

Microsoft Excel XP

Workbook - Intermediate Level



SAMPLE

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Installing the Sample Files into the Hard Disk

Installing the sample files

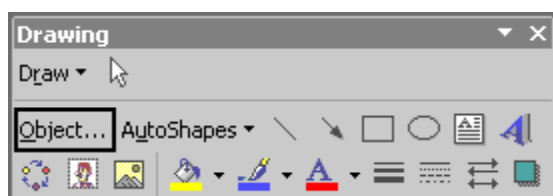
- Use Windows Explorer to create a folder called **Excel XP Intermediate Samples**, in the **My Documents** folder.
- Copy the sample files for this course to the **My Documents\Excel XP Intermediate Samples** folder. If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.

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Viewing Worksheets

Customizing a Toolbar

- Start Excel 2002.
- Choose **View > Toolbars > Drawing**.
- Right-click on the **Drawing** toolbar, and choose **Customize** from the popup menu.
- Click on the **Commands** tab.
- Select **Insert** from the **Categories** list box, and locate the **Object** command in the **Commands** list box.
- Click and drag the **Object** command onto the **Drawing** toolbar:



Hiding Workbooks and Worksheets

- Open the *inventory.xls* file from the Excel XP Intermediate Samples folder.
- Click on the **Inventory** sheet tab.
- Choose **Format > Sheet > Hide** to hide the Worksheet.
- Choose **Window > Hide** to hide the Workbook.
- Choose **Window > Unhide**.
- Select *inventory.xls*, and click **OK** to display the Workbook.
- Choose **Format > Sheet > Unhide**.
- Select **Inventory**, and click **OK** to display the Worksheet.
- Close the *inventory.xls* file without saving.

Freezing Panes

- Open the *inventory.xls* file from the Excel XP Intermediate Samples folder.
- Select cell **B2**.
- Choose **Window > Freeze Panes** to freeze the panes.
- Press and hold the **Down Arrow** key to see the effect of the frozen panes:

	A	B	C	D
1	Type	Item	On Hand	
7	Candy	7873	87	
8	Magazines	2396	12	
9	Newspapers	5271	9	
10	Magazines	2904	35	
11	Candy	8762	93	
12				
13				

- Choose **Edit > Go To**, and enter **B2** in the **Reference** text box, and click **OK**.
- Press and hold the **Right Arrow** key to see the effect of the frozen panes:

	A	D	E	F
1	Type			
2	Books			
3	Magazines			
4	Newspapers			
5	Books			
6	Books			
7	Candy			
8	Magazines			
9	Newspapers			
10	Magazines			
11	Candy			
12				

- Choose **Window > Unfreeze Panes**.
- Close the *inventory.xls* file without saving.

Grouping and Ungrouping Worksheets

- Open the *Format.xls* file from the Excel XP Intermediate Samples folder.
- Click on the **Quarter 3** sheet tab. (Notice that there is no formatting on this sheet.)
- Click on the **Quarter 1** sheet tab. (Notice that there is no formatting on this sheet.)
- Hold the **Ctrl** key, and click on the **Quarter 3** sheet tab.
- Select cell **A1**.
- Click on the **Bold** icon on the **Formatting** toolbar.
- Click on the **Font Color** down arrow on the **Formatting** toolbar, and select a **red** color:

	A	B	C	D
1	Computer Sales - Quarter 1			
2	(January to March)			
3				

- Right-click on the **Quarter 1** sheet tab, and choose **Ungroup Sheets** from the popup menu.
- Click on the **Quarter 3** sheet tab to see that cell **A1** has the same formatting as the **Quarter 1** sheet:

	A	B	C	D
1	Computer Sales - Quarter 3			
2	(July to September)			
3				

- Close the **Format.xls** file without saving.

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More Formatting Techniques

Creating and Applying a Formatting Style

- Open the **Format.xls** file from the Excel XP Intermediate Samples folder.
- Click on the **Quarter 4** sheet tab.
- Select cell **B4**.
- Choose **Format > Style**.
- Type **ColumnLabel** into the **Style name** dropdown list box, and click **Add**.
- Click **OK**.
- Click on the **Quarter 1** sheet tab.
- Select range **B4:H4**.
- Choose **Format > Style**.
- Click on the **Style name** down arrow, and select **ColumnLabel**.

Note: If you do not see the above style, choose the **Normal** style.

