

Fayetteville State University

Microsoft Word Advanced

Embedding and Linking Data, Editing and Updating Linked Data, Creating Fill-in
Forms, Saving and Protecting Forms

Fayetteville State University
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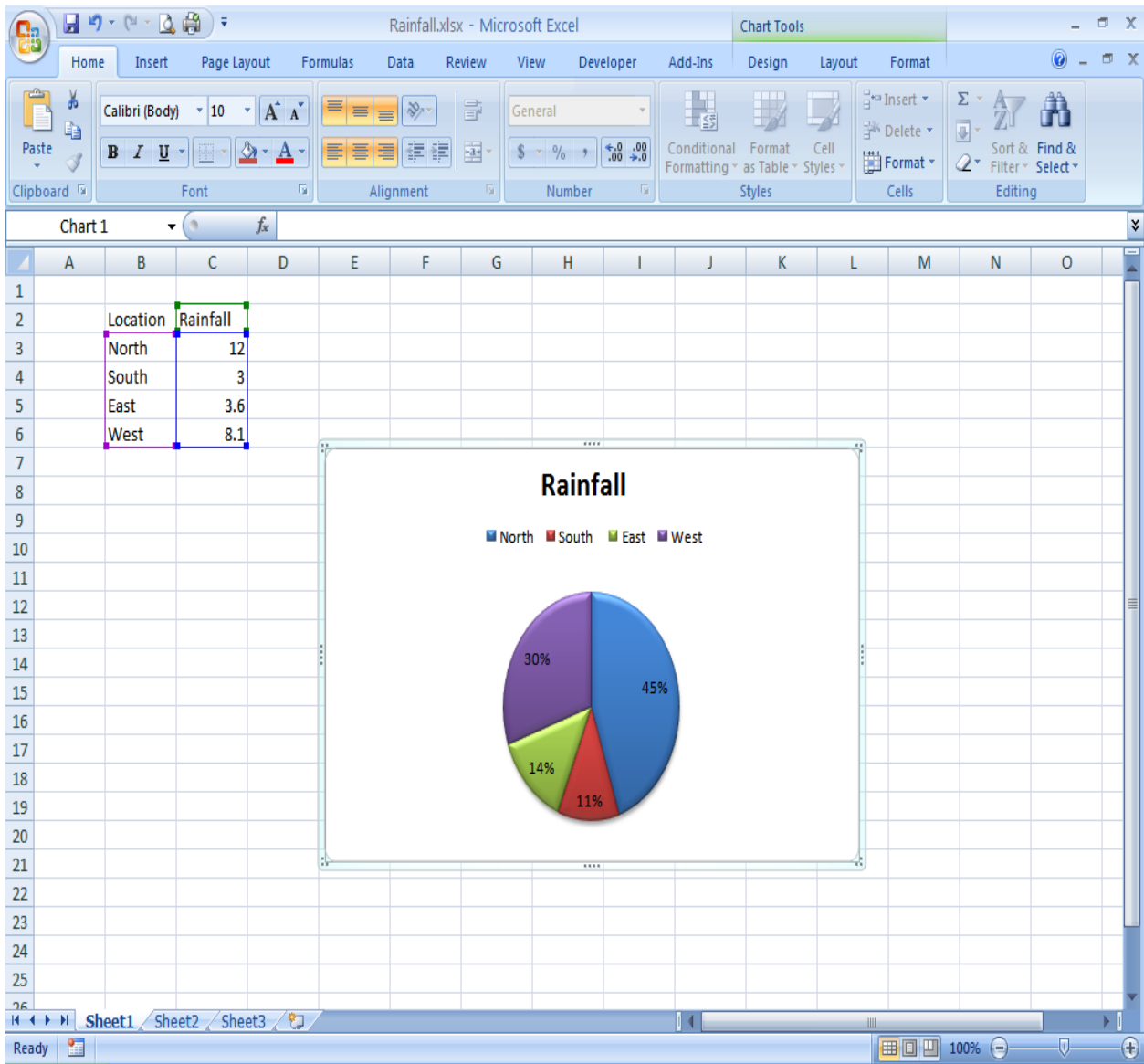
Embedding and Linking Data

How to embed data within a workbook

To embed data into Microsoft Word you want to first open the file containing the data you wish to embed. To embed a chart from Microsoft Excel, open Excel.

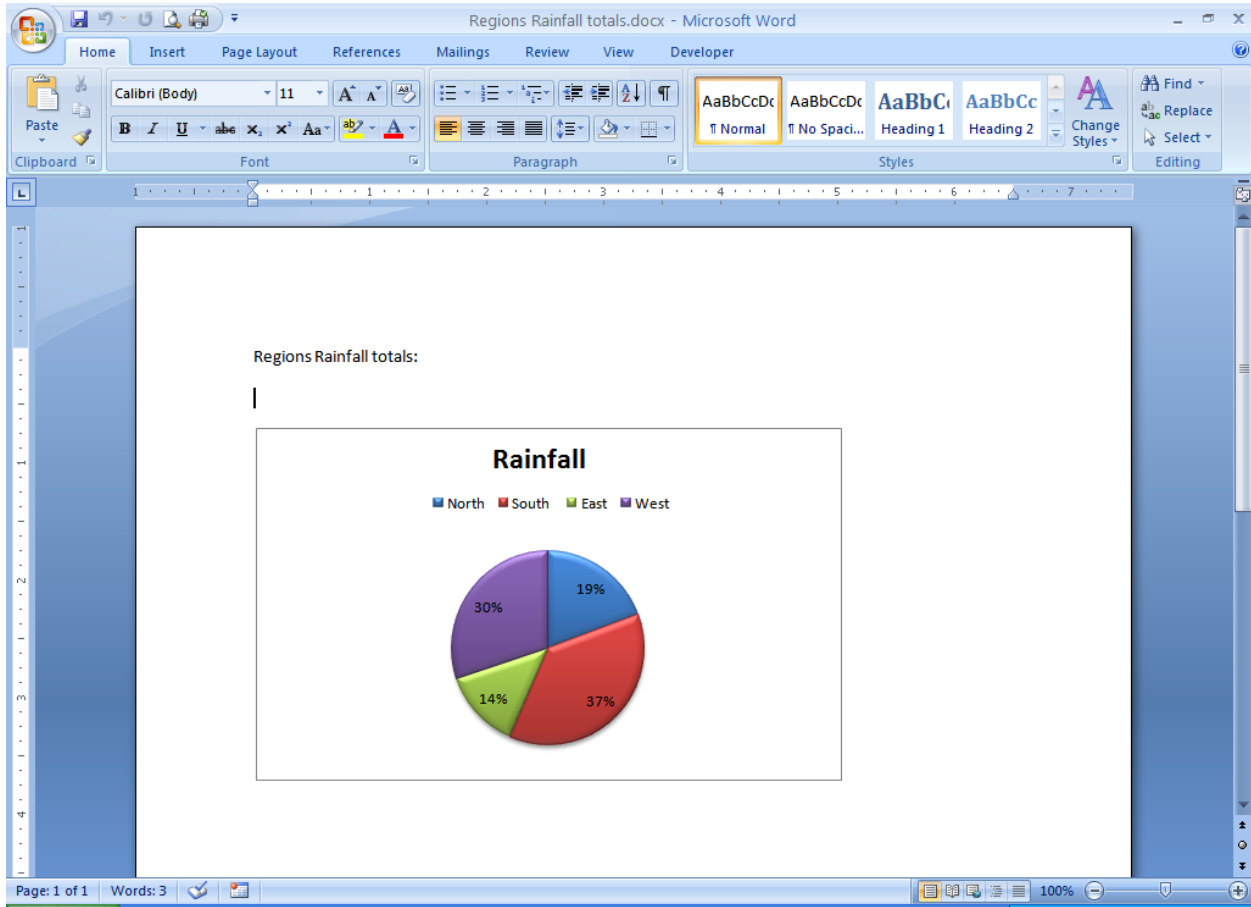
1. **Click** once on the **chart** to select it and **press Ctrl+C** on your key board to copy the chart. (Figure 1)

