Advanced Techniques for Formletters and Proposals

SESSION HANDOUT

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Target Audience:

	Accountant/Bookkeeper		Producer
X	CSR		Trainer
	Carrier		Vendor
X	IT Manager/Systems Coordinator		ALL
X	Operations		Other: (describe)
	Principal/Owner		

Seminar Type: Microsoft Products, Reports
Seminar Level: **Advanced:** An advanced level course facilitates the development of thoughts (ideas, theories, procedures) to the most advanced stage possible. For functional courses, the objectives taught at this level challenge learners to analyze and make business decisions on how to utilize the agency management system or software in their agency, or apply a high level of technical aptitude to understand in depth features and functionality.

Class Description: In this very advanced session, you will discover how to work with headers/footers, section breaks, pull from multiple applications, insert various objects, work with tables and math functions, macros, drawing objects, linking and embedding, and more. You will need a good working knowledge of Word to take your formletters and proposals to this next level as this session will move quickly.

Learning Outcomes:

- Discover how to insert pictures and link to other documents in proposals.
- Identify how to use Word's math functions to automatically total an equipment schedule or a premium summary, as well as the possibilities and limitations for pulling data from multiple applications into a single page.
- Demonstrate the knowledge you need to make your proposals more professional and easier for your CSRs/Account Managers to create.

Assumptions: This seminar is based on the following
TAM Version 12
Microsoft ® Word Version 2007/2010

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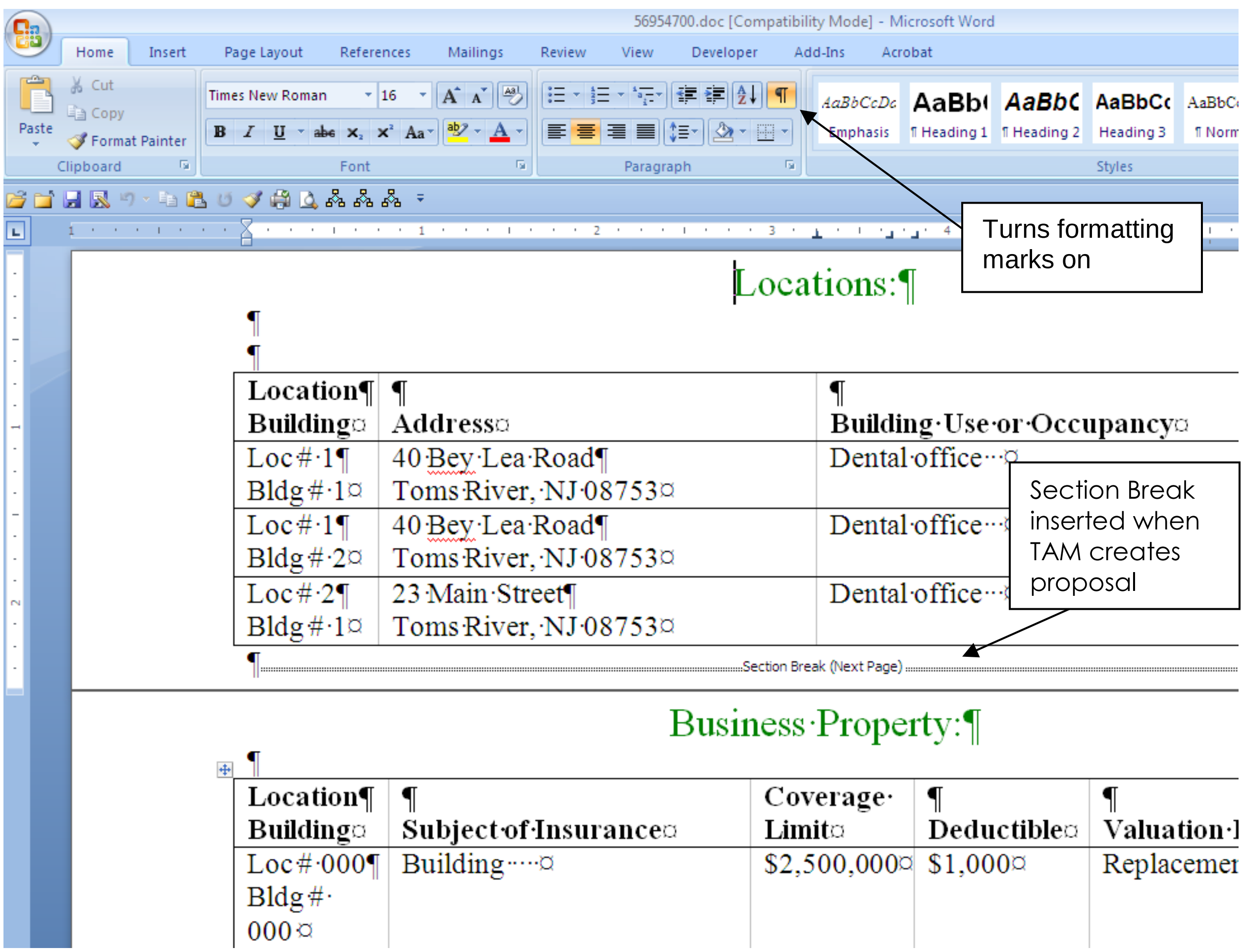
Section Breaks

When TAM/Vision creates a proposal on the client or prospect, it does it by creating each individual page from the master documents in the proposal setup, then merging them all into a single document. Between each page TAM/Vision puts a Section Break – you can see them by turning Formatting Marks on (the ¶ symbol on the toolbar).



Section Breaks come in various types; the most common, and the one that we are interested in here, is a Section Break-Next Page. It forces a new page at that point in the document.

Whenever a section break occurs you can change the page-based formatting – the margins; the page layout (landscape/portrait); the printer bin selection; and the headers and footers, which usually include the page numbering. This makes Section Breaks a very powerful and useful tool – here are just a few examples of how you can make use of them:

You can print one page of the proposal from your printer's letterhead bin, and the rest from the plain paper bin

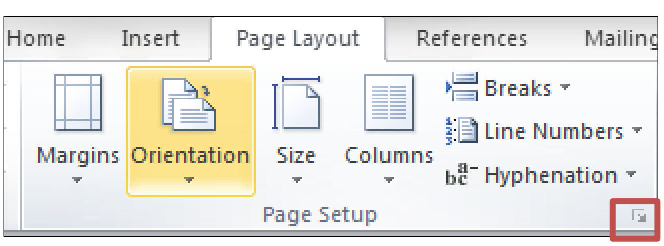
You can print one page (or more) in landscape mode – perhaps a schedule, or an inserted Excel spreadsheet – with the rest of the document in portrait mode

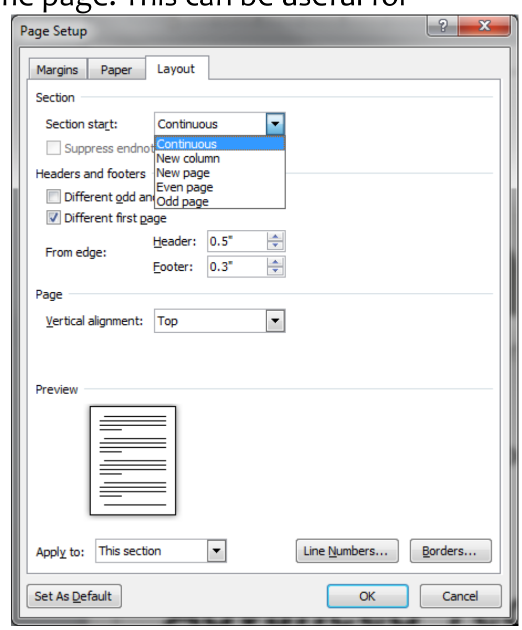
You can set up headers and footers that change throughout the document – perhaps one section is headed "Coverages and Limits" while another is headed "Coverage Descriptions"

You can have page numbers print on certain pages, but not all – perhaps not on the cover page, or on the cover letter

It is important when editing a proposal that has been created at the client/prospect that you do not inadvertently delete a Section Break. If you do, your proposal will change in unexpected ways – any of the features mentioned above might suddenly not be set the way you expect them.