- Click **OK**:

	A	B	C	D	E	F	G	H
1	Computer Sales - Quarter 1							
2	(January to March)							
3								
4	Salesperson	<i>Desktop</i>	<i>lotebooks</i>	<i>Monitors</i>	<i>Printers</i>	<i>Scanners</i>	<i>otal Sales</i>	<i>Sales %</i>
5	Ben	95	18	34	70	56	161720	0.107395
6	Frank	57	47	66	19	97	183440	0.121819

- Select cell **B4**.
- Click on the **Format Painter** icon on the **Formatting** toolbar.
- Click on cell **A4** to apply the format:

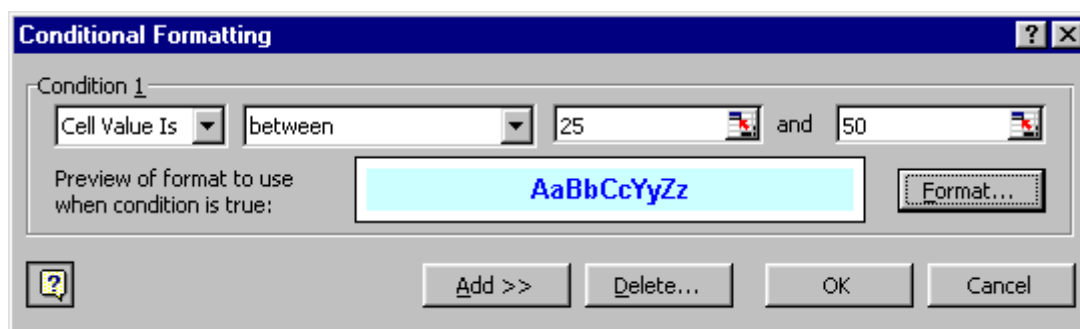
	A	B	C	D	E	F	G	H
1	Computer Sales - Quarter 1							
2	(January to March)							
3								
4	<i>Salesperson</i>	<i>Desktop</i>	<i>lotebooks</i>	<i>Monitors</i>	<i>Printers</i>	<i>Scanners</i>	<i>otal Sales</i>	<i>Sales %</i>
5	Ben	95	18	34	70	56	161720	0.107395
6	Frank	57	47	66	19	97	183440	0.121819

- Close the **Format.xls** file without saving.

Using Conditional Formatting

- Open the **Format.xls** file from the Excel XP Intermediate Samples folder.

- Click on the **Quarter 2** sheet tab.
- Select range **B5:F 10**.
- Choose **Format > Conditional Formatting**.
- In **Condition 1**, enter the following criteria:
Cell Value is between 25 and 50
- Click on the **Format** button.
- Click on the **Font** tab, select **Bold** in the **Font style** list box, and select **blue** from the **Color** popup menu.
- Click on the **Patterns** tab, and select **light turquoise** from the **Cell shading color**.
- Click **OK** to close the **Format Cells** dialog box. (An example of a **Conditional Formatting** dialog box is below):



- Click **OK**.
- Deselect the range to see the conditional formatting:

	A	B	C	D	E	F	G	H
1	Computer Sales - Quarter 2							
2	(April to June)							
3								
4	Salesperson	Desktop	Notebooks	Monitors	Printers	Scanners	Total Sales	Sales %
5	Ben	56	49	70	34	57	\$ 185,840	15.1%
6	Frank	27	50	47	23	41	\$ 145,320	11.8%
7	Mary	56	19	49	58	45	\$ 126,800	10.3%
8	Nancy	45	13	52	29	45	\$ 100,400	8.1%
9	Tom	92	51	77	55	23	\$ 228,360	18.5%
10	Wendy	84	11	47	11	53	\$ 131,160	10.6%
11								
12	Total	360	193	553	746	1,299	\$1,238,680	100.0%
13								

- Close the **Format.xls** file without saving.

Hiding and Displaying Cells

- Open the **Format.xls** file from the Excel XP Intermediate Samples folder.
- Click on the **Quarter 3** sheet tab.
- Click and drag the right border of column **F** to the right border of column **A** to hide the columns:

	A	G	H	I
1	Computer Sales - Quarter 3			
2	(July to September)			
3				
4	Salesperson	Total Sales	Sales %	
5	Ben	86560	0.09043	
6	Frank	113160	0.11822	
7	Mary	121880	0.12733	
8	Nancy	145720	0.152236	
9	Tom	145720	0.152236	
10	Wendy	125920	0.13155	
11				
12	Total	957200	1	

- Select column **A** and column **G**.
- Choose **Format > Column > Unhide** to display the columns.
- Close the **Format.xls** file without saving.

