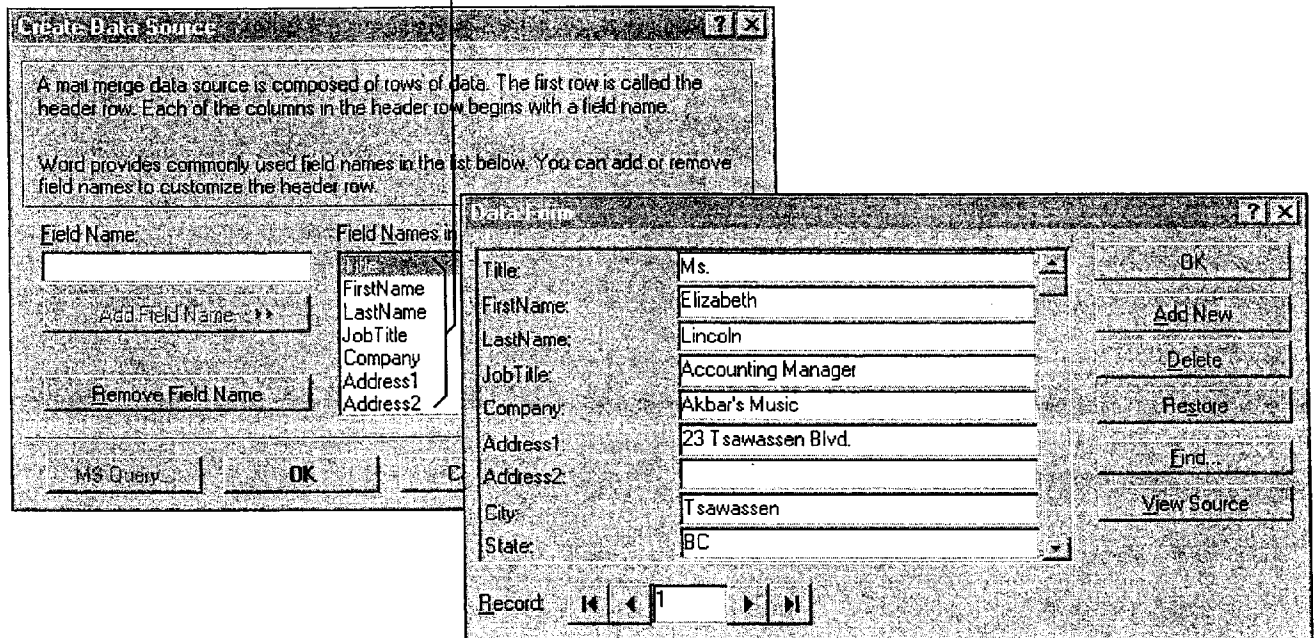
When a message about data records appears, click **Edit Data Source**. For each person on the mailing list, fill in the information on the form, or *record*, and then click **Add New**. When you finish, click **OK**.

MS 113949

Part 5 Create Informative and Entertaining Presentations

Create Speaker Notes

Sometimes a presenter needs to do a lot of talking to support the bulleted list on the slide, so keeping some notes handy is a good idea. Or if the presentation's creator and the presenter are different people, it's important for the creator to communicate ideas to the presenter.

To create speaker notes, switch to notes page view by clicking the **Notes Page** button. Just click in the box at the bottom of the screen and begin typing your notes.

Notes Page button
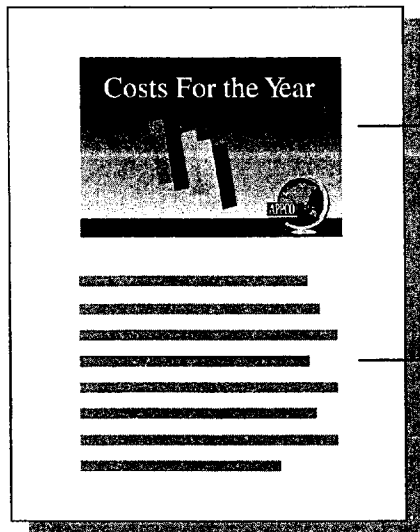
Each slide image appears on its own page.

Type your notes for the slide directly below.

Get a closer look The **Zoom** box gets you up close to your work, no matter what view you're in. Just type or select the percentage you want.

150%

Zoom box

Create and edit notes from other views You can type your notes without leaving slide view or slide sorter view. Click **Speaker Notes** (**View** menu) and type your notes.

Fit more notes on a page If you need more room for text, you can reposition and change the size of the slide image on the notes page by clicking the slide image and then dragging. Use the Notes Master to have your changes apply to all notes pages at once. Click **Master** (**View** menu) and then click **Notes Master**. For more information, see "Apply Master Formatting," page 322.

MS 114038

Customize your mailing list   Don't limit yourself to using just names and addresses to personalize form letters. You can include other types of customer data, such as phone numbers, products purchased, sales representative's name, and so on.

Need to update the mailing list?   You might want to add the names and addresses of new customers, or add another field, such as fax number or purchase order number. If you've stored the mailing list in Word, look up **Getting Results - Word Mailing** in Help. If you've stored the mailing list in your Microsoft Exchange personal address book, Outlook contact list, Microsoft Excel, or Microsoft Access, see "Next Steps," at the end of this topic.

Which Application Is Best for Your Mailing List?

If your list is short and you don't plan to update it frequently, you might want to create the list in Word (as explained earlier in this section).

For longer lists that require frequent updates, you might want to use your Microsoft Exchange personal address book, Outlook contact list, or Microsoft Excel. For longer lists that require full relational database capabilities, you might want to use Microsoft Access.

Mailing list in Microsoft Excel

The first row contains column headings identifying the information in each column.

MS 113950

Part 2 Create Letters, Mailings, and Other Business Communications

Insert Merge Fields into the Form Letter

Now that you've created the generic form letter and specified a mailing list, you need to insert *merge fields*, or placeholders, that tell Word where to put the names, addresses, and other personalized information.

In your document, click where you want to insert a merge field.
Click the **Insert Merge Field** button, and then click a merge field.

The merge field you selected appears.

Type any spaces and punctuation you want between the merge fields.

Want to emphasize the personalized information? Select a merge field and apply bold, italic, or any other formatting.

Save the form letter for future use When you've inserted all the merge fields—and added any text and graphics you want to include in each letter—save the form letter.

Want to know more? Look up **Getting Results - Word Mailing** in Help.

Office Assistant button

MS 113951

Target the Form Letter Recipients

To get the best response at the lowest cost, you probably don't want to send a form letter to everyone on your mailing list. For example, you might want to zero in on just your Canadian customers.

You can set up a simple *query*, or set of criteria, that tells Word to filter the list for just the records you want to merge. Here's how: After you insert the merge fields, click the **Mail Merge** button on the **Mail Merge** toolbar, and then click **Query Options**. On the **Filter Records** tab, set up your query.

Mail Merge button

This query tells Word to merge only the records of customers from Washington state.

Want to use a query you've already set up in Microsoft Access?
When you open the data source, you can also select Microsoft Access tables or queries.

MS 113952

Part 2   Create Letters, Mailings, and Other Business Communications

Merge the Mailing List with the Form Letter

Preview a few letters   To make sure the information is merged correctly, click the **View Merged Data** button on the **Mail Merge** toolbar. Then click the **Next Record** button to preview each letter.


View Merged Data button

Start the merge   Click the **Merge to Printer** button on the **Mail Merge** toolbar. Word prints one personalized letter for each record retrieved from the mailing list. For more mail merge options, you can return to the Mail Merge Helper instead of clicking the **Merge to Printer** button; just click **Mail Merge** (**Tools** menu), and then click the **Merge** button.

Merge to Printer button

— Merge fields in the form letter tell Word where to insert information.
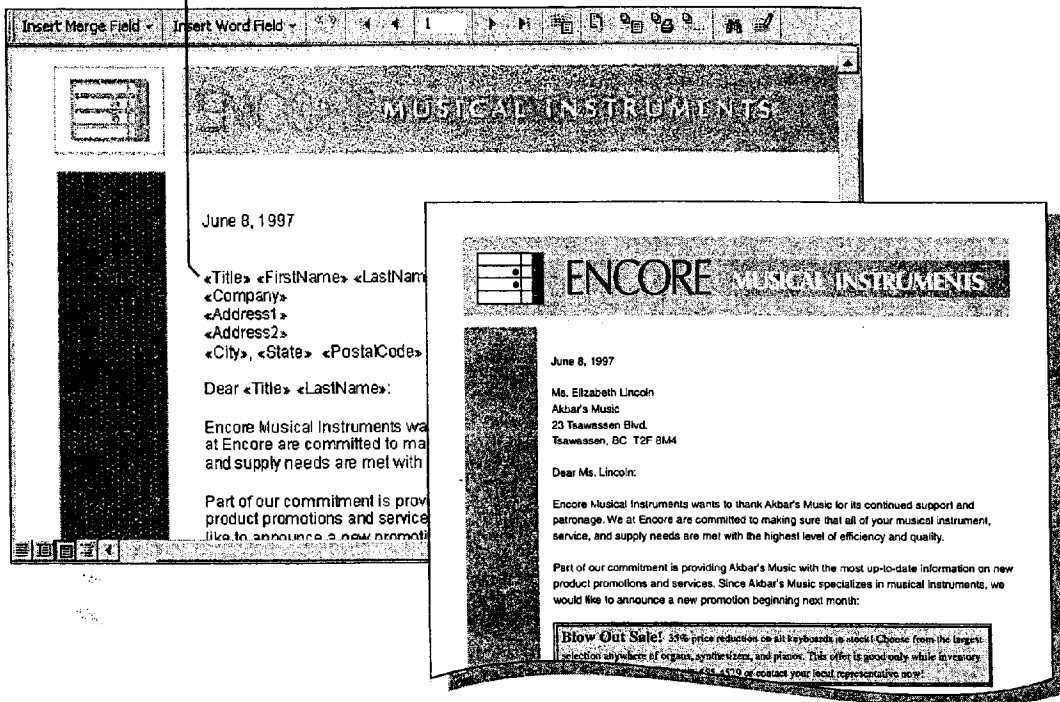
Final form letter

MS 113953

Want to merge the letters to a document instead of directly to the printer?   Click the **Merge to New Document** button on the **Mail Merge** toolbar. Word places the resulting letters in a single document, separating the letters with section breaks. You can review the letters before you print, or save a permanent copy of them.

Merge to New Document button

Want to print an individual letter?   Open the form letter, click the **View Merged Data** button, and then click one of the arrow buttons on the **Mail Merge** toolbar, or type a record number in the **Go to Record** box. When the letter that you want to print is displayed, click the **Print** button.

View Merged Data button

Go to Record box

Missing the first address from your Microsoft Excel mailing list? Word assumes that the first row contains the merge field names (FirstName, City, and so on). Just add column labels to the worksheet and then repeat the merge. For more information on using column labels, see "Create a Business Contact List in Microsoft Excel," page 353.

Want to know more?   Look up **Getting Results - Word Mailing** in Help.

Office Assistant button

MS 113954

Part 2   Create Letters, Mailings, and Other Business Communications

Print Addresses on Mailing Labels

You can merge names and addresses from your mailing list and print them on Avery labels or other types of mailing labels using a dot-matrix or laser printer. Here's an overview of what you'll need to do. For more information, look up **Getting Results - Word Mailing** in Help.

First, set up a "form" for the mailing labels: Click the **New** button to create a new document, click **Mail Merge** (**Tools** menu), click **Create**, and then click **Mailing Labels**. When a message about the document window appears, click **Active Window**. Click **Get Data**, and then select the data source: your mailing list or address book. When a message appears, click **Set Up Main Document**.

Select the label options you want, and then click **OK**.

Insert merge fields to put information where you want it on the labels, add punctuation and formatting, and then click **OK**.
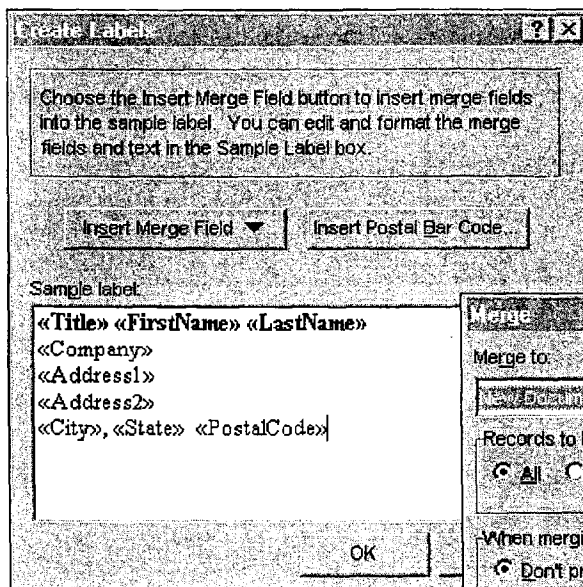
Click **Merge**, and then select the merge options you want. Make sure the printer is ready to print labels before you click **Merge** in the **Merge** dialog box.
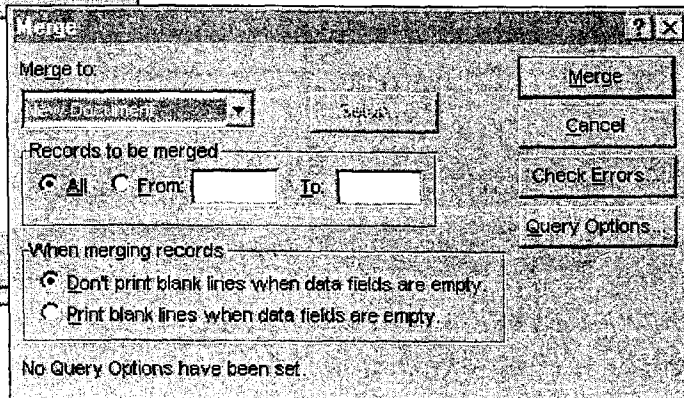
MS 113955

Start labels from the File menu   Click **New** (**File** menu). On the **Letters & Faxes** tab, double-click the **Mailing Label** wizard. This starts the Mail Merge Helper.

Create a page with the same label   Click **Envelopes and Labels** (**Tools** menu), click the **Labels** tab, and then type the name and address. If you want a label size other than the Avery Standard, click **Options**, select the label options you want, and then click **OK**. Make sure the **Full page of the same label** option is selected, and then click **Print**.

Need custom labels?   With Word you can have as many kinds of custom labels as you like. Follow the instructions above until the **Label Options** dialog box is displayed. Click the **New Label** button, and then specify the label size and number of labels per sheet.

Want to print addresses on envelopes?   Click **Mail Merge**, click **Create**, and then click **Envelopes**. Click **Get Data**, and then either create a mailing list or open an existing mailing list. Then set up how the addresses will be printed on the envelopes.

Have you stored names and addresses in a Microsoft Excel list?
From your Microsoft Excel list, you can run the Microsoft Access Label Wizard to create mailing labels. Open the Microsoft Excel workbook that contains your list, click the appropriate worksheet tab, and then click anywhere in the list. Click **Access Report** (**Data** menu), and then click **Label Wizard**.

Want to know more?   Look up **Getting Results - Word Mailing** in Help.

Office Assistant button

Use Microsoft Access to Start the Merge

If you've stored your mailing list in Microsoft Access, you can start the mail merge from Microsoft Access instead of from Word.

Use Microsoft Access to create a query and start the merge   To target the exact audience for the form letter, design a query that retrieves only the names and addresses you want. (For more information, see "Evaluate Sales Performance in a Microsoft Access Database," page 582.) Then, in the Database window, select the query you just created. Click the **OfficeLinks** button, select **Merge It**, and follow the instructions on the screen.

Next, use Microsoft Word to create the form letter and complete the merge   Write the generic form letter; then insert the merge fields. And, finally, complete the merge as described earlier in this topic.

Then, use Microsoft Access to print matching mailing labels   Select a query in the Database window, click the **New Object** button, and then click **New Report**. Start the Label Wizard, and then follow the instructions on the screen.

Create a query to select the form letter recipients from your database.

Write the form letter and complete the merge using Word.

Create the matching mailing labels with the Microsoft Access Label Wizard.

