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**DESIGN AND PRODUCE BUSINESS
DOCUMENTS
(OFFICE 2010)
BSBITU306A**



By

The Software Publications Writing Team



Software Publications

Design and produce business documents (Office 2010)

This book supports BSBITU306A Design and produce business documents in the Business Services Training Package.

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Scenario

Accurate Training Centre trains students to use computers. As part of their training, the students complete exams towards certified Diplomas and Certificates. You work for the Student Director. All the information gathered on students, courses and exams is kept in an Access database called Accurate Training Students Database. In this database you will create several queries - the first showing details of each student and the courses they are taking. Another will show the students who are in the Business Department and who are working towards attaining a Diploma of Computer Systems. Another query will display each student with their exam results. This query will require a calculation to give their total exam results.

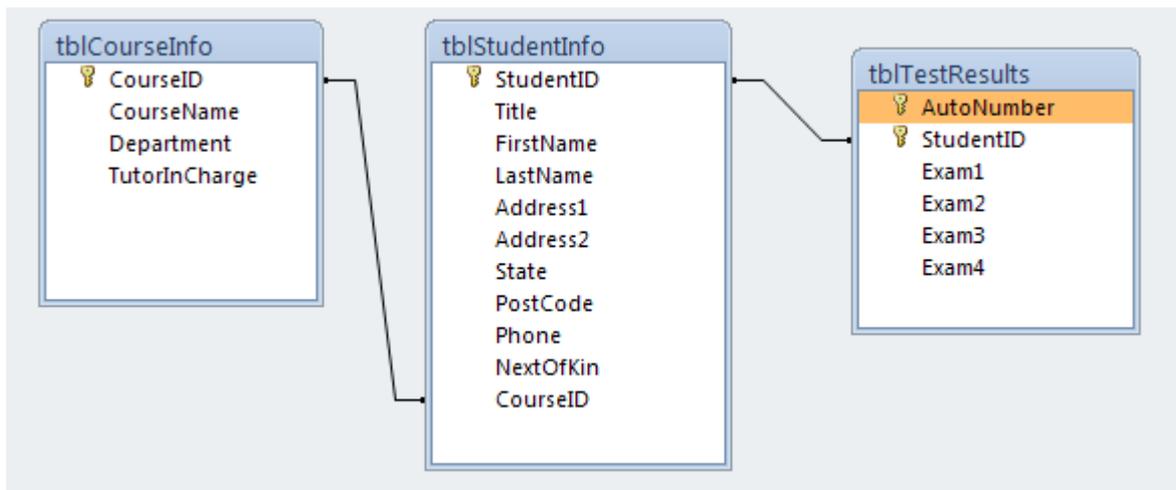
Once these queries have been completed you will create a merge letter using one of the Access queries to invite all business students to a presentation luncheon where they will receive their certificates. You will also need to take data from the Course Results query into Excel and create a column chart showing exam results for each student, by student number (this is to protect their privacy). An AutoFilter will be added to filter only the Diploma students and create a pie chart to display the total marks for each student in that course. A PivotChart will be created to display the students and their marks for each exam. Both the pie chart and the PivotChart will be linked to a Word document, which will be printed and displayed on the notice board so students can see their results.

Accurate Training Students Database

The Accurate Training Students Database has been set up as a relational database. In a relational database, data is divided into separate components (tables), all of which are related to each other.

The database you created earlier was a single table database, which is called a flat file database.

The structure of the Accurate Training Students Database is shown below. As you see, it contains three tables, one for Student information, one for course information and one for test results. These tables are joined by **relationships** which are shown below as lines between the tables. Note that where there is a relationship, the same field name is duplicated in both tables (e.g. the CourseID field is in both the tblCourseInfo table and the tblStudentInfo table).



If the data from the different tables were entered into a single table there would be duplication of data, e.g. the course name would be entered several times with each student instead of once. Creating a relational database reduces data duplication, decreasing errors when data is entered.

When a query is created using a relational database, data from the various tables can be collected in one query.

What is a Query?

Queries enable you to ask questions about the data in a database. The basic function of queries is the retrieval of a subset of data (i.e. information) from one or more tables in the database.



There are several types of queries and they can be divided into two main groups:

- ◆ **Data Retrieval** queries that perform a specialised data retrieval task.
- ◆ **Action** queries that perform a specific data management task, including updating, deleting, adding data and creating new tables based on existing data.

Data Retrieval Queries

The most commonly used data retrieval query is called a *select* query. All other queries are based on the select query.

