

Easy Steps



Unit 2791 (V7)

Integrate spreadsheet and database data
into word processed documents
to meet a set brief

with

Microsoft Word and Excel 2010

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Covers Unit Standard Criteria

A Cheryl Price Publication

Unit Standard 2791 (Version 7)

Integrate spreadsheet and database data into word processed documents to meet a set brief

— Word and Excel 2010

This book covers the course outline for the following New Zealand Qualifications Authority Unit Standard:

Unit Standard 2791 - GENERIC COMPUTING (Level 2, Credit 3)

Integrate spreadsheet and database data into word processed documents to meet a set brief (Version 7).

All topics in this Unit Standard are included in this book.

Retrievable exercise files are used with this book. These are available for free download from our web site at www.cherylprice.co.nz. Instructions for downloading are included on the next page.

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Downloading Exercise Files

Exercise files can be downloaded from the Cheryl Price web site as follows:


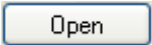




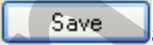
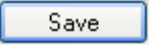
1	In your web browser, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Product Search box and type the number of this unit standard, as shown at the right. <div data-bbox="1157 499 1460 678" data-label="Image"> </div>
4	Click on  Search
5	Click on US 2791
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V7 Excel 2010 Free Download The File Download dialog box will display.
7	If you have Winzip use the following instructions otherwise move to step 8.
	a Click on  Open .
	b Click on the  of the  Unzip button.
	c If My Documents folder is not displayed click on Set default unzip folder at the bottom of the list. Ensure My Documents is selected then click on Select Folder.
	d Click on the  of the  Unzip button and click on the My Documents folder. The files will be unzipped.
8	Click on  Save and ensure My Documents folder is displayed. Click on  Save
9	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.

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Unit Standard 2791 Version 7

Title	Integrate spreadsheet and database data into word processed documents to meet a set brief		
Level	2	Credits	3

Purpose	People credited with this unit standard are able to integrate spreadsheet and database data into word processed documents to meet a set brief.
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Classification	Computing > Generic Computing
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Available grade	Achieved
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Explanatory notes

- 1 A *brief* is defined as a clear description of both the desirable outcomes sought and the constraints to be met by the solution. It contains requirements against which the success or otherwise of the document can be evaluated. The brief can be supplied either as part of the candidate's employment (in the case of workplace assessment) or in response to a set task. Text, spreadsheet and database files will be provided to the candidate.
- 2 Range
Evidence is required for two different mail merges, each with a minimum of three fields of database data being used.
- 3 Definition
Presentation means the documents produced must show consistent application of the principles of page layout, which may include but are not limited to – composition of elements upon the page, text hierarchy, consistent typography, balance, harmony, proportion, sequence, contrast repetition, alignment, and proximity.
- 4 An assessment resource to support computing unit standards (levels 1 to 4) can be found on the NZQA website at <http://www.nzqa.govt.nz/providers/resources/index.html>.

Outcomes and evidence requirements

Outcome 1

Integrate spreadsheet and database data into word processed documents to meet a set brief.

Evidence requirements

- 1.1 Spreadsheet data is inserted into the documents and formatted to meet the requirements of the brief.
- 1.2 A spreadsheet graph is inserted into the documents and formatted to meet the requirements of the brief.
- 1.3 The word processed documents containing integrated data are mail-merged using database data to meet the requirements of the brief.
- 1.4 The mail-merged documents are printed to hardcopy and checked for readability, legibility, presentation, accuracy and correct mail-merge.

Exercise Files used in this book

(Instructions are at the front of this book for downloading retrievable files from our web site.)

Names of files	
Best Deals	John Craig Limited
BluePrint Catalog	Lifestyle Books Budget 2012
BluePrint Clients Data	Lifestyle Books Letterhead
BOF – Gilbert Letter	Lifestyle Books Sales Summary
Book Sales for 2011	Lycra Products Price List
Book Sales for 2011-Chart	Memo Form
Checking Form	Promotion-Data
Clients-Data	Sponsors-Data
Club Meetings	Students Database
Company List – 14 May W2010 Advanced Course	Students Results Letter
Eats and Treats	Students Results Spreadsheet
Eats and Treats Letter	Toastmasters
Fashion House	VitaHealth Managers
Fax Form	VitaHealth Sales
Fundraising Letter	W2010 Advanced Course – 14 May Spreadsheet
Jetpoints-Data	Word 2010 Advanced Course Enrolments
Jetpoints-Main	

Learning Outcomes

At the end of this section you should be able to -

- ☐ Start Microsoft Excel, understand the Excel screen and spreadsheet concepts
- ☐ Start Microsoft Word, understand the Word screen and document types
 - Business letters
 - Faxes
 - Email
- ☐ Copy spreadsheet data and charts from an Excel workbook to a Word document
- ☐ Understand and use the Office Clipboard
- ☐ Identify mail merge documents and be familiar with merge fields
- ☐ Create a mail merge letter, fax and email