MS 113957

Next Steps

To	See
Decide which application to use for your address list	"Where Should You Store Your Contact Information?" page 346
Manage contacts with customers, including updating the mailing list and tracking responses from the form letter	"Manage Contacts with Outlook," page 348
	"Create a Business Contact List in Microsoft Excel," page 353
	"Track Your Business Contacts in Microsoft Access," page 360
Schedule follow-up calls, sales visits, and demos	"Add Activities to the Calendar," page 382
Prepare a bid or quote	"Prepare a Customer Quote," page 539
Track new orders	"Track Orders in a Shared Database," page 427
Print a report that summarizes how many new orders your form letter generated	"Create a Sales Summary," page 563
	"Create a Business Report," page 228

MS 113958

Create a Newsletter

Whether you want to update customers on new products or pricing changes, or keep constituents informed of the latest legislation, a newsletter is a good way to do it.

To create a well designed newsletter, use the Word Newsletter Wizard. The wizard provides a variety of layout options and styles that are suitable for just about any content you want in your newsletter.

Key Features

- Newsletter Wizard
- Text Boxes

Create professional-quality newsletters by using the Newsletter Wizard.

MS 113959

Use the Newsletter Wizard to Get Started

Start by clicking **New** (**File** menu). On the **Publications** tab, double-click **Newsletter Wizard**. If the Newsletter Wizard doesn't appear on the **Publications** tab, rerun Setup and choose the Custom installation to install it. For more information, see "Add or Remove Components," page 32.

The Newsletter Wizard walks you through steps in which you choose a visual style and then add or select information to set up the layout of the newsletter. If you want, you can even have space set aside for a mailing label on the last page of your newsletter.

When you click **Finish**, the newsletter appears. You'll see placeholder headings, text, and graphics. Just supply the content.
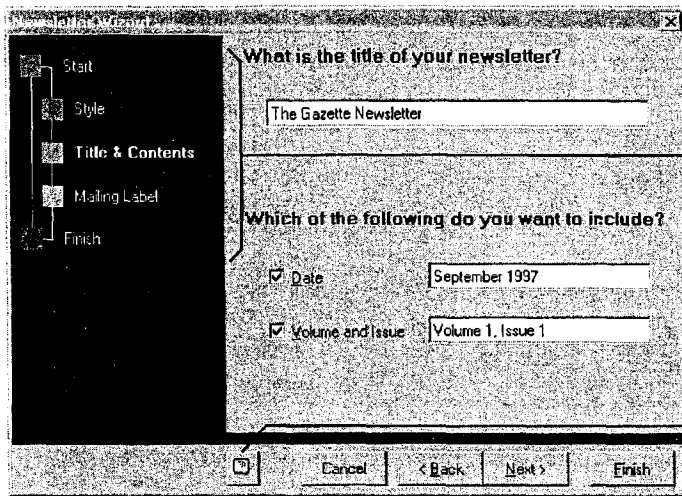
The Newsletter Wizard provides a road map of the steps you will complete to create a newsletter.

Click here to get Help from the Office Assistant.

Want help with your newsletter? As soon as you click **Finish**, the Office Assistant will ask you if you want help, on inserting pictures, for example. To get help on this or any topic, click the appropriate option button.

Want to know more? Look up **Getting Results - Newsletter** in Help.

**Office Assistant** button

MS 113960

Part 2   Create Letters, Mailings, and Other Business Communications

Add Your Content to the Newsletter

To add stories to your newsletter, select the placeholder text and then type in the newsletter. Or copy a story from another document and paste it into the newsletter, replacing the placeholder text.

When working in the newsletter, you might notice that some of the text is enclosed in text boxes. Text boxes allow you to start a story on any page and continue it wherever you want, as long as it's in the same document. For more information, see "Text Boxes for 'Desktop Publishing' Effects," page 141.
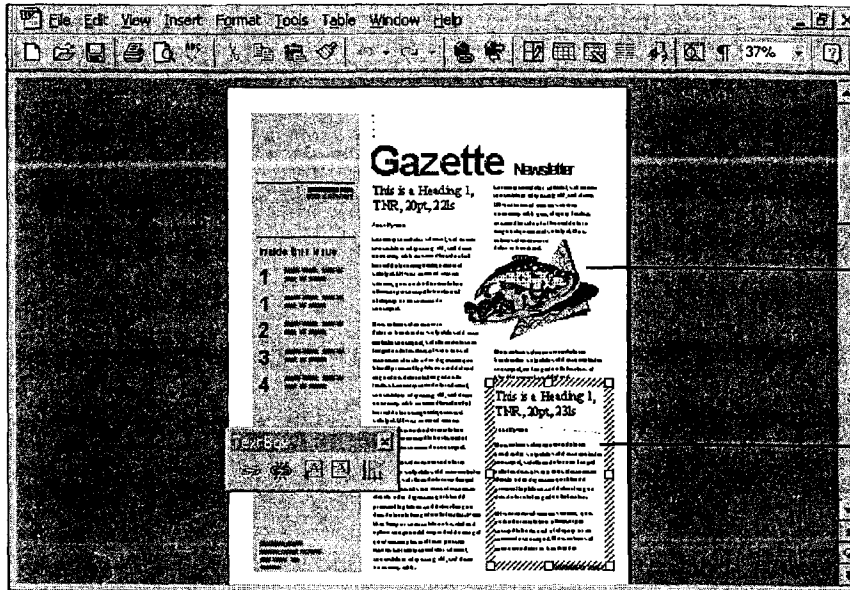
To insert pictures, click **Picture** (**Insert** menu) and then click the command you want, for example, **Clip Art**.

Text boxes enable stories to flow from one page to another, for example, from page 1 to page 4.

Want a story that catches the reader's eye? If the story is in a text box, click the text box and add fill effects, shadows, or colored lines (assuming you have a color printer). Click the **Drawing** button to display the **Drawing** toolbar, and then click the **Fill Color, Line Color,** or **Shadow** button.

Drawing button   **Fill Color** button

Line Color button   **Shadow** button

Want text to wrap around a picture? Right-click the picture, and then click **Format Picture.** On the **Wrapping** tab, set the options you want.

Want to crop or cut off part of a picture? Click the picture, and the **Picture** toolbar appears. On the **Picture** toolbar, click the **Toggle Crop Mode** button. When the pointer changes to a crop mark, click a sizing handle, and then drag to crop the picture.

Want additional ideas for graphics? See "Get Your Point Across with Graphics," page 159.

Need to know how long a story is? Check the word count by clicking **Word Count (Tools** menu).

Next Steps

To	See
Try other formatting options	"Make Your Word Document Look Great," page 127
Create labels for a mailing list	"Create a Mailing," page 206
Create a printed envelope	"Print an Envelope," page 187

MS 113962

Create a Flyer

Whether you want to announce a sale, advertise the opening of a new branch office, or announce the company holiday party, you can use Word to create an attractive, attention-getting flyer.

Key Features

Tables

Inserting Graphics

New for Spring

The Latest Spr
from top-name

Come to a show on
Sunday, May 8
1223 Main St.

Please accept our invitati
any purchase with this cd

Choose a distinctive typeface to help set the tone of the flyer.

Smith's Coffee Shop

2343 South 2nd Avenue

Wednesday Special:

Free cup of coffee wi
of any sandwich.

Open 6 A.M.–4 P.M.

VINTAGE FIXER-UPPER

Great Buy

- New on the market
- 3 bedrooms
- Detached garage
- Mountain view
- Close to schools

Open House
Saturday 1–5 P.M.
Call for directions
555-3242

Hurry, this one won't last!
Owner will carry the loan.

Use text effects to complement the clip art.

Use clip art to grab the reader's attention.

MS 113963

Lay It Out

You might find it helpful to draw a sketch showing how text and graphics will appear on the page. When you know what you want, create a new document by clicking the **New** button. To view the document as it will look when printed, click **Page Layout (View menu)**.

You can use a table to block off areas of the page to reflect your sketch. To create a table, click the **Tables and Borders** button, and then click the **Draw Table** button on the **Tables and Borders** toolbar. Position the pencil in the upper-left corner, and then drag to create a table. Draw lines by clicking and dragging. To erase lines, click the **Eraser** button and then drag the eraser along the line you want to erase.
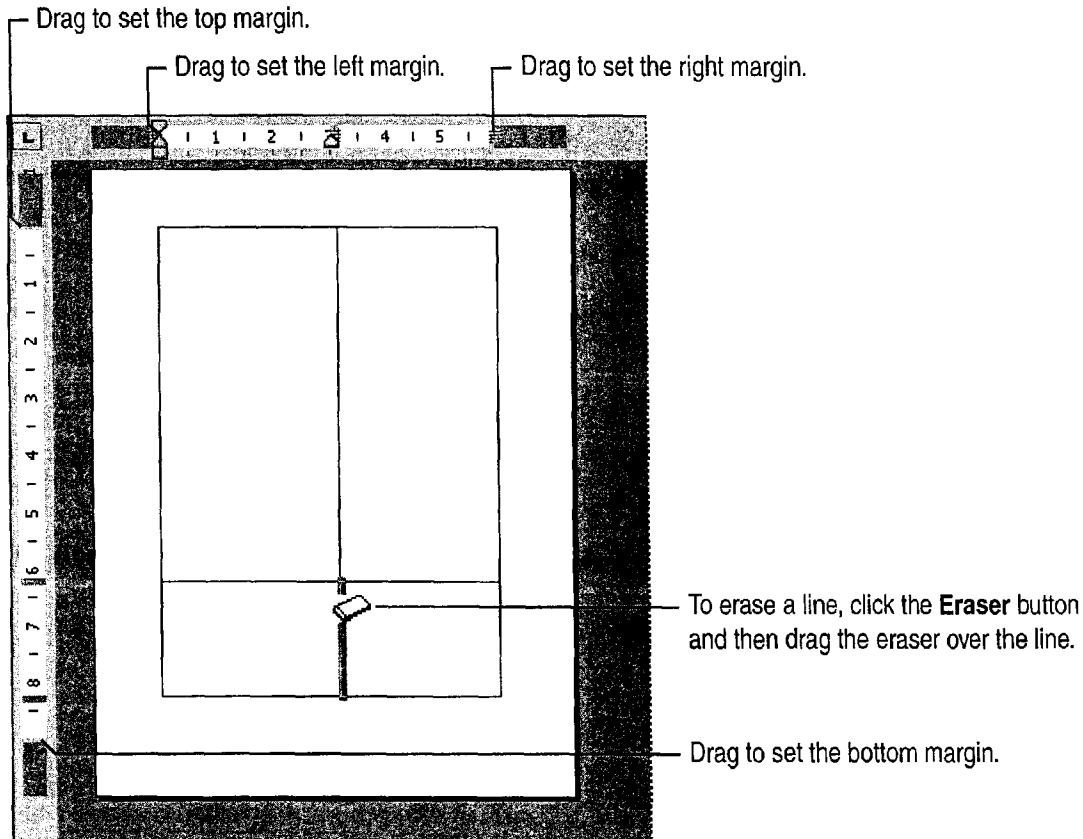
Tables and Borders button

Draw Table button

Eraser button

— Drag to set the top margin.

— Drag to set the left margin.   — Drag to set the right margin.

— To erase a line, click the **Eraser** button and then drag the eraser over the line.

— Drag to set the bottom margin.

MS 113964

Change the column width or length   Drag the boundary you want to change.
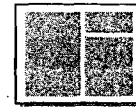
Want to lay out the page horizontally?   To create a flyer with a horizontal, or landscape, orientation, click **Page Setup** (**File** menu). On the **Paper Size** tab, click **Landscape**.

Horizontal orientation

Don't want borders on your table?   On the **Tables and Borders** toolbar, click the **Borders** arrow, and then click the **No Border** button.

No Border button

Want to use newspaper-style columns instead of table columns?   If you want text to flow from the bottom of one column to the top of the next, use newspaper-style columns. For more information, see "Create a Newsletter," page 218.

Want to know more?   Look up **Getting Results - Flyer** in Help.

Office Assistant button

Add the Art and Text

Insert the graphics you want by clicking **Picture** (**Insert** menu), and then clicking the kind of picture you want. Crop or resize the picture if necessary. Or, if you want to create your own drawing, click the **Drawing** button and use the toolbar buttons to create a graphic or special text effects.

Drawing button

Type the text you want in each column. Use the toolbar buttons to format the text.
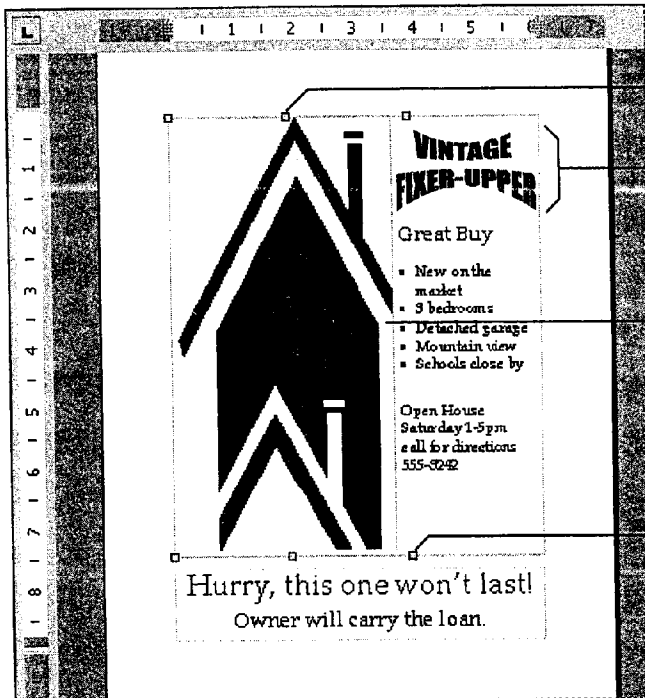
To resize a picture, click the picture, and then drag a sizing handle.

To create a text effect, click the **Drawing** button and then click the **WordArt** button on the **Drawing** toolbar.

This clip art is sized larger than the cell to align it closer to the text.

To crop, or exclude, part of a picture, hold down the SHIFT key as you drag a sizing handle.

Change your mind?   Want to change the text, colors, or shape of the WordArt object you've inserted? Click buttons on the **WordArt** toolbar to edit the object. The **WordArt** toolbar appears when you insert a WordArt object.

MS 113966

Part 2   Create Letters, Mailings, and Other Business Communications

Add Borders to Pages

To make your flyers, forms, and other documents more visually interesting, add page borders. Word provides page borders that range from simple to highly ornate. Choose the art that best complements the content of your document.