SAMPLE

More Formulas and Functions

Using the Series Command

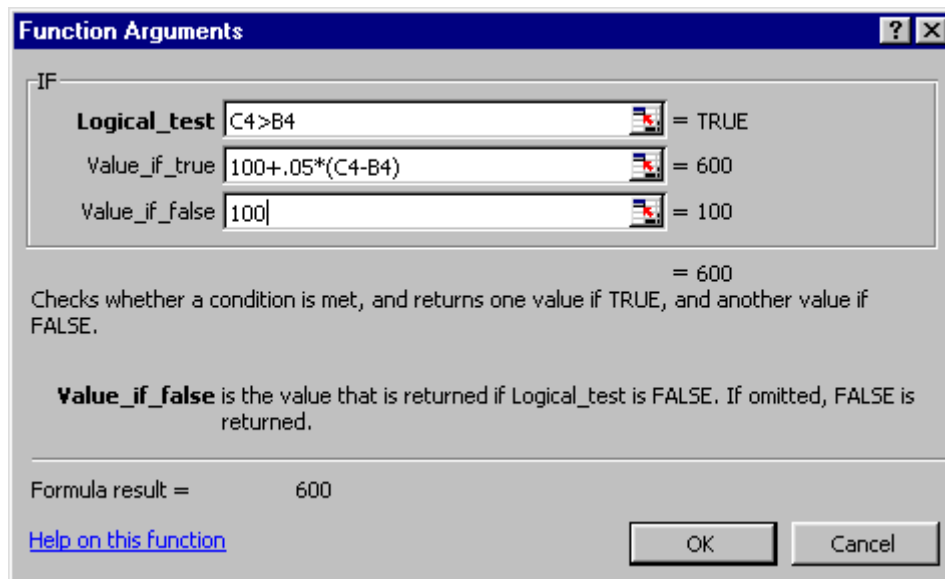
- Click on the **New** icon on the **Standard** toolbar to create a new Workbook.
- Type the number **3** into cell **A1**, and press the **Enter** key.
- Type the number **6** into cell **A2**, and press the **Enter** key.
- Select range **A1:A2**.
- Drag the bottom-right corner to cell **A8**.
- Type **January** into cell **C1**.
- Drag the bottom-right corner of cell **C1** to cell **C12**:

	A	B	C	D
1	3		January	
2	6		February	
3	9		March	
4	12		April	
5	15		May	
6	18		June	
7	21		July	
8	24		August	
9			September	
10			October	
11			November	
12			December	

- Close the file without saving.

Using Insert Function Wizard

- The objective of this exercise is to calculate the Bonus for the sales staff. All sales staff will receive a bonus of \$100. In addition, those who have exceeded their targets will receive a bonus of 5%. Our bonus calculation will say that if Actual Sales exceeds Forecast Sales, the salesperson will receive \$100 plus 5% of the excess; otherwise, the salesperson will receive just \$100.
- Open the **Bonus.xls** file from the Excel XP Intermediate Samples folder.
- Select cell **D4**.
- From the main menu, choose **Insert > Function**.
- Choose the **Logical** category.
- Select the **IF** function.
- Click **OK** to display the **Function Arguments** dialog box.
- Enter the following arguments:



- Click **OK**.
- Copy the contents of cell **D4** to range **D5:D7**:

	A	B	C	D
1	Annual Bonus Calculations			
2				
3	Salesperson	Forecast Sales	Actual Sales	Bonus
4	Murray	50000	60000	600
5	Smith	45000	60000	850
6	Green	40000	45000	350
7	Jones	50000	45000	100
8				

- Close the *Bonus.xls* file without saving.

Correcting Formulas

- Open the *CorrectFormula.xls* file from the Excel XP Intermediate Samples folder.
- Choose **Tools > Error Checking**.
- Click on the **Help on this error**, and read the detailed explanation of the error.
- From the **Error Checking** dialog box, click **Resume**.
- Click on the **Edit in Formula Bar** to see the formula. Notice that the highlighted range does not include cell **B7**.
- From the **Error Checking** dialog box, click **Resume**.
- Click on the Update Formula to Include Cells button.
- Click **OK**.
- Choose **View > Toolbars > Formula Auditing**.
- Select cell **G9**.
- Click on the Trace Precedents icon on the Formula Auditing toolbar.