Figure 1



- Return to the Microsoft Word document and **click** the location where you would like to embed the chart and **press Ctrl+V** to paste the chart into the document. (Figure 2)

Figure 2

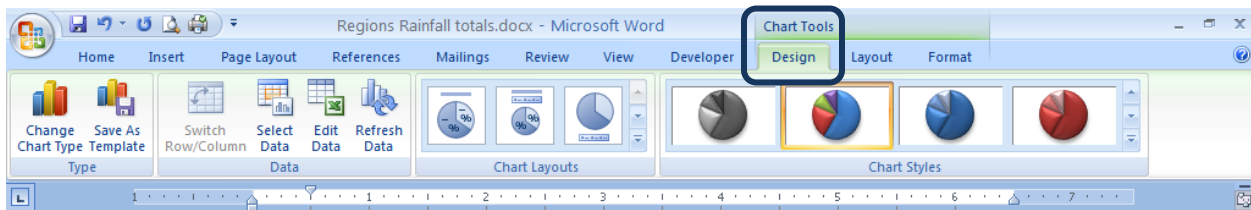


Note: When embedding an object you are only copying the object, it is not linked to the original document. When the chart is updated in Microsoft Excel it will not update in Microsoft Word.

Editing Embedded Objects

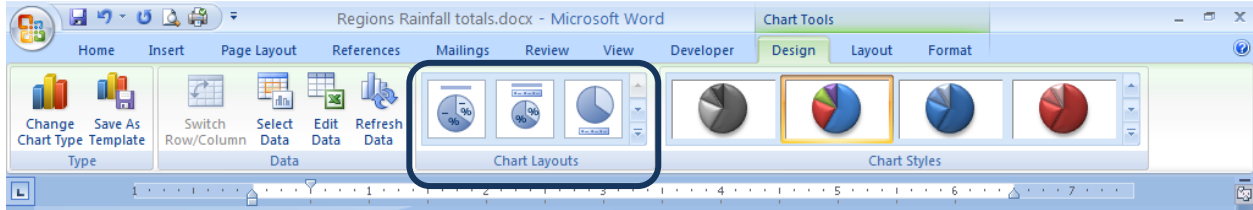
- To edit the chart **click** on the **chart** once to select it, the **Design** tab will appear. (Figure 3)

Figure 3



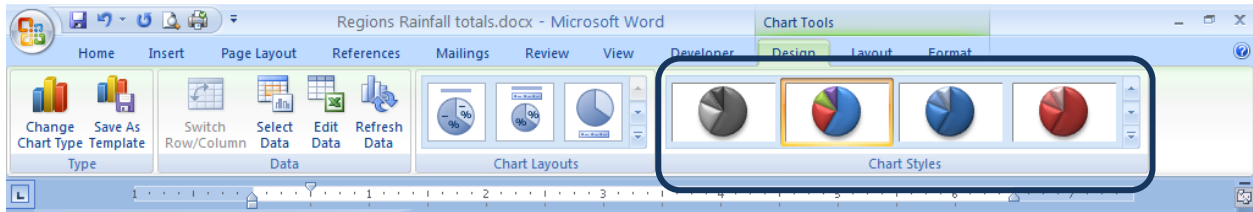
- From here you can change the Chart Layouts, Styles and chart Type. **Click** on an option in the **Chart Layout** group to change the layout. (Figure 4)

Figure 4



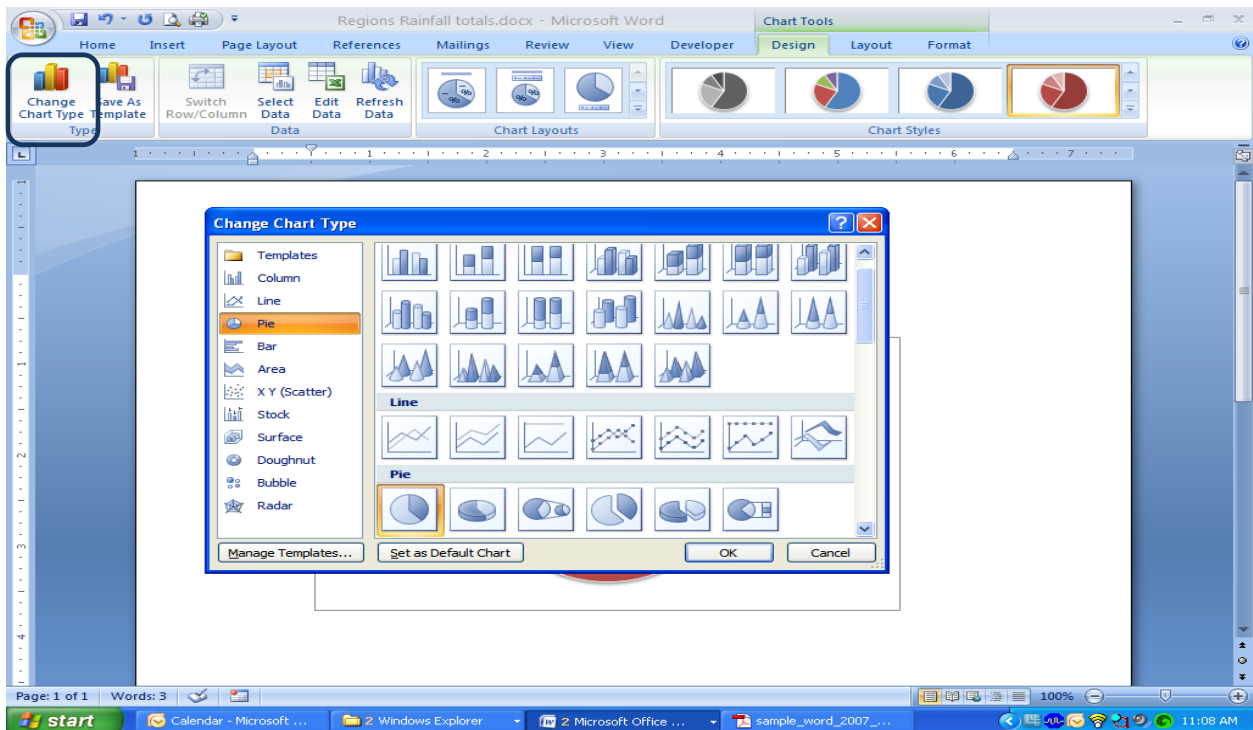
- Click** on an option in the **Chart Styles** group to change the style. (Figure 5)