To see the different kinds of page borders you can use, click **Borders and Shading** (**Format** menu). On the **Page Border** tab, use one of the standard line borders, or apply one of the fancy art borders in the **Art** list.
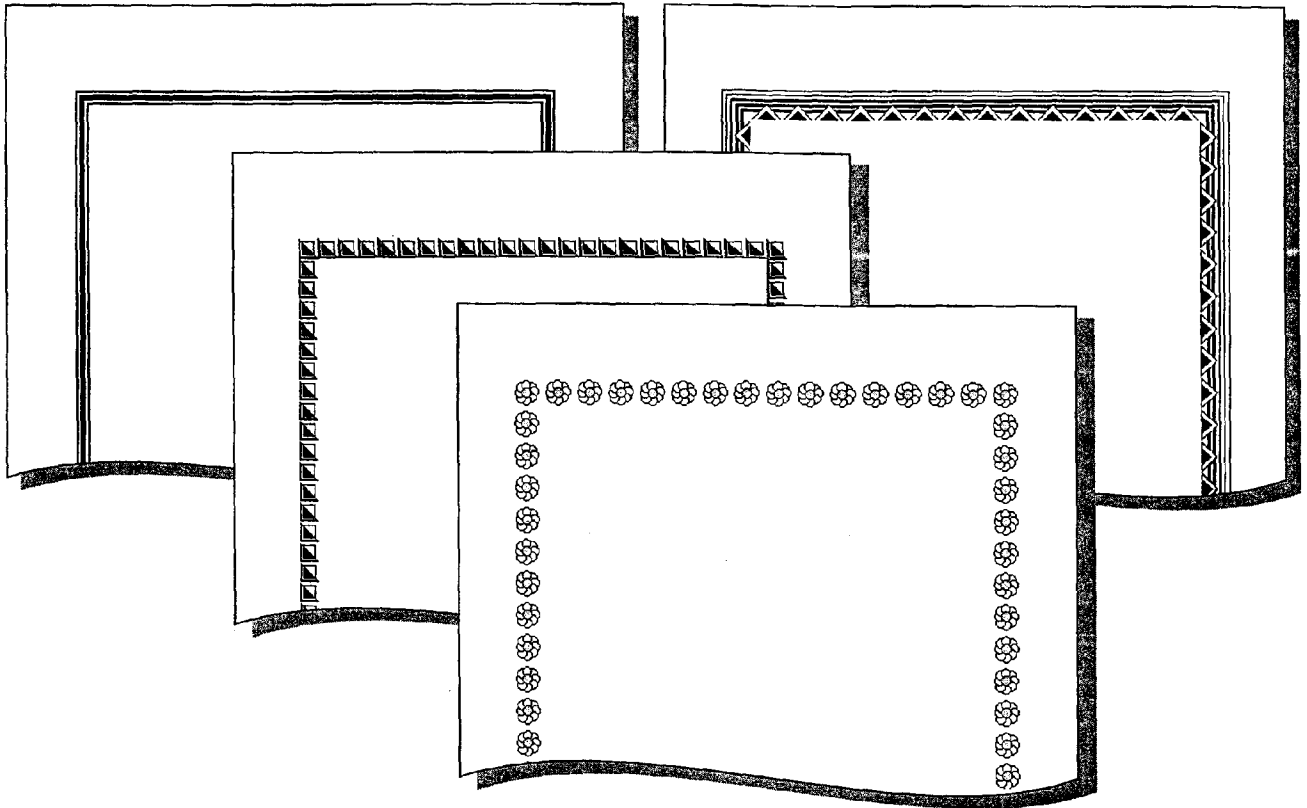
A page border can be a simple line style or an elaborate design.

Next Steps

To	See
See more examples of how to use graphics	"Get Your Point Across with Graphics," page 159
Jazz up the appearance of your flyer	"Make Your Word Document Look Great," page 127
Mail the flyer to customers	"Create a Mailing," page 206

MS 113968

Create a Business Report

When you have to write a report, you want to make the most efficient use of your time. You don't want to worry about how to format your report or how to incorporate information from other applications. Word can help with everything from creating a table of contents to inserting your logo on the title page.

Key Features

AutoText

Headers and Footers

Tables of Contents

Create a title page and include your company logo.

Executive Sales Summary

ENCORE

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Insert information from Microsoft Excel that can be automatically updated in your report if the original numbers change.

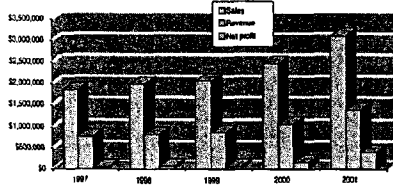Encore Musical Instruments Executive Sales Summary

Executive Summary

Encore Musical Instruments faces an important new challenge. Our privileged position as the premier name in high-quality musical instruments, the choice of the concert professional, is threatened by new technology. Electronic alternatives become more important every day. Yet our most important product line, acoustic instruments, is addressing the slowest-growing market segment in the industry.

Our answer to this challenge is change and development. This sales summary will help evaluate Encore Musical Instruments current position and suggest directions to help guide it through the transition to new technology. We will continue to develop and expand our position in keyboards, speakers, and related electronic equipment, while slowly reducing our present dependence on acoustics.

Based on this sales summary, our growth plans should be ambitious. We can expect a dramatic increase in sales and profits, as shown in the accompanying charts.

Encore Musical Instruments Sales Highlights

Objectives

Four measurable objectives drive the changing sales direction of Encore Musical Instruments:

1. To increase sales to $1.85 million in 1997 and to $2 million in 1998, reaching more than $3 million by 2001.
2. To maintain gross margins above 40% throughout the 5-year period.
3. To increase sales in keyboards, speakers, and music electronics to account for 55% of our sales for 1997.
4. To increase profits to more than $60,000 in 1997 and $400,000 by 2001.

PROPRIETARY INFORMATION   1

Contents

When you finish, have Word create a table of contents.

and then use arabic numerals for the body of your report

Use roman numerals for page numbers in your table of contents ...

MS 113969

Write a Draft of Your Report

In Word, click the **New** button to start your report. If your report contains several parts, you may want to start with part titles and then list the major and secondary headings in each part. At this point, don't worry about formatting titles or any of the text.

The easiest way to add text, graphics, tables, or other information is to copy and paste it. If the information is likely to change, you can *link* the information to your report, even if the information is from another application. Any time the original information changes, your report will be updated automatically.

From a worksheet in Microsoft Excel, copy the rows you want in your report.

Encore Musical Instruments Executive Sales Summary

Financial Analysis

We plan to increase sales significantly, without losing control of cash flow or profitability. This requires careful financial planning and management. The forecast of Encore Musical Instruments 5-Year Sales shown here points out the major financial goals for the next 5 years, and the 1997 Sales by Product Line chart shows what our financial picture looks for this year.

	1997	1998	1999	2000	2001
Acoustic Instruments	$2,950,000	$3,000,000	$3,000,000	$3,130,000	$3,200,000
Electric guitars	$2,380,000	$2,600,000	$2,870,000	$3,160,000	$3,500,000
Keyboards	$1,750,000	$2,000,000	$2,300,000	$2,650,000	$3,100,000
Speakers	$1,000,000	$1,000,000	$1,000,000	$1,000,000	$1,000,000
Electronics	$1,380,000	$1,650,000	$1,980,000	$2,370,000	$2,850,000
Total	$9,460,000	$10,250,000	$11,150,000	$12,310,000	$13,650,000

Table 1

In your report in Word, click **Paste Special** (**Edit** menu), and then select **Paste Link**.

To add a numbered caption, click **Caption** (**Insert** menu).

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Part 2   Create Letters, Mailings, and Other Business Communications

Want a ready-made report that you just fill in?   Use one of the Word report templates. Click **New** (**File** menu). On the **Reports** tab, double-click a report template.

Want to turn data in a table into a chart?   See "Add a Chart to a Document or Presentation," page 266. For more information on how to best present your data, see "Customize the Look of a Chart," page 276.

Want a faster way to add information from other applications?   In applications for Windows, Microsoft Excel for example, you can move or copy data to your Word report by using the right mouse button to drag the selection to where you want to add it. When you release the mouse button, a menu shows the available options for moving and copying.

Want a Quick Start on Creating Your Report?

The quickest way to create, organize, and automatically apply formatting to headings is to use outlining. Just click **Outline** (**View** menu) and type the headings in your report. Word applies a heading style to each heading that you type.

In *outline view*, you can see the structure of your document at whatever level of detail you choose. You can change heading levels with a click of the mouse, and you can move a whole section—heading, subheadings, and associated text—just by dragging the heading.

Outlining has other advantages: You can quickly create a table of contents, and, if you have Microsoft PowerPoint, you can create a slide presentation just by opening your report in PowerPoint. For more information, see "Finish by Adding a Table of Contents," page 236, and "Transfer Information Between PowerPoint and Other Applications," page 327.

Want to know more?   Look up **Getting Results - Business Report** in Help.

Office Assistant button

MS 113971

230   Getting Results with Microsoft Office

Make Writing Easier

You can easily reuse material you've already written by turning it into an AutoText entry. That way you don't have to hunt down the document containing the information you want to reuse. With AutoText entries, you can quickly insert boilerplate text, graphics, and other items you use frequently.

To create an AutoText entry, select the text or item you want to reuse, such as your company name. Click **AutoText** (**Insert** menu), and then click **New**.

After you create an AutoText entry, Word automatically displays a ScreenTip for the entry whenever you type at least four characters in the name. To ignore the tip, continue typing. To have Word automatically insert the contents of the entry, press ENTER.

To make the best use of your AutoText entries, display the AutoText toolbar by clicking **AutoText** (**View** menu, **Toolbars** submenu) and then clicking **AutoText**. That way you can quickly add new entries, edit existing entries, and insert entries directly from the toolbar.

AutoText toolbar

Word displays ScreenTips for AutoText entries that you create.   To accept the tip, just press ENTER.

| Encore Musical Instruments | Encore Musical Instruments |
| Enco | |
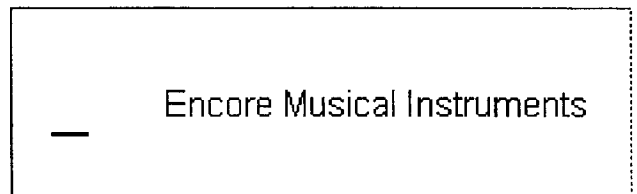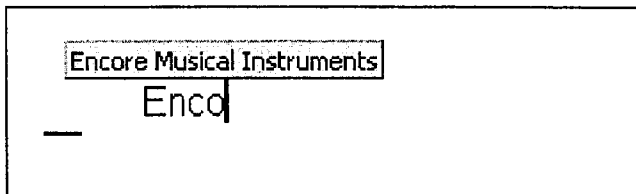
Part 2   Create Letters, Mailings, and Other Business Communications

Need an abstract of your report?   To have Word create the first draft of an abstract, click **AutoSummarize** (**Tools** menu), and then select the type and length of summary you want. Make sure you verify the accuracy of the summary. If you use the AutoSummarize command to summarize another person's document, you may need the permission of the copyright owner.

Word automatically checks your grammar   Word marks possible grammatical errors with a wavy underline as you work. To correct an error, right-click the word, and then select from the list.

Get a bird's-eye view of your document for easy editing   Use the Document Map to view and jump to major headings in your document. Click **Document Map** (**View** menu), and then click a heading in the Document Map pane to move to that heading in the document.

Want to know more?   Look up **Getting Results - Business Report** in Help.

Office Assistant button

MS 113973

Make Formatting Easy

When you're ready to format your report, you have several choices:

- Use the **Style** box to apply one of the built-in styles in Word.

- Use the **AutoFormat** command (**Format** menu) to have Word apply styles.

- Do your own formatting as described in this section.

Style box

To do your own formatting, select fonts, font sizes, and paragraph formatting. From your custom formatting, Word creates a style that you can reuse. After formatting a heading or paragraph, click the **Style** box and you'll find your new style in the list of Style Previews. For more information about styles created automatically, see "Reuse Your Custom Formatting," page 144, and "Let Word Do the Formatting for You," page 142.

Style box showing Style Previews
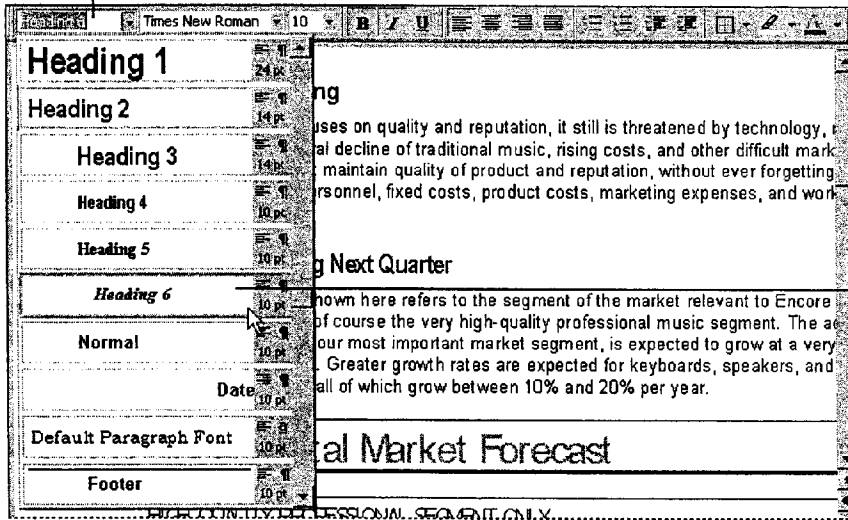
If you do special formatting to create a heading style (for example you make the heading Times New Roman 10 point bold italic), you'll find that heading style automatically added to the list of Style Previews shown in the **Style** box.

To reuse a style, select text, click the **Style** box, and then click the style you want to apply.

MS 113974

Part 2   Create Letters, Mailings, and Other Business Communications

Add Headers and Footers

To use the same header and footer throughout your report, just click **Header and Footer** (**View** menu), and then add the text.
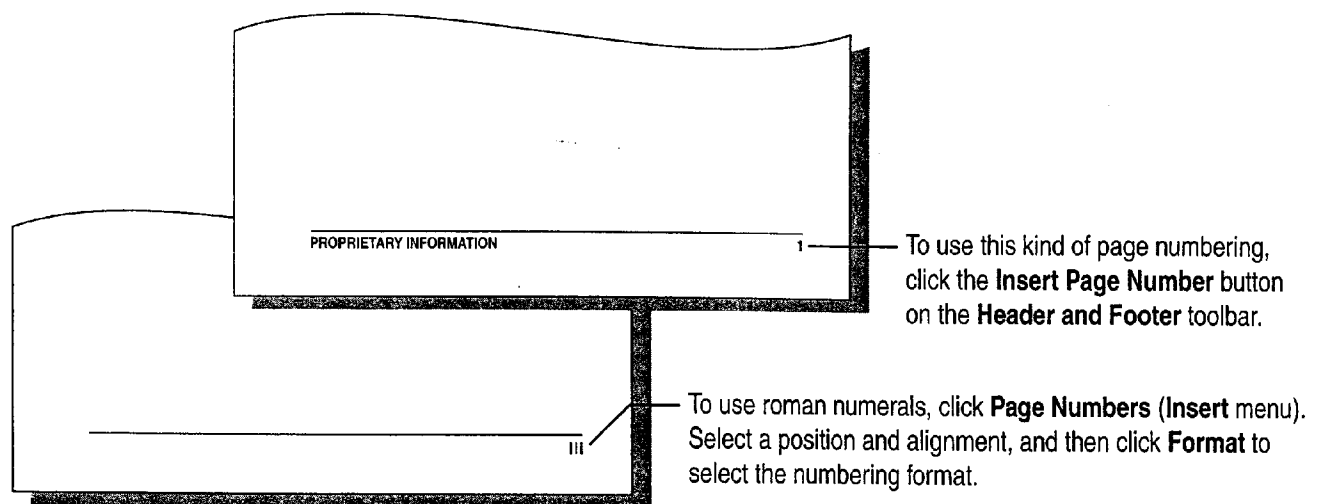
▶ To use different headers or footers in different parts of your report:

1 Divide your report into sections. Position the insertion point where you want a new header or footer to begin. Click **Break** (**Insert** menu), and under **Section breaks** click **Next page**.

2 Break the "link" with the previous header or footer (because Word makes all headers or footers the same as previous ones in the report). Position the insertion point after the new section break, click **Header and Footer** (**View** menu), and then make sure the **Same as Previous** button is not pushed in. If you're creating different headers and different footers, make sure you break the link for both.

Same as Previous button

3 Type the new text for the new header or footer.

PROPRIETARY INFORMATION   1

To use this kind of page numbering, click the **Insert Page Number** button on the **Header and Footer** toolbar.

To use roman numerals, click **Page Numbers** (**Insert** menu). Select a position and alignment, and then click **Format** to select the numbering format.

Add headers and footers more easily   Create AutoText entries for headers or footers you use frequently, or use one of the built-in AutoText entries available from the **Header and Footer** toolbar. For information on how to create an AutoText entry, see "Make Writing Easier," page 231.

Want to use page numbers such as "1 of 25"?   Use the built-in AutoText entry. Click the **Insert AutoText** button on the **Header and Footer** toolbar, and then click **Page X of Y**.

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Add a Title Page

At the beginning of the report, type the title page text. To put the title on a separate page, click **Break** (**Insert** menu), and then under **Section breaks** click **Next page**.