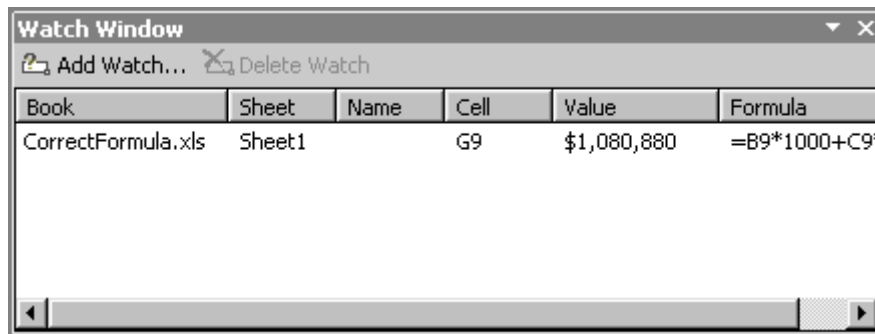
- Click on the **Trace Precedents** icon again.
- Click on the **Trace Dependents** icon on the **Formula Auditing** toolbar:

	A	B	C	D	E	F	G	H
1	Salesperson	Desktop	Notebooks	Monitors	Printers	Scanners	Total Sales	Sales %
2	Ben	95	18	34	70	56	\$161,720	15.1%
3	Frank	57	47	66	19	97	\$183,440	17.2%
4	Mary	93	29	14	81	31	\$170,720	16.0%
5	Nancy	60	52	38	8	70	\$178,800	16.7%
6	Tom	96	43	29	39	87	\$203,240	19.0%
7	Wendy	86	17	89	44	78	\$170,360	15.9%
8								
9	Total	407	286	270	261	419	\$1,068,200	100.0%
10								

- Click on the **Remove All Arrows** icon.
- With cell **G9** selected, click on the **Evaluate Formula** icon on the **Formula Auditing** toolbar.
- Click **Step In**, and click **Evaluate** to evaluate the secondary formula.
- Click **Step Out**, and click **Evaluate** to evaluate one step of the primary formula.
- Continue clicking the **Evaluate** button until you have step through the formula.
- Click **Close**.
- Close the *CorrectFormula.xls* file without saving.

Using the Watch Window

- Open the *CorrectFormula.xls* file from the Excel XP Intermediate Samples folder.
- Select cell **G9**.
- Choose **Tools > Formula Auditing > Show Watch Window**.
- Click on the **Add Watch** icon.
- Click **Add**.
- Select cell **C2**.
- Enter the number 25, and press the **Enter** key. Notice that the value in the **Watch Window** changes.
- Experiment with changing other values, and see the effect in the **Watch Window**.



- Close the Watch Window.
- Close the **CorrectFormula.xls** file without saving.

SAMPLE

Database and List Management

Sorting a Database

- Open the *inventory.xls* file from the Excel XP Intermediate Samples folder.
- Select cell **A1**.
- Choose **Data > Sort**.
- Click on the **Sort by** down arrow, and select **Type**. Click on the **Descending** radio button.
- Click on the **They by** down arrow, and select **Item**. Click on the **Ascending** radio button.
- Click the **Header row** radio button.
- Click **OK** to sort:

	A	B	C	
1	Type	Item	On Hand	
2	Newspapers	5271	9	
3	Newspapers	8921	22	
4	Magazines	2396	12	
5	Magazines	2904	35	
6	Magazines	4786	34	
7	Candy	7873	87	
8	Candy	8762	93	
9	Books	4173	95	
10	Books	4392	223	
11	Books	6356	212	
12				

- Choose **Data > Subtotals**.
- Select **Type** from the **At each change in** dropdown list.
- Select **Sum** from the **Use function** dropdown list.
- Select only the **On Hand** check in the **Add subtotal to** list box. (Deselect the other items if needed.)
- Select the **Replace current subtotals and the Summary below data** checkboxes.
- Click **OK** to create subtotals:

SAMPLE

	A	B	C
1	Type	Item	On Hand
2	Newspapers	5271	9
3	Newspapers	8921	22
4	Newspapers Total		31
5	Magazines	2396	12
6	Magazines	2904	35
7	Magazines	4786	34
8	Magazines Total		81
9	Candy	7873	87
10	Candy	8762	93
11	Candy Total		180
12	Books	4173	95
13	Books	4392	223
14	Books	6356	212
15	Books Total		530
16	Grand Total		822
17			

- Close the *inventory.xls* file without saving.