By default the type of Section Break that the TAM/Vision/Word interface uses is Section Break – Next Page. There is another option – Section Breaks - Continuous. If you use this then the various proposal sections will appear on the same page. This can be useful for coverage pages that have very little information and don't take up much space on a page. To change the Section break type, in the master document you want it changed on (the one that will have the next "page' printed after it) go to Page Layout **t**ab, Page Setup group click the dialog launcher, Layout, Section start, Continuous. If you want it changed back to New page at a later point in the proposal, go to that master document and make sure it's set to New Page.





Headers and Footers

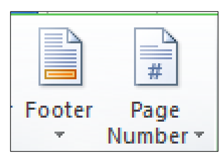
You can have each section of your proposal have a different header – the most common use of this technique it to head each document with the name of the coverage part it is detailing – "Property", Liability", etc. You can also use the header &/or the footer to include your agency name or logo, page numbering, or other information. A version 10 enhancement enables you to directly put TAM data (e.g. the client name) into a header or footer. Headers and Footers are accessed from the Insert tab.

Page Numbering

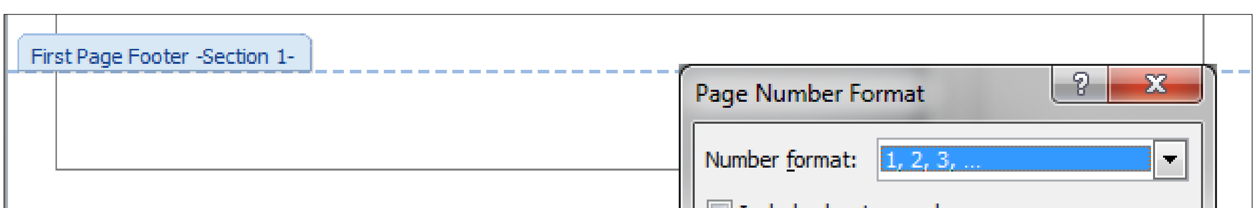
Even though each proposal you create at the client/prospect level will be different, you can set up page numbering so that every proposal will be numbered correctly. You do this by putting the page number field in the footer of each individual proposal document.

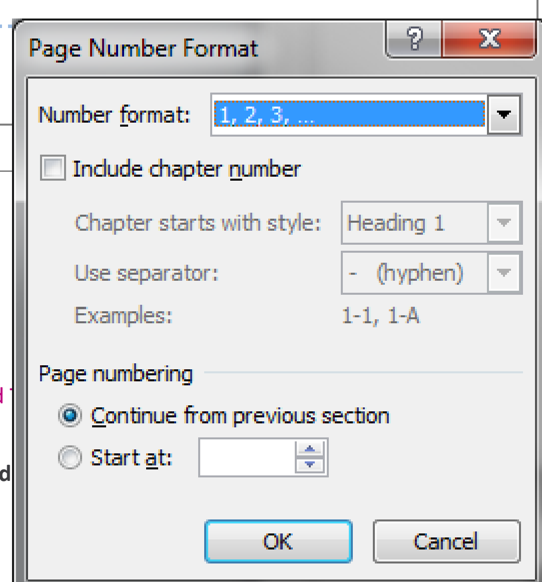
You probably have a proposal cover page that you do not want to be numbered and do not want included in the number count. So do not follow these steps for that page. In each of the other documents, follow these steps:

Select Footer in the Insert tab, and then select Edit Footer.



Insert the page numbering info you want by selecting Page Number, select Bottom of Page and the layout of where you want the number to be. Once it has been placed, then simply type "Page " in front of it.





Click on Page Number and select Format Page Numbers; you'll get this screen:

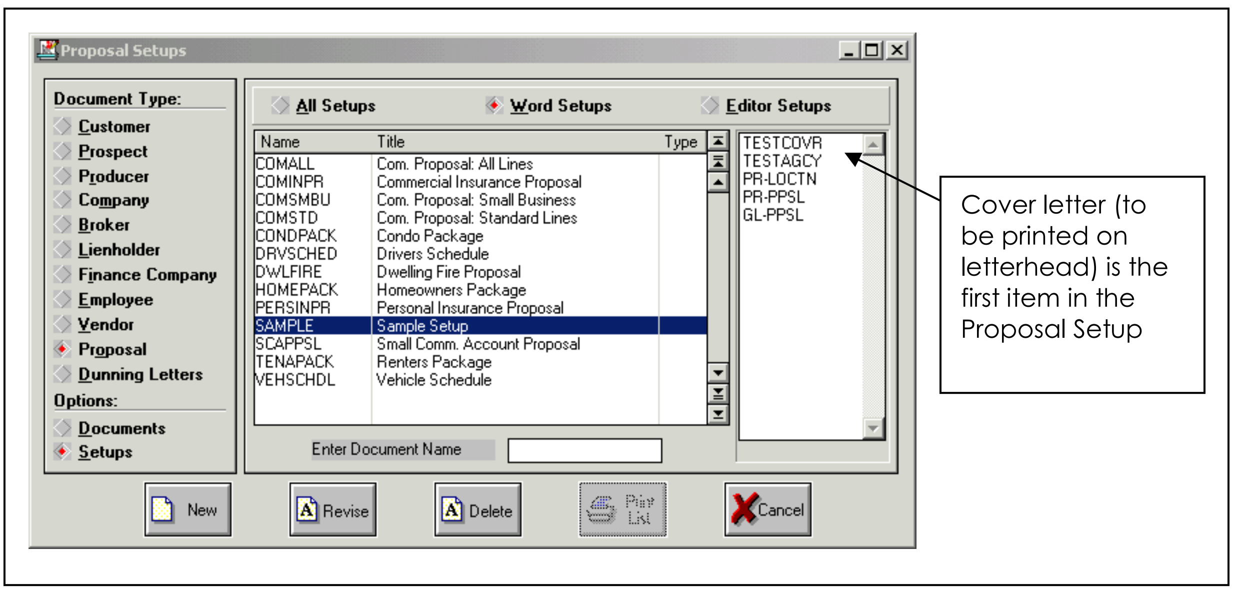
On all the documents except possibly the first one in your Proposal Setup, you will select the button "Continue from previous section".

Close out of the Header & Footer.

Printer Bin Selection

In theory you can set up the printer bin selection in the master documents – in each document go to your Page Setup, and pick the bin you want that page to print from. (Make sure you have selected the printer that your end users will be printing to, which may be different from the one you use at your workstation.) However there is currently a bug in the TAM/Word interface that sometimes stops these printer bin selections from holding when the proposal is created by the end user. Until that bug is fixed, here's the workaround for the end user.