Executive Sales Summary

ENCORE
MUSICAL INSTRUMENTS

705 North 50th Street
Chicago, IL 65010
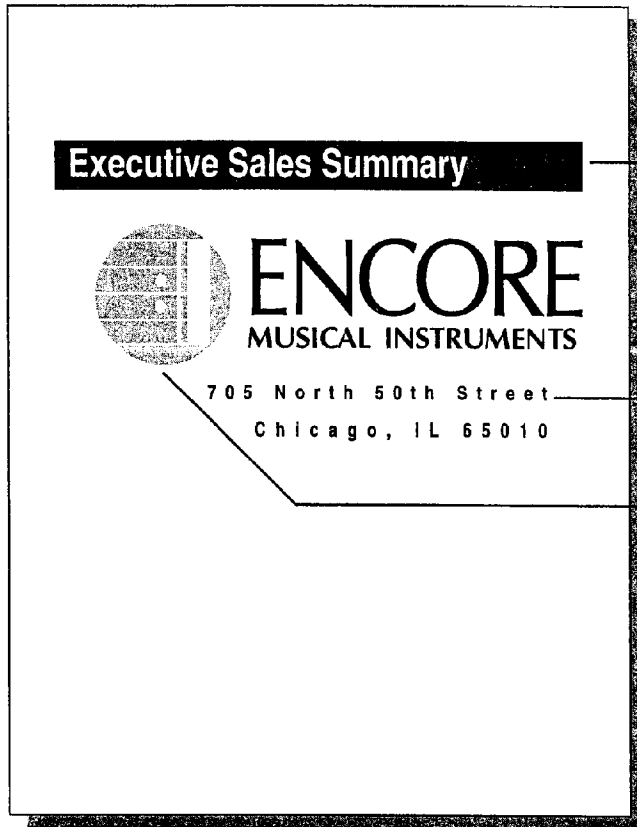
To create reverse text, select the text, and then click **Borders and Shading** (**Format** menu). On the **Shading** tab, select **Solid (100%)** from the **Style** list. To make the text white, select the text, and then click **Font** (**Format** menu). In the **Color** list, select either **Auto** or **White**.

To right align text, select the text, and then click the **Align Right** button.

To insert a graphic, click **Picture** (**Insert** menu).

Don't want headers or footers on the title page? Click **Page Setup** (**File** menu). On the **Layout** tab, select the **Different First Page** check box. Then, when you create the headers and footers, leave the first page header or footer area blank.

Want to vertically center the text and graphics on the title page?
Make sure your title page is in a separate section as described above. Click **Page Setup** (**File** menu). On the **Layout** tab, click **Center** in the **Vertical alignment** list.

Want to add a watermark to the title page? See "Add a Watermark," page 203.

MS 113976

Part 2   Create Letters, Mailings, and Other Business Communications

Finish by Adding a Table of Contents

The easiest way to create a table of contents is through heading
styles, whether they're built-in or ones that you create through
custom formatting.

<table>
<tr><td>

C o n t e n t s

Executive Summary 1
Objectives 1
Mission 1

Company 3
Company Ownership 3
Company History 3
Product Lines 3
Company Location and Facilities 3

Product 4
Product Description 4
Important Product Features and Comparison 5
Product Literature 5

Market Analysis 6
Industry Analysis 6
Keys to Success 6
Market Forecast 7

Business Strategy and Implementation 9
Marketing Strategy 9
Sales Plan 10
Strategic Alliances 12
Service 13

Organization 14
Organizational Structure 14
Management Team 14
Management Team Gaps 15
Other Management Team Considerations 16

Financial Analysis 17
Financial Plan 17

iii
</td><td>

To create a table of contents, click where you want to insert it. Click **Index and Tables (Insert menu)**, and then on the **Table of Contents** tab, select the format you want.

Word automatically includes the page number for each paragraph formatted as a Heading 1, 2, or 3. If page breaks or headings change, update your table of contents by selecting the table of contents and then pressing F9.

To use roman numerals in footers, see "Add Headers and Footers," earlier in this topic.
</td></tr>
</table>

MS 113977

Don't have heading styles in your document? Click **AutoFormat** (**Format** menu) to have Word format your document and create headings. Or select headings in your document, and then click in the **Style** box the name of the heading style you want.

Heading 1

Style box

Use different styles in your table of contents To customize your table of contents, click **Index and Tables (Insert** menu). On the **Table of Contents** tab, click **Options**. Then for each style you include, specify a TOC level.

Want to create a table of figures? Label each figure by selecting it and clicking **Caption (Insert** menu). Word uses the caption to determine the page number for each figure. Position the insertion point where you want the table of figures to appear. Click **Index and Tables (Insert** menu). On the **Table of Figures** tab, select the options you want.

Want to create a PowerPoint presentation from your report? If you used a Word outline or built-in heading styles, all you have to do is click **Send To (File** menu), and then click **Microsoft PowerPoint**. For more information, see "Transfer Information Between PowerPoint and Other Applications," page 327.

Next Steps

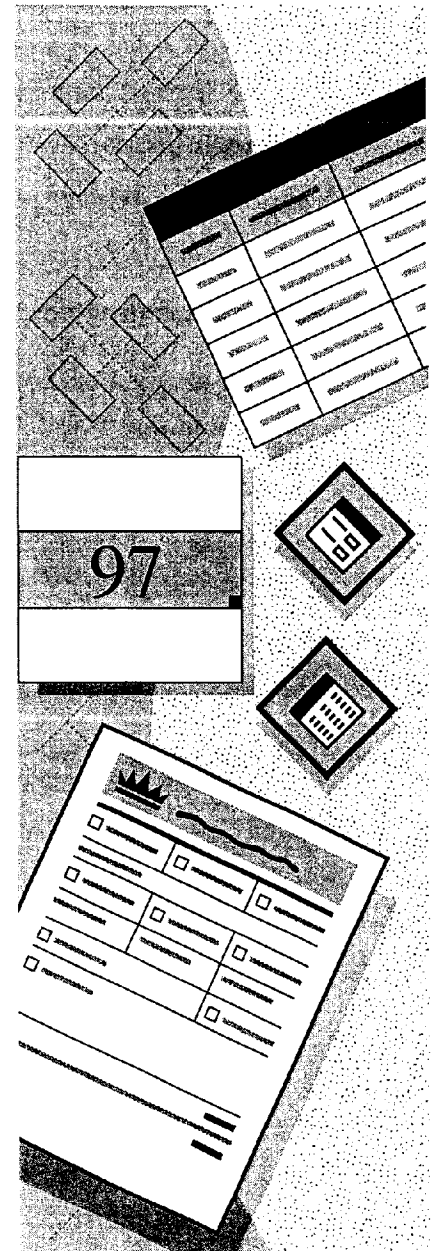| To	See
Decide how to distribute your report to your workgroup	"Distribute Documents Online," page 396
Create a chart from data in Microsoft Excel or Graph	"Add a Chart to a Document or Presentation," page 266
Format a chart	"Customize the Look of a Chart," page 276

MS 113978

Create Printed and Online Business Forms

Contents

MS 113979

What's the Best Way to Create a Form?

With the Office applications, you can create many different *forms* and use them in widely varying ways. In Microsoft Access, a form is an online document you can use to enter, edit, or view data. In other Office applications, a form is a framework for a document you use repeatedly, for example, an order form or expense report.

In your work, you may be creating your own forms already. If you open an existing document, save it with a different file name, and fill in information such as expenses or customer data, you are using the document as a form.

Use the following table to decide which use of forms is closest to the work you want to do.

If you want to	Use this application	See
Create a form that does not require online calculation or entry into a database for print, network, or the Web	Microsoft Word	"Create an Online or Printed Form in Word," page 241
Create a form for entering and calculating worksheet data	Microsoft Excel	"Create a Form for Online Invoices," page 250
Create a form for entering, editing, and storing data, or for viewing data in a database	Microsoft Access	"Create a Great-Looking Product Form," page 498
Create an e-mail form for entering personal data or for storing data received electronically from your workgroup	Microsoft Outlook	*Microsoft Office 97 Resource Kit*, Microsoft Press *Building Microsoft Outlook 97 Applications*, Microsoft Press

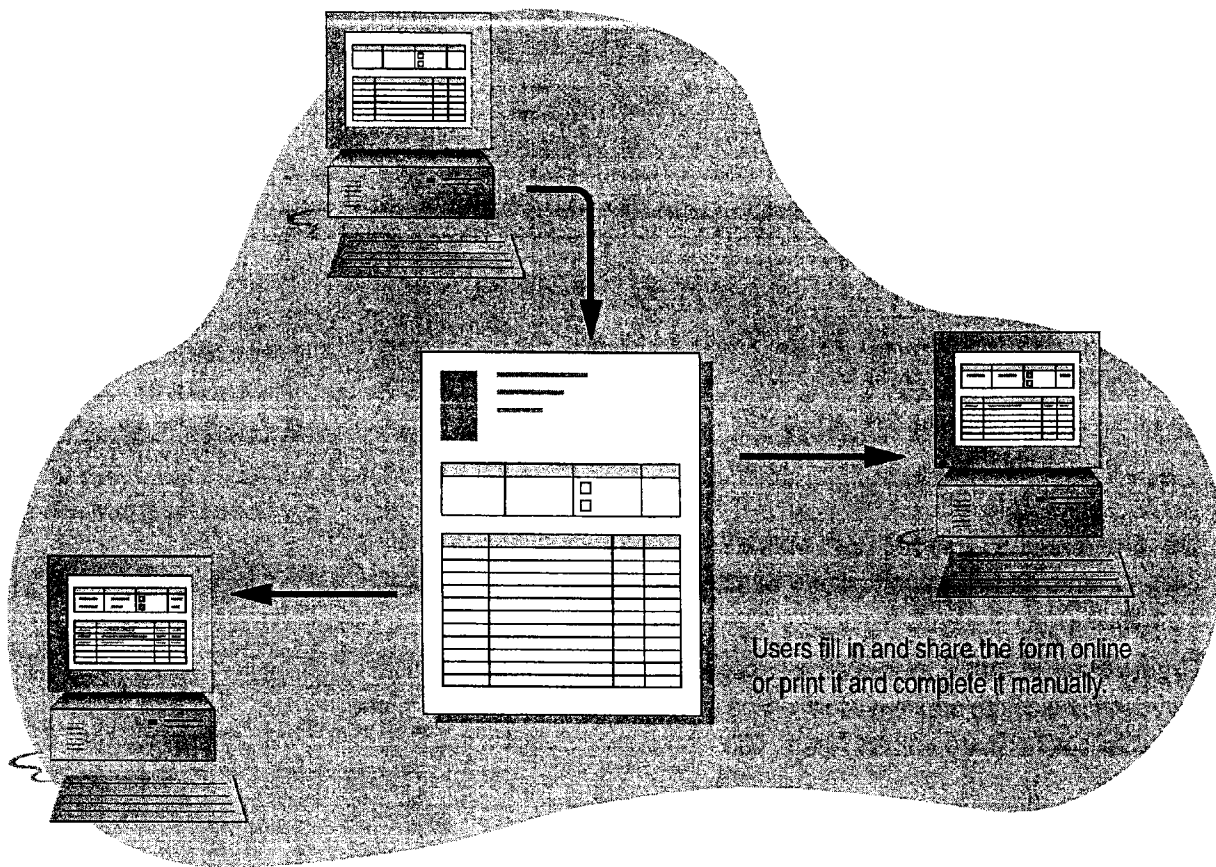**MS 113980**

Create an Online or Printed Form in Word

Your company doesn't have to live with poorly designed forms, and you don't have to type and retype information as the form is processed. Instead, create your own online or printed form that meets the company's specific needs. Then, if those needs change, you can quickly update or modify the form. And if it is online, users can process the form by routing it electronically.

You can create the form so that it automatically verifies and updates entries, offers custom Help instructions to users, and allows users to enter information only in the parts of the form that you designate.

Key Features

Forms

Tables

Author creates an online form.

Users fill in and share the form online or print it and complete it manually.

MS 113981

Part 3   Create Printed and Online Business Forms

Build the Form

Design the form   You might find it helpful to sketch a layout of the form or to use an existing form as a guide. Decide whether you want an online form or a printed form. Online forms give you more flexibility in getting information from users.

Build the form by using tables   Click the **New** button. Then click **Forms** and **Tables and Borders** (**View** menu, **Toolbars** submenu). Many of the commands you'll need are on these toolbars.

New button

Click the **Insert Table** button on the **Forms** toolbar to insert the same number of rows and columns as in your sketch. If you need several tables with different numbers of columns and rows, separate individual tables with blank paragraphs. Click the **Show/Hide ¶** button to display paragraph marks and cell boundaries. Then add text to cells in the table.
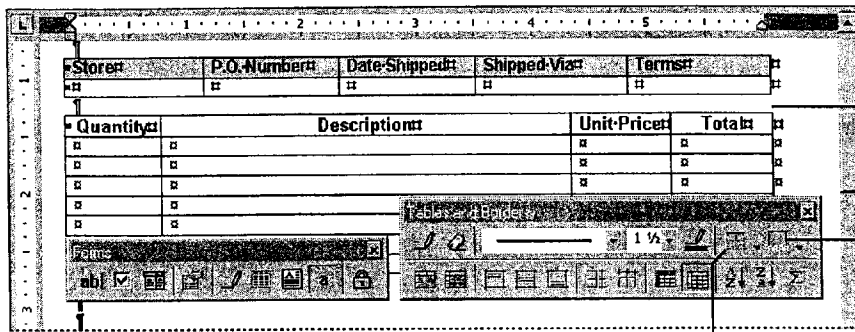
Insert Table button

Show/Hide ¶ button

Blank paragraph separating tables

To add shading to a row, select the row and then click here.

To add a border to a row, select the row and then click here.

Do others need to use the form online?   Save the form as a template by clicking **Save As (File** menu). In the **Save as type** box, click **Document Template.**

Create custom forms for e-mail messages or contacts   You can use Microsoft Outlook to create custom online forms. For more information, see "Use Outlook to Share Folders," page 433.

Guidelines for Working with Tables in a Form

Move from one cell to another Press TAB or use the arrow keys. If you press ENTER, you add a new line to a cell.

Insert rows quickly Select the number of rows you want to add, and then click the **Insert Rows** button on the **Forms** toolbar. Word inserts that number of blank rows. Note that you won't see the **Insert Rows** button until you've inserted a table.

Insert Rows button

Break up a table Select the row above which you want to break the table, and then click **Split Table** (**Table** menu).

Merge or split cells Select the cells you want to change and then click **Merge Cells** or **Split Cells** (**Table** menu). Or, you can use the **Eraser** button or **Draw Table** button to modify the table. For more information, see "Have a Complicated Form?" later in this topic.

Combine two tables separated by a paragraph mark Select the paragraph mark and press DELETE.

Make the form visually easy to follow Add shading and borders to key elements. Select the item you want to emphasize, click the **Tables and Borders** button, and then select the options you want.

Have a Complicated Form?

If your form has differing numbers of columns per row, or cells of differing heights, you can use the **Draw Table** button on the **Tables and Borders** toolbar to draw individual rows and columns. Use the **Eraser** button to erase mistakes. For more information, see "Create a Flyer," page 222.

Use the **Draw Table** button when you need custom rows or columns.

Draw Table button

Tables and Borders button

Eraser button

MS 113983

Part 3 Create Printed and Online Business Forms

Add Text Fields, Drop-Down Lists, and Check Boxes

After you lay out the basic structure of the form and enter the text that will appear in the table cells, add text fields (in which users type information), check boxes, and drop-down lists. You can insert any of these elements, collectively called *form fields*, by clicking the button you want on the **Forms** toolbar.

