

Easily Include Figures and Charts from Excel in Your Word Documents

This article shows you how to:

- ✓ Copy figures from an Excel worksheet to Word
- ✓ Include an Excel chart in a Word document
- ✓ Choose between the Paste options offered by Word

When you need to keep track of a set of figures, a spreadsheet is the perfect tool for the job. Your household bills (water, gas and electricity consumption); your finances (bank accounts, investments, insurance policies); your motoring expenses (petrol, servicing and repairs) – all are perfect candidates for a spreadsheet in Microsoft Excel.



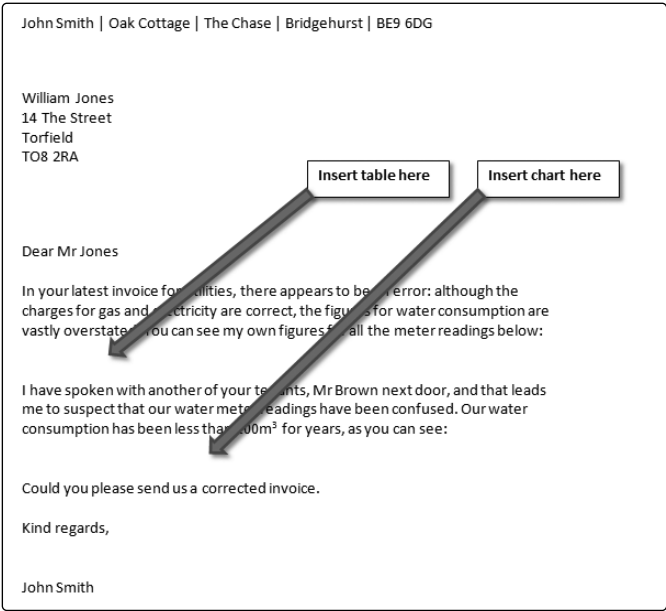
But what if you need to include some of your spreadsheet data in a Microsoft Word document? Perhaps you need to quote figures in a letter, or include a graph in a report. In fact, Excel is perfectly willing to share its data with Word: read on to learn how to go about it.

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The Basic Approach: Make It as Easy as Possible!

Example: include Excel figures in a Word letter

To demonstrate the way in which Word and Excel can work together, let's take an imaginary example. You believe your landlord has overcharged you for your home's utility costs, and you want to write to him pointing out the mistake and asking him to recalculate what you owe.



You already have the figures in an Excel worksheet

Fortunately, you read the meters yourself every month and keep track of the figures in an Excel spreadsheet. You'd like to include those figures in your letter, but you'd rather not type them all into Word yourself: that would be a long and tedious job, with the risk of typing mistakes creeping in.

Instead, you'd prefer to transfer the data straight from your Excel spreadsheet to your letter in Word.

| | A | B | C | D | E | F | G |
|----|--|------------|--------------|--------------|------------|--------------------|--------------|
| 2 | Meter Readings 2020 - Gas, Water, Electricity | | | | | | |
| 3 | | | | | | | |
| 4 | 2020 | Gas | | Water | | Electricity | |
| 5 | Month | Meter | Usage | Meter | Usage | Meter | Usage |
| 6 | Jan | 40683 | 40863 | 221 | 221 | 13684 | 13684 |
| 7 | Feb | 41113 | 430 | 227 | 6 | 13912 | 228 |
| 8 | Mar | 41488 | 375 | 232 | 5 | 14130 | 218 |
| 9 | Apr | 41740 | 252 | 238 | 6 | 14339 | 209 |
| 10 | May | 41927 | 187 | 245 | 7 | 14598 | 259 |
| 11 | Jun | 42013 | 86 | 251 | 6 | 14773 | 175 |
| 12 | Jul | 42043 | 30 | 260 | 9 | 14981 | 208 |
| 13 | Aug | 42078 | 35 | 268 | 8 | 15227 | 246 |
| 14 | Sep | 42186 | 108 | 278 | 10 | 15450 | 223 |
| 15 | Oct | 42390 | 204 | 282 | 4 | 15662 | 212 |
| 16 | Nov | 42754 | 364 | 289 | 7 | 15913 | 251 |
| 17 | Dec | 43172 | 418 | 297 | 8 | 16204 | 291 |
| 18 | per Month | | 3598 | | 25 | | 1350 |
| 19 | Total | | 43172 | | 297 | | 16204 |