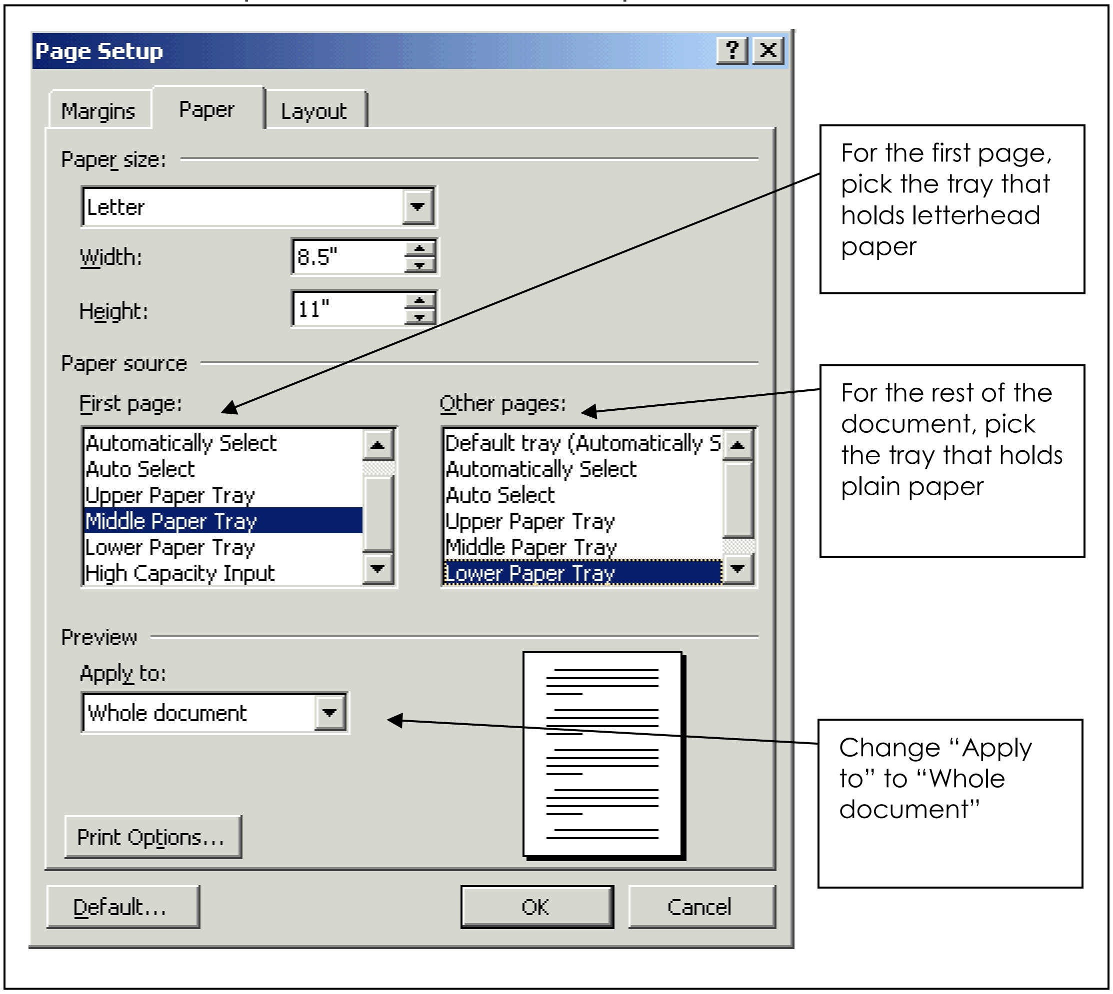
The first suggestion is to make the cover letter – that will be printed on letterhead – the very first page of the proposal, even if you want it as the second page (behind a cover page) when you deliver the proposal. Do this in Document Setup/Proposal Setup by making the cover letter the top item in the list of documents included in the proposal. After the proposal has been created and printed for the client or prospect, it is easy to insert the printed page into its correct location in the paper stack.



Office Icon (2007) or File tab (2010), Print, Page Setup, Paper tab.

Choose the Paper Source for the first page (your letterhead bin) and for all the other pages (your plain paper bin).

Change the setting in “Apply to” so that it is for the entire document.



This fix can be written into a macro, which can be added to each user's toolbar, making it as simple as a single mouse click to fix the printer bins. See the macro section on page 19 for instructions on how to do this.

Pulling Data From Multiple Applications

It has always been a limitation of the interface that a single document (proposal master or formletter) can only be linked to one application type – business auto, property, etc. There is a way to get around this in certain circumstances. If you create a file called multiapp.flg (a blank text file – use Notepad to create it) in your TAM_EXE folder, you can set up a document to pull from two (or more) applications *as long as they are on the same policy*. To create the master, first link it with one of the apps you want to pull coverage from and insert all the fields etc you want from that app. Then change the Associated Application at the setup screen to the next app you want to pull data from, and insert all those fields. You can use Replicate tables but you cannot mix data from different apps in the same table. So you cannot, for instance, pull the location descriptions from the Application Information app and the Subjects of Insurance from the Property app and mix them into the same schedule.

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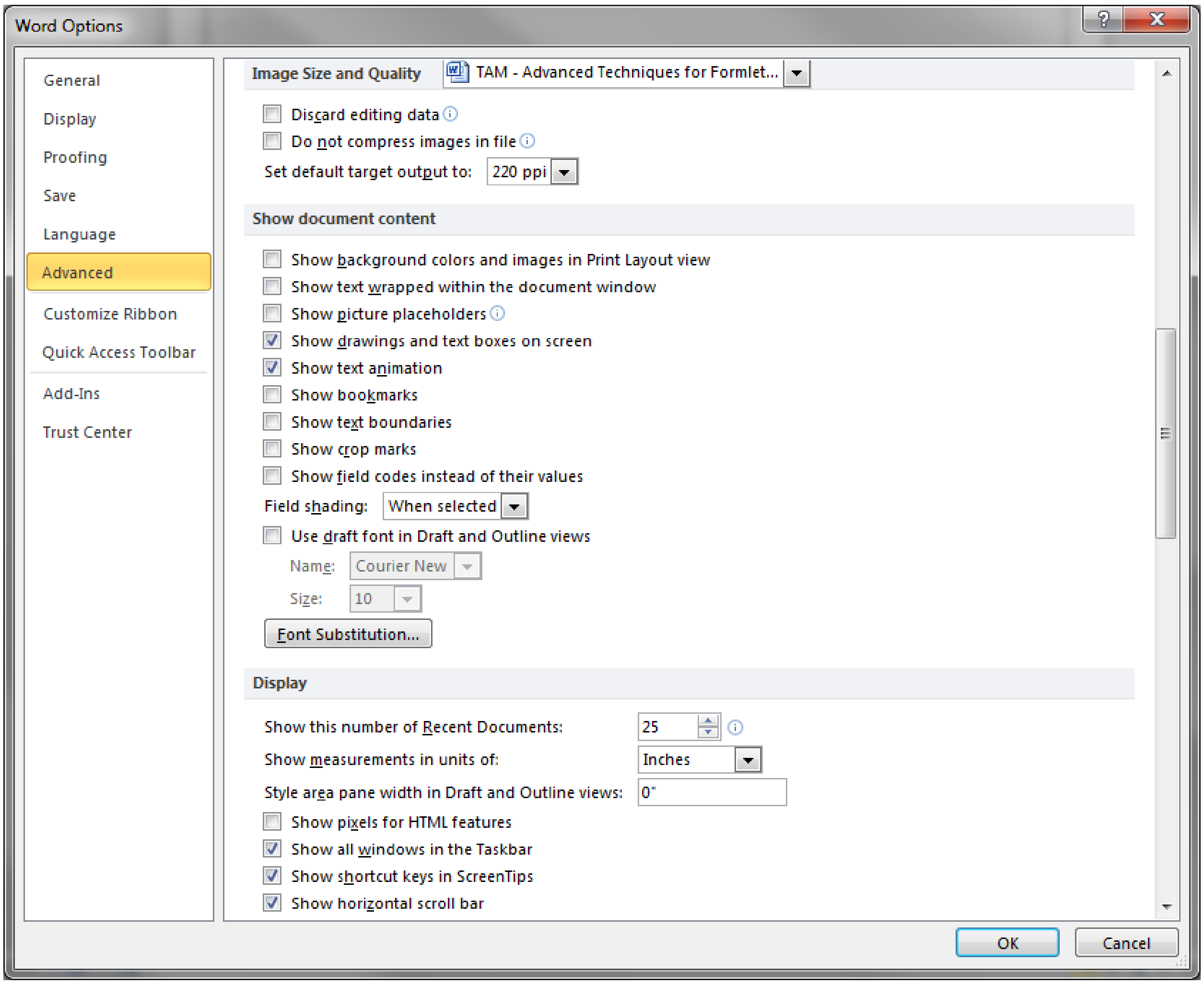
Inserting Pictures

It is very easy to insert pictures into any document.