To control settings (such as how many characters can be entered in a text field or what will appear in a drop-down list), click the field and then click the **Form Field Options** button on the **Forms** toolbar.
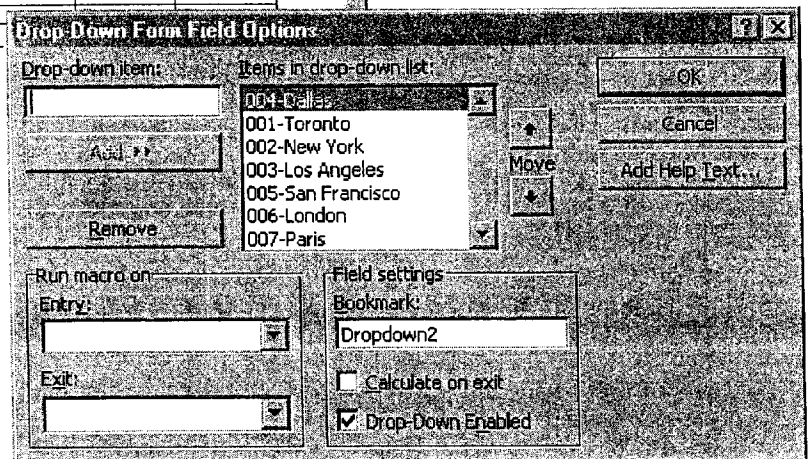
Form Field Options button

— Text field

— Drop-down list
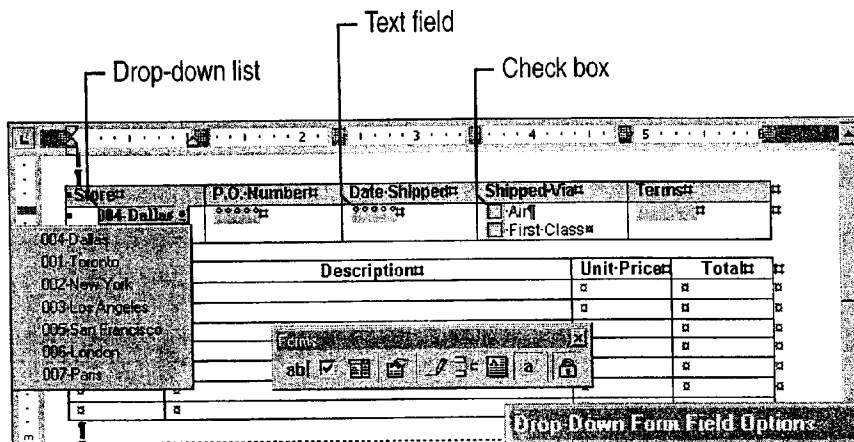
— Check box

Use the **Forms** toolbar to quickly add text fields, check boxes, and drop-down lists.

After you add a field, click the **Form Field Options** button to specify field settings.

MS 113984

Creating a printed form?   Use check boxes to list choices. For text fields, make sure you allow enough space for users to fill in the information.

Check spelling in your form   Click the **Spelling and Grammar** button. If this button is not available, click the **Protect Form** button on the **Forms** toolbar, and then check the spelling.

Want to test the drop-down lists or other fields?   Click the **Protect Form** button on the **Forms** toolbar, and then test the fields. To go back to writing or editing the form, click the **Protect Form** button again.

Does your calculation not work?   To do a calculation, you must use a text field and an on-exit macro. For more information, look up **Getting Results - Online Form** in Help. If your form has a lot of calculations, you may want to create it in Microsoft Excel. For more information on creating an online Microsoft Excel form, see "Create a Form for Online Invoices," page 250.

Need Option Buttons or Command Buttons?

If you need more flexibility in designing your online form, use the **Control Toolbox** toolbar. Click **Control Toolbox** (**View** menu, **Toolbars** submenu to add *controls*, such as spin boxes, scroll bars, command buttons, option buttons, and toggle buttons. Controls are inserted as floating objects, so you can position them anywhere you want on the online form.

You can set control properties, and you can review and edit the code for each of the controls. For more information, see **Getting Results - Online Form** in Help.

Buttons on the **Control Toolbox** toolbar give you maximum flexibility in creating and organizing online forms.
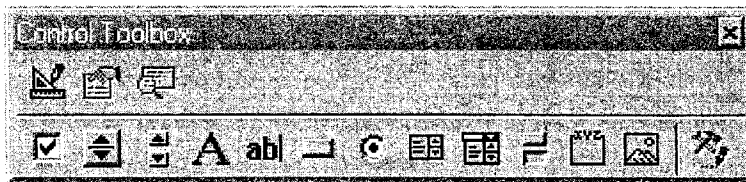

MS 113985

Part 3   Create Printed and Online Business Forms

In Case Your Users Need Help

You can make it easier for your users to fill in the form by adding Help text to each field. You can have Help appear either in the status bar when the user clicks a field, or in a pop-up window when the user presses F1.

To include Help text for a field, click the field, click the **Form Field Options** button on the **Forms** toolbar, and then click the **Add Help Text** button. Decide where you want Help to appear, click either the **Status Bar** or **Help Key (F1)** tab, and then type the Help text.
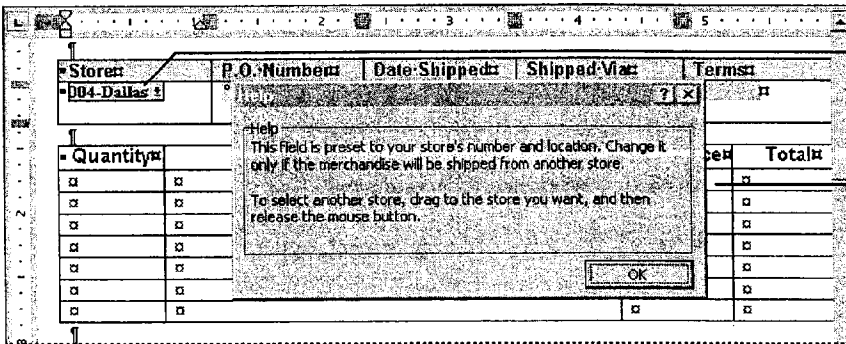
When the user selects a field and presses F1 ...

... Word displays the Help text that you wrote.

Additional instructions for online users   Make sure you tell users that when they use the form online they can name and save it just as they would any other Word document.

Want to test Help?   First protect your document by clicking the **Protect Form** button on the **Forms** toolbar. Then click a field and either press F1 or check the status bar to make sure Help appears. When you want to go back to writing or editing the form, click the **Protect Form** button again to unprotect the form.

MS 113986

Automate Your Form

You can use macros to check information that users type in your form.

For example, if your form includes a field for marital status, you could insert two check box form fields: "Married" and "Single." Then, for the "Married" field, you could assign an on-exit macro to see if the box is selected. If it is, the macro could activate a "Name of Spouse" field.

After you create a macro for your form, double-click the field you want to assign it to. In the **Form Field Options** dialog box, select the macro from the list in the **Run macro on** box, and then select any other options you want.

For more information on macros, see the *Microsoft Office 97 Programmer's Guide* (available wherever computer books are sold and directly from Microsoft Press), or look up **Getting Results - Online Form** in Help.

MS 113987

Part 3   Create Printed and Online Business Forms

Protect the Form from Changes

After you've tested the fields in your form and made sure that Help works, there's one more thing you need to do before you distribute the form to users. You should protect the form. Protection allows users to fill in the form, but prevents them from changing the form's layout and standard elements.

Protect the whole form   Click the **Protect Form** button on the **Forms** toolbar.

Protect sections in a form   If you divided the form into sections and don't want to protect them all, click **Protect Document** (**Tools** menu), click the **Sections** button, and then click the sections you want to protect. (You divide a document into sections by clicking **Break** (**Insert** menu), and then clicking the type of section break you want.)

Protect the form with a password   You can add a password so that only users who know it can remove the protection and change the form. Click **Protect Document** (**Tools** menu).

Click the **Protect Form** button to protect your form.

Important   Make sure you use a password you will remember because, if you forget it, you will not be able to make changes.

Want to know more?   Look up **Getting Results - Online Form** in Help.

Office Assistant button

MS 113988

248   Getting Results with Microsoft Office

Create Forms for Web Pages

If you want to get information from people who visit your Web page, add a form to collect it. For example, your form can be a questionnaire for adding people to a membership or mailing list; a request for feedback on your products; an order form showing pictures of items that can be ordered; or a subscription form for an online newsletter.

You start by using an HTML forms template. Click **New** (**File** menu), and then double-click the **Web Page** wizard on the **Web Pages** tab. In the dialog box that appears, select the style and content options you want for the HTML form.

To add controls to your form, use the **Control Toolbox** toolbar. To display this toolbar, click **Control Toolbox** (**View** menu, **Toolbars** submenu). Clicking a button on the toolbar inserts the control where the insertion point is positioned. You can add check boxes, option buttons, text entry boxes for user input, list boxes, drop-down list boxes, a **Submit** button (to send information back to the server), and a **Reset** button (to clear any information entered in the form). You can also add a password to your form, and you can use hyperlinks to jump from the form to other Web pages.

For more information on how to create forms for Web pages, see **Getting Results - Online Form** in Help. For more information on creating a Web page, see "Create a Web Page with Word," page 458, "Publish Microsoft Excel Tables and Charts on the Web," page 448, and "Create a Web Presentation with PowerPoint," page 452.

Important Before creating a form for your Web page, make sure that your host supports the collecting of information through forms. You will need to obtain permission and specific instructions from your service provider or web administrator to use a script to collect data.

Next Steps

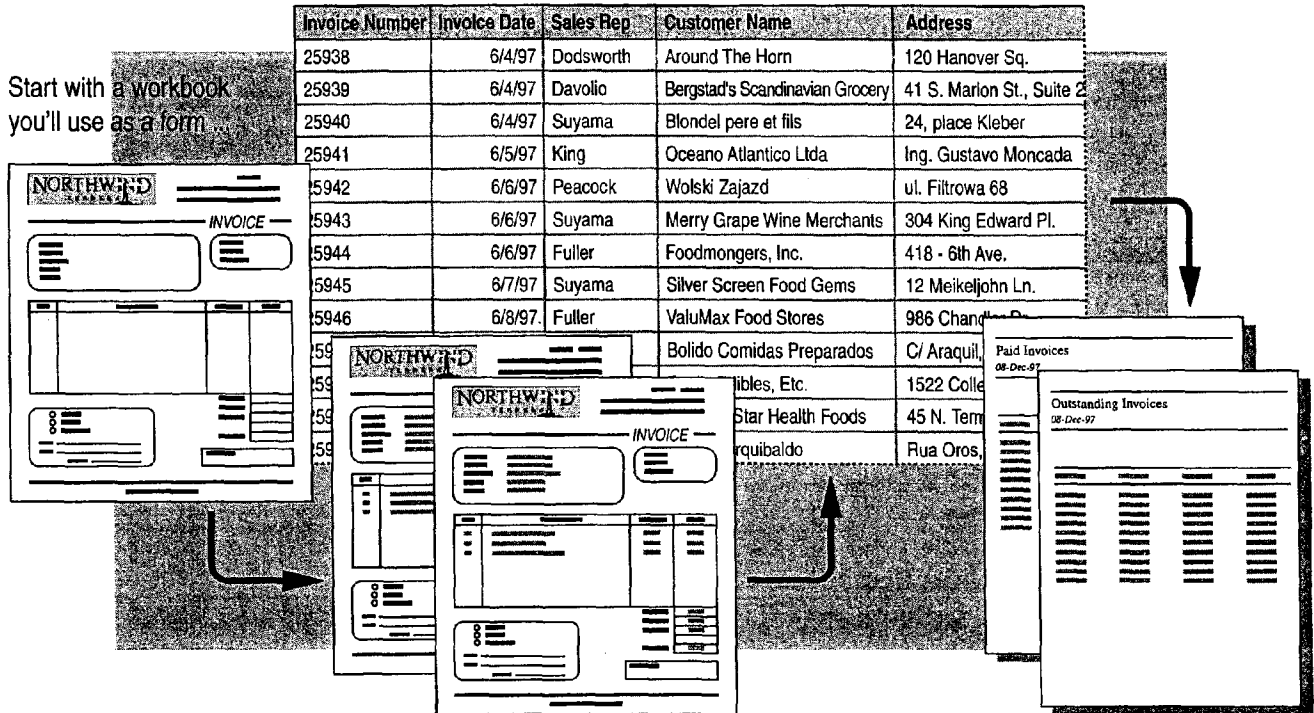| To	See
Send the completed form to others for approval or review	"Have Your Team Review a Word Document," page 406
Send or route a document through e-mail by using Microsoft Outlook	"Use Outlook to Share Folders," page 433
Send or route a document through e-mail	"Distribute Documents Online," page 396
Format the form	"Make Your Word Document Look Great," page 127

MS 113989

Create a Form for Online Invoices

Track Data from Microsoft Excel Workbooks to the Database of Your Choice

When you have data that you routinely enter into forms in Microsoft Excel, you can collect the data and store it in a database automatically, without retyping. Use the Template Wizard with Data Tracking to transform a workbook into an online template or form and to create a link from your workbook to a designated database. Each time the form is filled out and saved as a separate workbook, its data can be automatically entered into the database, in which you can create reports as well as filter and summarize the compiled data.

Key Features

Template Wizard
with Data Tracking

Start with a workbook you'll use as a form ...

Invoice Number	Invoice Date	Sales Rep	Customer Name	Address
25938	6/4/97	Dodsworth	Around The Horn	120 Hanover Sq.
25939	6/4/97	Davolio	Bergstad's Scandinavian Grocery	41 S. Marion St., Suite 2
25940	6/4/97	Suyama	Blondel pere et fils	24, place Kleber
25941	6/5/97	King	Oceano Atlantico Ltda	Ing. Gustavo Moncada
25942	6/6/97	Peacock	Wolski Zajazd	ul. Filtrowa 68
25943	6/6/97	Suyama	Merry Grape Wine Merchants	304 King Edward Pl.
25944	6/6/97	Fuller	Foodmongers, Inc.	418 - 6th Ave.
25945	6/7/97	Suyama	Silver Screen Food Gems	12 Meikeljohn Ln.
25946	6/8/97	Fuller	ValuMax Food Stores	986 Chand...
			Bolido Comidas Preparados	C/ Araquil,
			...ibles, Etc.	1522 Colle
			...tar Health Foods	45 N. Tern
			...rquibaldo	Rua Oros,

Paid Invoices
08-Dec-97

Outstanding Invoices
08-Dec-97

... collect data from completed forms in a database ...

... then generate reports and PivotTables from the database.

Important   You must have the Template Wizard with Data Tracking installed to complete the tasks in this topic. To link templates to databases, you must have Data Access Objects (DAO) and the appropriate open database connectivity (ODBC) driver installed. If you need to install the Template Wizard, DAO, or an ODBC driver, rerun Setup. To load the Template Wizard or another add-in, click **Add-Ins (Tools** menu).

MS 113990

Turn Your Form into a Data-Tracking Template

Open the workbook that contains the form you want to base your template on. If you have not created the form yet, do so before using the Template Wizard. You can get a head start by using one of the workbook templates provided. For example, the form shown in this topic was created with the Invoice template. For more information, see "The Template You Need May Already Exist," page 257.

When your form is ready, click **Template Wizard** (**Data** menu), and then follow the instructions in the wizard. In step 1, give the template a name. In step 2, specify the name and location of the database you want to create a link to. If the database doesn't exist yet, the wizard creates it in the file type and location you specify.

An existing workbook can be the basis ...

... for the form you create with the Template Wizard.

Delete data you don't want included in the standard form.

MS 113991

Which database file types can you link to?   The Template Wizard can link forms to databases in Microsoft Excel, Microsoft Access, Microsoft FoxPro®, Paradox, dBASE, and SQL Server. When necessary, new databases can be created in these applications, except SQL Server and Paradox.

Make the form attractive and easy to read   Use formatting to emphasize important information and make the form easy to fill out. For example, you can add borders, pictures, or shading; change the font, style, and size of text; and format the numbers. For more information, see "Make Your Microsoft Excel Worksheet Look Great," page 148.

Prevent Unwanted Changes to the Form

If co-workers will be adding data to the form, you can protect cells containing information that should not be changed, leaving only specific cells available for editing.

First select the cells you want available to your co-workers for editing. Click **Cells** (**Format** menu). On the **Protection** tab, clear the **Locked** check box. Then protect the rest of the cells by clicking **Protect Sheet** (**Tools** menu, **Protection** submenu). For additional security, you can also assign a password in the **Protect Sheet** dialog box.

Want to know more?   Look up **Getting Results - Invoices** in Help.

Office Assistant button

MS 113992

Link Template Cells to Database Fields

In step 3 of the Template Wizard, specify which worksheet cells
map to particular database fields.

You specify the cells in the form that link to database fields.

The worksheet labels and
database field names need
not be identical.

