

# The Data Mix and Mingle How To Move Your Data Between Applications

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*We are happy to bring to you today information on moving your precious work product between the Microsoft family of applications. For the purpose of this overview supporting documentation, the copyrighted and trademarked products Microsoft Office, Microsoft Excel, Microsoft Word, Microsoft Outlook, Microsoft PowerPoint, Microsoft Access and Microsoft Visio may be referred to in their abbreviated forms: Office, Word, Outlook, Excel, PowerPoint, Access and Visio.*

## I. INTRODUCTION

The increase in efficiency and productivity in a law firm is and should be of concern to all its members, whether the firm is billing hourly or moving to the increasingly popular flat fee basis. Regardless of the your practice area, understanding your valuable information and how to move it around is a responsibility of everyone who lays fingers to keyboard, whether you have an on-site computer guru or not.

The act of copying/pasting has been adopted as a regular practice by most, yet few have looked into the options available as variants. In this session we hope to shed some light on the often frustrating concept of moving information quickly and cleanly between the Microsoft Office key players.

## II. MICROSOFT WORD AS THE COLLECTOR

Since the word processor is the usual destination for information gathering and formatting in the oxymornical all-night brief, this is the best place to start. We will concentrate on bringing information “into” Word.

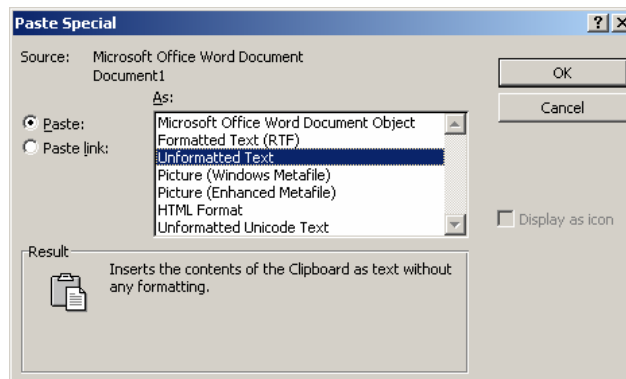
### A. **Understanding The Consequences Of Copy/Paste**

Copy/paste. You know how to do it. You’ve memorized the keystrokes. But let’s take a look at some of the options you’ve probably ignored.

#### 1. **Formatting**

##### a. **That Special Flavor Of Paste**

After copying from one page or another document, your first reaction may be to hit ctrl+v. Hold back a second and let’s consider what you’re doing. You’re about to paste everything that you’ve gathered and almost assuredly all of its formatting. Should your verbiage be all that you need, consider the Edit/Paste Special menu option and take a look at some of the flavors therein.



Unformatted Text may become your new favorite tool, allowing your paste to ‘absorb the formatting of the destination paragraph.’

## b. Linking And Consequences

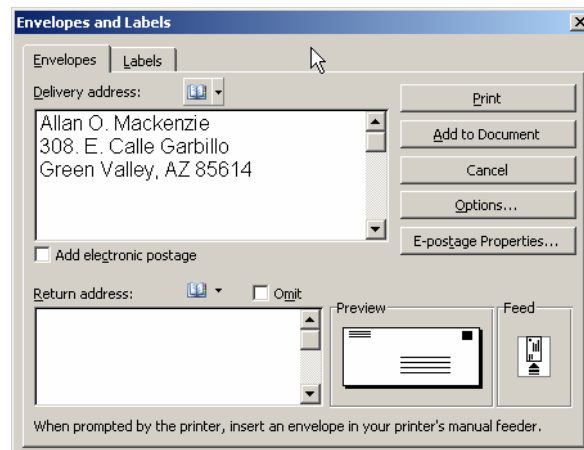
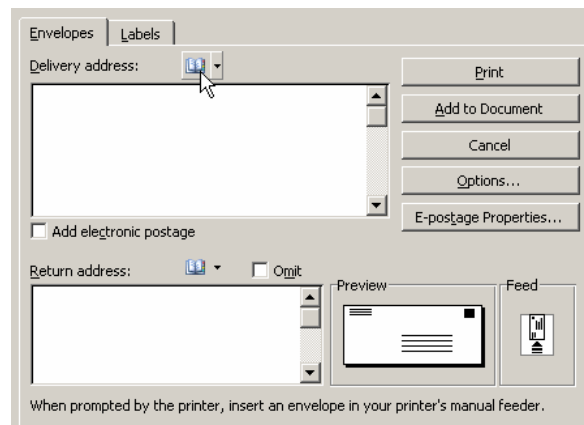
While pasting, linking is sometimes an option. This means that the pasted text has a live connection to its original source. But this dependency, while good for some forms of document assembly can bite you in the rear when the document you created no longer knows where the linked document is.....like when you email it. Consider breaking the link by highlighting the linked text and using Ctrl+Shift+F9 to break that family tie and move on. Not sure if text is linked? Try Alt+F9 to reveal those links

## B. The Relationship Between Word And Microsoft Outlook

Much of what you've already worked so hard to accumulate in terms of data may be those valuable names and addresses with Microsoft Outlook's contact list. There are direct links available between Microsoft Word and Outlook

### 1. Inserting Address In Envelopes

Microsoft Word's envelopes and labels tool for instance, has an immediate cross reference link to Microsoft Outlook contacts.