Excel offers a variety of ways to do this, but some are easier than others. For our example, however, we can keep things simple: all we need to include in our letter is a 'snapshot' of the Excel figures so that we can print the letter and send it. To achieve that, we can just copy and paste the figures into a Microsoft Word table using the Windows clipboard, or insert a picture of the figures or the chart.

We can copy the data using the clipboard

Copy a Set of Figures from Excel to Word

For our imaginary example, you already have an Excel spreadsheet file containing your figures, and you've already written the letter in Word. All that remains is to copy the Excel data into the letter. Here's how to go about it:

Copy columns of figures from Excel

1. Start both Word and Excel. In Word, open your letter document; in Excel, open the spreadsheet containing the figures you want to copy.
2. In Excel, select the area of the spreadsheet you want to copy to your Word document. To do that, move the mouse pointer to the top-left cell of the required



Select the required cells

area, press and hold the left mouse button and drag diagonally downwards and to the right until you reach the bottom-right cell of the required area, then release the mouse button.

Insert as a table, picture or plain text?



Now it's time to choose whether you want to insert the figures into Word as text in a table, or as a picture, or as plain unformatted text. I'll explain each of those options in turn.

If you copy the figures as a Word table, you'll be able to edit them in Word and alter their formatting (changing the font, text size, and so on). If you copy them as a picture, you can adjust the size of the picture in your document but the figures and their formatting will look exactly as they currently do in Excel.

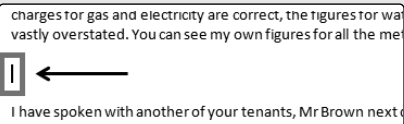
So which is the better choice? If you're happy with the way the figures look in Excel, and you won't feel the need to format them or edit them, you can use a picture. Whichever you choose, you can always delete the table or picture from your Word document and try the alternative option.

Insert the spreadsheet data as a table



Choose where to insert the table

1. First copy the spreadsheet data you've selected to the clipboard by pressing **(Ctrl) + (C)**.
2. Now switch to your Microsoft Word document and position the cursor at the point where you want to insert the figures. If necessary, press the **(Enter)** key at the end of the preceding paragraph to create a blank line before the next paragraph.



3. With the cursor flashing at the beginning of an empty line, press **(Ctrl) + (V)** and Word will paste the contents of the Excel cells you copied into an automatically-generated table with a similar layout to your spreadsheet.

Paste from the clipboard

Note that Word pastes the text and figures from all the cells, but not the formulas used to calculate any of the figures. If you were to change any of the figures in this table, you would have to recalculate the totals yourself and edit those cells too.



In your latest invoice for utilities, there appears to be an error; although the charges for gas and electricity are correct, the figures for water consumption are vastly overstated. You can see my own figures for all the meter readings below.

| Meter Readings 2020 - Gas, Water, Electricity | | | | | | |
|---|-------|-------|-------|-------|-------------|-------|
| 2020 | Gas | | Water | | Electricity | |
| | Meter | Usage | Meter | Usage | Meter | Usage |
| Jan | 40683 | 40683 | 221 | 221 | 13884 | 13884 |
| Feb | 41113 | 430 | 227 | 6 | 13912 | 228 |
| Mar | 41488 | 375 | 232 | 5 | 14170 | 218 |
| Apr | 41740 | 252 | 238 | 6 | 14330 | 205 |
| May | 41927 | 187 | 245 | 7 | 14598 | 259 |
| Jun | 42013 | 86 | 251 | 6 | 14773 | 175 |
| Jul | 42043 | 30 | 260 | 9 | 14981 | 208 |
| Aug | 42078 | 35 | 268 | 8 | 15222 | 246 |
| Sep | 42180 | 108 | 279 | 10 | 15450 | 222 |
| Oct | 42198 | 208 | 282 | 4 | 15642 | 212 |
| Nov | 42754 | 364 | 289 | 7 | 15913 | 251 |
| Dec | 43177 | 418 | 297 | 8 | 16204 | 291 |
| per Month | | 3398 | | 35 | | 1350 |
| Total | | 43172 | | 297 | | 18204 |