Before doing so, check a setting in Office Icon (2007) or File tab (2010), Advanced, Show document content – make sure "Show picture placeholders" is unchecked.



You can now insert a picture in your document:

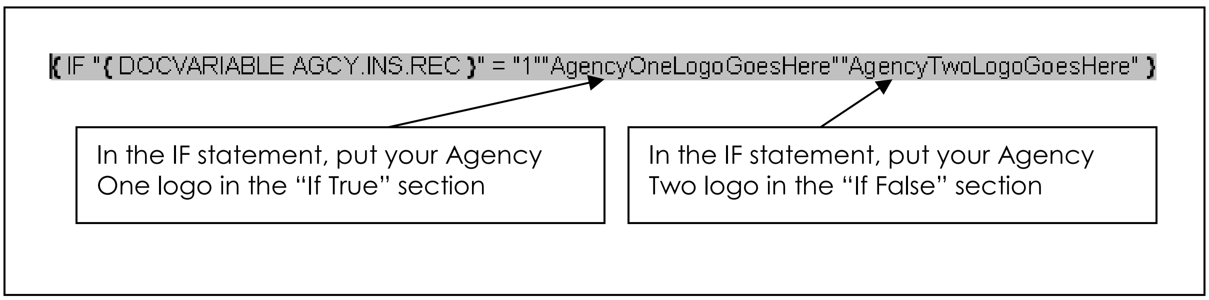
Put your cursor at the place in the document where you want the picture inserted.

On the Insert tab select either Picture or Clip Art. Locate and select the picture you wish to insert or search for the Clip Art topic.

When the picture appears in your document, you can right-click on it and make any changes you want to its size, location, etc.

Inserting Pictures in IF Statements

You can insert a picture into an IF statement by putting the cursor in the correct place in the IF statement – in either the "if true" section or the "if false" section – before you insert the picture. For instance, perhaps you have 2 agency logos and you want to use logo #1 for Agency #1 and logo #2 for Agency #2. Create an IF statement that tests if the Agency datafield is equal to 1; between the double quotes of the "if true" section insert logo#1, and between the double quotes of the "if false" section insert logo#2.



Format the pictures to be the size and location you want. In the master document the pictures won't seem to be in the IF statement – they'll appear on the page based on the formatting you apply, and may in fact overlap each other, but when you run the proposal they'll show up correctly.

Inserting Pictures in Header and Footer

Another useful picture to insert is your agency letterhead for when you want to fax a letter – many people think they have to print the letter on letterhead then fax it manually, because if you just send the document to fax@vantage it will be sent as if it was on plain paper.

Scan your letterhead in (just save the portion of the page with your logo, etc on it).

Write a macro that inserts the letterhead image file into the header of your document.

Put the "letterhead" macro on the Quick Access toolbar for easy, one-click operation.

Use the fax macro to fax it without printing it! Two mouse clicks – one to insert the letterhead and one to fax it – is all it takes.

Drawing Lines

There are several ways to draw lines in documents, and some work better than others, depending on the circumstances.

Underscore

The first, and easiest, is the underscore character. Just repeatedly type as many in a row as you want (to get a line completely across the page, type 3 underscore characters followed by Enter). To get a double line, use the = character instead of the underscore

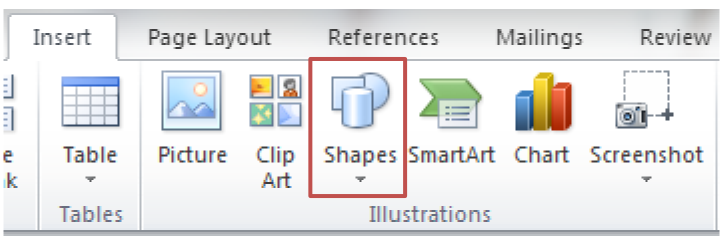
character. The problem with this method is when you are creating a line on a form (e.g. a company app) on which the end user will be entering information. Because the underscore character is a typed character, the information will "push" the line aside instead of appearing on the line.

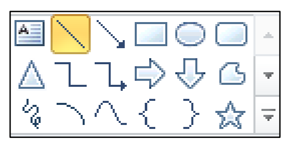
Underline

The second method is using Underline formatting, which can be useful when inserting datafields. If you set up the datafield in the master document as underlined, then the data will be underlined in the final document. The underlining will be as long, or as short, as the data itself.

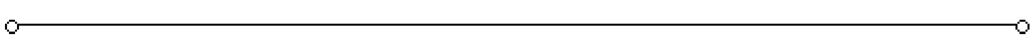
Shapes Tools

The third method is to use the shapes tool to draw lines in your master document. These lines are independent of the text and will remain in the same place, and the same length, no matter what data is inserted. You can find Shapes on the Insert tab.





- Click on this icon, then put your cursor where you want the line to start, hold down the left button, and drag to where you want the line to end.
- Here are a couple of tips to assist: to get an exactly horizontal line – no guesswork needed – hold down the Shift key while dragging. To get a line that extends equally in both directions from your starting point, hold down the Ctrl key while dragging.
- Once you've inserted the line you probably won't be happy with exactly where it is or where it starts or ends. You can edit without starting over. Select the line by hovering the cursor over it till it turns into a four-way arrow, and left-clicking – the line will now have small circles at each end, meaning it has been selected. It will look like this:



- You can put your cursor at either end and drag the end to lengthen or shorten it. You can also move the line on the page by dragging it with the mouse or by using the arrow keys (no mouse involvement here). If you press an arrow key the line will move a certain amount in that direction; if you hold down the Ctrl key while pressing the arrow key, the line will move in much smaller increments – useful for placing a line exactly below where you want some text to be inserted. You can also copy a line by selecting it then holding down the Ctrl key while dragging the line to the second location (this is the standard Windows copy function).

Table Borders

Yet another way to insert lines in a document is using tables. By selectively turning on cell borders in a table you can create the appearance of individual lines while maintaining the constraints on the relative positions of information that the table provides.

Borders

Word can add both Page Borders and Paragraph borders to a document. Unfortunately Page Borders don't work in the TAM/Word interface, so you can't use them. You can "fake" them by selecting all the text on a page and put a paragraph border round it; you could also create a box graphic that is page-sized and insert it in the header for the page you want it on. (Make sure to change the header for subsequent pages if you don't want the border on them too.)