Figure 5



- Click** on **Change Chart Type** in the **Type** group to change the chart type. The Change Chart Type window will appear, **select the chart type** and **click OK**. (Figure 6)

Figure 6

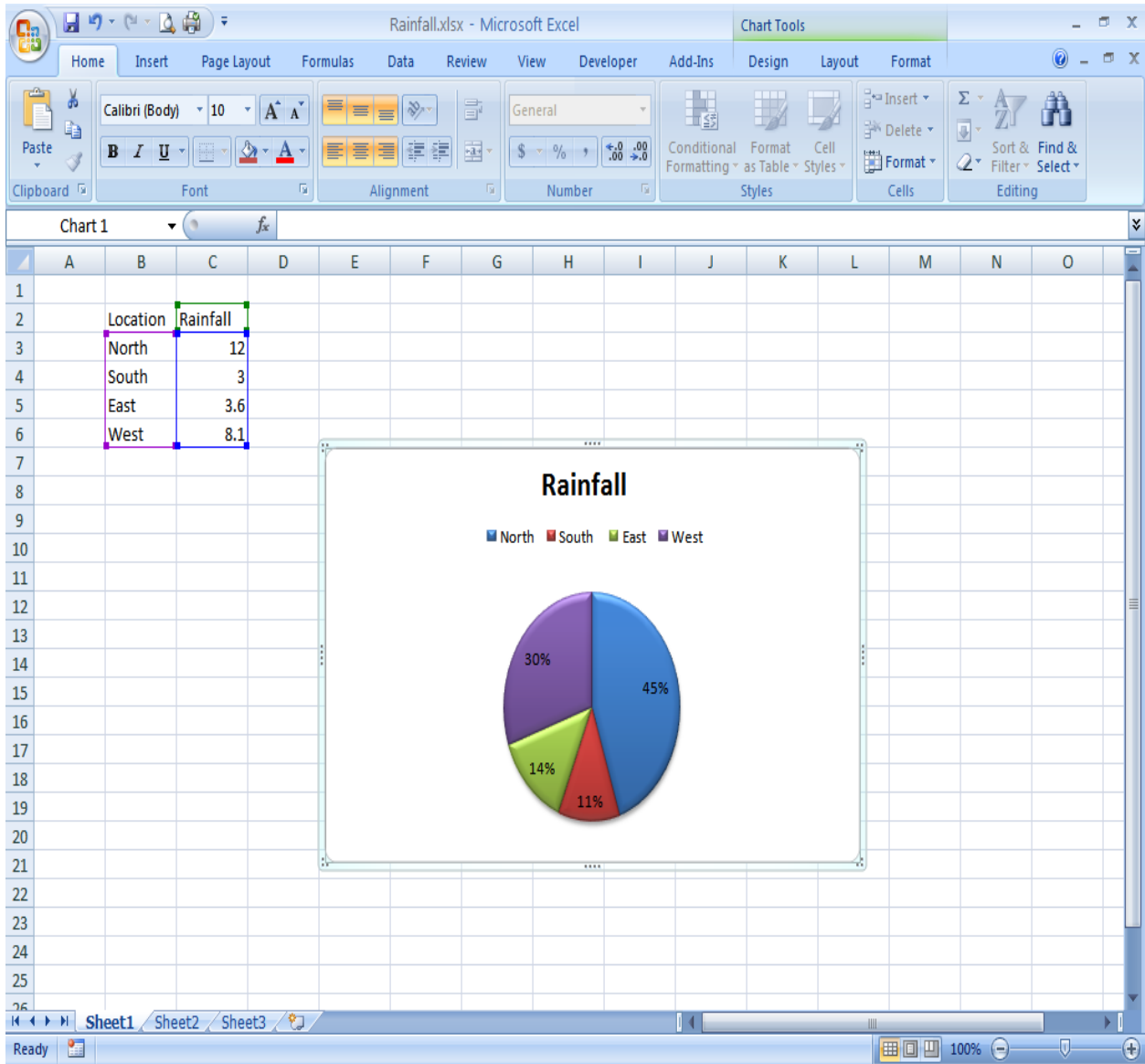


Linking Data/Objects

To link data into Microsoft Word you want to first open the file containing the data you wish to link. To link a chart from Microsoft Excel, open Excel.

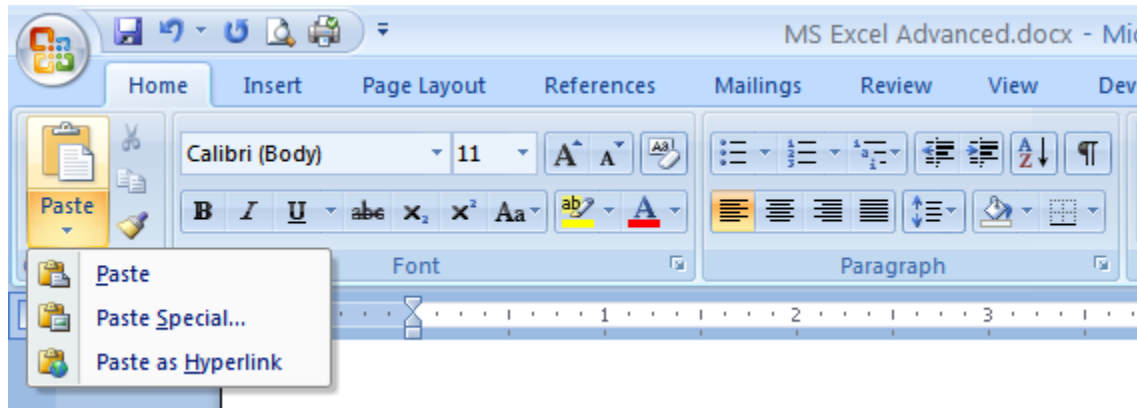
1. **Click** once on the **chart** to select it and **press Ctrl+C** on your key board to copy the chart. (Figure 7)