Using AutoFilters

- Open the *sales.xls* file from the Excel XP Intermediate Samples folder.
- Choose **Data > Filter > AutoFilter** to turn on AutoFilter.
- Select **Top 10** from the **Desktop** dropdown list.
- Enter the following criteria:
Top 5 Items

	A	B	C	D	E	F
1	Salespersc	Desktc	Noteboo	Monito	Printe	Scanne
8	Jim	95	18	34	70	56
10	Liz	93	29	14	81	31
12	Bobby	96	43	29	39	87
13	Ken	86	17	89	44	78
18	Kim	92	51	77	55	23
26						

- Select **All** from the **Desktop** dropdown list.
- Select Custom from the Notebook dropdown list.
- Enter the following criteria: Show rows where Notebooks
Is greater than or equal to 50
Or
Is less than or equal to 10
- Click **OK**:

	A	B	C	D	E	F
1	Salespersc	Desktc	Notebool	Monito	Printe	Scanne
5	Nancy	16	60	35	17	36
11	Rachel	60	52	38	8	70
15	Alison	27	50	47	23	41
18	Kim	92	51	77	55	23
21	Carey	81	7	45	23	26
26						

- Choose **Data > Filter > AutoFilter** to turn off AutoFilter.
- Close the *sales.xls* file without saving.

Using Advanced Filter

- Open the *sales.xls* file from the Excel XP Intermediate Samples folder.
- Select range **A1:A5**.
- Choose **Insert > Rows**.
- Select range **A6:F6**.
- Click on the **Copy** icon on the **Standard** toolbar.
- Select cell **A1**.
- Click on the **Paste** icon on the **Standard** toolbar.
- Select cell **B2**, and enter the following
>**80**
- Select cell **C3**, and enter the following
>**50**
- Select cell **D4**, and enter the following
>**75**

	A	B	C	D	E	F
1	Salesperson	Desktop	Notebooks	Monitors	Printers	Scanners
2		>80				
3			>50			
4				>75		
5						
6	Salesperson	Desktop	Notebooks	Monitors	Printers	Scanners
7	Ben	41	11	30	16	88
8	Frank	17	28	50	94	58

- Select cell **A6**.
- Choose **Data > Filter > Advanced Filter**.
- Select the **Copy to another location** radio button.
- In the **List range** text box, check to see that the range, **\$A\$6:\$F\$30** is entered.
- In the **Criteria range** text box, click on the **Minimize Dialog** icon, and select range **A1:F4**.
- Press the **Enter** key.

- In the **Copy to** text box, click on the **Minimize Dialog** icon, and select cell **H6**.
- Press the **Enter** key.
- Click **OK**:

	H	I	J	K	L	M
6	Salespers	Desktop	Notebook	Monitors	Printers	Scanners
7	Nancy	16	60	35	17	36
8	Jim	95	18	34	70	56
9	Liz	93	29	14	81	31
10	Rachel	60	52	38	8	70
11	Bobby	96	43	29	39	87
12	Ken	86	17	89	44	78
13	Kim	92	51	77	55	23
14	Tyler	84	11	47	11	53
15	Carey	81	7	45	23	26
16	Rita	84	23	20	21	53
17	John	85	17	79	25	15
18	Bill	82	15	70	52	13

- Close the *sales.xls* file without saving.

Adding a new Record using a Data Form

- Open the *inventory.xls* file from the Excel XP Intermediate Samples folder.
- Select cell **A1**.
- Choose **Data > Form** to display the **Data Form** for the list.
- Click on the **New** button.
- Enter the following record:

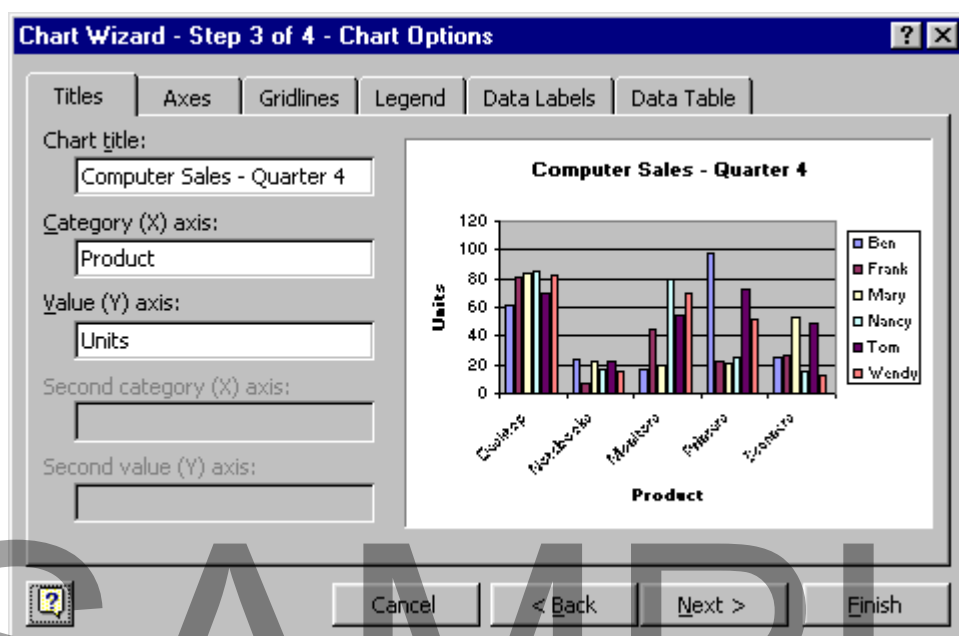
The screenshot shows a dialog box titled "Inventory" with a question mark and close button in the title bar. It contains three input fields: "Type:" with a dropdown menu showing "Books", "Item:" with the text "1234", and "On Hand:" with the text "8". To the right of these fields are three buttons: "New Record", "New", and "Delete".

- Press the **Enter** key.
- Click **Close** to close the **Data Form**.
- Close the *inventory.xls* file without saving.

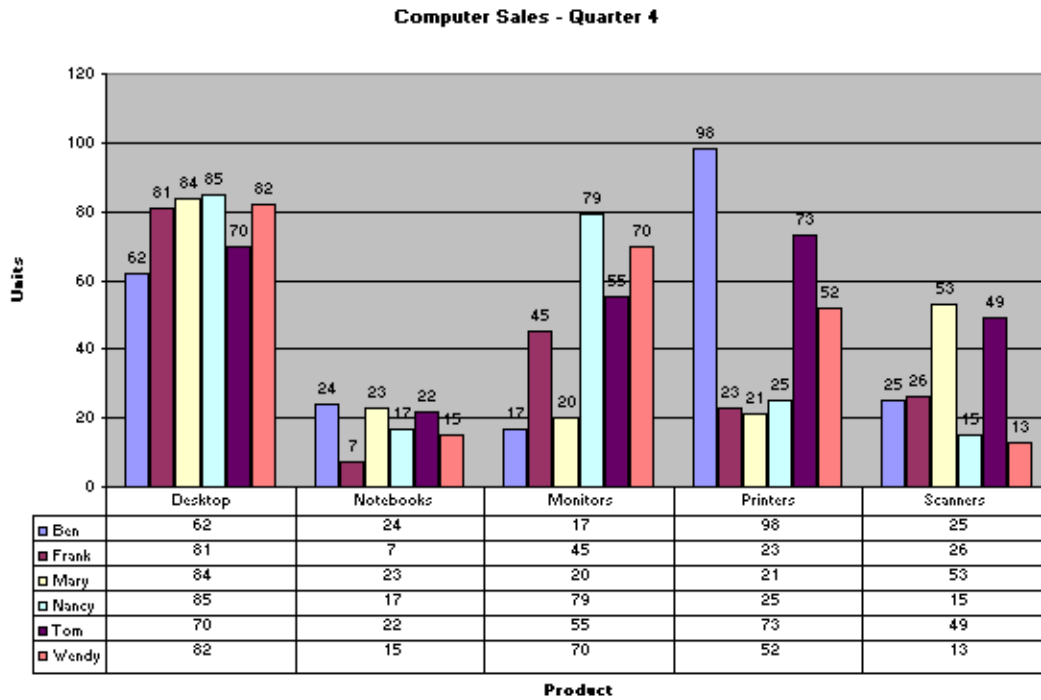
Charts

Creating a Chart

- Open the **Format.xls** file from the Excel XP Intermediate Samples folder.
- Click on the **Quarter 4** sheet tab.
- Select range **A4:F10**.
- Click on the **Chart Wizard** icon on the **Standard** toolbar.
- Select **Column** from the **Chart Type** list box.
- Select **Clustered Column** (the first sub-type) from the **Chart sub-type**.
- Click and hold on the **Press and Hold to View Sample** button to preview the chart.
- Click **Next**.
- Select the **Rows** radio button to display the series in rows.
- Click **Next**.
- Click on the **Titles** tab, and enter the following titles:



- Click on the **Legend** tab, and deselect the **Show legend** checkbox.
- Click on the **Data Labels** tab, and select the **Value** checkbox.
- Click on the **Data Table** tab, select the **Show data table** checkbox, and select the **Show legend keys**.
- Click **Next**.
- Select the **As new sheet** radio button, and enter **Q4 Graph** in the text box.
- Click **Finish**:



- Click on the chart, and display the **Chart** toolbar.
- Select **Chart Area** from the **Chart Objects** dropdown list.
- Click on the **Format Chart Area** icon to format the Chart Area.
- Select the **Shadow** checkbox.
- Click **OK** to apply the format.
- Select other chart object, and click the **Format Chart Object** icon to see the format options for that chart object.

Note: Open the *Chart.xls* file in the **Excel XP Intermediate Samples** folder, and click on the **Q4 Graph** sheet tab to see an example.

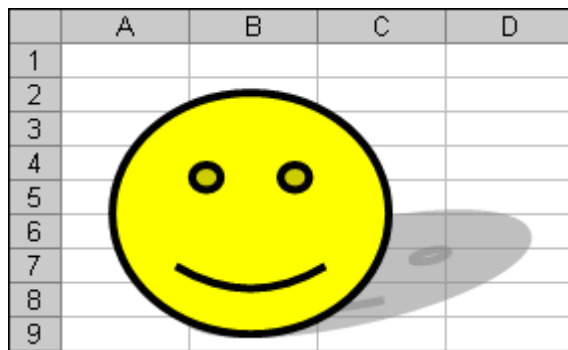
- Close the *Format.xls* file without saving.

SAMPLE

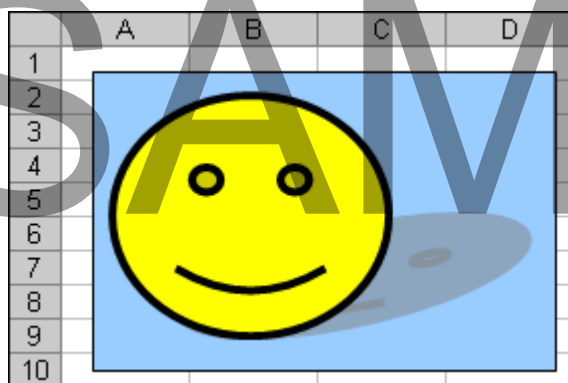
Drawing and Picture Objects

Drawing AutoShapes

- Click on the **New** icon on the **Standard** toolbar to create a new Workbook.
- Click on the **Drawing** icon on the **Standard** toolbar to display the **Drawing** toolbar (if it is not already displayed).
- From the **Drawing** toolbar, click on the **AutoShape** icon, select **Basic Shapes**, and choose **Smiley Face**.
- From the Worksheet, click and drag the mouse to draw the object.
- Select the **Smiley Face** object.
- From the **Drawing** toolbar, click on the **Fill Color**, and select **Yellow**. Click on the **Line Style** icon, and select **3 pt**. Click on the **Shadow Style** icon, and select **Shadow Style 4**:



- Click on the **Rectangle** icon on the **Drawing** toolbar.
- From the Worksheet, click and drag the mouse to draw a **Rectangle** such that it completely covers the **Smiley Face**.
- Select the **Rectangle** object.
- From the **Drawing** toolbar, click on the **Fill Color**, and select **Pale Blue**.
- Right-click on the **Rectangle** object, choose **Order > Send to Back**:



- With the **Rectangle** object selected, hold down the **Shift** key, and click on the **Smiley Face** object to select both objects.
- Right-click on over the selection, and choose **Grouping > Group**.