Invoice Number	Invoice Date	Sales Rep	Customer Name	Address	City/Region/Postal Code
25938	6/2/97	Dodsworth	Around The Horn	120 Hanover Sq.	London WA1 1DP
25939	6/2/97	Davolio	Bergstad's Scandinavian Grocery	41 S. Marlon St., Suite 2	Seattle WA 98104
25940	6/2/97	Suyama	Dondel pere et fils	24, place Kleber	Strasbourg 67000
25941	6/3/97	King	Oceano Atlantico Ltda	Ing. Gustavo Moncada 85	Buenos Aires 1010
25942	6/4/97	Peacock	Wolski Zajazd	ul. Filtrowa 68	Warszawa 01-012
25943	6/4/97	Suyama	Merry Grape Wine Merchants	304 King Edward Pl.	East Vancouver BC
25944	6/4/97	Fuller	Foodmongers, Inc.	418 - 6th Ave.	Walla Walla WA 99362
25945	6/5/97	Suyama	Silver Screen Food Gems	12 Meikeljohn Ln.	Helena MT 59601
25946	6/6/97	Fuller	ValuMax Food Stores	966 Chandler Dr.	Austin TX 78759
25947	6/7/97	Callahan	Boldo Comidas Preparadas	C/ Araquil, 67	Madrid 28023
25948	6/11/97	Suyama	Fred's Edibles, Etc.	1522 College Blvd.	Bellingham WA 98226
25949	6/11/97	Leverling	Morning Star Health Foods	45 N. Terminal Way	Helena MT 59601
25950	6/11/97	Fuller	Familia Arquibaldo	Rua Oros, 92	Sao Paolo SP 05442-030
25951	6/12/97	Suyama	Koniglich Essen	Maubelstr. 90	Brandenburg 14776
25938	6/13/97	Dodsworth	Around The Horn	120 Hanover Sq.	London WA1 1DP

MS 113993

Add a routing slip for distributing the form   If you want to route the form electronically, you have the option of adding a routing slip in step 5 of the Template Wizard. Other ways you can distribute the form include sending it through electronic mail and posting it on the network. For more information, see "Distribute Documents Online," page 396.

Need to make changes to your template?   To modify a template you've created, open the template workbook. Click **Open** (**File** menu), select **Templates** in the **Files of type** list, and then select the template you want to open. Click **Template Wizard** (**Data** menu) to modify the template. You can change the template's name, the database location, cell-to-database field linking, and the routing slip. However, you cannot add fields to a database you've already created.

Link Data from Other Workbooks to the Database

If you have other workbooks whose data corresponds to the workbook you are basing your template on, you can link them all to one database. The data must be arranged in the same way as the workbook the template is based on. Specify the duplicate workbooks in step 4 of the Template Wizard.

This option is useful when you have already copied an existing workbook (in effect used it as a template), changed the data, and saved each copy with a new file name. Using the Template Wizard enables you to compile the data from all the workbooks into the same database.

Want to know more?   Look up **Getting Results - Invoices** in Help.

Office Assistant button

Help Others Use the Form to Add Database Records

Now that the template is created and ready to use, others can fill out the form, save each completed form as a workbook, and then send the data to the database. To fill out the form, click **New** (**File** menu), click the tab containing the template, and then double-click the template name.

The next step is to add data to the template fields and then save the workbook. When you save a workbook created using the Template Wizard, a dialog box automatically appears, asking how you want to proceed. You can specify whether to create a new record in the database or continue without updating the database. If the workbook has been saved previously, you can specify whether to update the existing record, create a new record, or continue without updating.

Invoice Number	Invoice Date	Sales Rep	Customer Name	Address
25938	6/4/97	Dodsworth	Around The Horn	120 Hanover Sq.
25939	6/4/97	Davolio	Bergstad's Scandinavian Grocery	41 S. Marlon St., Suite 2
25940	6/4/97	Suyama	Blondel pere et fils	24, place Kleber
25941	6/5/97	King	Oceano Atlantico Lida	Ing. Gustavo Moncada
25942	6/6/97	Peacock	Wolski Zajazd	ul. Filtrowa 68
25943	6/6/97	Suyama	Merry Grape Wine Merchants	304 King Edward Pl.
25944	6/6/97	Fuller	Foodmongers, Inc.	418 - 6th Ave.
25945	6/7/97	Suyama	Silver Screen Food Gems	12 Meikeljohn Ln.
25946	6/8/97	Fuller	ValuMax Food Stores	986 Chandler Dr.
25947	6/9/97	Callahan	Bolido Comidas Preparados	C/ Araquil, 67
25948	6/10/97	Suyama	Fred's Edibles, Etc.	1522 College Blvd.
25949	6/10/97	Leverling	Morning Star Health Foods	45 N. Terminal Way
25950	6/10/97	Fuller	Familia Arquibaldo	Rua Oros, 92

Open the template and fill out the form to enter data in the database.

Find and calculate the data you need   Use the Microsoft Excel lookup functions and advanced filtering to pull together quickly the information you need. For more information, see "Prepare a Customer Quote," page 539.

Need to delete a record from the database?   After you have sent a record to the database, you can delete it anytime you are working in the database. However, you cannot delete records while using the Template Wizard.

Was an update interrupted?   If sending or updating a record in the database is interrupted, there is no change to the information in the database. This prevents entry of incomplete records. Try again later to send or update the record.

MS 113995

Create Reports from the Database

Summarize and analyze the data entered from forms into your database by creating reports and PivotTables. For example, you might want to see only the invoices that have been paid, or look at the invoice data by product, by salesperson, or by country.

Use the database to create reports and PivotTables summarizing the data in different ways.

💡 **Learn more about creating reports and working in databases**   To find out what kinds of reports you can create, see the documentation for your database application. For examples of reports created in Microsoft Excel, see "Create a Detailed Sales Report," page 556, and "Create a Sales Summary," page 563. For an example of creating a report in Microsoft Access, see "Create a Price List," page 532.

What's a PivotTable?   In Microsoft Excel, a PivotTable is an interactive worksheet table that quickly summarizes large amounts of data using the format and calculation methods you choose. For more information, see "Create a Sales Summary," page 563.

MS 113996

The Template You Need May Already Exist

Microsoft Excel provides a set of flexible, attractive, and easy-to-use templates that you can use to quickly create the workbooks you need.

The built-in templates are designed with small businesses in mind, and they are easily customizable for a variety of purposes.

The following templates have already been created with the Template Wizard. They are linked to companion databases located in the Library folder within the Microsoft Excel folder.

- Invoice
- Purchase Order
- Expense Statement

Use these templates as they are, or run the Template Wizard to adapt them as needed, for example, to link to different fields.

To use built-in templates, you may need to install them first by running Setup. To work with a template, click **New** (**File** menu), click the **Spreadsheet Solutions** tab, and then select the template you want.

For more information on working with templates in Office, see "About Creating and Opening Documents and Databases," page 48.

Next Steps

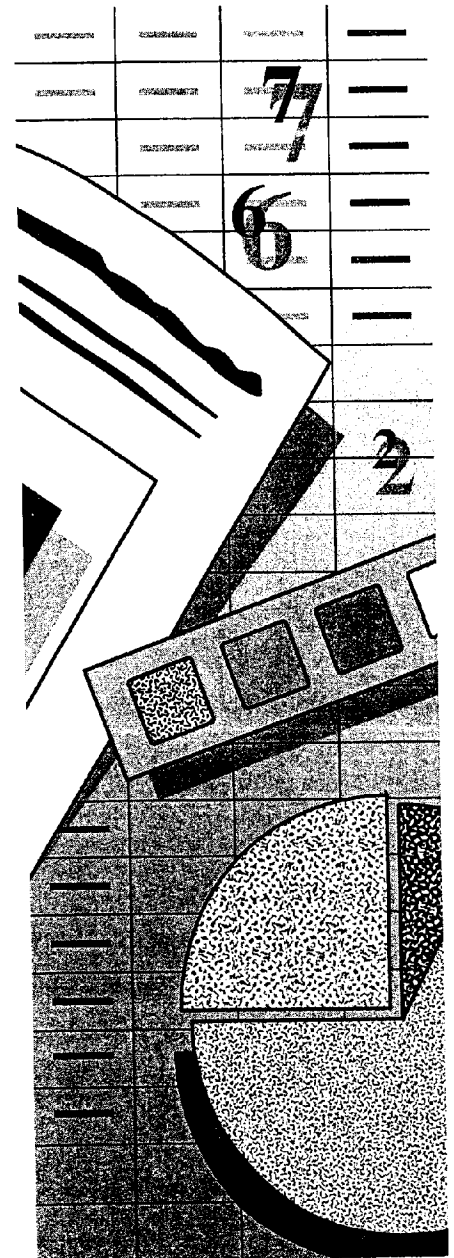| To	See
Find out about different types of forms you can create with Office applications	"What's the Best Way to Create a Form?" page 240
Learn more about alternative ways to store data	"Where Should You Store Your Contact Information?" page 346

MS 113997

Show Data in Charts and Maps

Contents

MS 113998

Create a Chart from Worksheet Data

Display Microsoft Excel Data Graphically

You can do more with Microsoft Excel data than simply arrange it in rows and columns. You can display it graphically in a chart. Show the values as lines, bars, columns, pie slices, and other data markers, and even combine different markers in the same chart.
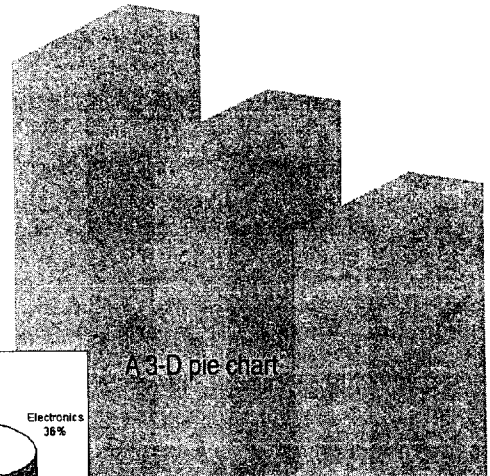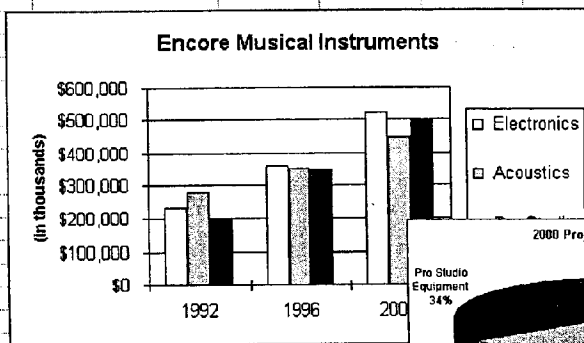
When the chart itself is all you need, create a separate *chart sheet*. When it's best to display the chart along with the associated data, you can either create a chart directly on the worksheet or add a table to a chart sheet containing the pertinent data. In any case, the values in the chart are updated whenever the source worksheet data changes.
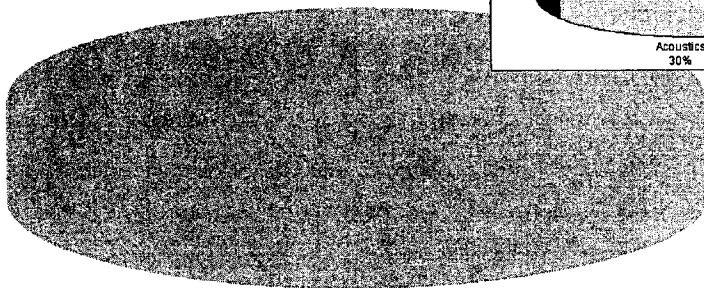
Key Features

- Chart Wizard
- Chart Types
- Custom Charts

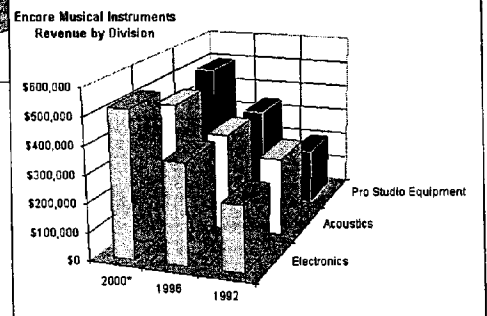|	A	B	C	D	E	F
1	Encore Musical Instruments					
2	Division Revenue (in thousands)					
3			1992	1996	2000*	* Projected
4		Electronics	$233,700	$359,200	$523,600	
5		Acoustics	$279,700	$350,800	$446,400	
6		Pro Studio Equipment	$202,200	$344,600	$499,000	

A 2-D column chart

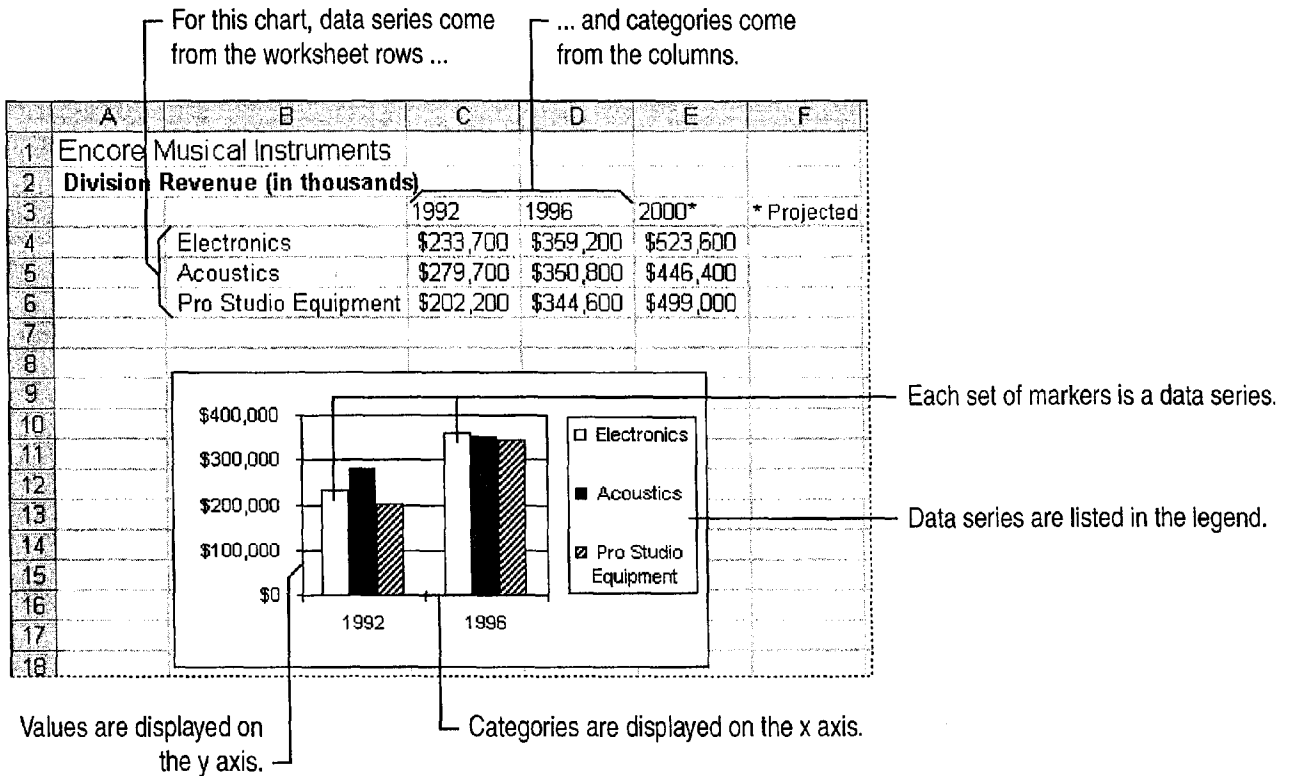A 3-D pie chart

A 3-D column chart

MS 113999

Create the Chart

Begin by selecting the range of worksheet data you want to include in the chart. Then click the **Chart Wizard** button. Follow the instructions in the wizard to specify the chart type and options you want. The wizard offers you the option of creating a chart on the worksheet, or creating a separate chart sheet in the workbook. If you create a chart on the worksheet, you can reposition and resize it.

