

# Integrate Excel and Word Skills

**overview** Your position as an assistant to Derek Bradberry, Training Director of The Bookstore, Inc., will allow you to showcase your *Word* and *Excel* skills. A needs assessment recently completed by Mr. Bradberry revealed the need for staff members to master their software to increase efficiency in completing administrative tasks. Your responsibilities include preparing the budget for the Software Mastery Training Series, preparing a memo with the column chart you prepared displaying the budgeted salaries, designing a worksheet template for the training series, preparing the training design sheet, creating customer labels for the training diskettes, and preparing a Web page.




## Excel Worksheet

1. Create a worksheet showing the budget for the Software Mastery Training Series, as shown in the spreadsheet on the following page. Save the file as **EX-job1**.
2. Prepare the worksheet heading as follows.
  - a. B1—Merge and center over columns B-H. Format bold, Antique Olive, 14-point font, and Indigo font color.
  - b. B2—Merge and center over columns B-H, bold, Indigo font color.
  - c. D3—Revised:, bold, Indigo font color.
  - d. E3—Enter date function; bold, Indigo font color, format with 3/14/01 date style.
  - e. A1—Insert clip art; size to fill the range A1:A3. (*Hint:* Search for computers.)
  - f. Row 1—Change row height to 37.50 and center the text in the row vertically.
  - g. Row 3—Change row height to 24.00.
  - h. Apply a cell border around A1:H3. Choose indigo border with yellow shading.
3. Insert a new row as the fourth item in the Salaries category. Select **A17:C17** and move to the new row. Indent A10, like the three other salary categories above. Move C10 to B10. Delete the blank row left when the Staff category was moved.

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4. Enter a formula in C11 to compute total benefits (15% of total salary). (*Hint:* Reference the percent entered in A23.)
5. Enter a formula in C10 to compute the total salaries. Enter a formula in C19 to compute the total budget.
6. Format number cells:
  - a. B7 and C19—Currency, \$ symbol, 0 decimal places
  - b. B8:B10 and C10:C18—Currency, no symbol, 0 decimal places
  - c. A23—Percent, 0 decimal places
7. Change the width of column A to 22.00 and column B to 10.00. (You will need to resize the image you inserted in A1.)
8. Insert the following comment in B13: **Cost on lease of 15 laptops and trainer workstation.**
9. Create a custom header that displays **Training Department** at the right. Create a custom footer that displays **Software Mastery Training Series** at the left and **Page # of total pages** at the right.
10. Save, but keep the file open. You will print this worksheet after Job 2.

	A	B	C	D	E	F	G	H
1		<b>Budget for Software Mastery Training Series</b>						
2		Date Prepared: November 1, 200-						
3		Revised 1/30/02						
4								
5	<b>Budget Item</b>	<b>Amount</b>						
6	Salaries							
7	Director	\$3,000						
8	Trainers	1,000						
9	Consultant	1,000						
10	Benefits							
11	Staff Development		1,000					
12	Furniture and Equipment		1,500					
13	Occupancy		300					
14	Marketing		100					
15	Communications		75					
16	Staff		600					
17	Supplies		125					
18	Postage		20					
19	<b>Total</b>							
20								
21								
22	Benefits Allowance							
23	15%							



## Excel Column Chart

1. Save the open file as **EX-job2**.
2. Create a column chart as an embedded object in the worksheet prepared in Job1. Show the breakdown of the Salaries budget item. Move the chart to A25 and fill the range A25:G40. Format as follows:
  - a. **Chart title:** Salaries Budget for Software Mastery Training Series. Insert thick green border around chart title.
  - b. **Data points:** Green
  - c. **Chart area:** Gold
  - d. **Plot area:** Recycled paper fill effect
  - e. **Category axis and value-axis:** Bold
  - f. **Legend:** None
3. Save, print, and close the file.