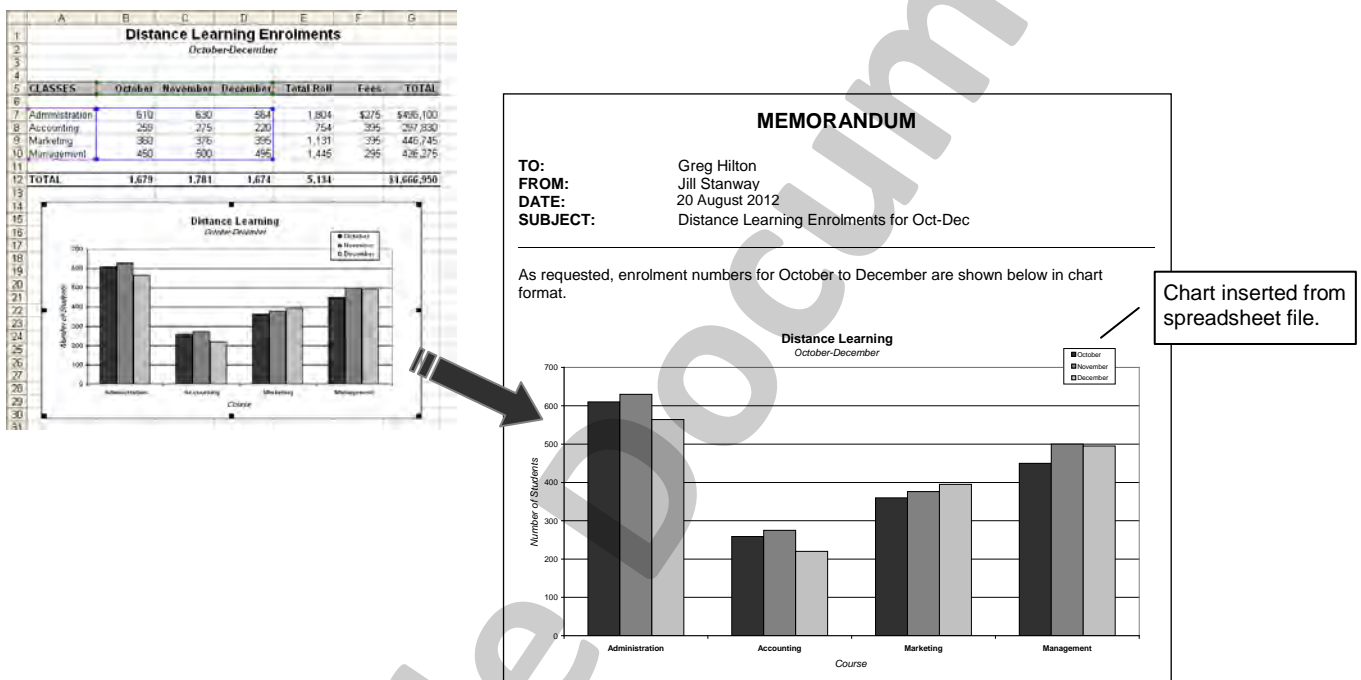
Sample Document

What is an Integrated Document?

In most organisations a range of business computer applications or programs are available. Each application is used to produce an end result, ie Microsoft Word to create documentation, Microsoft Excel to create spreadsheets, charts, etc.

When working in one application you may need to insert data from another computer application. Most computer applications available today allow you to do this, giving you the opportunity to analyse and present all data in one file.

In this workbook you will learn how to create a document and insert data produced from another computer application. This type of document is called an *Integrated Document*. An example of an integrated document is shown below.



In the above example a memorandum is typed in Microsoft Word and a chart that has been created from a Microsoft Excel spreadsheet is copied and pasted into the document.

By using a word processing program together with a data file you can create a personalised letter. This process is called a "mail merge". In this workbook you will also learn how to do this.

Combining data from other computer applications allows a user to produce an end result quickly and easily.

Items can also be copied to the Office Clipboard and pasted (see page 22).

Microsoft Excel

Microsoft Excel is a spreadsheet program which is essentially a large working area composed of rows and columns. The intersection of a row and column is called a cell. Text and numbers are entered into these cells and formulas are used to manipulate the data to provide information required.

Microsoft Excel 2010 (or any spreadsheet program) makes calculations easy - it replaces your pencil, paper and calculator. If you change data in a worksheet, every formula associated with that data will be automatically recalculated accordingly.

Data can therefore be altered to re-calculate budgets and to forecast results using different sales projections. Worksheets can be saved on disk, retrieved and printed as required.

Spreadsheets are widely used -

- 1 **In industry and commerce for**
 - financial accounts
 - forecasting and projection results
 - recording and comparing data
 - personnel details
- 2 **At home for**
 - budgeting
 - calculations, eg painting, wallpapering
 - savings and travelling expenses
- 3 **At schools for**
 - test and examination results
 - timetables
 - school rolls
- 4 **At clubs for**
 - membership fees
 - sports results
 - sponsorship details

Examples of other spreadsheet programs include Lotus 1-2-3, Corel Quattro Pro and OpenOffice Calc (the last of which can be freely downloaded from the Internet).