## 2. **Inserting Address Information Into Your Documents.**

Did you know, however, that this option is also available for documents? There are several ready-made options.

### a. **Copying/Pasting Entire Address Card To Your Document**

Within Outlook contacts, click on a card and use the Edit/Copy command. Back in Word, the regular old paste command yields something like this:



Allan O  
Mackenzie.msg

But try that again with Edit/Paste Special/Unformatted! The result is a little different!

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### b. **InsertAddress Field/Button**

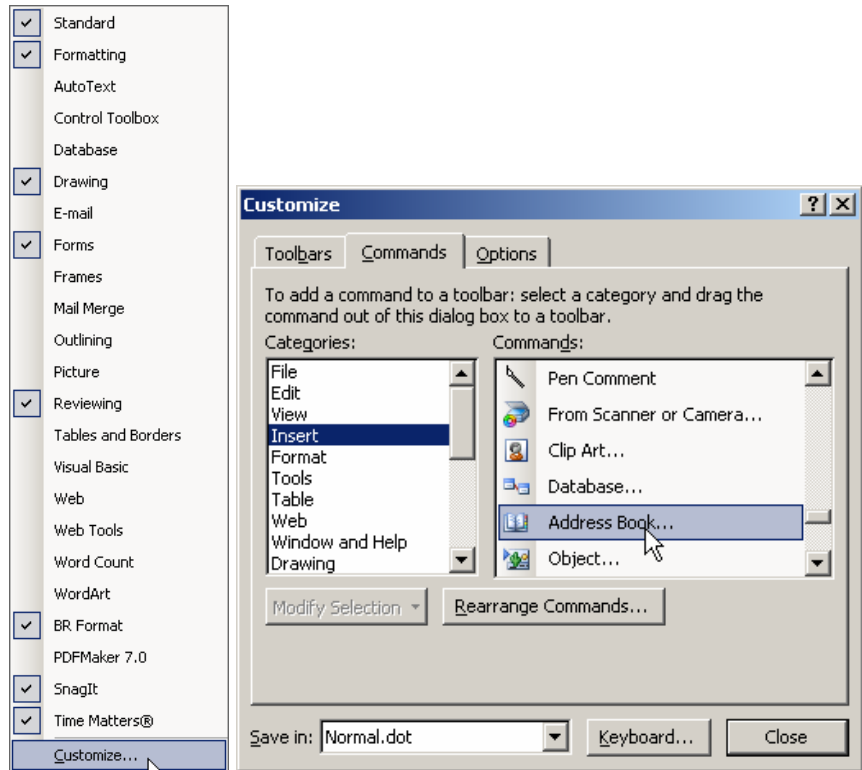
Similar to the envelope tool, Word allows you to add address information in any document using the Address Book tool button:



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Green Valley, AZ 85614  
United States of America

### c. **Adding The Addressbook Button To Your Toolbar**

Don't see that toolbar button? Go to the View/Toolbars menu and choose customize. Use the Inert category, find the Address Book icon and drag it to your Toolbar.



**d. Understanding The Layout Auto Text Entry Of The Address Insert**

Unhappy with the address results? Don't care about what country you the address is in? Be sure to check the Microsoft Knowledge base for Article 212345 on modifying a special autotext entry called AddressLayout.

**i. To Create a New Format**

To create a new address format, follow these steps:

1. In a new Word document, type the predefined address property names (in uppercase letters) in the format that you want to set up. For example, type the following

```
{<PR_GIVEN_NAME>} {<PR_SURNAME>}<ENTER>
{<PR_COMPANY_NAME>}<ENTER>
{<PR_STREET_ADDRESS>}<ENTER>
{<PR_LOCALITY>}, {<PR_STATE_OR_PROVINCE>}
{<PR_POSTAL_CODE>}<ENTER>
```

-or-

```
{<PR_GIVEN_NAME>} {<PR_SURNAME>}<ENTER>
{<PR_COMPANY_NAME>}<ENTER>
```

{<PR\_POSTAL\_ADDRESS>}<ENTER>

where <ENTER> indicates that you should press ENTER. Also, type the brace characters ({ and }) on the keyboard and do not confuse them with field braces (CTRL+F9). When you use the braces with the address layout fields and a field is blank when you import the address, Word automatically suppresses the blank line.