You may not always want to look at all the fields in a table, or all the records. A select query can be used to select only the data to be displayed from one table or more. Select queries are often referred to simply as “queries”, which is the term used for the rest of this book. Specialised queries will be named according to their specific function.

When you run a query, the subset of data retrieved is called a *dynaset* - a dynamic view from one table or more, selected and sorted as specified by the query. A dynaset is displayed in a datasheet, and looks and performs like a table.

Queries may return data directly from the database, or manipulate it to provide summarised or analysed information. Queries can be used as a basis for a form, report, graph or even for another query.

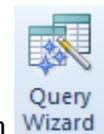
Queries can be created manually or by using one of the specialised query wizards, from anywhere in the Database window.

The Simple Query Wizard

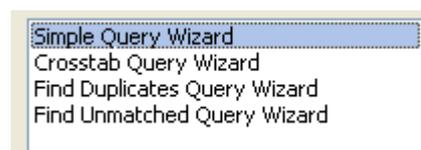
Create a select query using the Simple Query Wizard as follows.

Exercise 77

- 1 Open the **Accurate Training Students Database** database. Ensure all content in the database is enabled.



- 2 Click on the Create Ribbon, then click on the Query Wizard button .

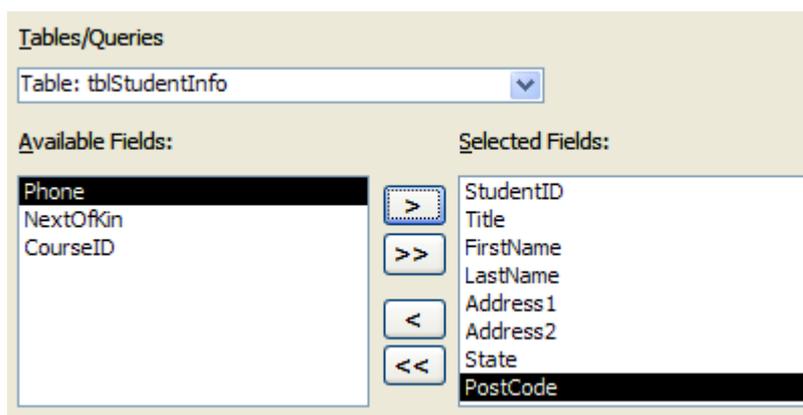


- 3 Ensure Simple Query Wizard is selected and click on OK.

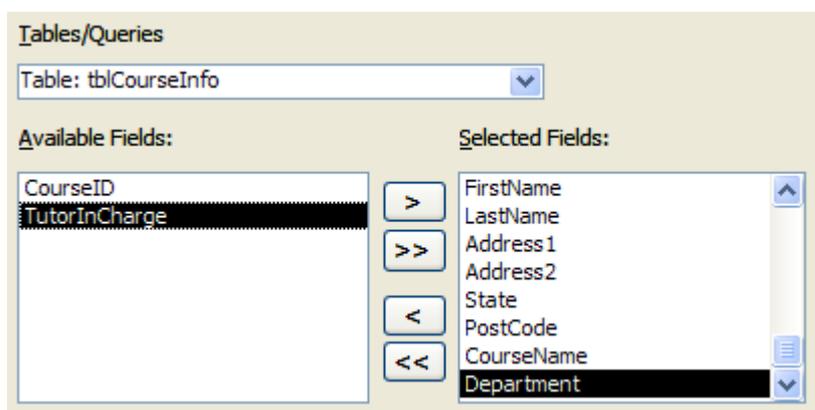
The first dialog box allows you to select the fields from more than one table (or query). The tblCourseInfo table should be displayed.

- 4 From the Tables/Queries box, click on  and select Table: tblStudentInfo.

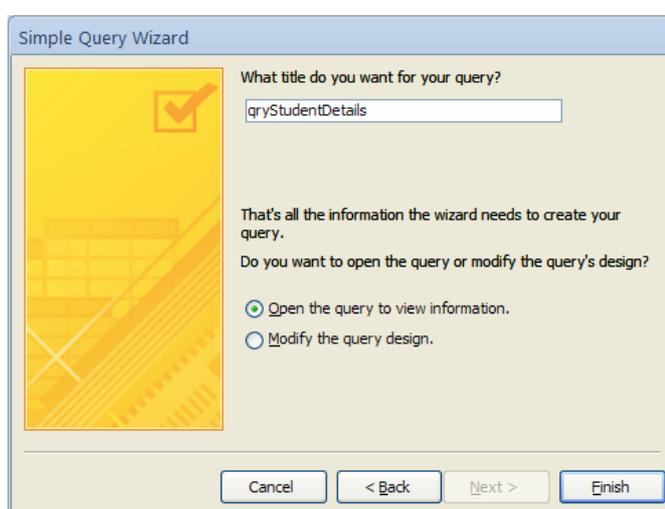
- 5 Insert the following fields (in the order shown below) by clicking once on the field in the Available Fields: box and clicking on  or double clicking on the field.