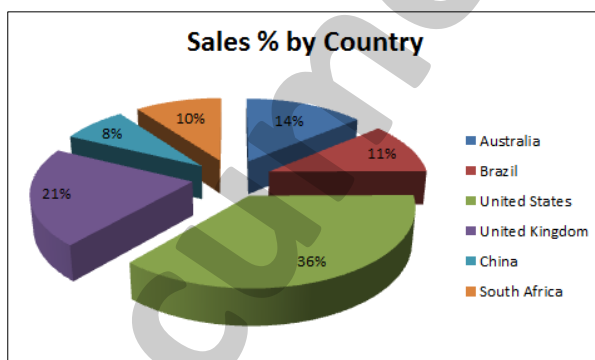
Spreadsheet/Worksheet

The word *spreadsheet* is a general term for any document created by a spreadsheet program; a spreadsheet is referred to in Excel 2010 as a *worksheet*. Both of these terms are used throughout this book but they refer to the same thing.

Samples of Spreadsheets

	A	B	C	D	E	F	G	H
1	Day Trippers							
2								
3	Tours	January	February	March	April	May	June	Total
4	Hinterland Tour	256	353	178	125	374	322	1608
5	The Coast Tour	312	262	285	310	345	370	1884
6	Bryon Bay and Tweed Heads	408	478	324	314	423	384	2331
7	Fraser Island	993	810	826	786	874	882	5171
8	Brisbane in a Day	554	487	512	456	492	414	2915
9	Brisbane at Night	452	435	478	398	416	488	2667
10	Total	2975	2825	2603	2389	2924	2860	16576

	A	B	C	D	E	F
1	VitaHealth Products - Worldwide Sales					
2	2011					
3						
4		Q1	Q2	Q3	Q4	Total
5	Australia	105,000	95,600	87,500	160,200	448,300
6	Brazil	85,000	92,300	75,000	96,000	348,300
7	United States	199,000	357,000	224,785	391,255	1,172,040
8	United Kingdom	153,000	169,000	158,700	180,250	660,950
9	China	62,500	52,500	49,000	82,000	246,000
10	South Africa	75,000	84,000	70,400	96,100	325,500
11	Total	679,500	850,400	665,385	1,005,805	3,201,090
12						
13						
14						
15	2010					
16						
17		Q1	Q2	Q3	Q4	Total
18	Australia	55,000	88,000	76,000	155,350	374,350
19	Brazil	75,000	85,300	72,400	95,000	327,700
20	United States	155,000	225,000	123,950	250,780	754,730
21	United Kingdom	125,000	255,690	155,890	175,500	712,080
22	China	65,000	45,650	45,000	75,000	230,650
23	South Africa	78,000				
24						
25	Total	553,000				
26						
27						
28	2009					
29						
30		Q1				
31	Australia	125,000				
32	Brazil	75,000				
33	United States	185,500				
34	United Kingdom	145,500				
35	China	65,000				
36	South Africa	72,500				
37						
38	Total	668,500				






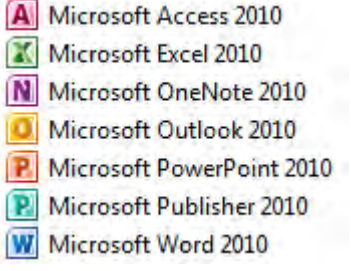

	A	B	C	D	E	F	G
1	Te Kea Trading Company						
2	Pricing Structure for December Sale						
3							
4							
5		Product	Cost Price	Retail Price	% Margin	Quantity in Stock	Value of Stock
6							Sale Price
7		Calendars	\$11.00	\$18.95	41.95%	50	\$550.00
8		Saucepans	75	95	21.05%	25	1,875.00
9		Electric Jug	42	75.5	44.37%	32	1,344.00
10		Men's Sweatshirt	24	42.95	44.12%	55	1,320.00
11		Weedeater	185	269.9	31.46%	24	4,440.00
12		T-Shirts	15	24.85	39.64%	75	1,125.00
13		Garden Shed	295	375.5	21.44%	11	3,245.00
14		Crockpot	120	159.9	24.95%	30	3,600.00