## Memo with Embedded Chart

Prepare a memo to Tara Lanford, Vice President, from Derek Bradberry, Training Director. Use the Professional template; key our company name in the heading. Use the Paste Special feature to embed the chart showing the budgeted salaries created in Job 1. Send a copy of the memo to Catherine Lawrence. Save the memo as **EX-job3**.

### Function Review

#### Paste Special

Copy *Excel* chart. In *Word*, click **Edit, Paste Special**.

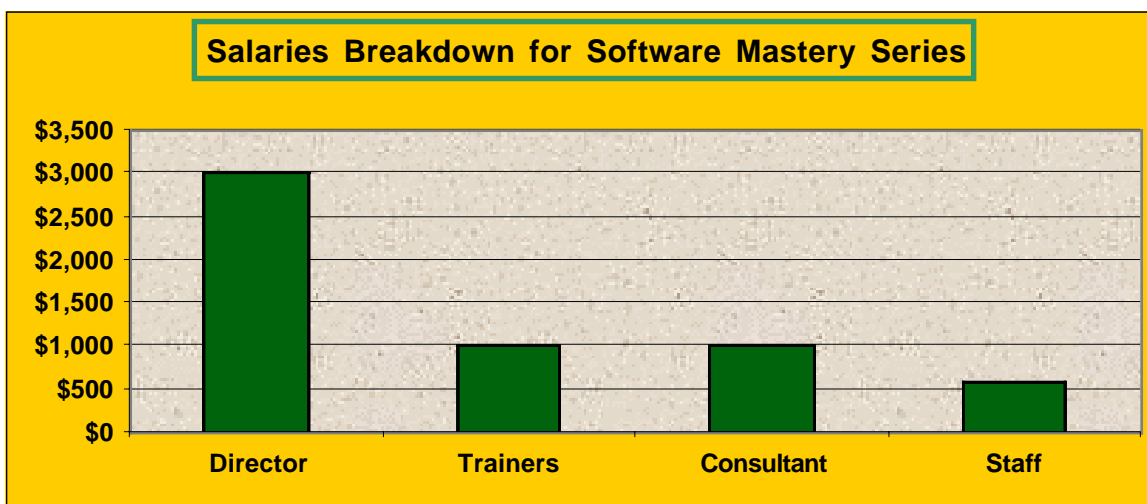
# Memo

To: Tara Lanford, Vice President  
From: Derek Bradberry, Training Director  
CC: Catherine Lawrence  
Date: February 20, 200-  
Re: Update on Training Program for Software Mastery Series

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The training program titled Software Mastery Series is designed as a result of the outcome of a needs assessment conducted by the Training Department last week. The needs assessment showed that more than three fourths of our staff only know and use one fourth of the capabilities of their software. When asked about time-saving features such as mail merge, templates, styles, index, bookmarks, hyperlinks, paste special, autoformat, very few were using these efficiency features.

Upon evaluation of the learning outcomes determined by the needs assessment, I have hired a Microsoft consultant to identify the software competencies needed by our staff to increase efficiency in completing administrative tasks. The chart below shows the breakdown of the salaries budgeted for this training program. As training director, I will be responsible for designing the training program upon receipt of the consultant's report. My trainers are very qualified to lead the instructional sessions.





## Excel Worksheet Template

You will prepare a template for all worksheets related to the Software Mastery Training Series. Then you will use the template to create a worksheet for logging the registration for the first two training sessions held on November 15 and 19.

1. Open **EX-job1**. Save it as a template file named **Software Mastery Training Series Template**.
2. Delete all the worksheet data except the heading (A1:H3). (*Hint: Use **Clear** feature to delete all content and formats.*)
3. Copy everything on Sheet 1 to the same position on Sheet 2.
4. In B1 on both sheets, key **Software Mastery Training Series**.  
In B2, key **November 15, 200-** on the first sheet and **November 19, 200-** on the second sheet. Format with full date (Wednesday, March 14, 200-).  
In B3 on both sheets, key **Calendar Wizard**. Merge and center across the entire worksheet; bold and indigo font color.
5. Resave.