2. Select this text.
3. On the Insert menu, point to AutoText, and then click New.
4. For the name, type AddressLayout.

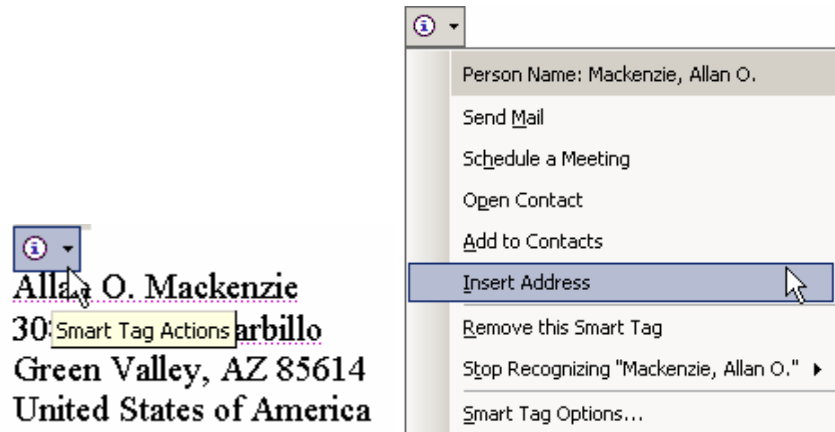
Below you can see all of the valuable bits you can gather from an Outlook contact card automatically.

AddressLayout Field	Contacts (OAB) or Personal Address Book (PAB)	OAB	PAB
	Field Name		
<b>Name Fields</b>			
<PR_DISPLAY_NAME>	Subject (by default, First Last Middle Suffix) (OAB) First Last or Last, First (PAB, depending on setting)	X	X
<PR_GIVEN_NAME>	First	X	X
<PR_SURNAME>	Last	X	X
<PR_TITLE>	Job Title (OAB) Title (PAB)	X	X
<PR_DISPLAY_NAME_PREFIX>*	Title (OAB)	X	?
<b>Company Fields</b>			
<PR_COMPANY_NAME>	Company	X	X
<PR_DEPARTMENT_NAME>	Department	X	X
<PR_OFFICE_LOCATION>	Office Location (OAB) Office (PAB)	X	X
<PR_ASSISTANT>	Assistant	X	X
<b>Address Fields</b>			
<PR_STREET_ADDRESS>	Street	X	X
<PR_LOCALITY>	City	X	X
<PR_STATE_OR_PROVINCE>	State/Province	X	X
<PR_POSTAL_CODE>	ZIP/Postal code	X	X
<PR_COUNTRY>	Country	X	X

<b>AddressLayout Field</b>	<b>Contacts (OAB) or Personal Address Book (PAB) Field Name</b>	<b>OAB</b>	<b>PAB</b>
<PR_POSTAL_ADDRESS>	Full address, including country only if it's not your own		
<b>Phone Fields</b>			
<PR_OFFICE_TELEPHONE_NUMBER>	Business	X	X
<PR_OFFICE2_TELEPHONE_NUMBER>	Business 2	X	X
<PR_PRIMARY_TELEPHONE_NUMBER>	Phone number (on Business tab)		X
<PR_BUSINESS_FAX_NUMBER>	Business Fax	X	
<PR_PRIMARY_FAX_NUMBER>	Fax		X
<PR_ASSISTANT_TELEPHONE_NUMBER>	Assistant (on Phone pick list) (OAB) Assistant (on Phone Numbers tab) (PAB)	X	X
<PR_BEEPER_TELEPHONE_NUMBER>	Pager	X	X
<PR_CAR_TELEPHONE_NUMBER>	Car	X	
<PR_CELLULAR_TELEPHONE_NUMBER>	Mobile	X	X
<PR_RADIO_TELEPHONE_NUMBER>	Radio	X	
<PR_HOME_TELEPHONE_NUMBER>	Home	X	X
<PR_HOME2_TELEPHONE_NUMBER>	Home 2	X	X
<PR_HOME_FAX_NUMBER>	Home Fax	X	
<PR_OTHER_TELEPHONE_NUMBER>	Other	X	
<b>Other Fields</b>			
<PR_EMAIL_ADDRESS>	E-mail Address	X	X
<PR_ADDRTYPE>	E-mail Type	X	X
<PR_COMMENT>	Notes		X

**e. Going Between Outlook And Word Through Smart Tags**

Reverse transmission of data is also possible through the use of smart tags. For instance, as you pass your mouse over a name and address typed into a Word document, there are options available to you:



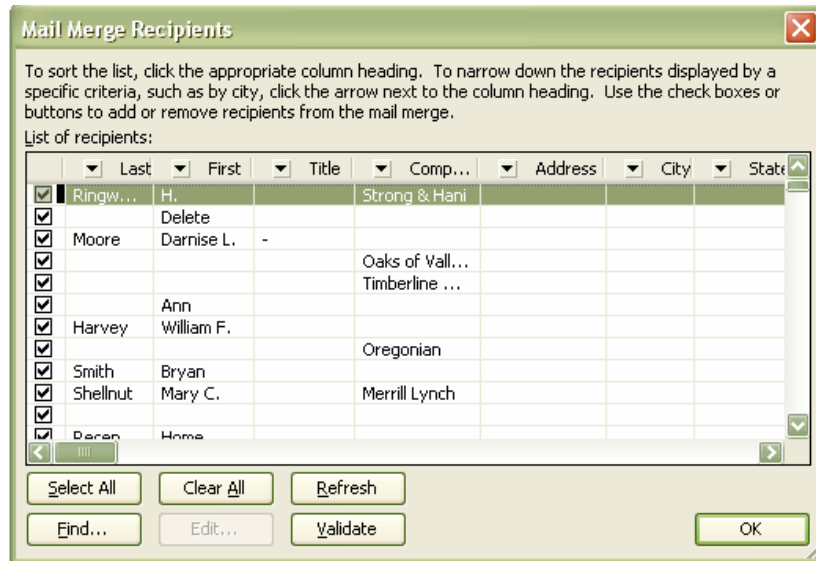
These options show the direct link available to Microsoft Outlook, assuming SmartTags are turned on in Tools/Auto Correct.

