

Crabby's tips for choosing the best program for the job



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Crabby Office Lady

Many Office programs can accomplish the same basic task, but knowing which one is best suited for your particular project will make you the king or queen of productivity.

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When you have to go out in the rain often, like we Pacific Northwesters do this time of year (frankly, most times of the year), you're confronted with choices:

- Rubber galoshes or suede boots?
- Brimmed hat or beret?
- Raincoat or no coat?

You can make an argument for either choice — it just depends on how far you have to walk and how much of a slave to fashion you are.

When it comes to using Office, you're also confronted with choices. And while you may feel totally comfortable with one program, it may not be the best program for the job that you're doing. In this column I'll highlight a few Office programs, match them with possible tasks or projects, and then let you decide.

Choice #1: Taking notes

If you're a meticulous keeper of notes, you've probably counted on Word for years. You use it, you like it, and you know it like the back of your mouse. Familiarity, after all, breeds comfortability (or something like that).

Well, prepare to jump outside the box, because there's a new kid on the block who might — and frankly, who should — make you think twice about creating long, vertical, multi-page documents just for note taking. That kid's name is OneNote.

But before I get into the nitty-gritty details, let me first say that I'm not suggesting you toss Word out with yesterday's garbage. There are some things that Word does a lot better than OneNote when it comes to note taking. Maturity does have its value. (Don't think I can't hear your snickering.)

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
Create a multi-subject, digital notebook that travels with you.	OneNote	Instead of having to find and open multiple documents stored on your computer, OneNote keeps everything in one place. Just open it and you have access to all your notes, meeting minutes, ravings, musings, and doodles.
Highlight key ideas, reminders, or follow-up tasks with icons.	OneNote	I have two words for you: Note Flags. Once you get into OneNote, you'll wonder how you ever did without these little helpers.

Manage the flood of information you gather from e-mail, meetings, presentations, and other sources.

OneNote

You can capture virtually any type of information all in one place. This means typed notes, hand-drawn pictures, audio, Web site links, etc.

Better protect how your document is modified and reduce the number of conflicting comments you receive.

Word

If you plan on sharing and expanding your notes to include others but still want some modicum of control, this Word feature comes in handy.

Have greater control over your sensitive planning or financial notes.

Word

Information Rights Management (IRM) in Word lets you create protected content and give access and editing permissions at different levels to different users.

Don't think for one moment, however, that Word and OneNote can't work together. You can take all the notes you want in OneNote, and then drag the note container that contains the text into your Word document and apply all the security you want to it. It's a beautiful thing.

Choice #2: Gathering information

If you're like me, you get a lot of feedback. Good, bad, it's all useful (this is a personal mantra). Sure, it's awfully easy to ask for your customers to send you an e-mail with their concerns, ideas, kudos, and complaints, but sometimes wouldn't it be better to guide them through a form that will ensure you get useful comments without all those cutesy signatures? And wouldn't it be great to pick the best type of form for each particular type of customer?

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
Create dynamic, XML-based forms.	InfoPath	The data stored in your form don't remain locked in the form forever; they can be separated, reformatted, or reused. We're talking Gumby-like flexibility.
Create a form based on external data.	InfoPath	InfoPath can build a form based on the tables and structure of a database, a Web service, or an existing XML document or schema.
Collect and store a LOT of data, and generate a variety of reports.	Access	When you need full relational database capabilities, you'll know it.
Use your information in calculations, analysis, or financial documents.	Excel	How much easier could it be to create a mortgage table or gather customers' financial information? (Hint: Not much.)
Create a form on a Web page.	FrontPage	You can create a virtual guestbook, collect e-mail addresses for a mailing list, or give your customers the opportunity to submit online kudos or criticism.
Customize e-mail messages and appointments.	Outlook	You can group and sort the information you collect, respond to it, or view it by conversation so that responses to the form are grouped with the original form. In other words, save time!

It's not unusual for users of Office to play favorites. You know who you are and who your pets are. But I have one word for you: Collaboration. In fact, InfoPath plays quite nicely with some of the other programs. Some ideas:

- Export your data in InfoPath forms to Excel. Then you can analyze and work with the data you have collected in the forms users have filled out.
- Create an InfoPath form that is connected to an Access database.

Choice #3: Working with data

Excel and Access have a lot in common when it comes to managing data. However, there are some key differences that you need to know...

Let's say you're planning a massive family reunion for the holidays (you're a masochist, and a well-organized one at that). Figuring out who can sit next to whom (thus avoiding last year's scandals, crying, and drunken confessions), who's vegetarian/vegan/lacto-intolerant/gluten-free, and where everyone will spend the night can be a daunting task. If you use the right program for the job, you may just enjoy the holidays this year.

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
Deal with a very large amount of data. (If you're a Kennedy or something, that's thousands of entries.)	Access	Access is like having a handy-dandy little organizer, accessing (get it? accessing) Cape Cod houses full of information in a quick and easy way. A few clicks of the mouse and you can make sense of all those toothy entries.
Manage a fairly small amount of data.	Excel	If you can simplify your life, by all means do it. Because once the big day hits, simplification will go right out the window.
Spend less time plugging in the same information again and again, and more time playing around with it.	Access	If you want to make sure all the guests' variables are accounted for, create a relational database. One table can contain their names, and the other tables can contain seating, dietary, and lodging requirements. Each guest probably has more than one requirement, so you need a database that can cross reference all of them.
Create a very simple database with limited amounts of cross referencing.	Excel	Why get all wrapped up in relationships if you don't have to? (Ah yes, the holiday greeting of the misanthrope.) You have a list of guests in one column, the corresponding "yes, he's coming" or "no, she's banished" in the the next column. Easy as pumpkin pie.
Rely on multiple external databases and run complex queries.	Access	If you need to compare the last decade's worth of databases that address seating arrangements, dietary preferences, etc., don't even try this in Excel. (Now that I think of it, if this is what you have to do to get the family together, perhaps you should reconsider.)

I've now hammered into your brain when you should use Access and when you should use Excel. But here's a thought: How about using them together?

- Copy Access records to Excel. This is great if you want a static snapshot of a few selected Access records.
- Bring refreshable Access data into Excel for PivotTable fun.
- Use Access to manage Excel data. There are a few ways to do this:
 - Link Excel data into an Access database.
 - Import Excel data into an Access database.
 - Convert an Excel range to an Access database.
 - Create an Access report from Excel data.
 - Use an Access form to enter Excel data.

For more information about using Access and Excel together read the article [About exchanging data between Excel and Access](#) which I've linked to in the **See Also** section of this column.

More choices

When you're working in Office, there is often more than one way to get the job done. You have to think about what you want the end result to look like, how complicated it will be to get there, and what features you need to accomplish your goal. Here are some of the other Office choices you may someday face:

- Creating documents, newsletters, graphic-rich catalogs, or legal documents: Word and Publisher.
- Making lists: Word, Access, and Excel.
- Adding flowcharts to documents or presentations: PowerPoint and Visio.

- [Creating tables: Word, Access, Excel, FrontPage, and Excel](#)

Find out more about how to choose which program is right for you by reading the articles listed in the **See Also** section of this column. Happy Holidays, everyone, and remember:

"The difficulty in life is the choice." — George Moore, Irish author, poet, dramatist

About the author

[Annik Stahl](#), the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

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