4. How does it look? If your spreadsheet contained a large number of columns – or very wide columns – you might find that Word has trouble fitting them into the width of the A4 page. In that case, you could try adjusting the widths of the table's columns in Word, but that tends to be an exasperating job: it's simpler to delete the table from Word, adjust the column widths in and then repeat the steps above.

Does it all fit?

How to remove the table

If you need to delete the table from Word, move your mouse over the table until you see a little ‘move’ box (pictured below) appear at its top-left corner.

Click this ‘move’ box and then press the **Backspace** key on your keyboard and the table will be deleted.



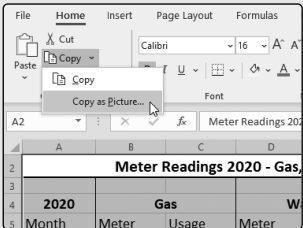
Insert the spreadsheet data as a picture



Copy the figures as a picture

Paste into Word

1. On the **Home** tab of Excel’s Ribbon, in the ‘Clipboard’ group at the far left, click the arrow beside the Copy button and choose **Copy as Picture**.

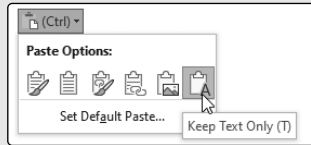


2. A tiny Copy Picture dialog will appear. Don’t change anything in this dialog, just click **OK**.
3. Switch to your Word document and place the cursor at the point where you want the picture to appear.
4. Press the key combination **Ctrl** + **V** and a picture of your Excel data will appear in your document. You can adjust the size of the picture if needed: just click the picture so that little blobs appear around its edges, then click-and-drag the blob in the bottom-right corner: drag towards the centre of the picture to reduce its size, or away from the centre to enlarge it.
5. If you want to remove the picture from your Word document, just click it once to select it and press the **Del** key on your keyboard.

Insert the spreadsheet data as plain text

Perhaps you just want to copy the bare figures into your Word document as unformatted text, so that you can format them yourself? If so, here's what to do:

1. Follow steps 1, 2 and 3 on pages 4 and 5 to copy the selected worksheet cells to the clipboard and paste them into your Word document.
2. Initially the data lands in your Word document as a table, but at the bottom-right of that table you'll see a little Paste Options button – a rectangular box containing the word (Ctrl). Click that box or tap the **(Ctrl)** key, which shows the available options for pasting the data, and click the last item, **Keep Text Only**.
3. Now each row of your data appears on a separate line, with a tab space separating the figures of each column. You can now set about formatting and laying-out this text in any way you like.



Copy an Excel Chart to a Word Document

If you've created a chart in your Excel spreadsheet, you can copy that to your Word document in a similar way:

1. In Excel, click your chart once to select it. (Make sure you really have selected the whole chart, so that you can see a selection border around its outer edges. Unless you click a blank space within the chart, you can find you've selected a text label or key inside the chart rather than the chart itself.)