### 3. Mail Merge Directly From Outlook

Once upon a time, Mail Merge was a complicated mix of data files and forms. Now thanks to wizards, you can use the data that already exists in Outlook. Just begin the mail merge wizard\*, choose your favorite contact folder.

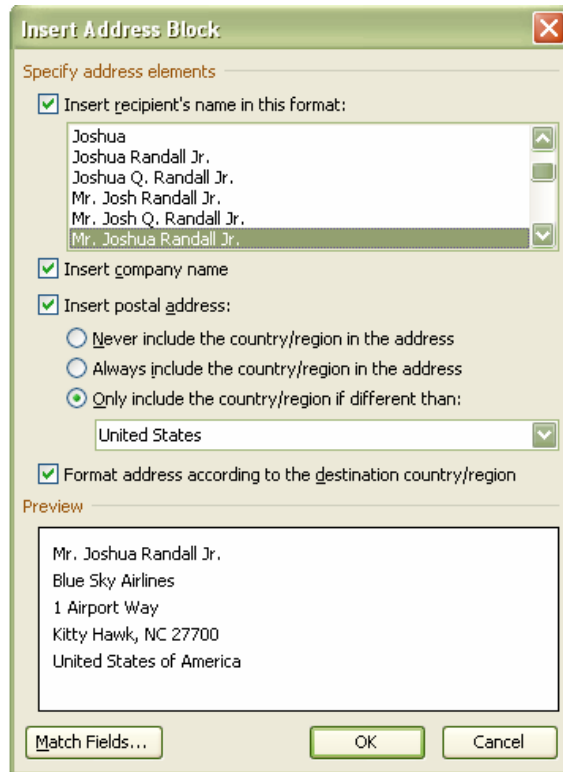


Next, select specific contact cards, or choose them all!



Finally, format your single <<ADDRESSBLOCK>> code using a simple menu system.





\*Please refer to Microsoft Word help, or Microsoft online at: <http://office.microsoft.com/en-us/help/HA010349201033.aspx?CTT=42> for more complete instructions.

## C. The Relationship Between Word and Microsoft Excel

Those who collect information in rows and columns have discovered that both Word and Excel have plus and minus categories for data manipulation. Thankfully, moving back and forth between Word and Excel is fairly easy, provided you understand the options for keeping or replacing certain differences.

### 1. Similarities between Tables and Spreadsheets

Microsoft Word Tables and Excel spreadsheets seem generically similar in composition. However, the bigger and faster “cruncher” of data is Excel, hands down. That being said, here are some key things to look out for.

#### a. Cell limits in Excel vs. Cell limits in Word

Microsoft Excel (based on the 2003 version) has a serious display limitation. While the cell itself can store more, there is a limit of 1024 (approx) characters for display and printing. Anything beyond this and you may get truncated results when viewing or printing. Those of you writing discovery reviews and other

largely descriptive lists may find this a severe limitation. Please refer to Microsoft Knowledgebase Article 211580.

If the limitation does not trip you up, then beginning your work in Excel for its ease of column and row manipulations, quick sorting and other WOW features will not limit you to final inclusion in a Word document through the ever faithful copy/paste.

**b. Formulas In Excel Vs. Formulas In Word**

If, on the other hand you are crunching numbers, Word tables CAN work but do not dynamically update. Again, starting your work in Excel could be the answer (taking the character limitation mentioned above into consideration).

Finding your favorite flavor of copy/paste is the step to bringing your complex Excel work into Word as part of a larger work document.

**2. The Flavor Of Paste**

Copying and pasting from Microsoft Excel into Microsoft Word is DEFINETLY something to do with careful consideration.

For discussion purposes, let us consider the following Excel Worksheet with both text, numbers and formulas:

	A	B	C
1	<b>Date</b>	<b>Billable Hours</b>	<b>Attorney</b>
2	1/1/2007	220	John Dewey
3	2/1/2007	200	Marvin Cheatum
4	3/1/2007	192	MaryAnn Howe
5	4/1/2007	223	MaryAnn Howe
6	5/1/2007	217	MaryAnn Howe
7	<b>Total</b>	<b>1052</b>	

Where Cell B6 contains the formula =SUM(B2:B6)

**Multiple Paste Options**

The act of copying the range A1:C7 and doing a simple paste into Word converts the spreadsheet into a similarly formatted Word Table, thus:

**a. Standard Paste**

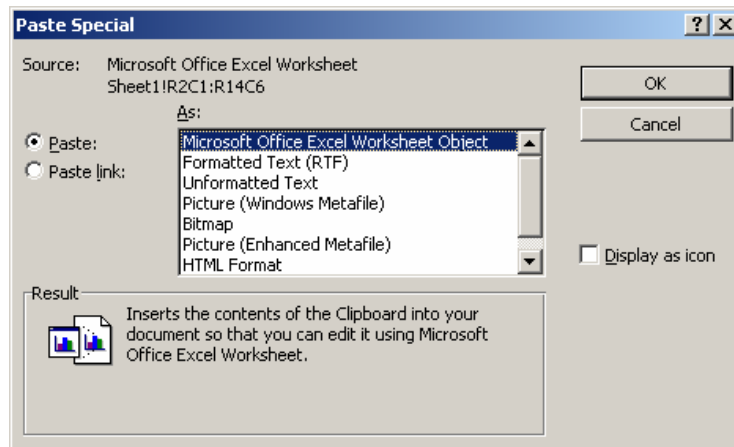
<b>Date</b>	<b>Billable Hours</b>	<b>Attorney</b>
1/1/2007	220	John Dewey
2/1/2007	200	Marvin Cheatum

3/1/2007	192	MaryAnn Howe
4/1/2007	223	MaryAnn Howe
5/1/2007	217	MaryAnn Howe
<b>Total</b>	<b>1052</b>	

While potentially visually pleasing, all the information that is brought in from Excel is now text. There are no formulas. The table is expandable, and format-able but cannot be added to with resulting calculations

**b. Microsoft Excel Worksheet Object**

Using the Paste Special Option yields more interesting results as far as calculations are concerned if you exercise the Worksheet Object choice.



This nifty feature actually embeds the Excel spreadsheet itself within the Microsoft Word document. The result LOOKS like a table.

<b>Date</b>	<b>Billable Hours</b>	<b>Attorney</b>
1/1/2007	220	John Dewey
2/1/2007	200	Marvin Cheatum
3/1/2007	192	MaryAnn Howe
4/1/2007	223	MaryAnn Howe
5/1/2007	217	MaryAnn Howe
<b>Total</b>	<b>1052</b>	

However double clicking the table yields hidden surprises.

	A	B	C
1	<b>Date</b>	<b>Billable Hours</b>	<b>Attorney</b>
2	1/1/2007	220	John Dewey
3	2/1/2007	200	Marvin Cheatum
4	3/1/2007	192	MaryAnn Howe
5	4/1/2007	223	MaryAnn Howe
6	5/1/2007	217	MaryAnn Howe
7	<b>Total</b>	<b>1052</b>	

Excel and all its wonders, formulas and the like are available for use making a sort of Word/Excel hybrid. Take a look at all the menus – they’re Excel! Click back anywhere within the Word document and normality returns.

Remember that this pasted version of the spreadsheet bears no relationship at all to the original spreadsheet it was copied from. Like Vegas, what happens within the Word document STAYS within the Word document.

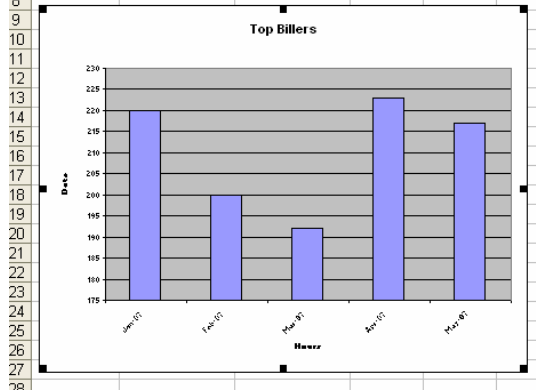
**c. Understanding The Consequences Of Linking**

Should you be so bold, you could add the linking option to the paste, meaning that as you do to the original spreadsheet, so happens to the Word document. But be *careful* here, in that the locations of the Word document and the Excel spreadsheets must not change without notifications to both parties! (*Don’t email one without the other.*)

**3. Pulling In Charts and Other Information Through Copy/Paste**

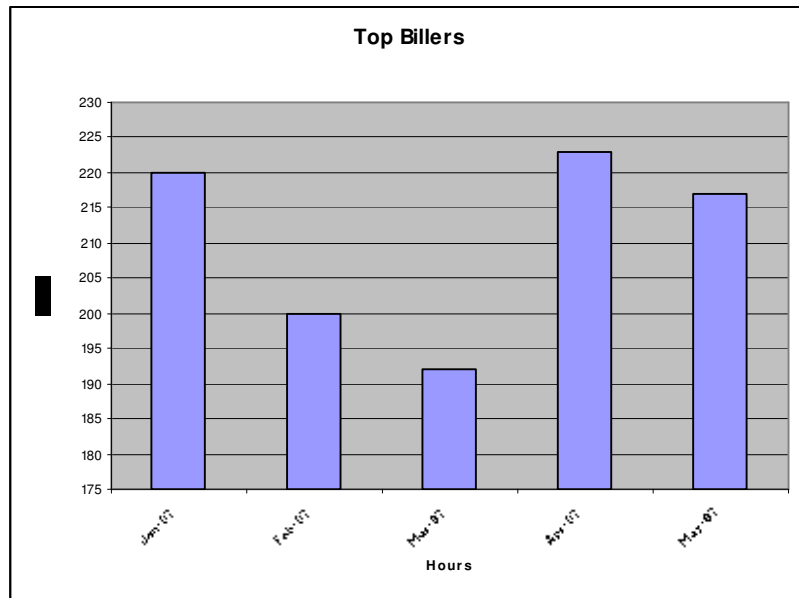
Excel is known not only for its number and text crunching possibilities, but the resulting graphs (charts) as well. These objects, whether embedded on a spreadsheet or created as a separate chart sheet can be copied/pasted directly into Word in all their glory. Just select the chart by clicking and use your favorite copy method.