Figure 7



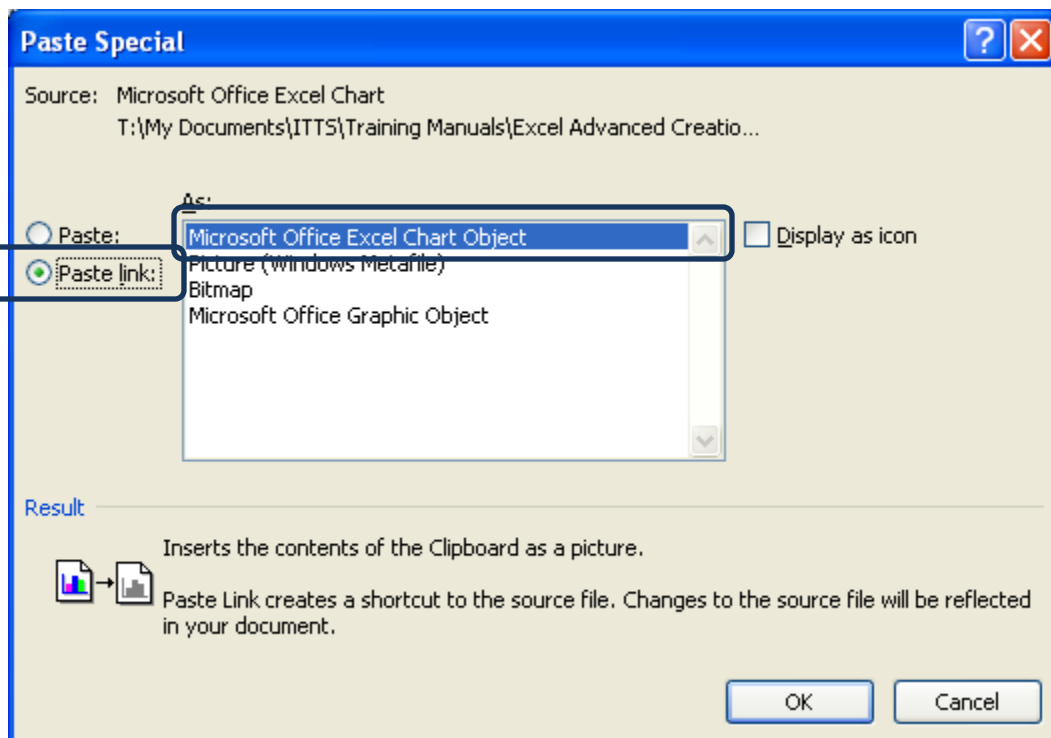
- Return to the Microsoft Word document and **click** the location where you would like to link the chart and on the **Home** tab, **click** the **arrow** under paste in the **Clipboard** group and **select** *Paste Special*. (Figure 8)

Figure 8



- The Paste Special dialog box is displayed. **Select** *Paste link*: then **select** *Microsoft Office Excel Chart Object* and **click** *OK*. (Figure 9)

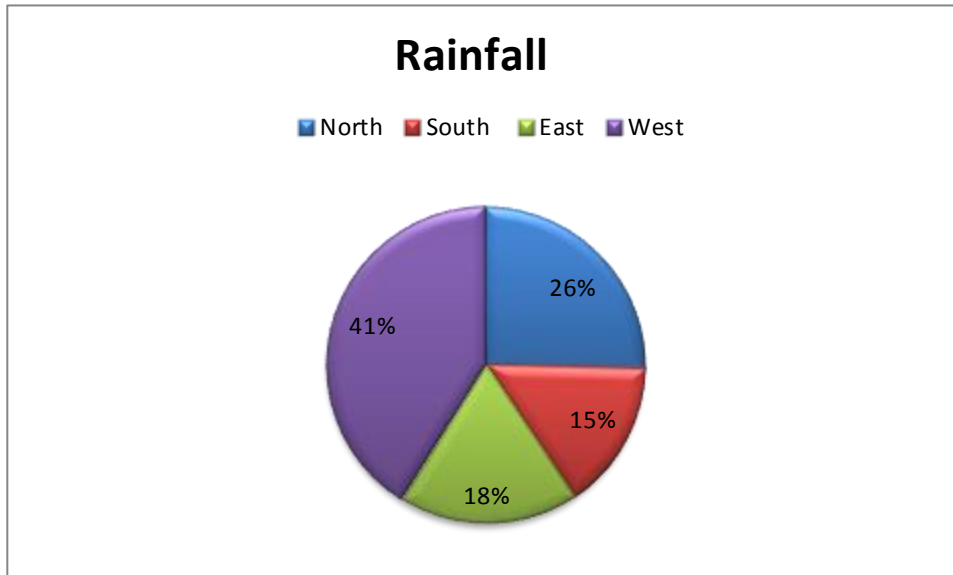
Figure 9



The linked object is displayed in Microsoft Word. (Figure 10) Note: Once the Excel data is updated and saved the Word data will also be updated.

4. To see updates automatically in Word without having to close and reopen the document **click** on the chart and **press F9** on your keyboard.

Figure 10



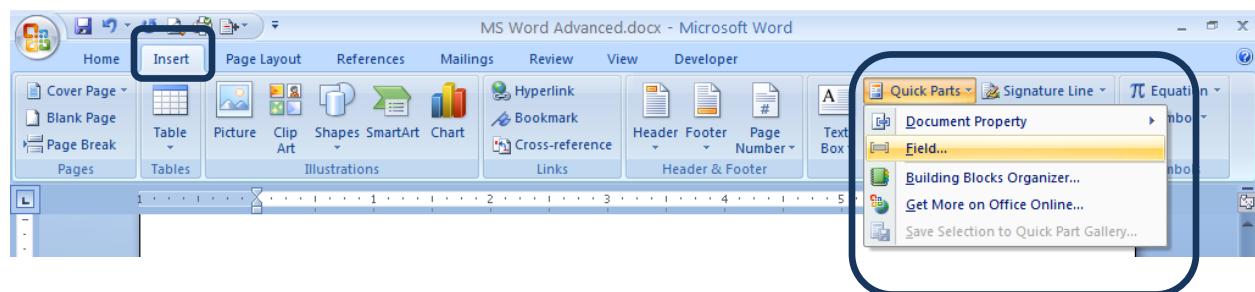
Creating Fill-in Forms

Using Word Field Codes

A Microsoft Word field is an object that can be updated within a Microsoft Word document. Such as a date field used in a letter template that automatically update to show the current date.