SET Command

The SET command assigns a value to a reference name (also called Bookmarks in Word), which can then be used repeatedly throughout the document, though unfortunately the value does not "hold" across the various pages of a proposal as it is created. There are several ways this command can be used:

- To include non-replicated data in a replicate table, or schedule. For instance if you want to pull the liability limit into the vehicle schedule on Business Auto. The command format would be {SET autoliability "<APP.BA2.COMBINED_SINGLE_LIMIT>"}. Then, wherever you want the liability limit to print, use the REF command – {REF autoliability}.
- To pre-assign a default value to a reference that you are using in an ASK statement so that if the end user leaves the answer blank any IF statements relying on that answer will not error out.
- To take non-standard answers to ASK statements and correct them to what you are looking for. For instance, you might have an ASK statement such as {ASK pollution "Do you want to include pollution coverage? Answer Y or N"} Then you have an IF statement that tests that bookmark and if it's Y inserts the pollution coverage verbiage. But the end user might put in a lowercase y, and if he/she does, the IF statement will test as false. One way to address that is to always ask for numeric answers (1=Yes, 2=No). However if you haven't done that you can nest the IF statement so it tests for both Y and y, but it's quicker and easier, right

after the ASK statement, to put the following IF/SET combination:
{IF pollution = “y” “{SET pollution “Y”} }

Math functions

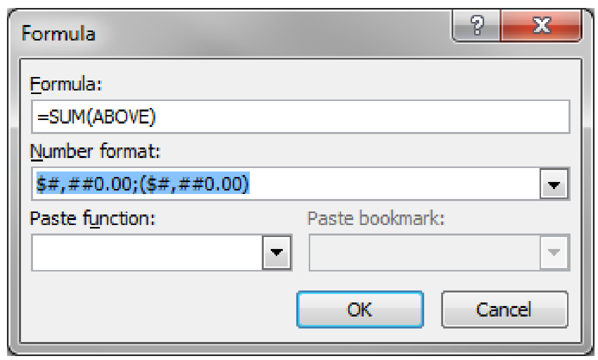
Although not as powerful or as varied as Excel, there are some basic math functions available within Tables in Word.

Tables have cell references just like Excel EXCEPT you do not see the Column and Row labels. In the example shown below, the cell reference is displayed in each cell:

A1	B1	C1	D1
A2	B2	C2	D2
A3	B3	C3	D3

Accessing the Math Functions

Place your cursor in the cell where you want the formula results to display. Click on Table Tools, Layout, Formula.



If there are numbers displayed in the cells above or to the left of the selected cell, an automated formula (=Sum(Above)) or (=Sum(Left)) is shown.

If neither of these is the desired formula, delete the automated formula leaving just the equal (=) sign in the brackets. You can then enter the formula you need based on the available functions, by themselves or in various combinations. Examples of the available functions are shown below:

Add – "+"

Add a number to a cell:	=(A1)+3
Add two adjacent cells:	=SUM (A1:A2) or =(A1+A2)
Add two non-adjacent cells:	=(A1+A3) or =(A1)+(A3)
Add a range of cells:	=SUM(B1:B3)

Subtract – "-"

Subtract a number from a cell:	=(A1)-1
Subtract two cells:	=(A3-B2)

Multiply – "*"

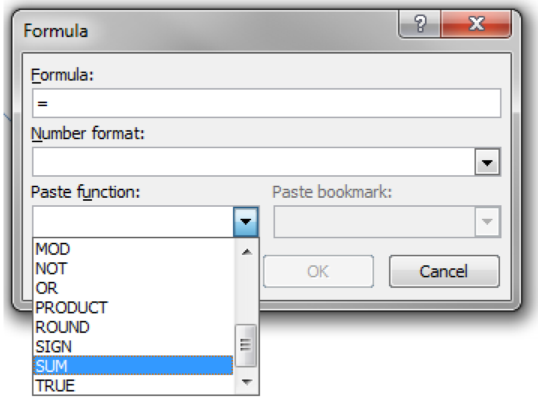
Multiply a cell by a number:	=(A1)*3
Multiply two adjacent cells:	=PRODUCT(A1:A2)

Multiply two non-adjacent cells:	=(B1*B3) or =PRODUCT(B1)*(B3)

Divide – "/"

Divide a cell by a number:	=(C2)/3
Divide two cells:	=(C2)/(A1)

You can manually type the above functions into the formula field or select the function from the Paste Function box. For instance, to add numbers, click **SUM**.



To reference cells in formulas, use a comma to separate references to individual cells (ie, (=SUM(A1,B3) and a colon to separate the first and last cells in a designated range (ie, (=SUM(A1:D1). You can reference an entire row or column in a calculation in the following ways:

Use a range that includes only the letter or number that represents it — for example, 1:1 to reference the first row in the table. This designation allows the calculation to automatically include all the cells in the row if you decide to add other cells later.

Use a range that includes the specific cells — for example, a1:a3 to reference a column with three rows. This designation allows the calculation to include only those particular cells. If you add other cells later and you want the calculation to include them, you need to edit the calculation.

You can format the results of your formula by selecting the format from the available options in the Number format box. For example, to display the numbers as a decimal percentage, click 0.00%.

Notes:
Word inserts the result of the calculation as a field in the cell you selected and does not automatically update the formula results if there are changes to the referenced cells. You can update the calculation by clicking once on the field (or selecting the entire table) and then pressing F9.

If you see codes between braces instead of the actual sum (for example, {=SUM(LEFT)} not the number result you wanted), press SHIFT+F9 or ALT+F9 to switch to the number result.

If your column or row contains blank cells, Word will not total the entire column or row. To total the entire row or column, type a zero in each blank cell.

Totaling Columns of Information in a Replicate Table

Here we use math functions in a table that is replicated schedule information to provide a total once the document/proposal merges the client data:

Formula looks like this:

SCHEDULED EQUIPMENT

MODEL/ YEAR	DESCRIPTION	SERIAL #	AMOUNT OF INSURANCE
{ DOCVARIABLE BEGINREP }			
<APP.EF.MODEL_YEAR>	<APP.EF.SCHED_EQUIP_TYPE_LINE_1> <APP.EF.SCHED_EQUIP_TYPE_LINE_2>	<APP.EF.IDENTIFICATION/SERIAL_NO>	{ =<APP.EF.AMOUNT_OF_INSURANCE> \# #,### }
{ DOCVARIABLE ENDREP }			
		Total Amount of Insurance:	**{ =SUM(ABOVE) \# "#,##0" }**

End result is this:

SCHEDULED EQUIPMENT

MODEL/ YEAR	DESCRIPTION	SERIAL #	AMOUNT OF INSURANCE
1996		8XK999	20,000
		20217D	3,200
		T0310SE875575	42,000
		301256	30,000
2004		A20998	57,000
2004		50715	77,000
		Total Amount of Insurance:	**229,200**

Performing Calculations on Data from TAM or ASK Statements

This second example shows how the sum and multiply functions are used to add the results of ASK variables and then multiply that sum by various factors to obtain the applicable tax and fees:

Formulas Look Like This:

Surplus Lines Tax & Stamping Fee Calculation

Premium	$ { ASK premium "What is the pure policy premium? (show as 0,000.00)" }{ REF premium }
Company Fee	{ ASK company_fee "What is the fee the company is charging, if any? (show 0,000.00)"\d"0.00" }{ REF company_fee }
Agency Fee	{ ASK agency_fee "What is the fee the agency is charging, if any? (show 0,000.00)"\d"0.00" }{ REF agency_fee }
Subtotal Premium and Fees	**$ { =SUM(ABOVE) \# "#,##0.00" }**
Surplus Lines Tax (4.85%)	{ =(b4*.0485) \# "#,##0.00" }
Surplus Lines Stamping Fee (.01%)	{ =(b4*.001) \# "#,##0.00" }
Total	**$ { =SUM(b4,b5,b6) \# "#,##0.00" }**

End Result is This:

Surplus Lines Tax & Stamping Fee Calculation

Premium	$	56,000.00
Company Fee		150.00
Agency Fee		1,500.00
Subtotal Premium and Fees	**$**	**57,650.00**
Surplus Lines Tax (4.85%)		2,796.03
Surplus Lines Stamping Fee (.01%)		57.65
Total	**$**	**60,503.68**

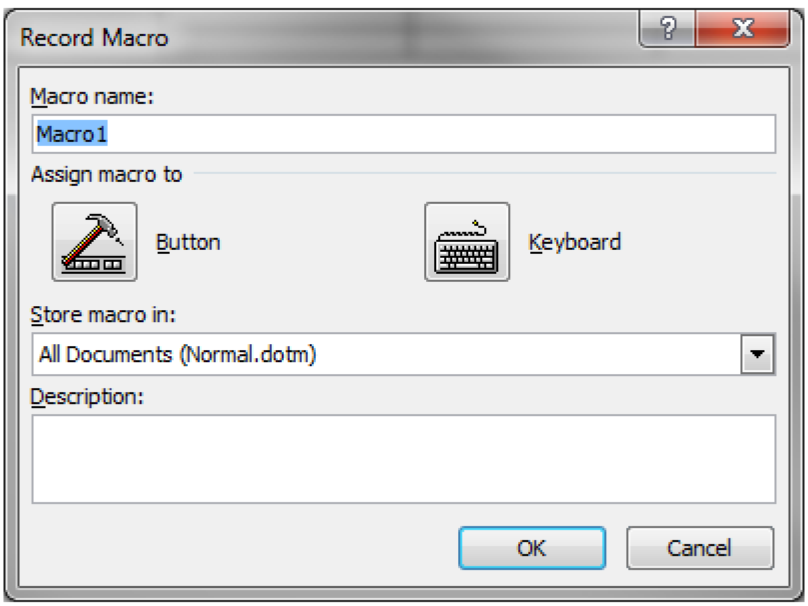
Macros

Many people are scared of macros and don't use them. This is a shame because they can make life *very easy* for the end user – and they are simple to set up. All you do to record a macro is switch on recording, then perform the steps you would perform anyway to achieve the result you want. When you've finished, you hit the "Stop Recording" button. It's as easy as that! You can then take that macro and put it on a button so a single mouse click will execute every step of the macro, and with a little more work you can make the macro available to every user in your agency.

The easiest way to get all the steps right is to actually have a document that needs the actions performed on it. For example, to have page 1 pull from the letterhead bin and all the other pages pull from the plain paper bin, start by creating a proposal on a client, then switch on macro recording before fixing the document.

Recording

Developer (if this is not an available ribbon, right click on any ribbon and select Customize the Ribbon, then check Developer), Record Macro.

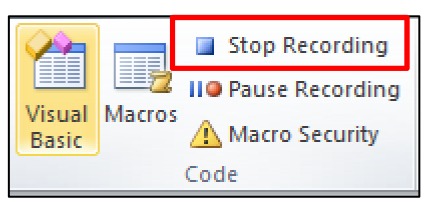


Give the macro a name, for instance, FixPaperBins. (Please note there can be no spaces in the name) and click OK.

Now carefully work though the steps to create your macro/procedure. Be careful with your workflow since all of your menu actions will be recorded and implemented by the saved macro

Open up the Page Setup box and change the Paper Sources.

Click on the Stop Recording button.



Assigning to Ribbon

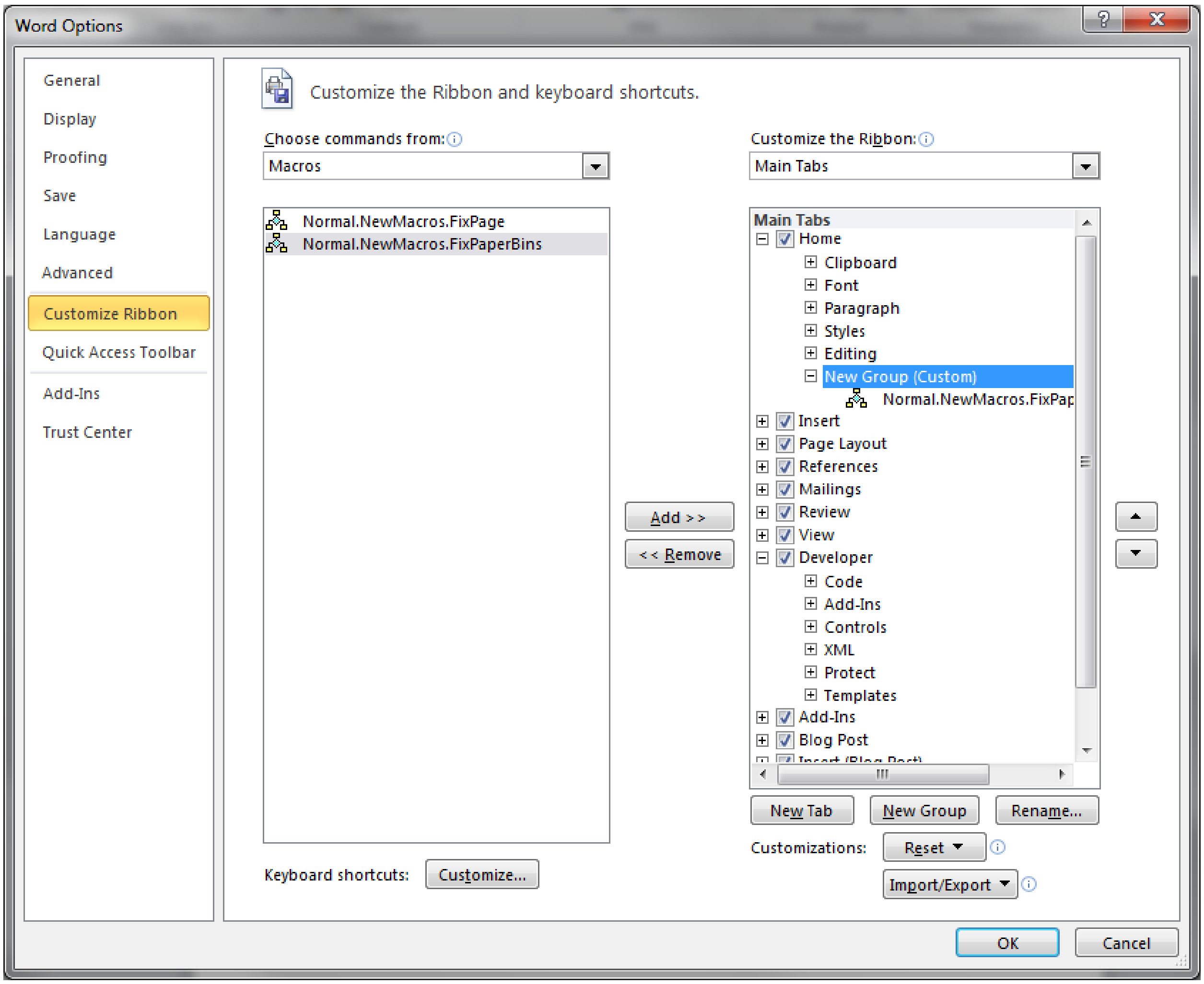
Right-click anywhere on the ribbon, select Customize the Ribbon.

On the Choose Commands from, select Macros.

Select the macro of your choice. Click the Tab name where you want to put it and select New Group. Then click Add.

Right-click on the Macro name and Rename it. This is what will display on the screen and can have spaces in it – the longer you make the name the more space the icon will take up on your ribbon. You can also rename the New Group.

Close the dialog box.