Advantages of Spreadsheets

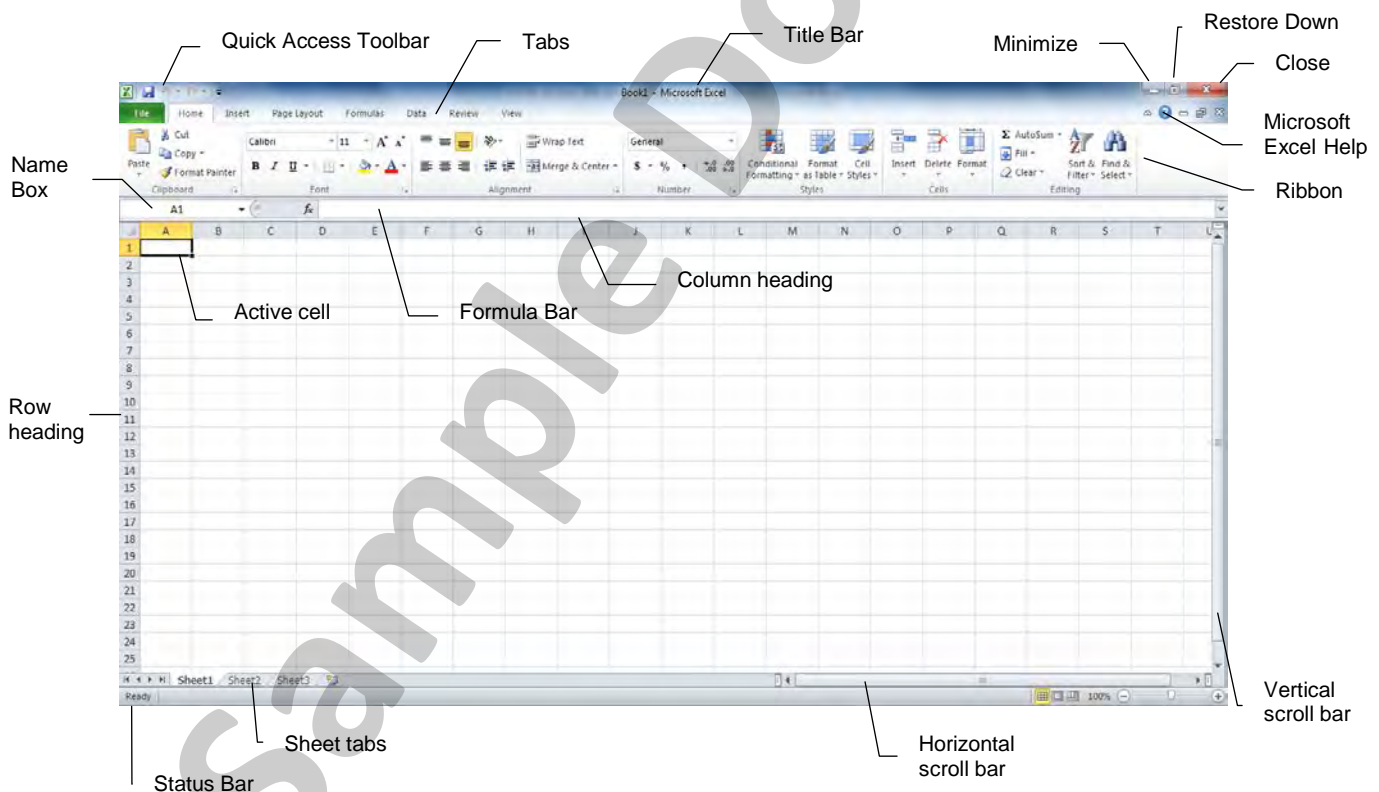
- Calculations can be performed quickly and easily.
- If data is altered, the calculations automatically adjust.
- Worksheets within a workbook can be used for different groups of data. Data from a group of worksheets can be calculated onto one summary worksheet.
- Charts can be used to visually display data, eg bar, column, pie, line.
- Data can be manipulated, grouped and sorted into a specific order for lists, databases, etc. Data within a spreadsheet can then be quickly located.

Starting Excel 2010



Exercise 1

- 1 Click on the Start button  at the bottom left-hand corner of the screen.
- 2 Select  from the Start Menu.
- 3 Select  Microsoft Office from the Programs menu.

- 4 Select  Microsoft Excel 2010 from the list to start Excel 2010.

The Excel Screen



Note

The Office button  in Excel 2007 has been replaced with a File tab  which contains all basic tasks such as opening, saving and printing a spreadsheet.

Quick Access Toolbar

The Quick Access Toolbar contains commands to Save, Undo and Redo. Frequently used commands can be added to this toolbar.



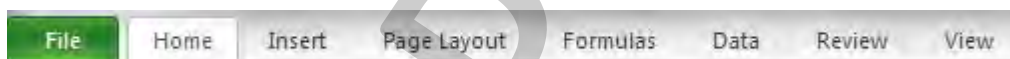
The Ribbon

The toolbars and menus from Excel 2003 were replaced by the ribbon in Excel 2007 and is very similar in Excel 2010. The ribbon provides access to all the tools required for working with a spreadsheet.

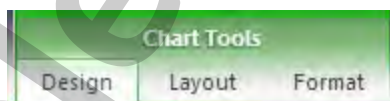


Ribbon Tabs

The ribbon has a series of tabs along the top; click on the tab to display the ribbon required. There are seven default tabs:

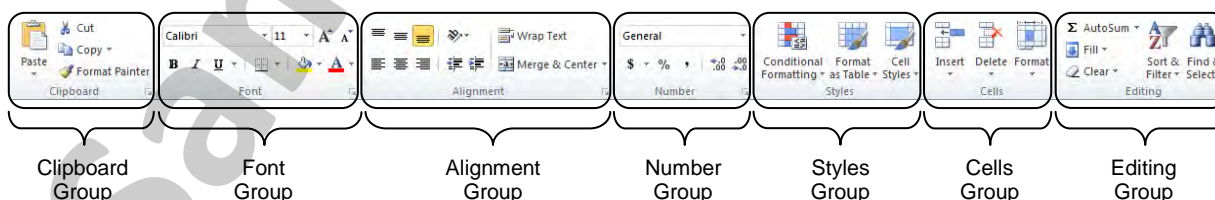


There are also hidden tabs that appear when appropriate, such as the Chart Tools. These are displayed when you are working on a chart and disappear again when you have finished.