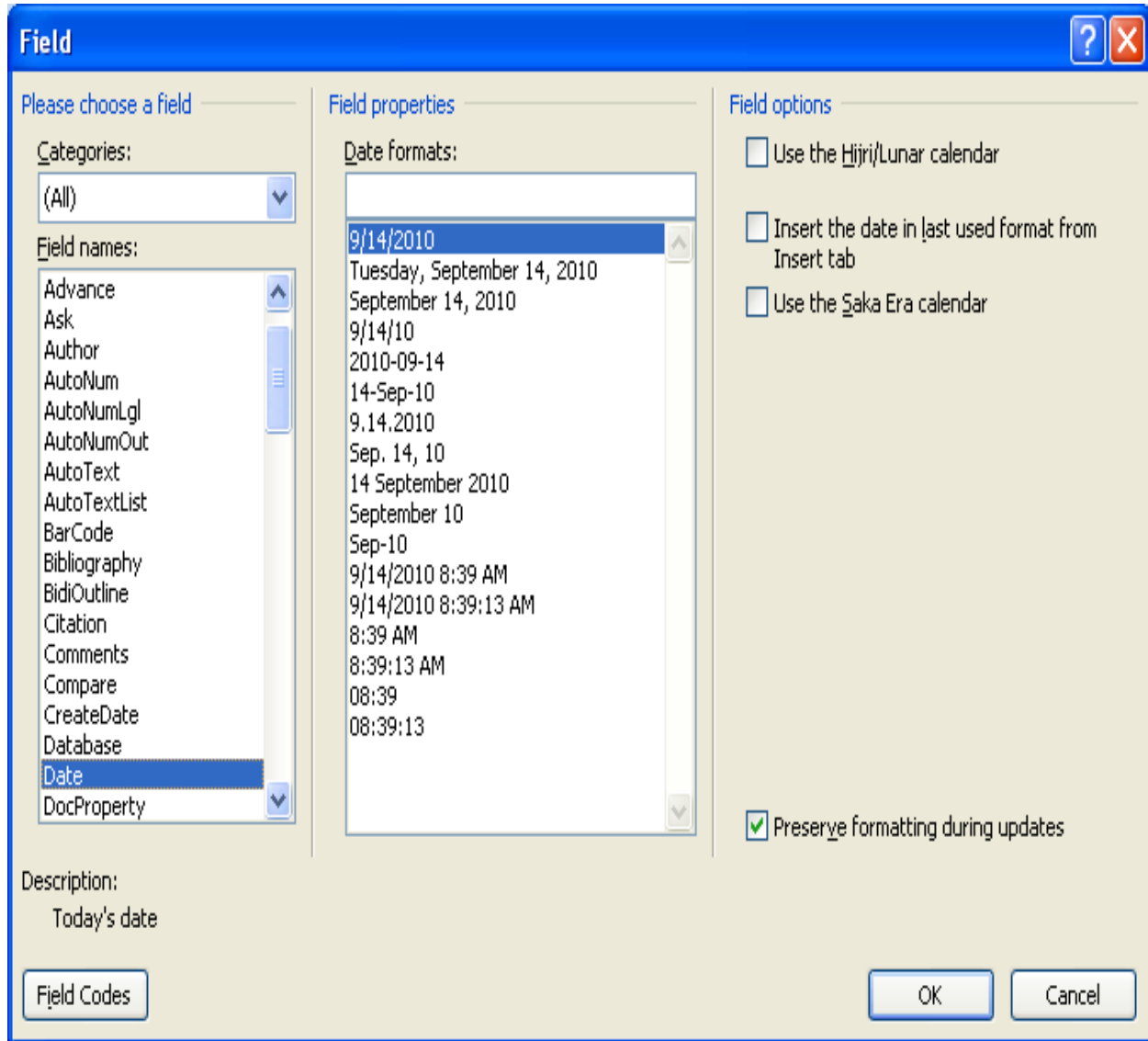
1. To insert a field code into a document **click** on the **Insert** tab – within the **Text** group **click** on **Quick Parts** and **select** the **Field** command. (Figure 11)

Figure 11



2. The Field dialog box will appear. To insert a date field:
 - **select** *Date* in the Field names: column
 - **select** the desired format in the Date Formats: column
 - **select** any desired Field options in the Field Options: column and **click** *OK* (Figure 12)