### Prepare Training Session Worksheet

1. Save the template worksheet as a *Microsoft Excel* Workbook named **EX-job4**.
2. Open the data file **Participants**. Copy the data on the Nov 15 sheet tab to Sheet1 and the data on the Nov 19 sheet tab to Sheet 2 in the **EX-job4** worksheet. Rename the sheet tabs appropriately. Change the tab color as follows: Nov 15-blue and Nov 19-yellow.
3. Hide column H on both sheets.
4. Insert a column to display after column C Department. Label the column **Department Fee Paid**.
5. Enter data in column D as follows to record that Departments 4 and 6 have paid the registration fee:
  - a. Use the custom filter of the AutoFilter feature to display those records in Departments 4 or 6.
  - b. Then enter **25** as the amount paid in column D. Remember to use the fill handle to copy that amount.
  - c. Repeat for the November 19 session.
6. Insert a column to display after column D. Label the column **Group Color**. Use the Format Painter feature to copy format of one of the other column headings.
7. Assign the participants as follows to the four groups: Blue, Yellow, Green, and Orange.
  - a. At D6, freeze the panes. Scroll until column E is next to column C.
  - b. In E6, key **Blue** for the first person. Assign the next person **Yellow**, the third person **Green**, and the fourth person **Orange**.
  - c. Now start over and assign the fifth person to the **Blue** group. Continue until all participants have been assigned a group.
  - d. Repeat for the November 19 session.
  - e. Unfreeze the panes.

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8. For the November 15 session, print the area that shows the participants registered from Department 6. After printing, clear the print area.
9. Sort each session by last name in ascending order.
10. Select both worksheet tabs. Print both worksheets in portrait orientation. Ungroup the sheets.



## Word Training Design Sheet

Create the training design sheet for the first module of the training session. Use landscape orientation. Save as **EX-job5**.

### Become Efficient in Your Job—Master Your Software

#### Training Design Sheet

#### Module #1 Calendar Template

Leader: Tarase Lowry

Lab assistant: Kelly Easley

**Program Goal #5: To increase efficiency in completing administrative duties.**

Objectives	Procedures	Time	Materials	Evaluation
<b>The participant will:</b> 1. understand the benefits of using <i>Word</i> templates. 2. create a calendar using the <i>Word</i> calendar template. 3. change font color to add emphasis. 4. insert a graphic. 5. decrease size of textbox. 6. create textbox and key special notes.	<b>The trainer will:</b> 1. check the session roster. 2. complete icebreaker to introduce training participants and leader. 3. distribute Handout #1 (yellow) to participants and demonstrate accessing the various <i>Word</i> templates (memo, agenda, web page, etc.).	2 min.	15 laptop computers for participants	<b>Independent Practice</b> See Handout #2 December calendar  <b>Observation</b>  <b>Student Participation</b>  <b>Check for Understanding</b> 1. Click _____, _____ to open the <i>Word</i> templates. 2. Would a picture of a duck be a relevant graphic for February's calendar? 3. On which toolbar do you find <ul style="list-style-type: none"> <li>• textbox button?</li> <li>• font color button?</li> <li>• insert clip art button</li> </ul> <b>Out-of-Session Application</b> See Handout #2 Jan-Oct calendars
		10 min.	1 demonstration workstation with computer and projection device	
	7 min.	3½" floppy diskettes with labels		
	15 min.	<b>Handouts:</b> a. #1 Sample Templates (yellow) b. #2 Using the Calendar Template (blue)		
	2 min.			
	20 min.			
	4 min.	4. instruct participants to save calendars on 3½" training diskette. 5. distribute Handout #2 (blue) and demonstrate creating November calendar while participants work along with leader. 6. assist students in completing the independent practice to reinforce training objectives. 7. Close and check for understanding through oral questioning.		