- 6 From the Table/Queries box click on  and select Table: tblCourseInfo.
- 7 Double click on **CourseName** from the Available Fields: box.
- 8 Double click on **Department**.



- 9 Click on Next.
- 10 Type: **qryStudentDetails** for the query name.



- 11 Ensure the *Open the query to view information* option is selected. This option will display the data in Datasheet view. Click on Finish.
- 12 Click on Shutter Bar Open/Close Button  at the top of the Navigation Pane to hide the Navigation Pane, then Maximise the screen.

StudentID	Title	FirstName	LastName	Address1	Address2	State	PostCode	CourseName	Department
00A062	Mr	Steve	Coleman	86 Toongarra R	Leichhardt	QLD	4305	Certificate II in Business (Office Administrati	Business
00A112	Miss	Kim	Derig	100 Smiths Ro	Goodna	QLD	4300	Certificate II in Business (Office Administrati	Business
00C197	Mr	Shane	Prescott	6 Oakmont Cr	Albany Creek	QLD	4035	Certificate II in Business (Office Administrati	Business
97B329	Mrs	Carole	Easton	2 Child Street	Riverview	QLD	4303	Certificate II in Business (Office Administrati	Business
98A122	Miss	Sharon	Burns	6 Willowbrook	Kenmore Heights	QLD	4069	Certificate II in Business (Office Administrati	Business
98B082	Miss	Natalie	Warne	34 Clipper Stre	Inala	QLD	4077	Certificate II in Business (Office Administrati	Business
99A276	Miss	Joanne	Gardner	57 Noble Stree	Wilston	QLD	4051	Certificate II in Business (Office Administrati	Business
00A308	Mr	Royden	Newman	22 Avery Court	Jimboomba	QLD	4280	Certificate III in Accounting	Business
00C308	Miss	Summer	McKeown	82 Harcourst	New Farm	QLD	4005	Certificate III in Accounting	Business
97A192	Mr	Seth	Fasher	50 Monash Ro	Loganlea	QLD	4131	Certificate III in Accounting	Business
99A099	Mr	Blair	Johns	44 Brennan Pai	Strathpine	QLD	4500	Certificate III in Accounting	Business
99C209	Miss	Christine	Rean	31 Scanlen Cr	Wynnum West	QLD	4178	Certificate III in Accounting	Business
00A107	Ms	Maryanne	Bassett	32 Central Ave	Paddington	QLD	4064	Diploma in Computer Systems	Electronics
00B201	Miss	Kelly	Molineaux	51 Moolingal S	Jindalee	QLD	4074	Diploma in Computer Systems	Electronics
00B340	Mr	Wayne	Matthews	54 Washbrook	Petrie	QLD	4502	Diploma in Computer Systems	Electronics
00C219	Mr	Gary	Stele	10 Hawera Cou	Aspley	QLD	4034	Diploma in Computer Systems	Electronics
97A085	Miss	Katrina	McNamara	23 Dickson Str	Morningside	QLD	4170	Diploma in Computer Systems	Electronics
98B041	Mr	James	Downs	1 Swale Street	The Gap	QLD	4061	Diploma in Computer Systems	Electronics
98B154	Mrs	Lynley	Price	30 Begonia Str	Daisy Hill	QLD	4127	Diploma in Computer Systems	Electronics
98C138	Mr	Craig	Matthews	6 Network Dri	Greenbank	QLD	4124	Diploma in Computer Systems	Electronics
99A192	Miss	Rachel	Hall	110 Duffield R	Margate	QLD	4019	Diploma in Computer Systems	Electronics
99A331	Mrs	Sheila	Marks	19 Elizabeth St	Everton Hills	QLD	4053	Diploma in Computer Systems	Electronics



13 On the Home Ribbon click on the View button  to change to Design View.

Notice the two tables from which you selected fields are displayed in the top part of the window. The relationship between the two tables is shown.

Modifying Queries

The Query Design window consists of two major areas.