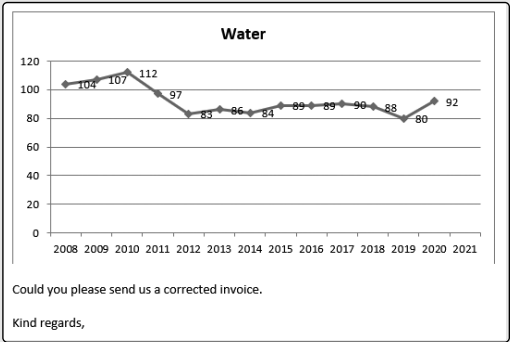
Copy the chart

Paste into Word

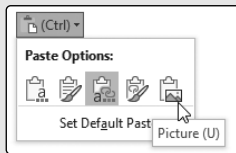
Choose between
insertion options

A picture of
the chart

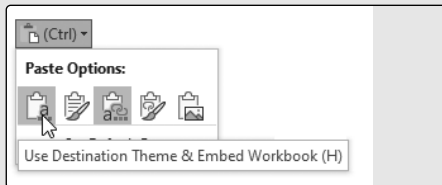
- 2. Copy the chart to the clipboard by pressing **Ctrl** + **C**.
- 3. Switch to your Word document and place the cursor at the point in the document where you want the chart to appear.
- 4. Press the key combination **Ctrl** + **V** to have Excel paste the chart into your Word document.



- 5. The final job is to choose how Word should treat this newly-arrived chart. The chart initially lands in your document as a 'linked' chart. I'll explain what this means on page 10, but it's unlikely to be the option you want. Just below the bottom-right corner of your chart you'll see a little Paste Options button – a little box showing the word **Ctrl** and an arrow: click button or tap the **Ctrl** key to see the available options. (Holding the mouse over the little pictures displays a tooltip explanation of what they mean.)
 - **Insert as a picture:** to place a picture of the chart in your document (making the chart look just as it does in your Excel spreadsheet), choose the **Picture** option.



- **Insert as a chart:** to have the chart reformatted in a way that matches your Word document's theme (if you've applied one) and allows you to change its appearance, choose **Use Destination Theme and Embed Workbook**.



6. If you chose the option to insert the chart as a picture, you can now resize the picture as required by dragging the little blob in its bottom-right corner. If you chose the option to 'insert as a chart', you can edit the appearance of the chart in your document. To do this, just click the chart and you'll see a pair of new tabs appear at the right of the Ribbon: **Chart Design** and **Format**.

A chart you
can edit later

Resize the
picture, or edit
the chart

From Excel to Word: The Other Options

As you can see from the previous pages, there's no shortage of options for copying data from Excel to Word. However, all the options we've covered above have one thing in common: once the table of figures or the chart arrives in your Word document, it becomes a completely separate entity from your Excel spreadsheet.

The Word document doesn't change if you edit your spreadsheet

By that I mean that if you go back to your Excel spreadsheet and change a few figures or redesign your chart, it won't affect the figures or chart in your Word document. Those will remain exactly as they were when you pasted them into your Word document.

Perhaps that seems obvious (after all, that's what happens when you copy anything else from one place to another), but Word and Excel have one other trick up their sleeve: the ability to 'link' the data.

The alternative: 'link' the data to the Excel worksheet

When you paste Excel charts or figures into Word as 'linked' data, Word remembers where the data came from. Each time you open the Word document in future, Word checks the 'linked' Excel spreadsheet to see whether anything has changed and updates the figures (or the chart) in the Word document to match.



For this linking to work, it's vital that Word can always find the Excel spreadsheet you used! If you delete the spreadsheet file, or rename it, or move it elsewhere, the link will be broken and your figures will remain unchanged.

How to link the Word document to the Excel spreadsheet

For our purposes in this article, linking the Word document to the original Excel data is unnecessary: we just want a 'snapshot' of the figures to include in a letter to print and send straight away. However, if you do want your Word document to continually reflect the latest figures in your spreadsheet, use the little Paste Options button after pasting the data from Excel to Word and pick one of the 'Link Data' options. These will give you the choice between linking the data while keeping the 'source' formatting (the formatting used in Excel) or applying the 'destination' formatting (adjusting the style of the figures or chart to match the look of your Word document).