Groups

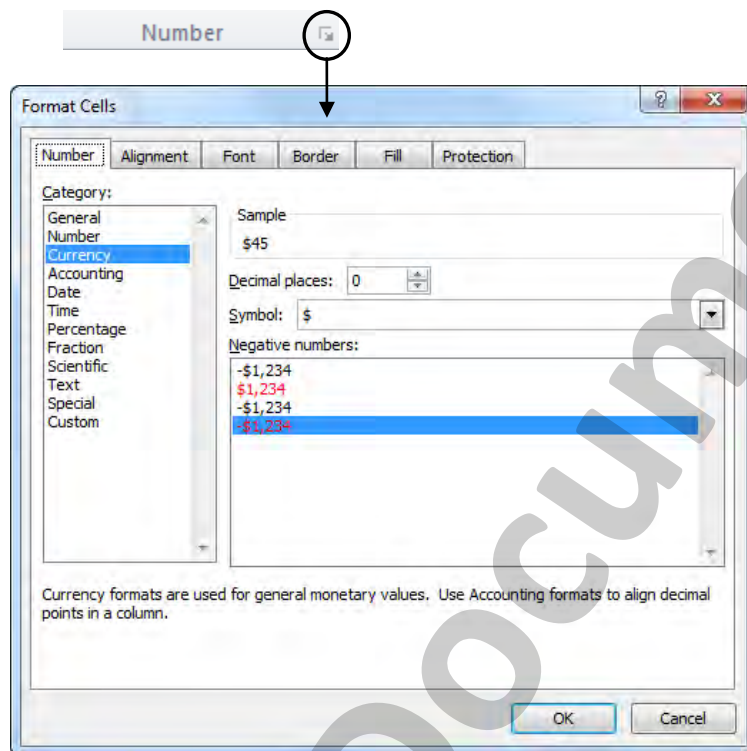
Ribbons are split into groups, (eg the Font Group). Each group contains command buttons appropriate to a particular action; the font formatting tools are located in the Font Group.



Dialog Box Launcher

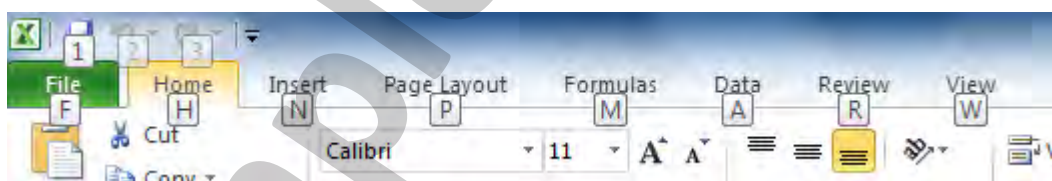
The Dialog Box Launcher is the small diagonal arrow in the bottom right corner of some groups. When you click on this button, it displays an associated dialog box.

Dialog boxes usually contain more settings or advanced features. For example, the Number dialog box allows you to make formatting changes to the contents of the current cell.



Key Tips

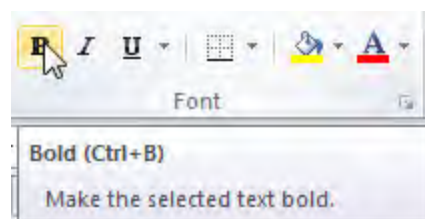
The keyboard can be used to select tabs on the Ribbon and buttons on the Quick Access Toolbar. If you press Alt, Key Tips become active.



These small badges are labelled with various letters and numbers, that when pressed on the keyboard, will trigger the associated command or function. For example, to save the workbook press Alt and then 1.

ScreenTips

When you rest the mouse pointer over a button or command, a screen tip appears. This is a small window describing the function of that command and any shortcut key it may have.



Opening a Workbook

Exercise 2

- 1 Click on the **File** tab at the far left of the Ribbon. When you click on the File tab Backstage view will appear. This view allows you to create, open, print and save a workbook. Excel options, accessing help along with exiting Excel are available in this view.

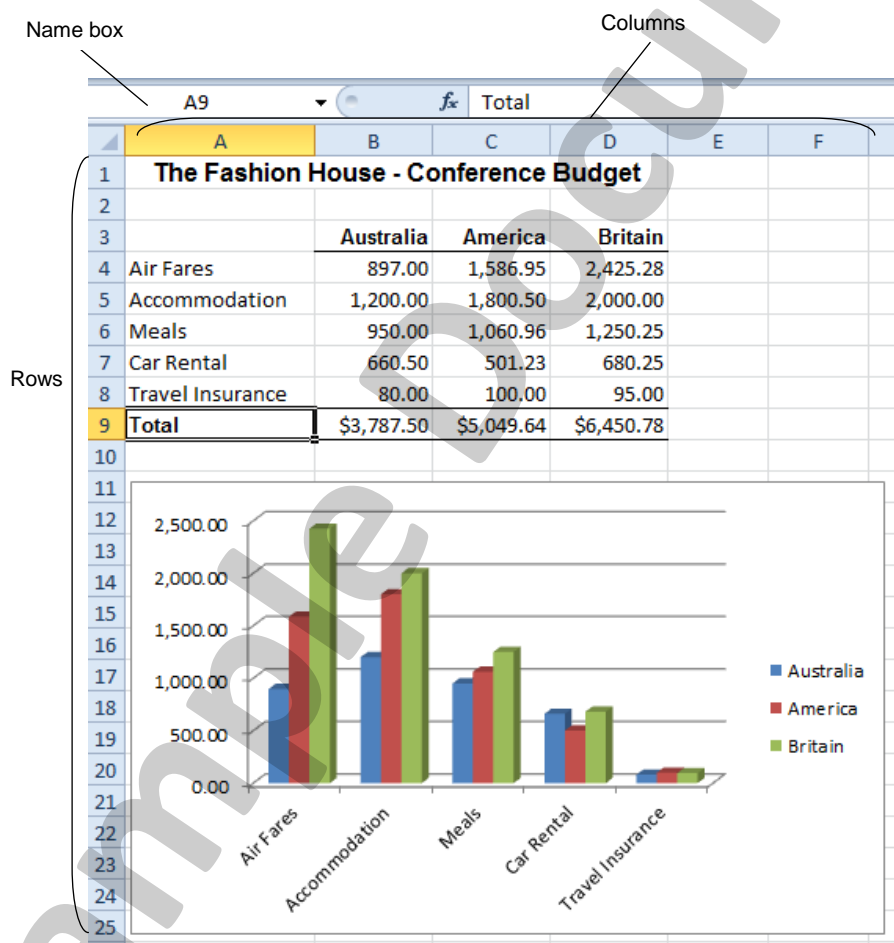
Ctrl O 2 Click on **Open** to display the Open dialog box.