- ◆ The upper portion of the screen displays the field lists for the Tables and/or Queries, and the relationship between them, similar to the database diagram in the Relationship window.
- ◆ The lower portion displays the Design grid, which is used to specify the fields to be included in the query, the sort order for the records in the query and the selection criteria.

The divider between the two sections can be moved up or down to adjust the view as required.

The screenshot shows the Query Design window for 'qryStudentDetails'. The top section displays two tables: 'tblCourseInfo' and 'tblStudentInfo'. 'tblCourseInfo' has fields: CourseID (primary key), CourseName, Department, and TutorInCharge. 'tblStudentInfo' has fields: StudentID (primary key), Title, FirstName, LastName, Address1, and Address2. A relationship line connects the CourseID field in 'tblCourseInfo' to the StudentID field in 'tblStudentInfo'. Below the tables is a horizontal divider bar. The bottom section is the Design grid, which is currently empty. The grid has columns for 'Field:', 'Table:', 'Sort:', 'Show:', 'Criteria:', and 'or:'. The 'Table:' row shows 'tblStudentInfo' for all fields. The 'Show:' row has checkmarks in the columns for Title, FirstName, LastName, Address1, Address2, and State.

Exercise 78

- 1 To view only the students taking the Diploma in Computer Systems, which is a course in the Business Department, apply the following steps:
 - a Click on  to scroll to the right in the Design grid until you can see **CourseName**.
 - b In the CourseName column click in the Criteria: row as shown below.

Field:	State	PostCode	CourseName	Department
Table:	tblStudentInfo	tblStudentInfo	tblCourseInfo	tblCourseInfo
Sort:				
Show:	✓	✓	✓	✓
Criteria:				
or:				

Click here

- c Type: **“Diploma in Computer Systems”** (including the quote marks).



- d Click on the Run button . The results will be displayed.



- e Click on the View button  to switch back to Design View.

- f Delete the text *“Diploma in Computer Systems”* from the CourseName column.

- 2 To display the students in the Business Department in alphabetical order by LastName apply the following steps:

- a Click in the Sort: row in the LastName column.

- b Click on  and select Ascending. This will sort all records in alphabetical order by the LastName field.

LastName	
tblStudentInfo	
	▼
	✓

Click here

- c Click on  to scroll to the right in the Design grid until you can see Department.

- d In the Department column click in the Criteria: row and type: **Business**

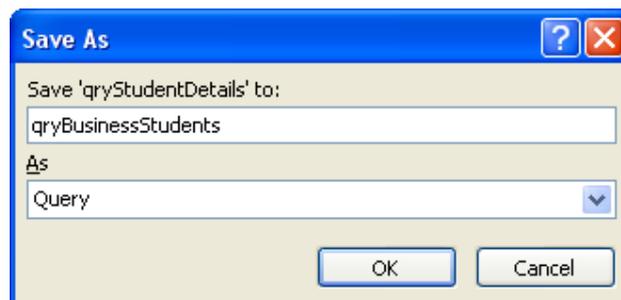
- e Press Enter.



- f Click on .

- 3 Click on  and select .

- 4 In the Save Query ‘qryStudentDetails’ to: box change the name to **qryBusinessStudents**.



- 5 Ensure the As box displays Query then click on OK.

- 6 Display the Home Ribbon. Close the query.

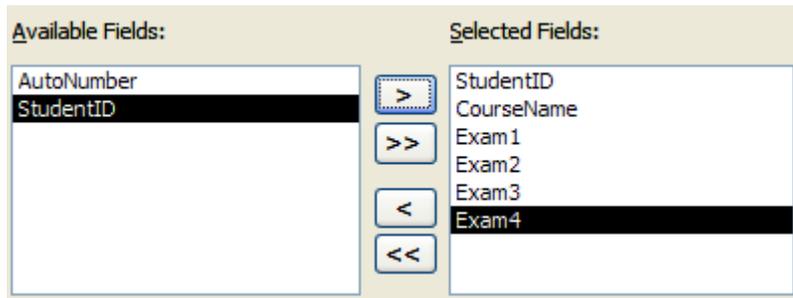
Exercise 79

- 1 From the Create Ribbon click on the Query Wizard button.
- 2 Select Simple Query Wizard and click on OK.
- 3 Select tblStudentInfo from the Tables/Queries list.