Chart Wizard button

— For this chart, data series come from the worksheet rows ...

— ... and categories come from the columns.

	A	B	C	D	E	F
1	Encore Musical Instruments					
2	Division Revenue (in thousands)					
3			1992	1996	2000*	* Projected
4		Electronics	$233,700	$359,200	$523,600	
5		Acoustics	$279,700	$350,800	$446,400	
6		Pro Studio Equipment	$202,200	$344,600	$499,000	
7						
8						

— Each set of markers is a data series.

— Data series are listed in the legend.

Values are displayed on the y axis.

— Categories are displayed on the x axis.

How do you indicate whether rows or columns are the data series?
Specify this in step 2 of the Chart Wizard when you create the chart. Microsoft Excel proposes data series in rows or columns based on the dimensions of the range you selected. Check the sample to see if the setting is right, and try it the other way if necessary.

Want to alter a chart? In a chart placed on a worksheet, simply click the item you want to change. To activate a chart sheet, click its tab at the bottom of the workbook. The **Chart** menu and toolbar appear.

MS 114000

Part 4   Show Data in Charts and Maps

Add Data to the Chart

Data seems to be constantly changing, so sometimes you need to revise a chart you've already created. For example, you might need to add data points to a revenue chart to show a year of projected sales.

For a chart placed on a worksheet, just click the chart to display *color coded ranges*—indicators that outline the data on the worksheet used by the chart. Then drag the *drag handles* to adjust the range. If you're working with a chart sheet, use the **Copy** and **Paste** commands (**Edit** menu) to add the data.

Drag the drag handle to select the data you want to add ...
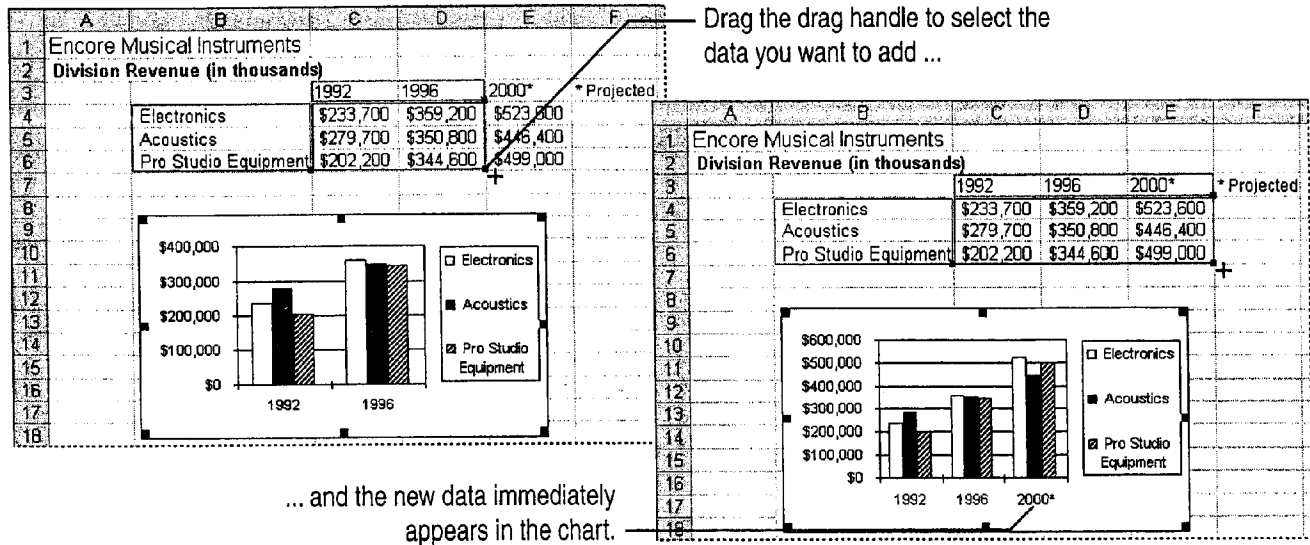
... and the new data immediately appears in the chart.

Make a mistake?   If you add data incorrectly, you can remove it by using the **Undo** button. You can undo up to 16 previous actions.

Undo button

Need to remove data from the chart?   To delete a data series, you can drag the drag handles, or select the series on the chart and then press DELETE. To delete one data point, just delete the value on the worksheet.

Want to know more?   Look up **Getting Results - Worksheet Charts** in Help.

Office Assistant button

MS 114001

262   Getting Results with Microsoft Office

Find the Best Chart Type for Your Data

There are 14 chart types to choose from, and each has a number of possible variations; experiment to find the one that presents your data most effectively. Sometimes combining chart types, such as columns and lines, can help provide clarity and emphasis.

Change the chart type by clicking **Chart Type** (**Chart** menu) and then selecting the type you want. If you need to display the **Chart** toolbar, click **Toolbars** (**View** menu). To change the chart type for one data series, select the series before clicking the **Chart Type** command.
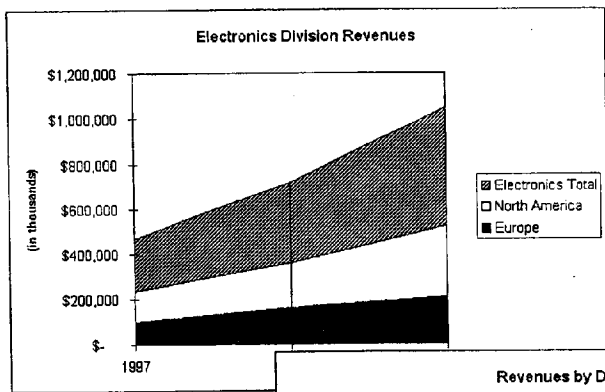
A 2-D area chart emphasizes the amount of change over time.
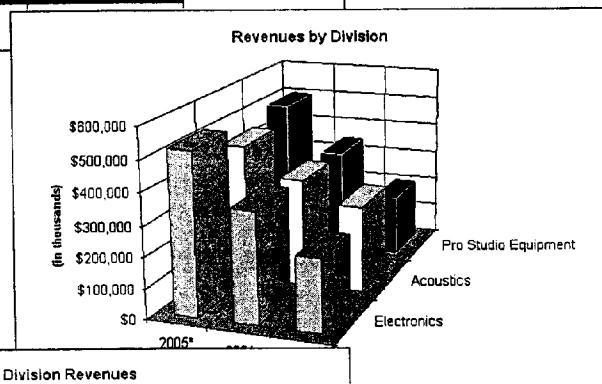
A 3-D column chart allows comparison of values within data series and by category.
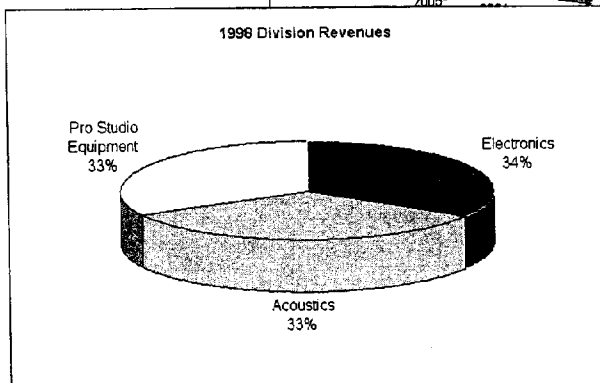
A 3-D pie chart displays one data series, showing the relationship of parts to the whole.

MS 114002

Part 4   Show Data in Charts and Maps

Does the chart show different kinds of data?   In addition to varying the chart types, you can display a *secondary value axis* and associate some of the data series with that value axis. For example, show price along one value axis and volume along the other. To do so, click the data series you want to plot on the secondary axis and then click **Selected Data Series** (**Format** menu). On the **Axis** tab, click **Secondary axis**.

What if the data has no categories?   Use the xy (scatter) chart, which displays values along both the x and y axes. For more information, see "Display Scientific Data in a Chart," page 595.

Change the Look of a Chart Automatically

Want a "new" chart in a hurry? Change the way your chart looks all at once, without changing individual items, by applying a *custom chart type*. Similar to a template or style, a custom chart type changes the look but does not affect the chart's data.

For example, you can apply a custom chart type to quickly get a chart combining column and line data markers, a scatter chart with logarithmic gridlines, or a line chart with curve smoothing.

To apply a custom chart type, activate the chart and then click **Chart Type** (**Chart** menu). On the **Custom Types** tab, select a chart type.

Create a custom look for a chart and reuse it later   You can save your own custom chart formatting to apply to other charts. Activate the chart, and then click **Chart Type** (**Chart** menu). On the **Custom Types** tab, click **User-defined**, and then click **Add**. Type the name and description for your custom chart type.

Want to know more?   Look up **Getting Results - Worksheet Charts** in Help.

Office Assistant button

MS 114003

Is Your Data More Complex?

Your chart can show more than one level of categories. For example, you might need to show divisions within regions for your company. Or you might be creating a chart from a filtered list or from data with subtotals. Like other charts, the chart is updated when the source data changes.

Create a chart from a PivotTable Some of your worksheet data may be in the form of a PivotTable (an interactive worksheet table that summarizes large amounts of data). You can use a PivotTable as the source data for a chart. For more information on PivotTables, see "Create a Sales Summary," page 563.
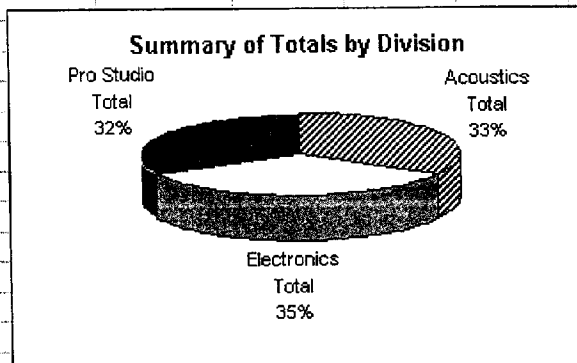

This subtotaled worksheet contains the source data for the inserted chart.
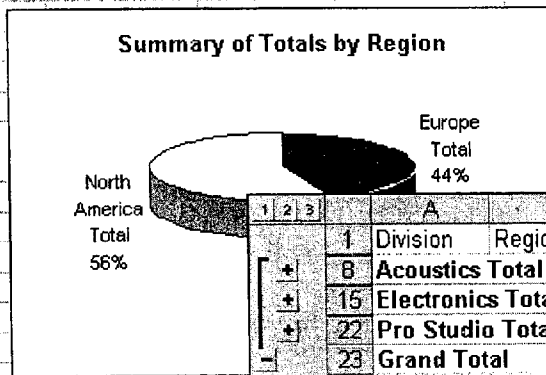
When a different set of subtotals is displayed in the same worksheet, the chart changes accordingly.
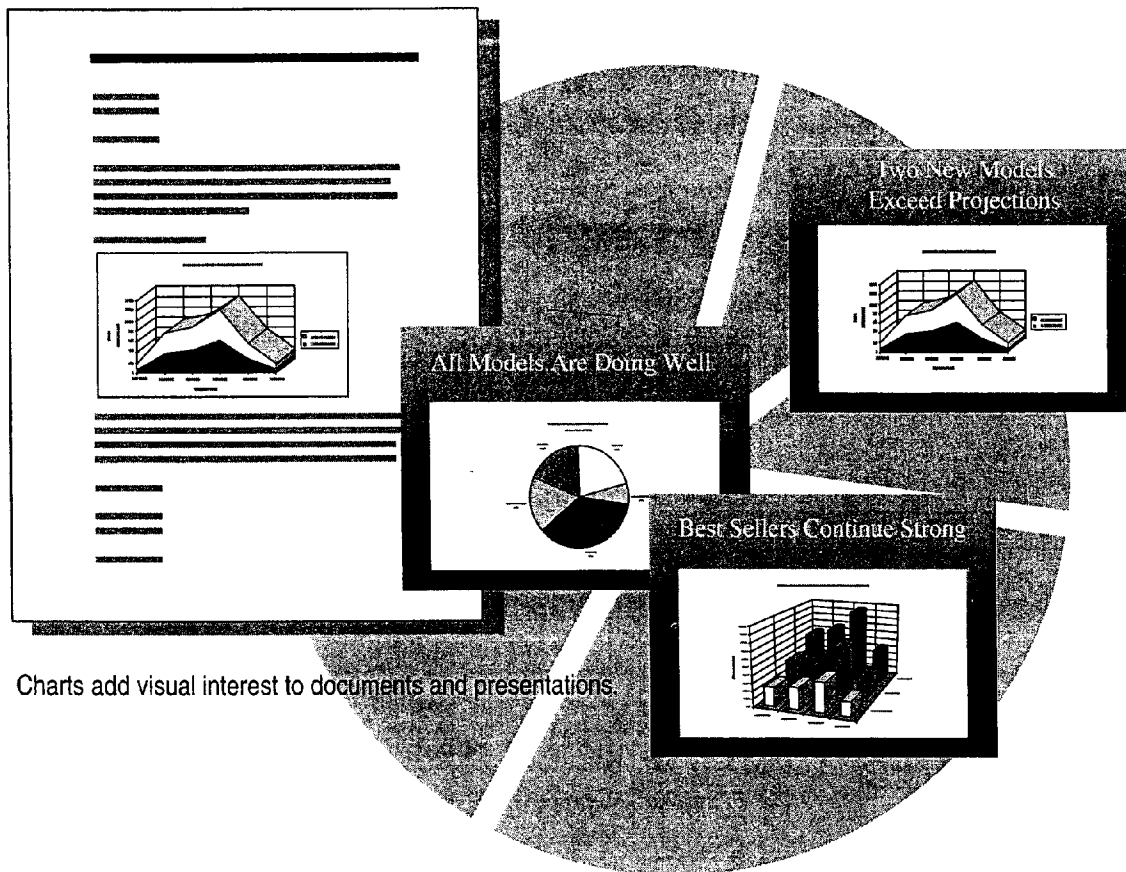
MS 114004

Add a Chart to a Document or Presentation

Don't let too many numbers make your document or presentation dull: Show data in chart form. Charts add visual interest and useful information, showing patterns or trends that a list of numbers alone can't show.

You can create a chart in Microsoft Excel and keep it up-to-date automatically by creating a link to it. For more information, see "Create a Chart from Worksheet Data," page 260. In addition to Microsoft Excel, Microsoft Graph offers an alternative way to create charts. However you create your chart, you can modify it while working in your document or presentation.

Key Features

Linked Charts
Microsoft Graph

Linked Charts
Microsoft Graph

Charts add visual interest to documents and presentations.

MS 114005

Add a Chart That Stays Up-To-Date

To make sure that a Microsoft Excel chart you insert into a
document or presentation displays the most recent data, create a *link*
to the source chart in the Microsoft Excel workbook. The chart you
see is actually a representation of the chart that exists in the
workbook. That chart is updated whenever its source data changes,
and the linked representation in your file is updated accordingly.
You can create links to files located on your computer, on a
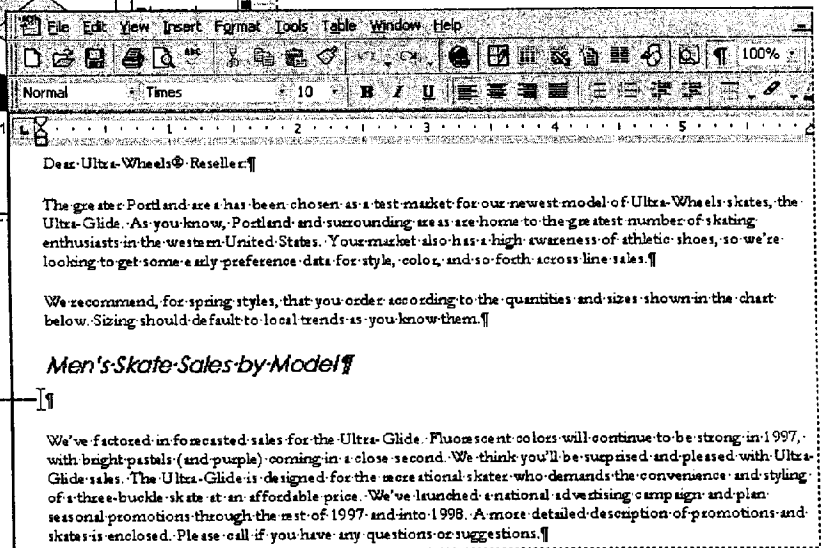network, on your company's intranet, or on the Internet.