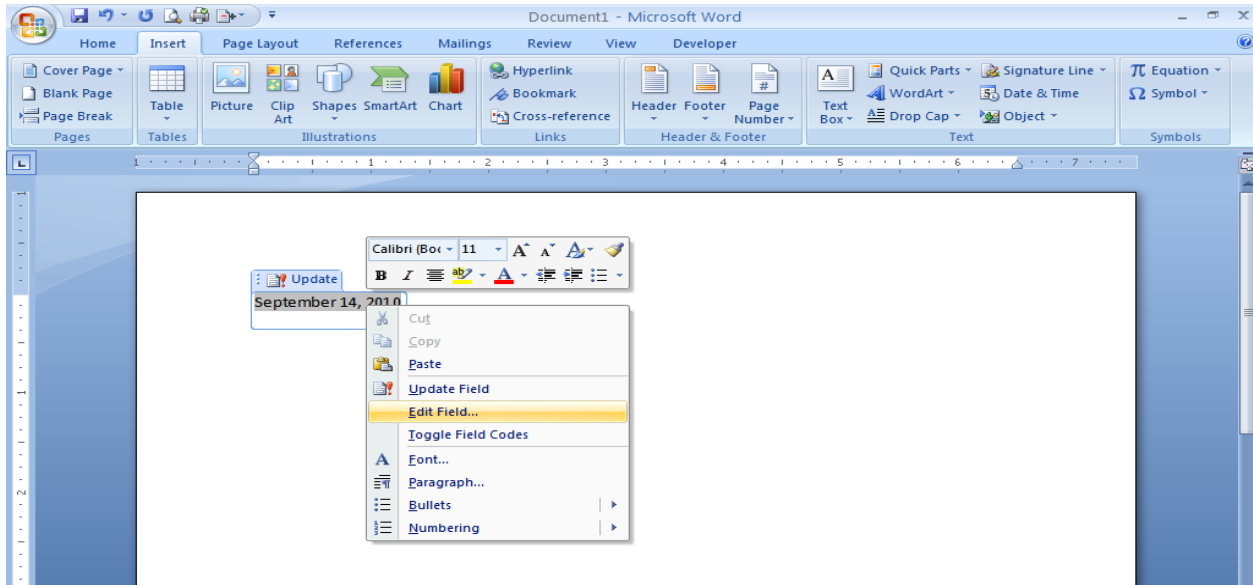
Figure 12



Editing and Deleting Word Fields

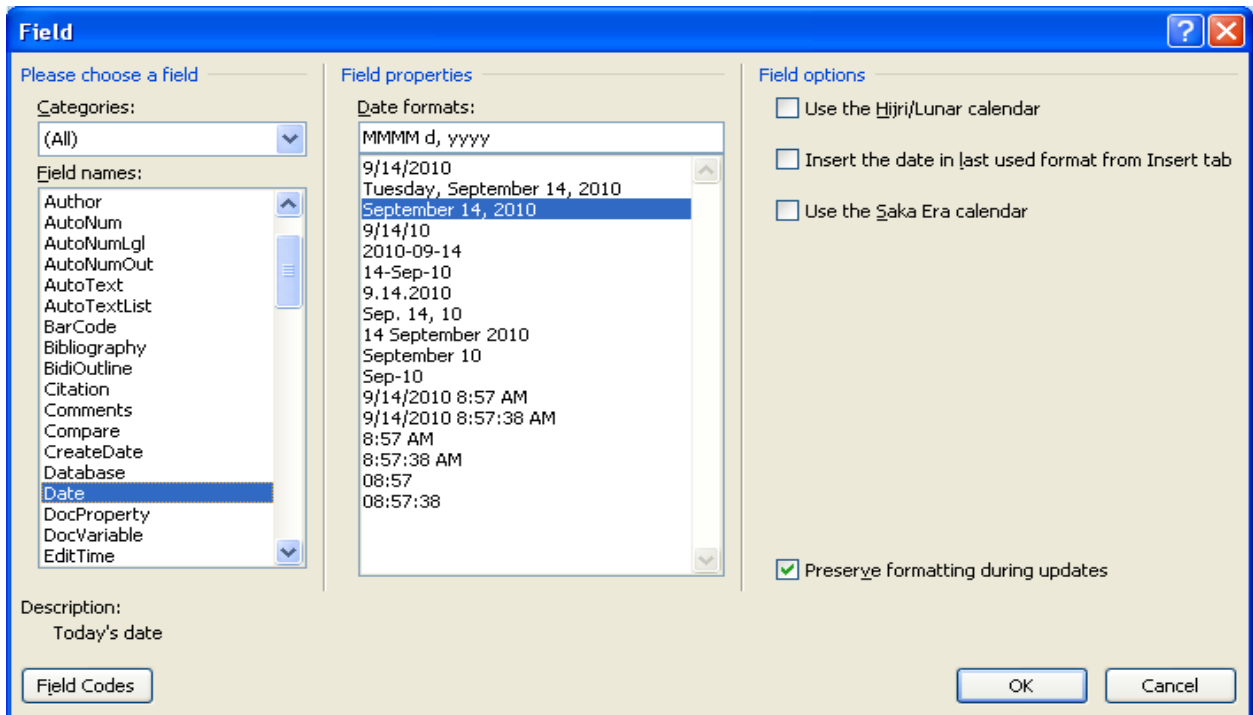
1. To edit a Word field **right-click** on the field you wish to edit and **select** *Edit Field...* (Figure 13)

Figure 13



2. The Field Dialog box will appear, select your changes and **click** OK. (Figure 14)

Figure 14



Creating Fill-in Forms

When creating fill-in forms in Microsoft Word you first need to display the Developer tab if it is not already displayed.


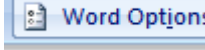
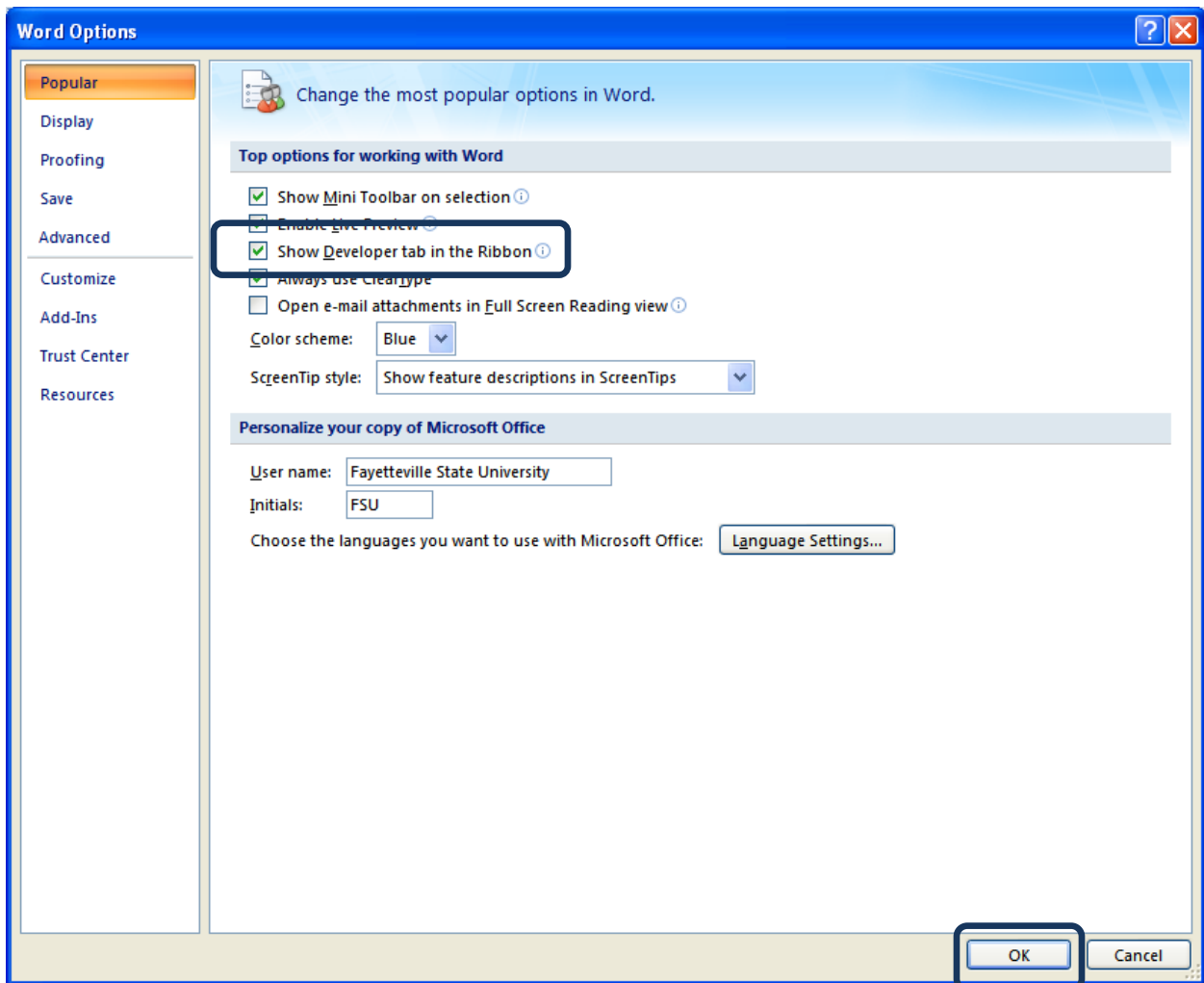
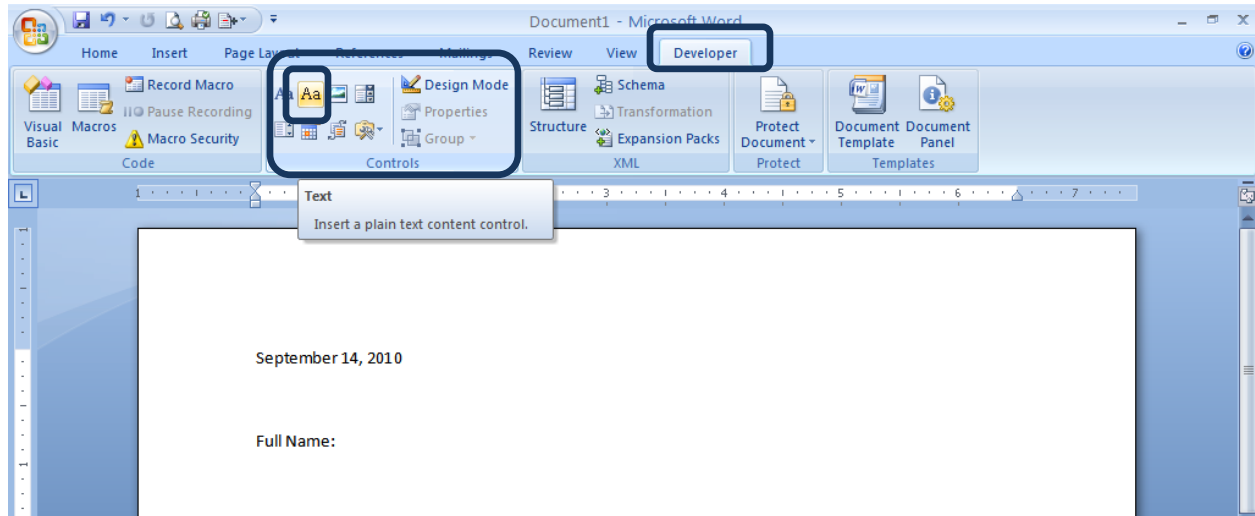
1. Click on *the Microsoft Office* button  and then click *Word Options*. 
2. The Word Options window will appear. Click *Show Developer tab in the Ribbon* and click *OK*. (Figure 15)