	A	B	C	D	E	F
1	<b>Date</b>	<b>Billable Hours</b>	<b>Attorney</b>			
2	1/1/2007	220	John Dewey			
3	2/1/2007	200	Marvin Cheatum			
4	3/1/2007	192	MaryAnn Howe			
5	4/1/2007	223	MaryAnn Howe			
6	5/1/2007	217	MaryAnn Howe			
7	<b>Total</b>	<b>1052</b>				

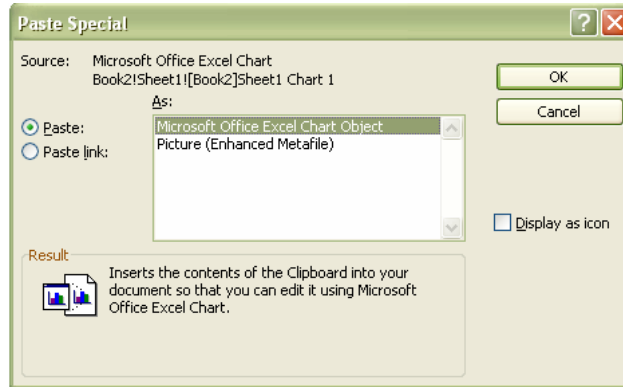


**a. Paste**

Pasting in its direct form yields you a sizeable graphic object suitable for printing.



**b. Watch For Those Links**



Once again that linking option requires some thought. When linked you must remember to always keep both files together.

**4. Mail Merge Directly From Excel**

Have a specific address or other data file with lots of non-standard variables? No problem. Mail merge can also be accomplished with external custom lists. And where better to manage a list than in Microsoft Excel. There are just a few Rules of Thumb:

- Data should be arranged with field names as columns and rows as records
- Field names must be single word. For instance `FirstName` or `First_Name` are acceptable. `First Name` is not acceptable.
- No blank rows in the spreadsheet, please.
- Each field name must be unique
- Field names must be in the first row

Last Name	First Name	Title	Address	City	Postal Code	Country
Davolio	Nancy	Sales Representative	507 - 20th Ave. E. Apt. 2A	Seattle	98122	USA
Fuller	Andrew	Vice President, Sales	908 W. Capital Way	Tacoma	98401	USA
Leverling	Janet	Sales Representative	722 Moss Bay Blvd.	Kirkland	98033	USA
Peacock	Margaret	Sales Representative	4110 Old Redmond Rd.	Redmond	98052	USA

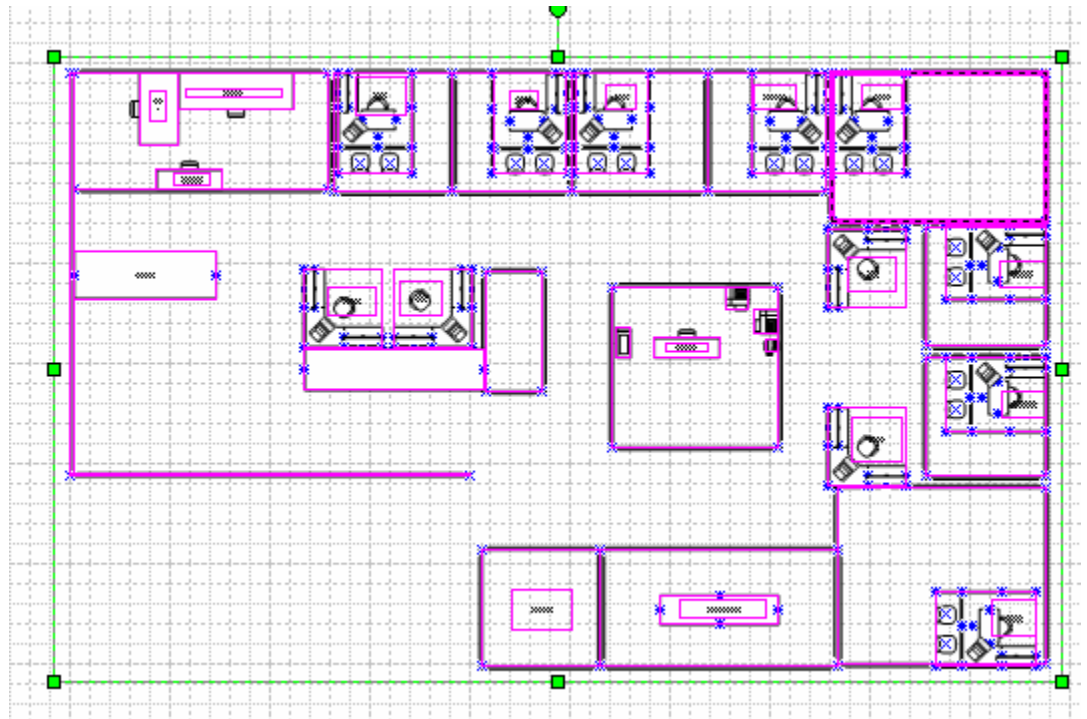
For more complete details, please see Microsoft Knowledgebase Article 318118