- 3 Double click on the *2791 V7 Exercise Files* folder, ie **2791 V7 Exercise Files**.

- 4 Select **Fashion House**. Click on **Open**.

The spreadsheet is made up of rows and columns as shown below. The intersection of a row and a column is referred to as a “cell”.

- 5 Click on cell A9, ie the cell that displays **Total**. You will notice that the cell reference is displayed in the Name box at the top of the worksheet area



Selecting Worksheet Data

A row can be selected by click on the row header (ie the row number) and a column can be selected by clicking on the column header (ie the column letter).

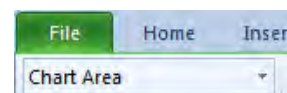
To select data in the worksheet you can simply drag across the columns and down the rows, ie from the beginning cell to the end cell required. This is referred to as a “range”.

- 6 Practise selecting columns, rows and various ranges in the worksheet on screen.

A chart has been displayed on this worksheet using the spreadsheet data.

To select a chart that is on the same sheet as worksheet data

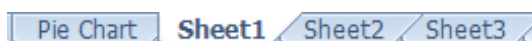
Click on a blank white area of the chart. If you are unsure if you have selected the chart correctly click on the Layout tab and ensure Chart Area is displayed in the Current Selection group as shown above at the right.



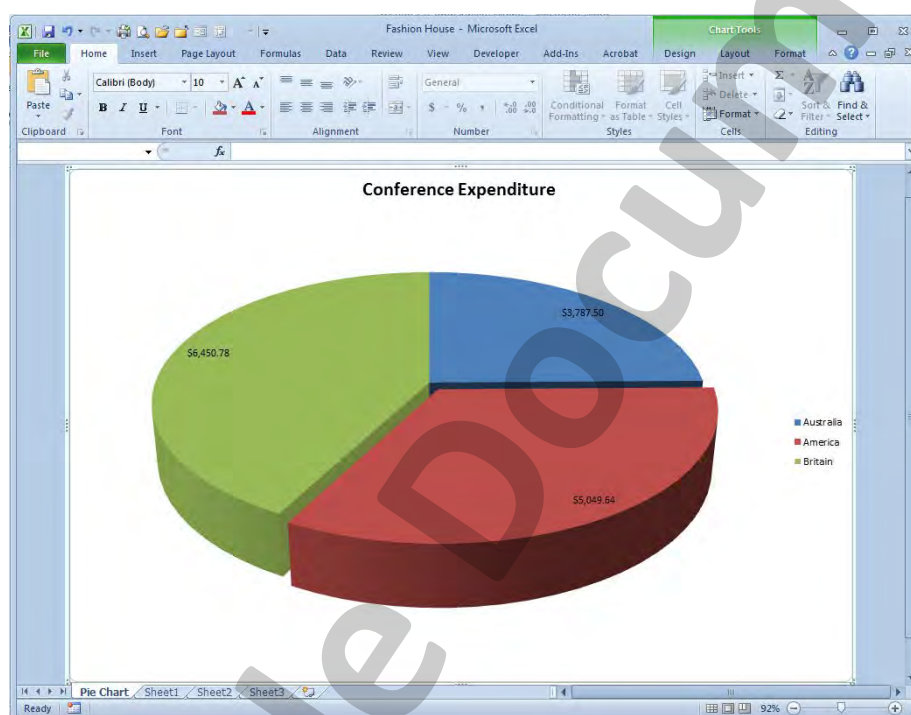
- 8 Practise selecting the chart and drag to move it up to the right of the worksheet data.

A chart can be displayed *either* on the same worksheet as the spreadsheet data.

- 9 Click on the *Sheet* tab at the bottom of the window that displays **Pie Chart**, ie

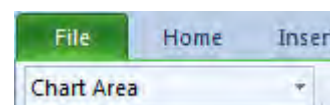


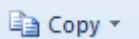



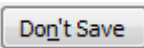
The pie chart shown below is displayed.



To select a chart that is on another sheet

Click at the right of the heading. If you are unsure if you have selected the chart correctly click on the Layout tab and ensure Chart Area is displayed in the Current Selection group as shown at the right.