Figure 15



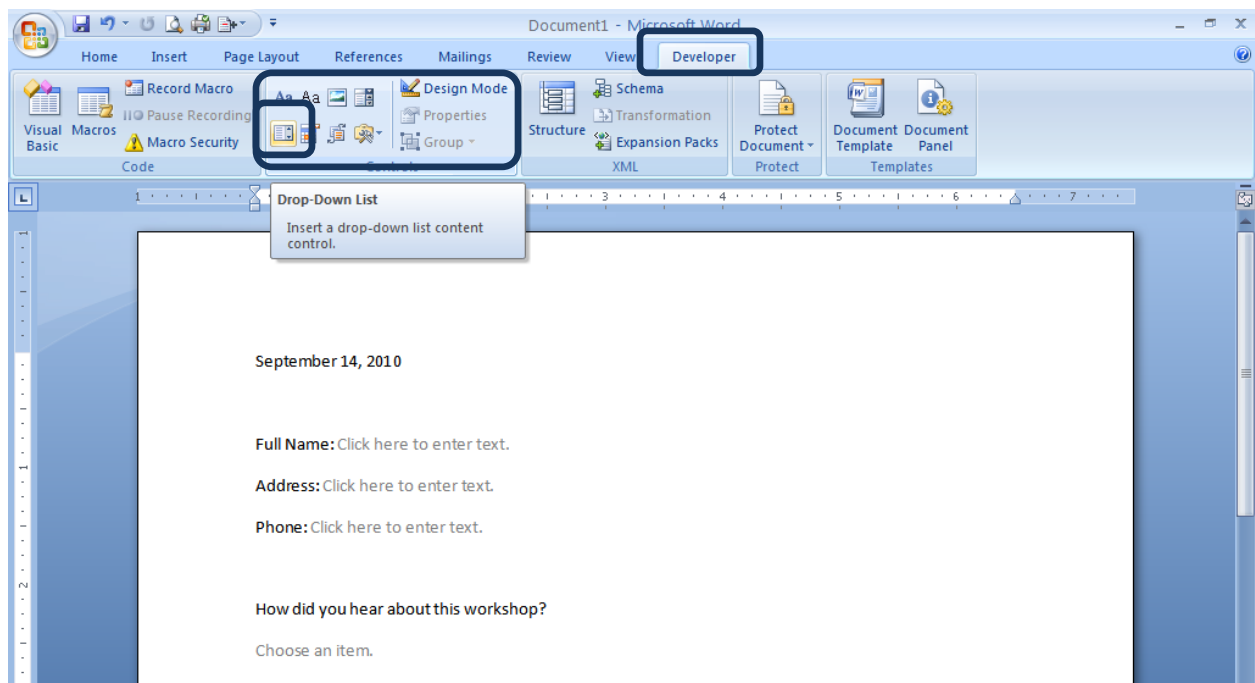
3. To insert a text field **click** on the **text** icon in the **Control** group on the **Developer** tab. (Figure 16)
Repeat this process to add all text fields.

Figure 16



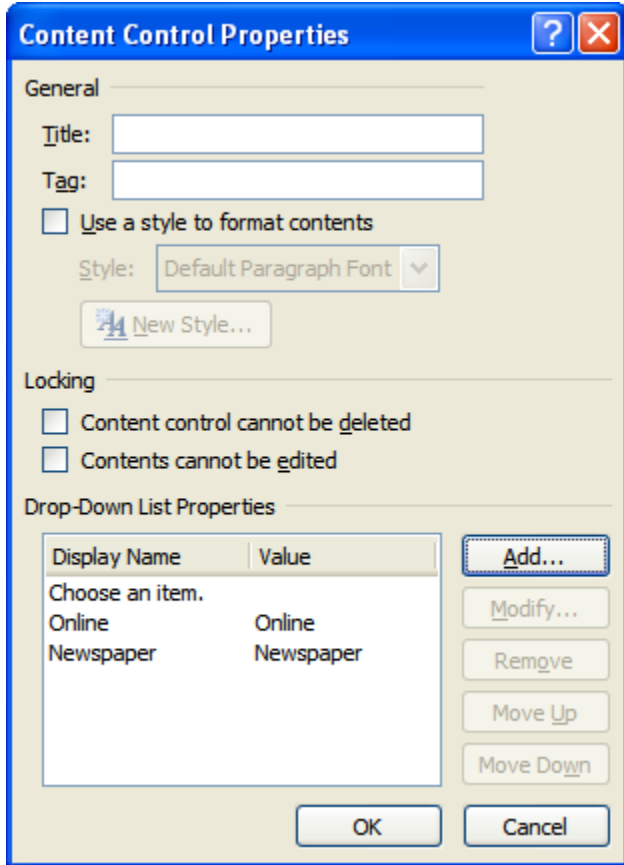
4. To insert a drop-down list field **click** the **drop-down list** icon in the **Control** group on the **Developer** tab. (Figure 17)

Figure 17



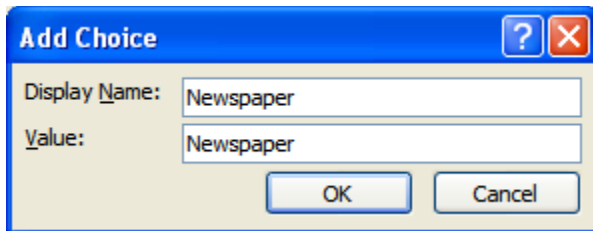
- Once the field is created, **click** on it and **select *Properties*** in the **Control** group on the **Developer** tab, the Properties dialog box will appear. (Figure 18)

Figure 18



- To insert options **click *Add...*** the Add Choice dialog box is displayed. (Figure 19) Enter the Display Name: and **click *OK***. Continue this process until all options are added.