#### D. The Relationship Between Word And Visio

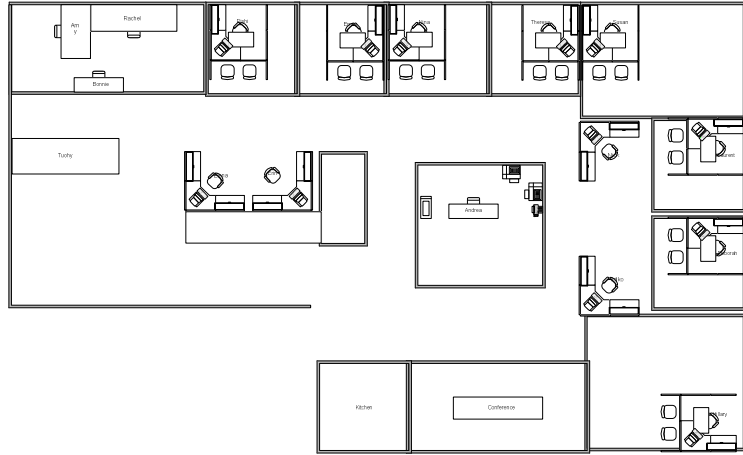
Visio, a truly whiz-bang (technical term) program for making outstanding business graphics, including but not limited to Organization Charts (static and dynamic), Flow Charts, Floor diagrams, etc, etc. is another of the simple copy/paste variety.

##### 1. Copy/Paste

Select the graphic area within Visio and copy via your favorite method (ala menu or CTRL + c)



Click in the desired destination point in Word and paste



Note: Remember that all inserted objects of a graphic nature can be resized. Click once on the object so that it is selected (little squares on the corners). Touch the corner with the mouse, click and drag in a diagonal direction to maintain the height to width ratio.



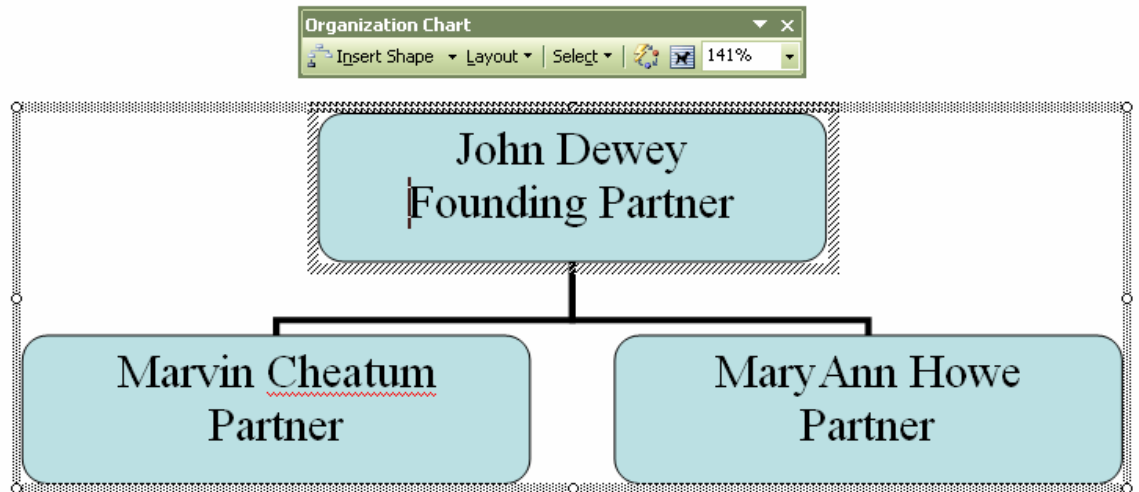
## 2. Understanding Visio And The Concept Of Linked Objects And The Drawing Canvas

One of the key reasons for the creation of Microsoft Visio was to establish the concept of linked graphics. In an organization chart for example, a box with a line pointing to another box is understood as “connected” such that if you moved a box the line stays connected to it.

Microsoft Visio introduced this concept within the Microsoft Office suite, and it was quickly adopted within the other programs. Now, thanks to the Diagram menu inside Word, you can create smaller examples of the Visio product without owning it. From the Insert menu click Diagram.



If you then choose, for example, Organization Chart, you are given a robust menu system and linked graphics. These graphics are located in a special container object known as a drawing canvas. Rather than floating around the Word document, the objects in a drawing canvas can have the special “linked” quality. The canvas can have a related menu/toolbar allowing you to manipulate shapes or groups of shapes, rather than moving boxes and lines individually ad naseum.