- Click on the **Text Box** icon on the **Drawing** toolbar.
- From the Worksheet, click and drag the mouse to draw a **Text Box** in another area of the Worksheet.
- Type This is a Smiley Face.
- Click on the **Text Box** border, and resize the text box so that the text fits.
- Select the **Rectangle** object, and drag to move the object so that it overlaps the **Text Box**. (Notice that the Smiley Face and the Rectangle objects move together):



Note: Open the *Drawing.xls* file in the **Excel XP Intermediate Samples** folder to see an example.

- Close the file without saving.

SAMPLE

Excel 2002 and Other Applications

Converting a Lotus 1-2-3 File

- Open the **LOTUS.wk4** file from the **Excel XP Intermediate Samples** folder. You should be able to open this Lotus 1-2-3 formatted file without problems.
- Choose **File > Save As**, and save the file in Excel (**.xls**) format.
- Close the file.

Using Paste Special

- Open the **Format.xls** file from the Excel XP Intermediate Samples folder.
- Click on the **Quarter 4** sheet tab.
- Select cell **G12**.
- Click on the **Copy** icon on the **Standard** toolbar.
- Select cell **A14**.
- Choose **Edit > Paste Special**.
- Select the **Values and number formats** radio button.
- Click **OK**. (Notice that the formula in cell **G12** was changed into a value, and only the number formatting was copied.)
- Experiment with the other paste options.
- Close the **Format.xls** file without saving.

Embedding Objects

- Click on the **New** icon on the **Standard** toolbar to create a new Workbook.
- Select cell **A1**.
- Choose **Insert > Object**, and click on the **Create from File** tab.
- Click on the **Browse** button, and select the **Sample.doc** file from the **Excel XP Intermediate Samples** folder.
- Click **Insert**.
- Deselect the **Link to file** and **Display as icon** checkboxes.
- Click **OK**.
- Double-click on the embedded **Word** document to edit it in **Excel**.
- Select and delete the address or make other significant changes.
- Open the **Sample.doc** file in Microsoft Word to see that your changes did not affect to the original document.
- Close the files without saving.

Linking Objects

- Open the **Chart.xls** file from the Excel XP Intermediate Samples folder.
- Click on the **Q4 Graph** sheet tab, and select the chart.
- Click on the **Copy** icon on the **Standard** toolbar.
- Start Microsoft Word.
- In a new document, choose **Edit > Paste Special**.
- Select the **Paste link** radio button.
- Select **Microsoft Excel Chart Object** from the **As** list box.
- Click **OK**.
- Save the Word document as **ChartLinkdoc.doc** in the Excel XP Intermediate Samples folder.
- Switch to the **Chart.xls** file in Microsoft Excel.
- From the **Chart** toolbar, click on the **Data Table** icon to hide it.
- From the **Chart** toolbar, click on the **Legend** icon to display it.
- Switch back to **Microsoft Word**.
- Right-click on the chart, and select **Update Link**. Notice that the changes made in Excel is reflected in the Word document.

Note: Using Word, open the **ChartLink.doc** file in the **Excel XP Intermediate Samples** folder to see an example.

- Close the files without saving.

Inserting a Hyperlink

- Click on the **New** icon on the **Standard** toolbar to create a new Workbook.
- Select cell **A1**.
- Choose **Insert > Hyperlink**.
- From the Link to area, select Existing File or Web Page.
- In the **Text to display** text box, enter **Test Link**.
- In the Look in area, select the **Sample.doc** file from the Excel XP Intermediate Samples folder.
- Click **OK**.
- From the Worksheet, click on the cell **A1** to display the **Sample.doc** file in Microsoft Word.
- Close the file without saving.

Managing Links

- Click on the **New** icon on the **Standard** toolbar to create a new Workbook.
- Select cell **A1**.
- Choose **Insert > Object**, and click on the Create from File tab.

- Click on the **Browse** button, and select the **Sample.doc** file from the **Excel XP Intermediate Samples** folder.
- Click **Insert**.
- Select the **Link to file** checkbox.
- Click **OK**.
- Double-click on the linked document to display it in **Microsoft Word**.
- Switch back to Microsoft Excel, and choose **Edit > Links**.
- Click on the **Change source** button.
- Look at the link syntax, and click **Cancel**.
- Click on the **Break Link** button.
- Click **Break Links** to remove the link.
- Click **Close** to close the **Edit Links** dialog box.
- Double-click on the document. Notice that the **Format Picture** dialog box appears instead of displaying the document in Microsoft Word.
- Close the files without saving.

SAMPLE