Figure 19



The drop-down list will display in your Word document like so. (Figure 20)

Figure 20

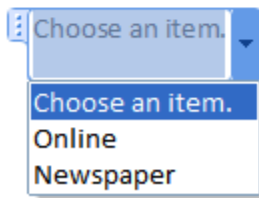
September 14, 2010

Full Name: Click here to enter text.

Address: Click here to enter text.

Phone: Click here to enter text.

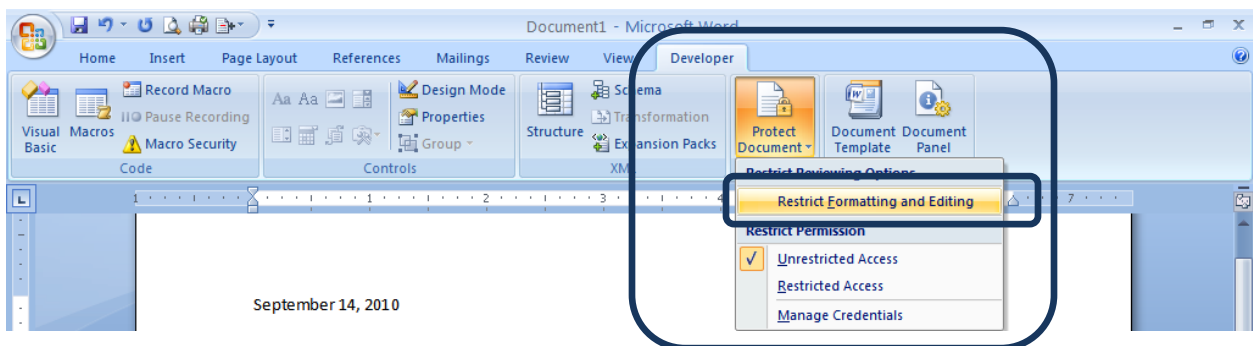
How did you hear about this workshop?



Saving and Protecting the Fill-in Form

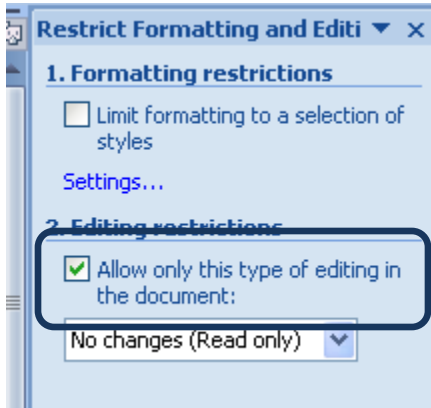
1. To protect your form from unwelcome editing **click the *Protect Document* icon and select *Restrict Formatting and Editing* in the *Protect* group on the *Developer* tab.** (Figure 21)

Figure 21



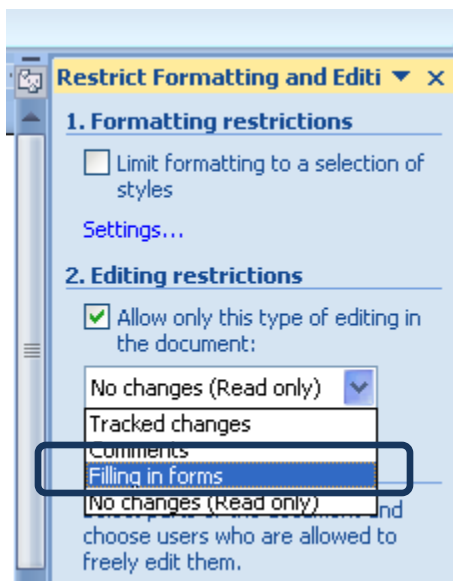
2. The protect options will be displayed on the right side of the screen. **Click** the box ***Allow only this type of editing on the document.*** (Figure 22)

Figure 22



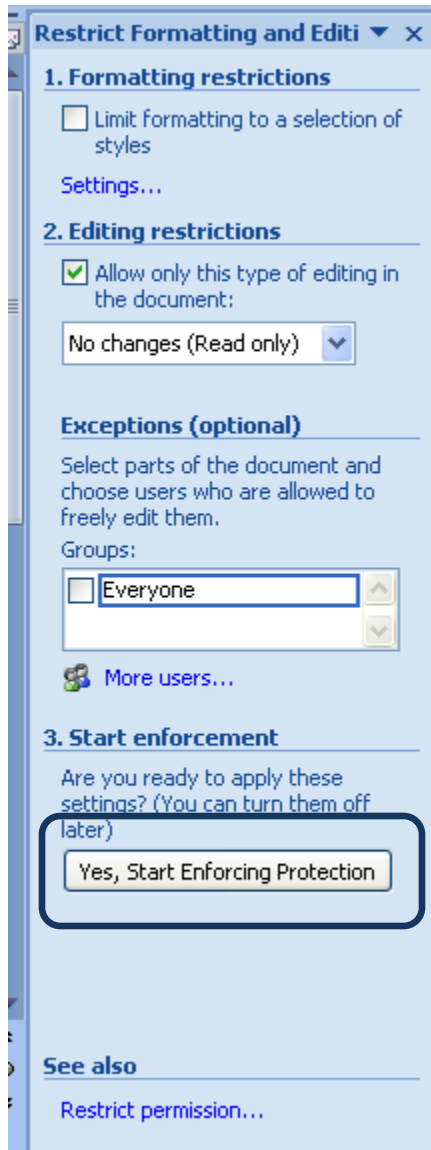
3. **Click** the ***drop-down arrow*** and **select** ***Filling in forms.*** (Figure 23)

Figure 23



4. Click the **Yes, Start Enforcement Protection** button to start document protection. (Figure 24)

Figure 24



5. The Start Enforcing Protection dialog window appears. Create a password and **click OK**. Save and close the document. (Figure 25)

Figure 25



When the document is re-opened the form will be protected so that you can only add data into the form via the fill-in fields, the other data cannot be edited within the document.

This along with other Microsoft training materials can be found on the Training and Development website at the following URL:

<http://www.uncfsu.edu/itts/training/>