Now test the macro by creating another proposal that needs fixing (remember you already fixed the one you have open on your screen when you recorded the macro, so you need to close that one). If you find it doesn't do what you expect, the easiest way to fix it for most macros that only have a few steps in them is to simply re-record the macro – when you give the new macro the same name it will ask you if you want to replace the existing one – answer Yes.

Copying to Other Workstations

Macros are stored in the normal.dotm file, so the easiest way is to copy that file from your workstation out to a network drive (use File, Options, Advanced, General, File Locations to see where template files are stored) and then copy it in to each workstation you want it on. Be aware that this will copy ALL the settings in the normal.dotm file, so it will overwrite any toolbar changes etc that have already been made on the target workstation.

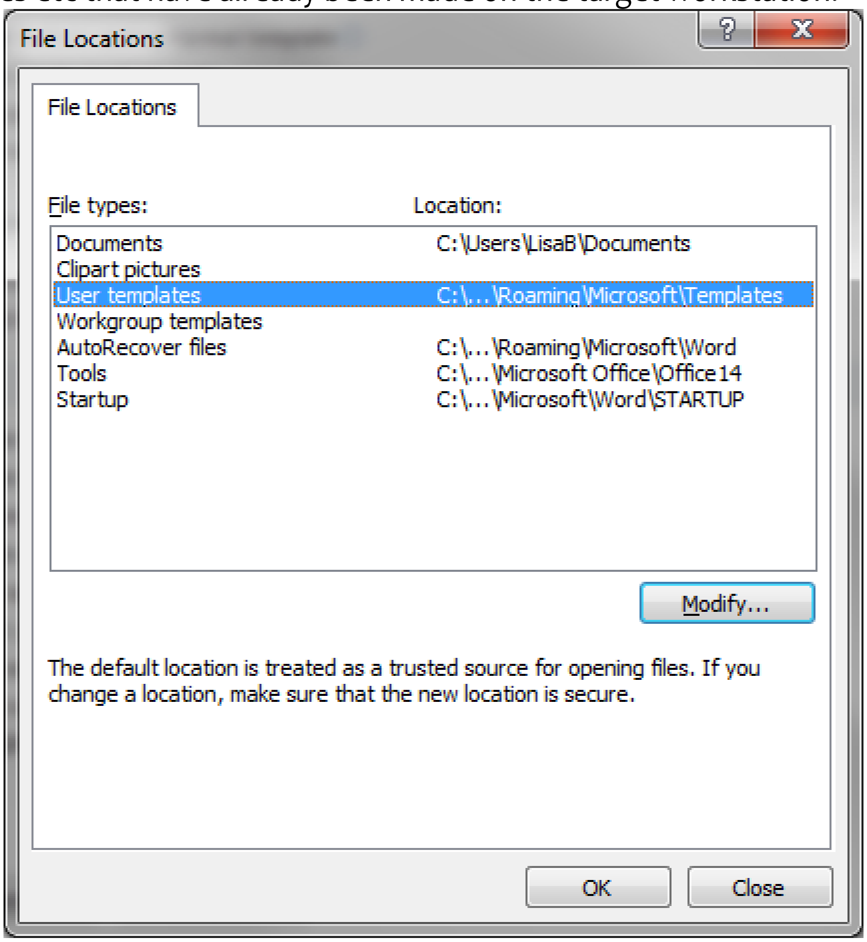


Table of Contents

You cannot set up a Table of Contents (TOC) in the master, but if you set up all your heading styles correctly you can have the end user add one to the final proposal fairly easily. The TOC entries are based on header styles, so make sure that in every one of your master documents you use the same style names for each of the headers you want at the same level or sublevel in the TOC. In one of the master documents, where you want the TOC to appear, set up a blank page with the appropriate title (presumably "Table of Contents").

After the end user has created the proposal, he/she goes to References, Table of Contents, and select the style. The table will be created. It may be necessary to do some formatting for fonts, etc.

Linking to & Embedding Documents, Spreadsheets, Charts

Microsoft gives you the ability to combine data from two or more programs into one document. This integration can occur by copying and pasting data between programs. Information or objects can also be copied and pasted between programs. The downside to this is that if you continually update a spreadsheet that you have copied into another document, you will have to copy and paste the edited worksheet each time a change is made. The reason for this is because the changes you make to the Excel worksheet are not reflected in your copied worksheet or document. The program where your object was created is called your source. The program where you want the object is called your destination.

There are two different options to help you overcome the downside of copying and pasting objects between various programs. What you will do is share the information with another program. For example, you create a worksheet in Excel and then share it with another program such as Word. This type of sharing is referred to as object linking and embedding (OLE). You can create a linked object or an embedded object from any program that supports linked objects and embedded objects. So, what does this mean? First we need to understand the difference between a linked object and an embedded object.

When you link an object, the object exists in the source program. In the destination program, the object contains only a code that points to the name and location of the source. When you embed an object, it exists in both the source and the destination programs. The thing to remember is that if you link an object, and you update the object in either the source or the destination, the other will reflect your changes. If you embed an object and you change that object, those updates will not be reflected in the other program.

So, should you link or embed your objects? This will depend on how the information in the object is to be used. For example, if you have an Excel worksheet that you want to insert into a Word document and it contains information that you don't need to update, then the best thing here would be to either embed the object or simply copy and paste it. If the worksheet that you want to copy will be continually updated, and you want those updates to appear in the destination program, then you should link the object.

An additional point that you must remember if you are going to link the object is that it (the object) must in a location on the network that is accessible to every user who will use the document. If the document can't find the link, the object won't be there.

Linking Objects

Let's create a new Linked Object. As mentioned earlier, when you link an object there is only one object so changes made to that object will be reflected in the source as well as the destination. For our example we are going to link an Excel worksheet to a Word document.

First we need to make sure that both Excel and Word are open.

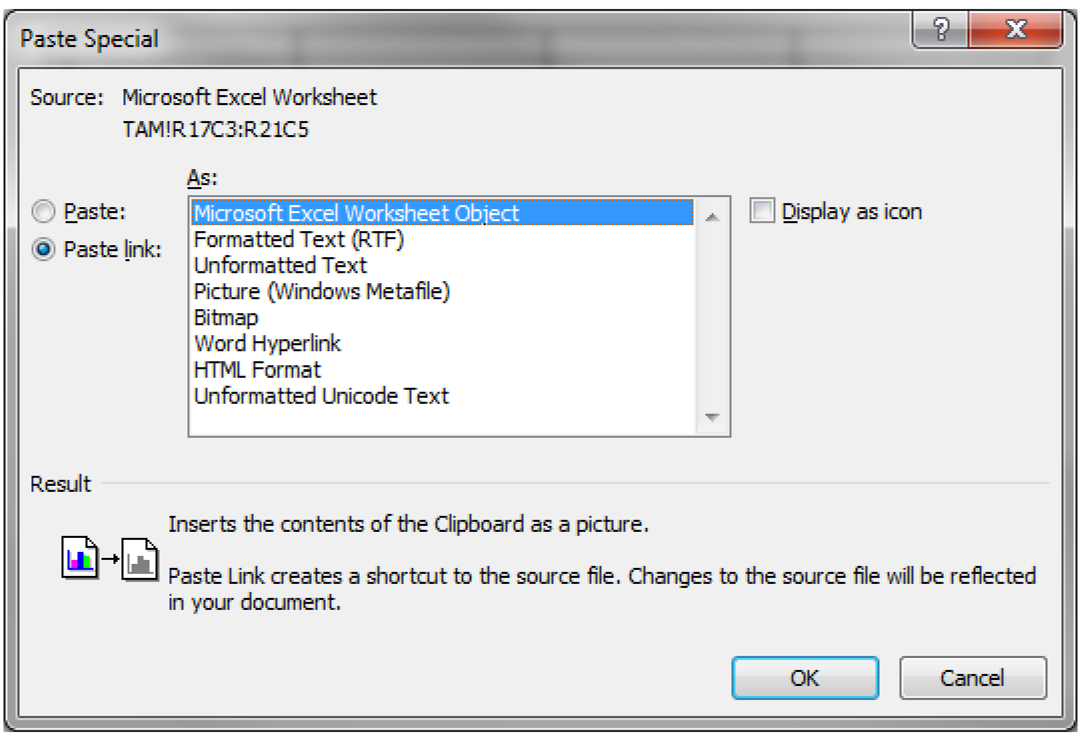
Make sure that your active program is Excel and you have the workbook containing the worksheet you want to link open.