- 10 Select the pie chart, click on the Home tab and click on  in the Clipboard group. This will copy the chart to the Clipboard.
- 11 Click on the Sheet 1 tab then click in a cell under the worksheet data and chart.
- 12 Click on . The chart will be displayed under the worksheet data but needs to be reduced in size.
- 13 Move the mouse pointer to the top right corner until the cursor displays as a diagonal arrow. Drag towards the centre of the chart until it is an appropriate size. You may need to move the chart to display it attractively under the worksheet data (by dragging on an outside line).
- 14 Click on the  tab then select . Click on .

Microsoft Word

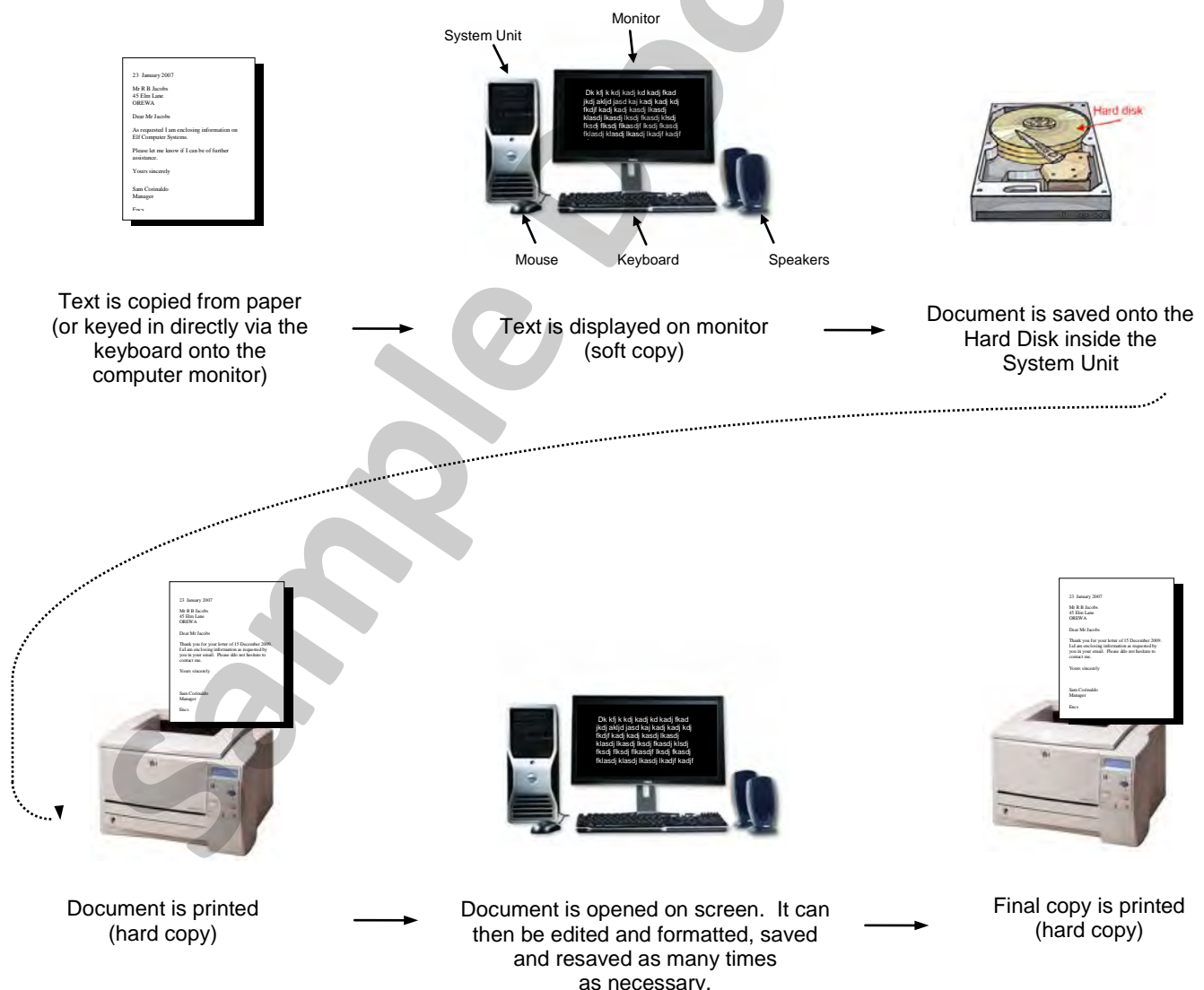
Microsoft Word is a word processing program that allows you to create text and/or graphics using a keyboard which is displayed on screen (referred to as “soft copy”). The document is then saved onto the hard disk in your computer system. A document can be opened on screen and edited and formatted (as many times as necessary). A “hard copy” can be produced by sending the document to the printer.

A word processing program generally includes the creation of -

- General correspondence, eg letters, memos, faxes
- Reports, travel documents, minutes of meetings, financial documents
- Advertisements, flyers, brochures
- Mail merges (ie direct mail), labels, tables
- Manuals, other documentation


Data from other programs, eg Microsoft Excel, Microsoft Access etc can be copied into a Word document, or linked.