Open the Microsoft Excel workbook containing the chart ...
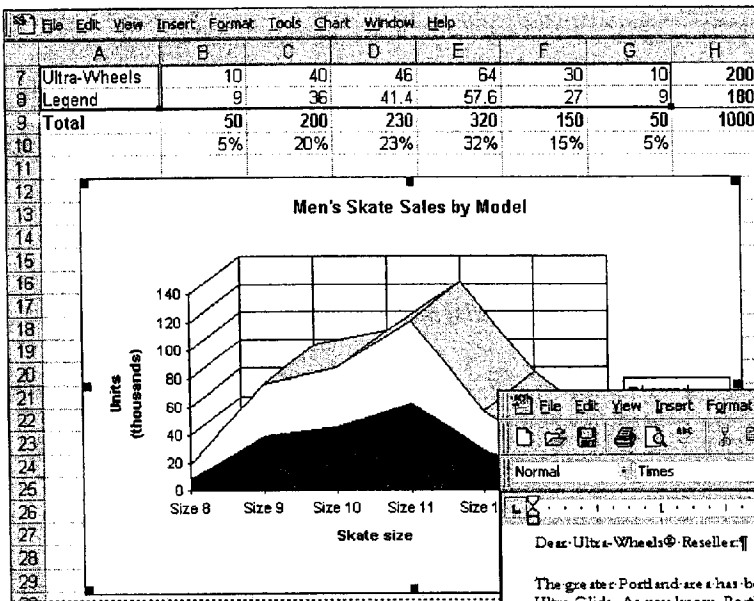
... select the chart, and then
click **Copy** (**Edit** menu).

If you are working in Microsoft
Word, switch to the document ...

... then click where you want the chart
inserted. Click **Paste Special** (**Edit** menu),
and then click **Paste Link.**

Important To ensure that a chart in a presentation is up-to-date, you must
have access to the workbook containing the chart. The surest way to
maintain the link to the source workbook is to save the Microsoft Excel
workbook and the document or presentation file in the same folder, such as
a project folder. For more information, see "Create Links to Automatically
Update Information," page 174.

MS 114006

Modify a link You can reassign the link to a different chart, specify manual or automatic updating, or lock the link to prevent changes. To modify a link, click **Links** (**Edit** menu).

Display a slide you want to add a chart to If you are adding a chart to a slide in Microsoft PowerPoint, after copying the chart in Microsoft Excel, switch to PowerPoint and then display the slide you want to add the chart to. Click **Paste Special** (**Edit** menu), and then click **Paste Link**.

What if your data is in a table in Microsoft Word? You don't have to copy the data into Microsoft Excel. Instead, use Microsoft Graph to create the chart. For more information, see "Create Charts with Microsoft Graph," page 271.

Insert a Chart if Updating Isn't Necessary

When you want a chart to be part of your document or presentation instead of a representation of a chart that exists elsewhere, *insert* the chart. For example, you might be submitting a final report that doesn't need to be updated. Or the source data might not be available later for updating. The chart looks the same whether it is linked or inserted, and in either case you can open, modify, and format the chart. You follow the same steps to insert a chart as you do to create a link to one, except that after copying the chart, you click **Paste** (**Edit** menu) instead of **Paste Special**. Or, click **Object** (**Insert** menu) and select **Microsoft Excel Chart** from the **Object type** list.

Want to know more? Look up **Getting Results - Add Chart** in Help.
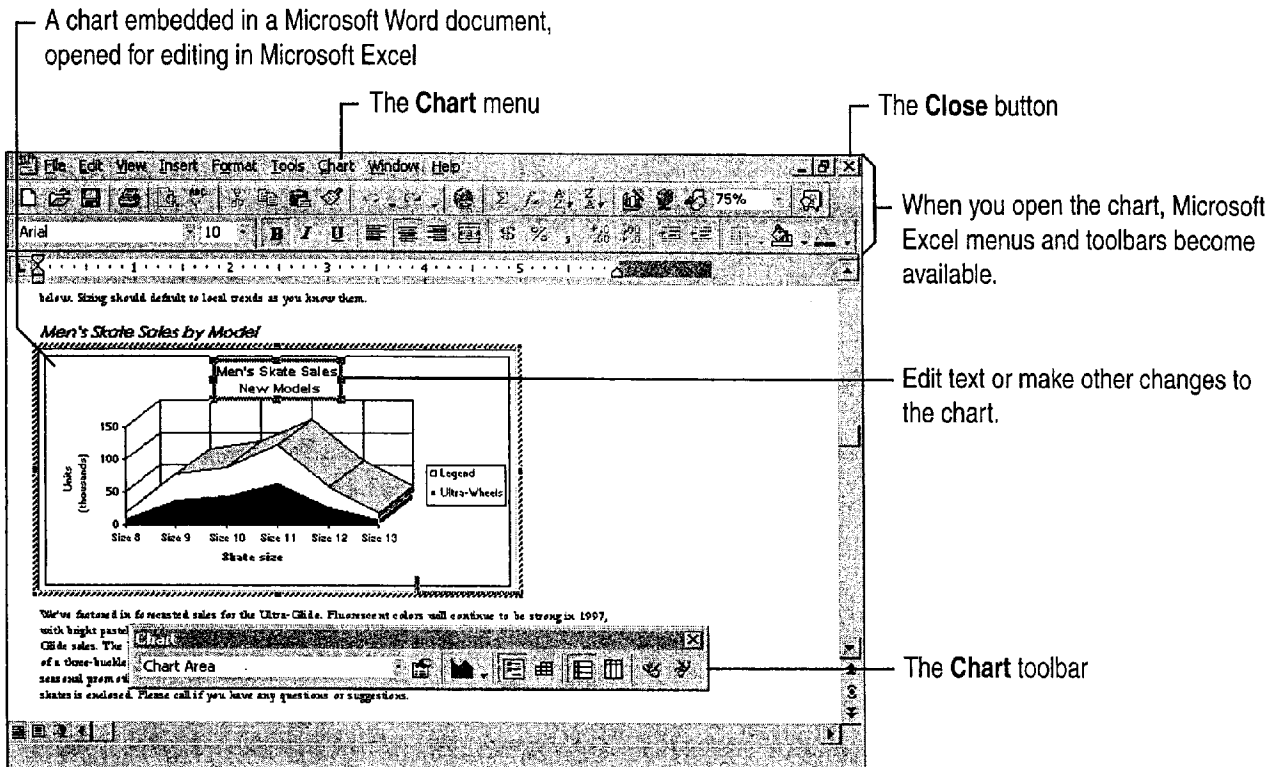
Office Assistant button

MS 114007

Modify the Chart

After you add a chart, you sometimes need to modify it. For example, you might change the chart type from pie to column, make the text larger, or use different colors.

To modify a chart, double-click it to start Microsoft Excel. If the chart is inserted into a worksheet, the **Chart** menu and toolbar become available when you click the chart. To resume work in your document or presentation, click anywhere outside the inserted chart.

— A chart embedded in a Microsoft Word document, opened for editing in Microsoft Excel

— The **Chart** menu

— The **Close** button

— When you open the chart, Microsoft Excel menus and toolbars become available.

— Edit text or make other changes to the chart.

— The **Chart** toolbar

MS 114008

Give the chart a new look, automatically   The easiest way to change the look of a chart is to apply a built-in *custom chart type*. Doing so changes the chart's formatting but does not affect its data. After clicking the chart, click **Chart Type** (**Chart** menu), and on the **Custom Types** tab, select the look you want.

Create your own formats and use them for other charts   After manually formatting a chart, save your custom formatting and apply it to other charts. You can even use pictures for data markers. For more information, see "Customize the Look of a Chart," page 276.

Animate a chart   In PowerPoint, you can animate charts so that individual elements are added one at a time with each mouse click, or automatically at predetermined intervals. Click the chart to select it, click **Custom Animation** (**Slide Show** menu), and on the **Chart Effects** tab, select the animation options you want.

Want to know more?   Look up **Getting Results - Add Chart** in Help.

Office Assistant button

MS 114009

Create Charts with Microsoft Graph

If Microsoft Excel is not available, or if you have data in a table in your Word document, you can create charts with Graph. Graph is available from Word, PowerPoint, and Microsoft Access.

You can create the same types of charts in Graph that you can in Microsoft Excel, and the same formatting options are provided. Graph does not allow calculation, but you can enter, import, and edit data in the Graph datasheet.

Use Graph to create a chart in Word Click where you want to insert the chart in the document. Or, if you want to base the chart on a table of data, select the table. Click **Object** (**Insert** menu), and then specify **Microsoft Graph**.

Use Graph to create a chart in PowerPoint Display the slide you want to add a chart to, and then click the **Insert Chart** button.

Create a new slide in a presentation In the **New Slide** dialog box (**Insert** menu), select an AutoLayout that includes a chart. After creating the slide, double-click the chart icon to start Graph.

Modify a chart created in Graph Double-click the chart to open it, and then make changes by using the commands and toolbars that appear.

Want more information about Graph? While working in Graph, you can get information by using the commands on the **Help** menu.
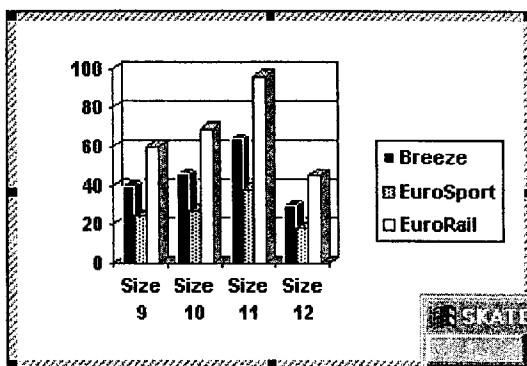
The gray border indicates that the Microsoft Graph chart is open.

		A	B	C	D
	Model	Size 9	Size 10	Size 11	Size 12
1	Breeze	40	46	64	30
2	EuroSport	24	27.6	38.4	18
3	EuroRail	60	69	96	45
4					

The Graph datasheet

Next Steps

To	See
Add data labels, titles, and other items to a chart, or change the format of a chart	"Customize the Look of a Chart," page 276

MS 114010

Create a Chart from a Database

Use Microsoft Graph to Analyze Your Data Visually

Suppose you want to make it easy to see the total annual sales for a product while you browse through your database. With Microsoft Access, you can represent your data in chart form and then add the chart to a database form or report. Charts are useful because they make it easy to see patterns and trends in data that numbers alone can't show. To create a chart quickly, you can use the Chart Wizard.

Key Features
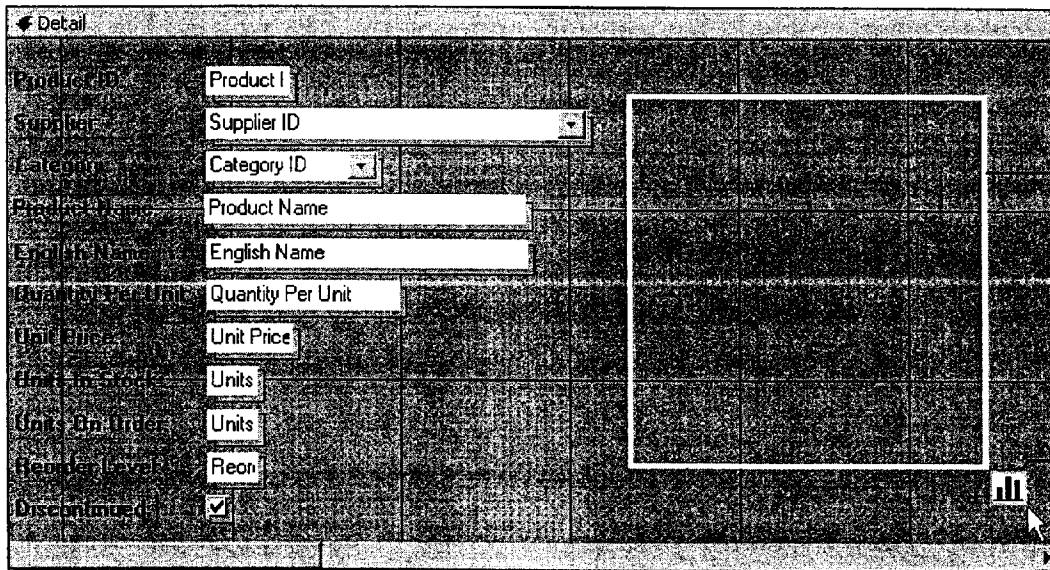
Chart Wizard

Microsoft Graph

When you browse through the Products form, the chart changes with each record to display information about the currently selected product.
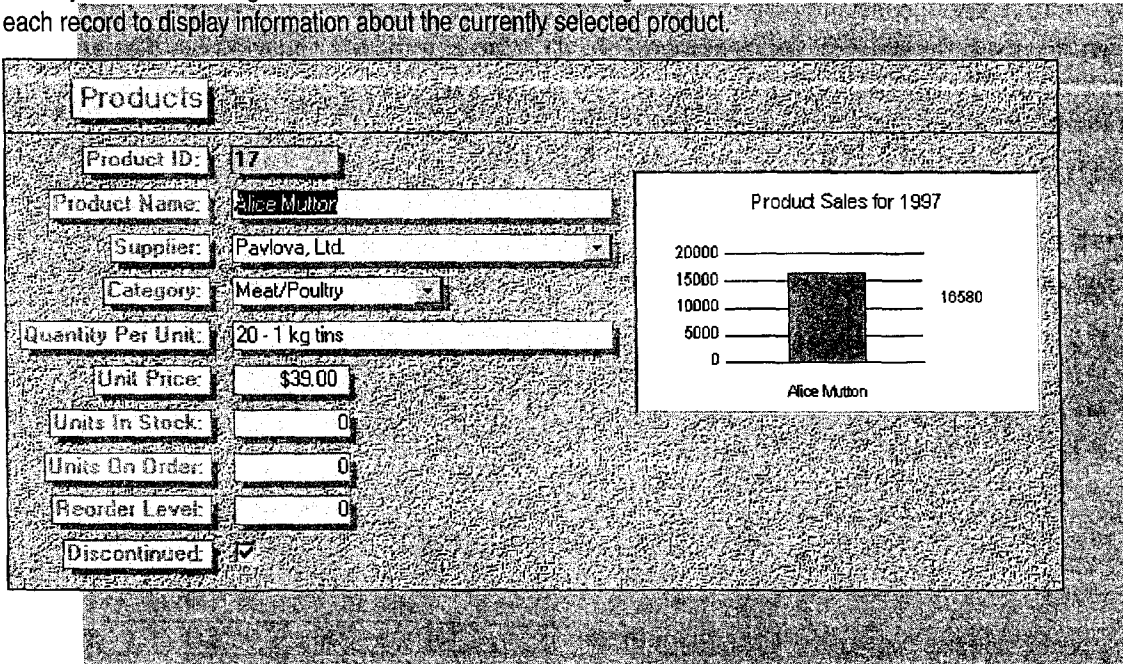
To complete the steps in this topic you need to have Microsoft Office, Professional Edition or an individual copy of Microsoft Access installed. You also need to have Microsoft Graph installed. If you do not have Microsoft Graph installed, run Setup again and select the Typical installation to install it. For more information, see "Install and Start Microsoft Office," page 28.

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Add a Chart to a Microsoft Access Form

Before you create the chart, you need to specify where you want the chart to appear in your form. In the database window, on the **Forms** tab, click **Products**. Click **Design** to open the form in form design view. Click **Chart (Insert** menu), and then draw a box where you want the chart to appear.

Click where you want the chart to appear, and then drag to draw the box for the chart.

When you release the mouse button, the Chart Wizard starts.

Want to chart specific data?   For example, you might want to chart the products sold in a specific region. To do this, create a query that retrieves only the records you want to chart. When the Chart Wizard prompts you to select a source for the chart data, select this query. For more information, see "Evaluate Sales Performance in a Microsoft Access Database," page 582.

Want to know more?   Look up **Getting Results - Chart and Database** in Help.

Office Assistant button

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