

How to Embed Documents into a Microsoft Word Document

A Practical Step-by-Step Help Guide

What Does “Embedding” Mean?

Embedding a document means inserting another file directly inside a Microsoft Word document so readers can open it without searching for separate attachments.

Examples include PDFs, Excel spreadsheets, PowerPoint presentations, Word documents, images, and text files.

Benefits of Embedding Documents

Advantages:

- Keeps supporting files together in one document
- Makes executive packets easier to distribute
- Prevents lost attachments
- Useful for compliance documentation and evidence collection

Important Considerations:

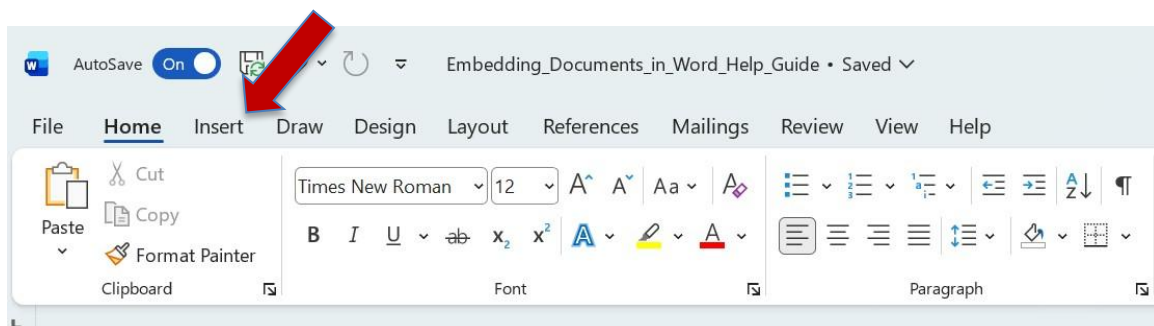
- Embedded files increase Word document size
- Recipients may need original software to open files
- Large embedded files can slow Word performance

Embed a File as an Object (Recommended) - Newer MS Word Software

Step 1: Open your Word document.

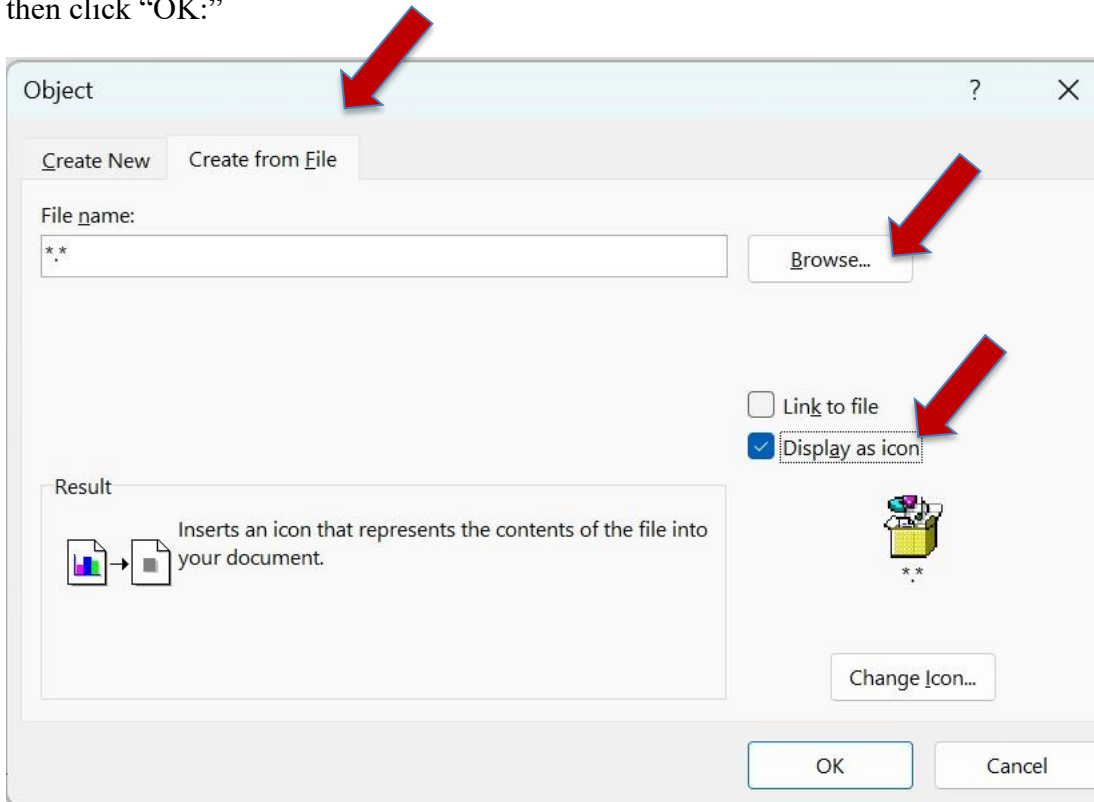
Step 2: Place your cursor where the embedded file should appear.