The Process of a Word Processed Document




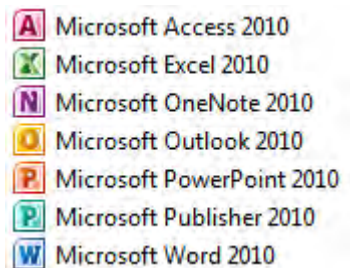
Starting Microsoft Word

Exercise 3


1 Click on the Start button  at the bottom left-hand corner of the screen.

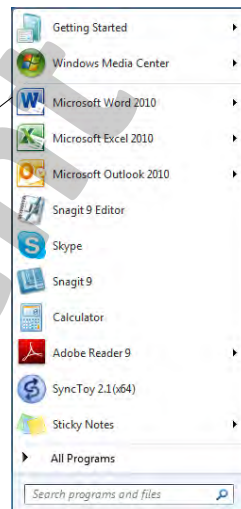
2 Select  All Programs from the Start Menu.

3 Select  Microsoft Office from the Programs menu.

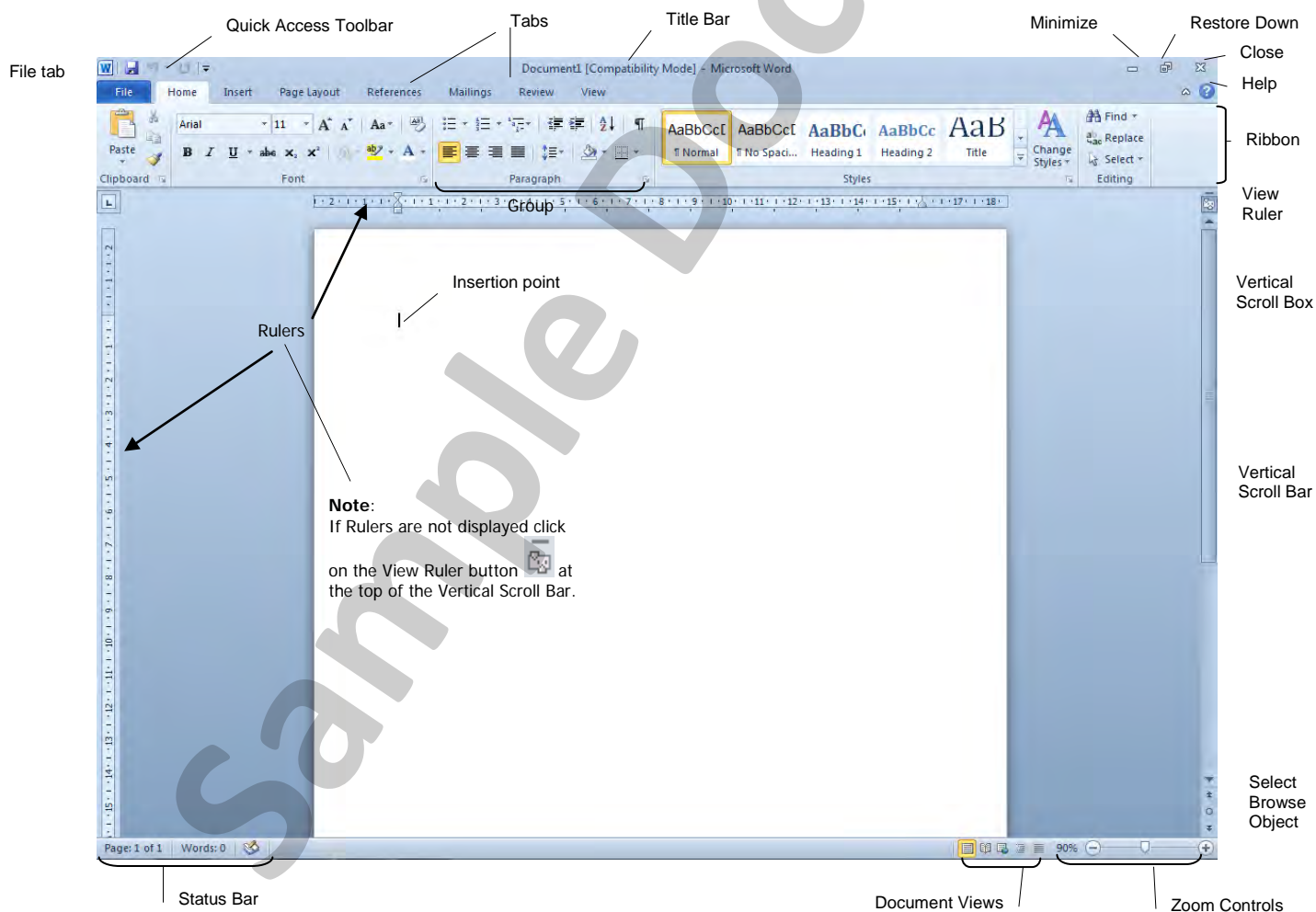


Microsoft Word 2010 appears on the Start menu after you have used it three times. You can click on it to start Word.

4 Select  Microsoft Word 2010 from the list to start Word 2010.



Microsoft Word will be displayed on screen with a new document, ready for you to enter text.



Parts of the Word screen, ie tabs, ribbons and groups are similar in Word as they are in Excel (see pages 6 and 7).