

Right job, wrong program? Crabby helps out

Applies to: Microsoft Office Access 2007, Excel 2007, OneNote 2007, Outlook 2007, PowerPoint 2007, Publisher 2007, Word 2007, Access 2003, Excel 2003, OneNote 2003, Outlook 2003, PowerPoint 2003, Publisher 2003, Word 2003, Access 2002, Excel 2002, Outlook 2002, PowerPoint 2002, Publisher 2002, Word 2002

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Crabby Office Lady

Ever feel stuck in a rut, using the same program over and over but not getting the results you want? It's time to open your eyes to what else is out there — expand your horizons, step outside your comfort zone, think outside the box (and perhaps get some new clichés).

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Every day, when you wake up, you immediately have choices to make:

- Snooze it one more time?
- Cereal or eggs?
- Jeans or dress for success?

When you get to work, the decisions don't stop; no, they're just beginning. Sometimes you make good decisions and sometimes you don't. One reason you don't may be plain reluctance to try something new. For example, you might struggle to create a really complicated list in Excel — one with rows and rows of information that you need to cross-reference — when that long list is actually a database and you should create it in Access. And why try to create a form in any other program than InfoPath, whose purpose in life is to manage data with forms?

Listen, I know that when you get comfortable with one program, you tend to use it as much as possible. Little kids are notorious for wanting to wear the same outfit every day of the week (and this often means a Superman cape or a ballerina tutu), but people, it's time to put away childish tendencies. A tutu is made for dancing; it's not so useful for soccer. And a cape, well, I suppose one could make the case that a cape is good for just about anything, but if it were my kid, and bike riding were involved, the cape would have to go.

Yes, Office programs can be pretty flexible. But if one program could handle every task, there wouldn't be the need to offer 15 different ones. In this week's column I'll list a few common tasks and then compare the various Office programs that you can use to accomplish them. Then you can make up your mind about which program is best for the work at hand.

Making sense of 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 (a job for the family's well-organized masochist). Figuring out who can sit next to whom (thus avoiding last year's scandals, crying, and drunken confessions), who's vegetarian/vegan/lactose-intolerant/gluten-free, and where everyone will sleep is a daunting task. If you use the right program for the job, though, you may avoid that cleaning bill after last year's food fight.

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,	Access	Access is a handy-dandy organizer, accessing (get it? <i>accessing</i>) Cape Cod houses full of information in a quick and easy way. A few clicks of the mouse and you can make sense

that's thousands of entries).

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. Don't use a database when a list will do nicely.
... spend less time plugging in the Access same information again and again, and more time playing around with it.		If you want to make sure all your relations' 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 list with limited amounts of cross-referencing.	Excel	Why get all tangled up in relationships if you don't have to? (Spoken like a true misanthrope.) You have a list of guests in one column, the corresponding "Yes, he's coming" or "No, she's banished" in 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 information about seating arrangements, dietary preferences, and who ran for Congress in which state, 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.

Project management

Chances are you don't work on just one thing all day long. You're a multitasker, juggling many projects at a time, and spending a lot of time trying to keep all those flaming torches in the air. Think of the right Office program as the perfect juggler's helper: If you choose the one dedicated to making your life easier, it will save you time, possibly money, and definitely frown lines.

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
... make sure the communication you get from everyone about a certain project is kept in one place.	Outlook	Obviously, you're going to use Outlook for e-mail. But it can also be quite handy for keeping everything together, especially attachments such as spreadsheets, presentations, and documents. You can create a folder for the project itself, and then individual folders under that one for specific people involved. You can even set up rules so that Outlook does the organizing for you — it's like an electronic personal assistant (and no need to remember its birthday).
... control the work, schedule, finances, and resources of a project.	Project	This program was made for the juggler in all of us. You can see at a glance what tasks need to be done in what time frame. You can do "what if" scenarios (what if I took a 3-hour lunch and blew off today's meeting?), and you can keep your teams aligned and on track.
... ensure that everyone working on a project — employees, vendors, even people in different countries — collaborates in a secure environment to use and see what everyone involved is doing.	Groove	This is a great program when teams need to collaborate from virtually anywhere — on the road, in the office, at home, or at a partner site. There is one central data storage location for everyone — and a secure one at that. They can view the site and its documents at any time, so there's no excuse for not participating.

One of the most important requirements for managing a project is being organized. If you don't have that skill, no amount of software I toss at you will help. Before you launch into it, think about the various aspects of your project: What is the goal or desired outcome? What is the timeline? How many people will be involved? And which one of them will be your personal delegate, on whom you can toss the lion's share of work?

Forms and more forms

Forms are everywhere. They're used for timecards, expense reports, and surveys. Forms keep track of customer information, gather customer feedback, and when they're electronic, limit how much information customers can enter (something I dream about when going through your thoughtful but occasionally fulsome comments).

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
... 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 to gather your clients' financial data? (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.

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, there's someone you should meet, someone who might — and frankly, who should — make you think twice about creating long, vertical, multipage documents just for note-taking. That someone's name is OneNote.

But before the introductions, 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. (Oh stop snickering.)

WHEN YOU WANT TO...	USE THIS PROGRAM	WHY SHOULD I TAKE CRABBY'S ADVICE?
... create a multisubject, digital notebook that OneNote travels with you.		Instead of you having to find and open multiple documents, OneNote keeps everything in one place. Just open OneNote and you can see 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 know 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, audio, Web site links, etc.
... better protect how your document is modified and reduce the number of conflicting comments it receives.	Word	If you plan on inviting others to review your notes, and you still want some modicum of control, this 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 permissions at different levels to different users.

Don't think for one moment, however, that Word and OneNote don't get along. You can take notes in OneNote, drag the note container into your Word document, and apply all the security you want. It's a beautiful thing.

Come see about these

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 you'll use the results for later on. Here are other Office choices you may someday face:

- Creating documents, newsletters, or legal documents: Word or Publisher?
- Making lists: Word, Access, or Excel?
- Adding flowcharts to documents or presentations: PowerPoint or Visio?
- Creating tables: Word, Access, Excel, FrontPage, or Excel?

"The strongest principle of growth lies in the human choice." — George Eliot

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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