1. Key the training title in Tahoma 16 point and all other heading information in Times New Roman 12 point. Set spacing after each line to 6 point. Add 1 ½" border and 15% gray shading.
2. Insert a five-column table.
  - a. Choose the **Table Web 2** AutoFormat.
  - b. Use the numbering feature to insert numbers. Decrease indent to display at the left of the column.
  - c. Use Repeat row heading feature to repeat column headings on the second page.
  - d. Insert a footer with **Module #1** printed at left and **Page 1 of total pages** at right; bold, 10 point.

*Optional:* E-mail the training design sheet as an attachment to your instructor and one student. Compose an e-mail message that requests them to review the training design sheet. Ask them to send any suggestions by Friday.

You received a number of suggestions for improving the training design sheet. Make the following changes.

3. In the Procedures columns, switch items #4 and #5.
4. Insert a column to the left of the Evaluation column. Label it **Cost**; center the heading. Center the following costs in the new column:

Laptops \$1000

Demonstration workstation \$500

Diskettes \$20

Handout 1 \$20

Handout 2 \$25

5. Add the following row at the end of table. Merge the cells so the row is one cell.

**Teacher Reflection**

Were the participants at ease in the learning environment?

Did the participants understand the time-saving capability of using *Word* templates?

Did each participant successfully complete the November and December calendars?

Were the participants motivated to return to their offices and complete the Jan-Oct calendars for mastery of this objective?

Do you perceive that the participants will call you if additional assistance is needed?

6. Insert a row above the Teacher Reflection row. Enter a formula to total the Time and Cost columns.
7. Save the revisions, print, and close the file.

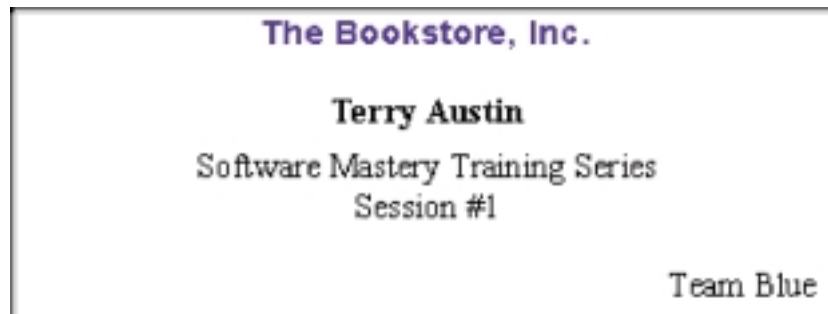
JOB  
**6**

## Word Mail Merge Labels with Excel Worksheets

1. Prepare labels for the diskettes you will provide the participants in the November 15 training session. Choose **Avery label #5097** and use the *Excel* file **EX-job4** as your data source.

*Hints:* When the Edit Recipient List dialog box displays, deselect any rows not needed in the mail merge, e.g., the heading. Note the field names given to each column (F1 for Last Name). You may double-click the headings to size to best fit for ease in reading.

2. Save the main document as **EX-job6 merge Nov 15**. Save the merged labels as **EX-job6a**. Print the labels. Double-check each label with the *Excel* file to be sure groups were assigned correctly. Note that having the teams assigned prior to the training session will save time during the session.
3. Prepare labels for the November 19 session, as shown below. Rename the main document **EX-job6 merge Nov. 19**. Select a new recipient list (Nov 19 sheet). Save the labels as file **EX-job6b**. Print. Check group assignments.



JOB  
**7**

## Word and Excel Web Pages

1. Save the budget created in Job 1 as a Web page named **EX-job7**.
2. Preview the Web page. (*Hint:* It is recommended to view in *Internet Explorer* for software compatibility.)
3. Make any needed revisions. For example, the Antique Olive font in A2 may not display. Change to Arial. Resave the *Excel* file. Refresh your Web browser.