Step 3: Go to “Insert:”



Step 4: Go to search bar and type in “Insert Object.” A pop-up box should appear.

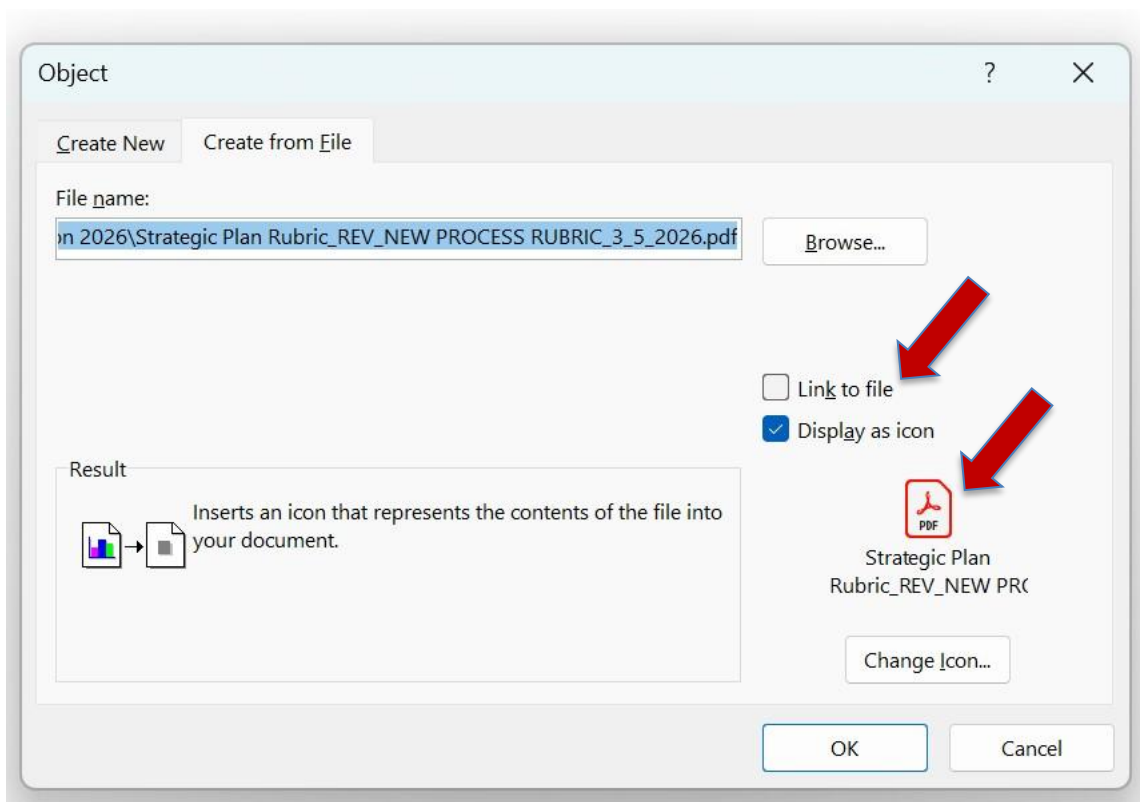
Step 5: Click the “Create from File” tab, and also click the “Display as Icon” checkbox, then click “OK:”



Step 6: Click the “Browse” box to find your file.

Step 7: Double click the file you would like to insert and click “Open.”

Step 8: The icon will appear in the box: Click “Link to file” (only if the original file location remains unchanged).



Step 9: Click “OK.” Your icon should appear in the MS Word document.

If you are using an older version of MS Word:

Step 1: Open your Word document.

Step 2: Place your cursor where the embedded file should appear.

Step 3: Go to Insert → Object.

Step 4: Select “Create from File.”

Step 5: Browse and select the file.

Step 6: Choose display options.

- Display as icon (**recommended**)
- Link to file (only if the original file location remains unchanged)

Step 7: Click OK.

How the Embedded File Appears

Embedded files usually appear as icons with the file name and associated software icon (PDF, Excel, Word, etc.). Users can double-click the icon to open the embedded document.

How to Open an Embedded File

Double-click the embedded object or icon. Word launches the appropriate software (Adobe Acrobat, Excel, PowerPoint, etc.).

How to Edit an Embedded File

Double-click the embedded object, edit the file, save changes, and close the window. The Word document updates automatically.

Best Practices

- Convert supporting documents to PDF before embedding
- Use clear and professional file names
- Avoid embedding extremely large files
- Use “Display as icon” for cleaner formatting
- Avoid “Link to file” unless absolutely necessary

Common Troubleshooting

Problem: Embedded file will not open

Solution: Ensure the recipient has the necessary software.

Problem: Linked file broken

Solution: Use embedded files instead of linked files for portability.

Problem: Incorrect icon

Solution: Right-click object → Change Icon

Recommended Approach

For most professional documents:

- Convert supporting documents to PDF first

- Embed as icon
- Avoid linking unless necessary
- Keep file names clean and professional