Select the cells that you want to link to your Word document.

Click the Copy button.

Switch to Word to make it your active program and open the document where you want to insert the worksheet cells. Make sure that your cursor is in the insertion point in the document.

Click Home, Paste, then select Paste Special. The Paste Special dialogue box will appear.



Within this dialogue box you first need to select the "As" field. This is the type of object that you are pasting. In our case we are pasting in a Microsoft Excel Worksheet Object.

You also have the option to either Paste or Paste Link. Keep in mind, simply pasting will not allow for any updates to happen. If you want to make sure that changes made in the source are updated in the destination, you will need to select the radio button for Paste Link.

Right click in the table to get Paste Options. If you are linking data from a worksheet, and you select Keep Source Formatting and Link to Excel option, the linked data will match the formatting in your Excel worksheet. If, on the other hand, you select the Match Destination Table Style and Link to Excel option, the linked data will be formatted in the Word default table style.

Linking Word Documents

Linking doesn't have to be between two different programs. You can link documents within the same program. For example you can have an object in a Word document and link that object to another Word document, or even several Word documents. When you make a change to the object in the original document, the other document(s) will automatically update. When linking objects between Word documents, your "As" selection would be *Microsoft Word Document Object;* make sure that you select the Paste link option rather than just Paste.

Editing a Document with a Linked Object

To edit a document that contains a linked object, edit the object in your source program. For example, if your source originated in an Excel worksheet, then you would make the change in Excel. Any changes that you make in your Excel worksheet will be reflected in your Word document the next time you open your document. If you want the change to be saved, don't forget to save the worksheet.

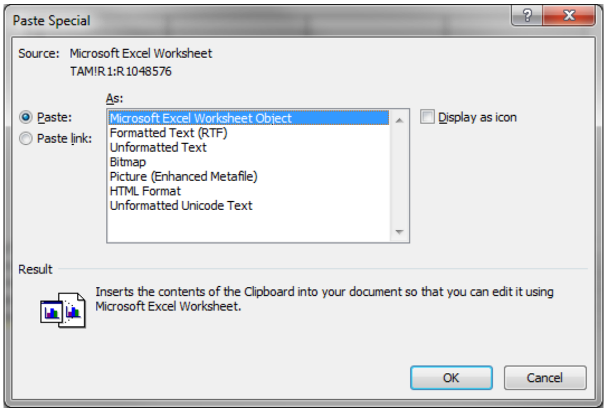
Embedding Objects

Now let's create a new embedded object. First we need to click in the document where we want the embedded object located. On the Insert tab, click on Object and then select the Create New tab. In the Object type box, you need to select the type of object that you want to create. You can display the embedded object as an icon if others are going to be viewing the document online. To do this, you would select the Display as icon check box. You also have the ability to insert an Excel worksheet as an embedded object by clicking Insert Microsoft Excel Worksheet.

For our example, let's create a new embedded object using an existing Excel file.

First we need to make sure that both Excel and Word are open.

Now, we need to be on our Excel document and select the entire worksheet, a chart, or a range of cells and click Copy.



Go back to your Word document and click where you want the information to appear. On the Home tab, you will click Paste, then click Paste Special. In the "As" box, click the entry with the word "object" in its name, such as Microsoft Excel Worksheet Object. Then click OK.

This will paste the cells that you highlighted in your Excel sheet into your Word document. So, how is this different from simply using the Copy, Paste commands? The big advantage of embedding an object rather than simply copying and pasting is that you can edit the object using the tools of the program or application that the object was created in.

Editing a Document with an Embedded Object

If you need to edit an object that has been embedded, you can do this in the destination program using the tools of the source program. To do this, in your destination program, open the document with the embedded object. Then simply double-click on the embedded object. This will cause the tools that are used in the source program to display in your destination program.

Linking Charts

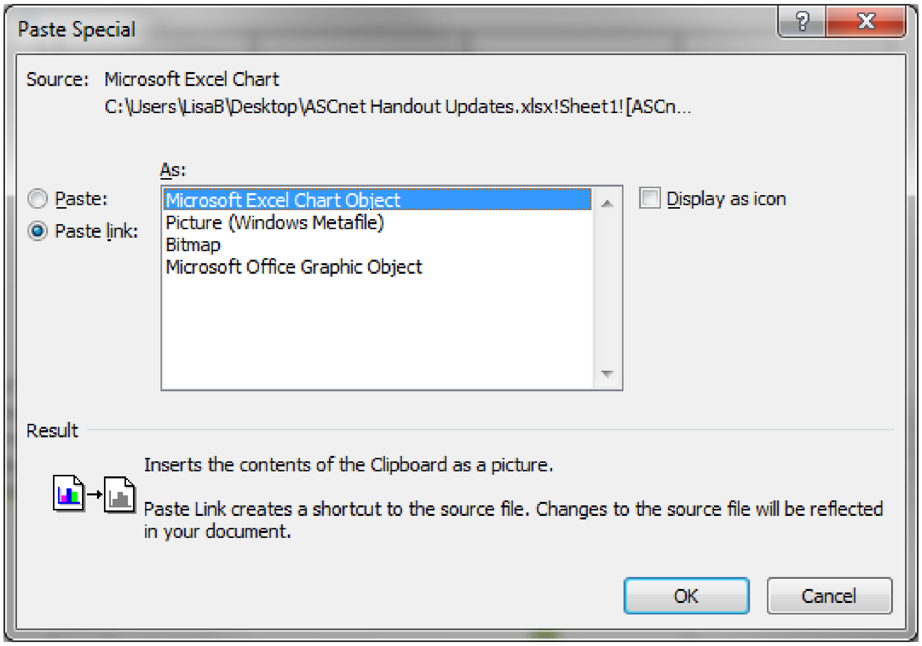
There are many different types of objects that you can link or embed. Another example would be a chart. To link a chart into a Word document or even a PowerPoint presentation, make sure that you have both programs open (Excel and Word, or Excel and PowerPoint).

To link a chart you would do the following:

Open Excel and then open Word.

In your Excel worksheet, select the chart area and click the Copy button.

In your Word document, position your cursor where you want the chart to be located and click Paste, Paste Special. You will see the following dialogue box.



Your "As" selection should be Microsoft Excel Chart Object.

Your radio button selection should be Paste Link.

By linking the chart, whenever you update the source program, it will update your destination program.

Embedding

Charts

To embed a chart, you would follow the same procedure above, but rather than selecting Paste Link you would select Paste.

Shapes

Word includes a set of drawing and graphics capabilities that you can use to easily embellish your text and graphics with 3-D effects, shadow effects, textured and transparent fills. We already described Drawing Lines on page 11. To use these tools select Insert, Shapes. You can now also use SmartArt which can incorporate pictures.

Operations

- Liability

Location #1

- Property

2012 Eco-Car

- Automobile

Look what you can do with SmartArt!

This is a Cloud Callout, one of many default designs available in Shapes.