## E. The Relationship Between Word And PowerPoint

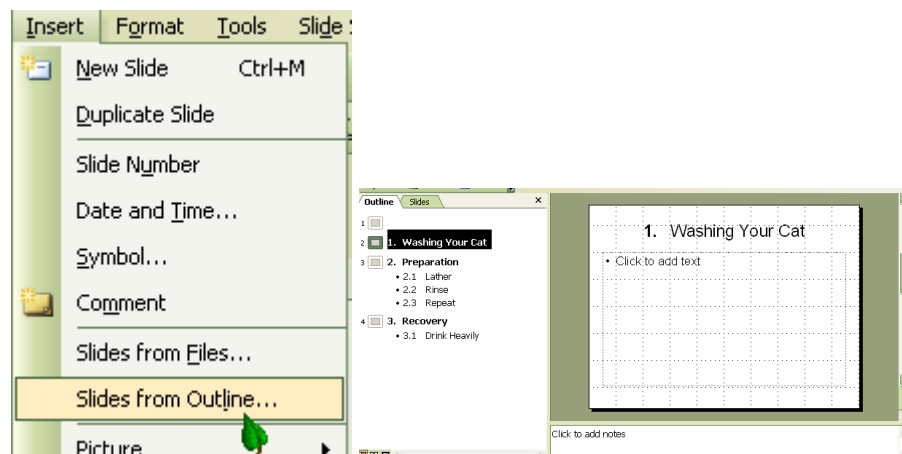
PowerPoint is now it's own word category, similar to the word Xerox® standing in for anything “photocopy.” The word has come to mean the slideshow file itself or for the projection equipment used to display the show. Since what you are presenting on the screen often represents an overall outline, it makes sense that you should be able to easily move your information readily from PowerPoint to Word and vice versa.

### 1. Working Level Headed

Microsoft Word has styles called Heading 1, Heading 2, etc. While not always adopted in their as-packaged formats, they are an important tool for outline organization. PowerPoint relies heavily on this organization, to the extent that if you use Heading/Outline Level styles within a Word Document, the PowerPoint presentation is all but made already! For example, if you have a document formatted thus:

Heading 1	1.	Washing Your Cat
Heading 1	2.	Preparation
Heading 2	2.1	Lather
Heading 2	2.2	Rinse
Heading 2	2.3	Repeat
Heading 1	3.	Recovery
Heading 2	3.1	Drink Heavily

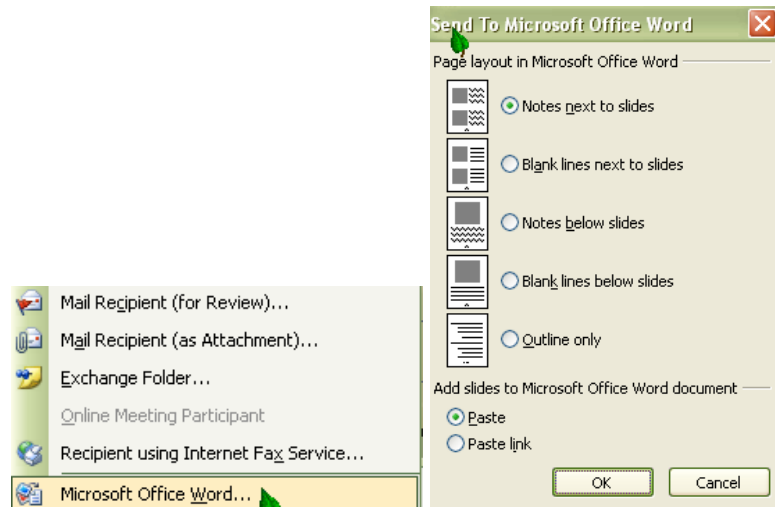
you can easily move the information into PowerPoint. Within your existing or new PowerPoint presentation, Click in the Outline Tab (left side of the screen and From the Insert Menu, click Slides from Outline and locate your saved Word document with the outline in it.



The result is that your entire PowerPoint slideshow structure is created. Add template style, some transition effects and you're done. Indeed, it is most efficient to work through your presentation in outline form before messing with the fun stuff anyway.

## 2. Reverse Engineering

If you've already started your work in PowerPoint, but want to then expand into related materials it is easy enough, even if you don't like PowerPoint's printed format. From within the PowerPoint presentation choose the File/SendTo menu and choose Microsoft Office Word. There is a delightful array of options which create a preformatted, editable Word document .



### III. WORKING OUTSIDE WORD

Due to the presentation time limit, we will be exploring moving data between non-word applications as time allows, and during the Q&A period. Topics included may be, but are not limited to:

- Exporting Address Book information from Outlook
- Importing and Manipulating CSV files in Excel to create useable formats
- Table manipulation in Word, converting tabbed information into useable tables
- Grabbing information off Web Pages and massaging into a useable format
- Understanding Excel Graphics and their special qualities with PowerPoint
- General Microsoft Access Questions