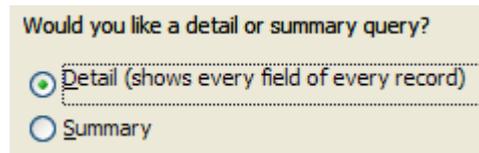


- 4 With the **StudentID** field selected click on .
- 5 Select the table tblCourseInfo from the Tables/Queries list. Move the field **CourseName** into the Selected Fields: list.
- 6 Select the table tblTestResults. Move the following fields into the Selected Fields: list:

- Exam1
- Exam2
- Exam3
- Exam4



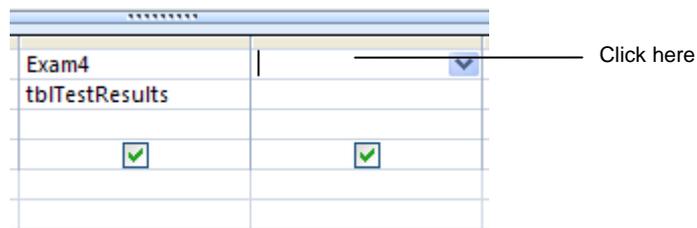
- 7 Click on Next.
- 8 Ensure *Detail (shows every field of every record)* is selected and click on Next.
- 9 Save the query with the name **qryCourseResults** and click on Finish.



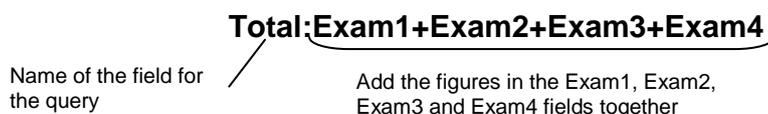
Calculation Query

Exercise 80

- 1 Display the **qryCourseResults** query in Design View.
- 2 At the end of the Design grid, click in the first row of the first blank column at the right as shown below.



- 3 Type: **Total:Exam1+Exam2+Exam3+Exam4**
- 4 Press Enter. This formula means:



- 5 Click on the Run button. If required, scroll across to view the entire query.
- 6 Save and close the query.

Mail Merge



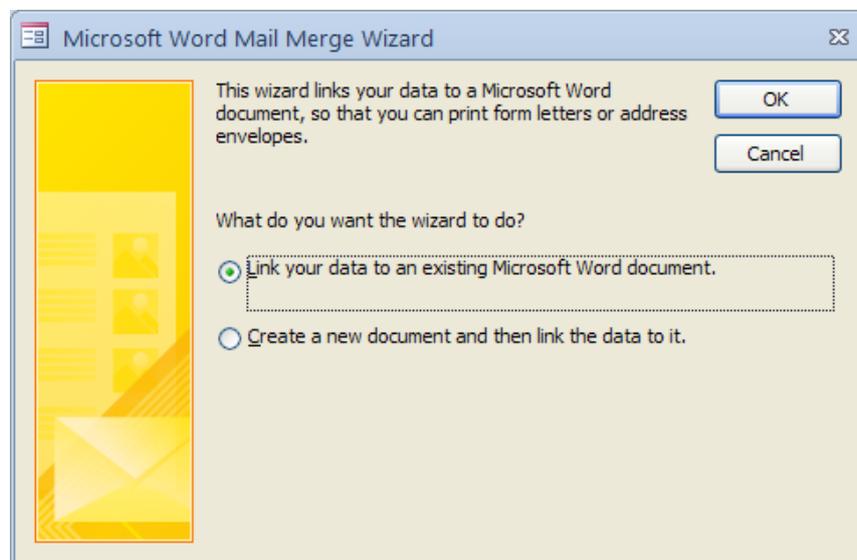
Task

Please send a letter to all business students inviting them to a lunch for the Certificate Presentation at 12.30 pm on Thursday 18 December in Lecture Theatre 1.

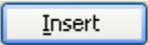
Use the query called **qryBusinessStudents** in the Accurate Training Students Database.

Exercise 81

- 1 In Access click on the query called **qryBusinessStudents** in the Navigation Pane. You may need to display the Navigation Pane by clicking on the Shutter Bar Open/Close Button , to access the query.
- 2 Display the External Data Ribbon. Click on  **Word Merge** from the Export group.



- 3 Click in the *Create a new document and then link the data to it* option.
- 4 Click on OK. This will allow you to type the letter in a new document and insert the fields from the query.
Microsoft Office Word 2010 will display ready for you to type the letter.
- 5 In Print Layout view place the mouse pointer on the Top margin dividing line on the vertical ruler. Hold down the Alt key and drag down to 5 cm (approximately). This will leave room for the letter to be printed on a letterhead. (If the ruler is not displayed select Ruler from the View Ribbon.)
- 6 Press Alt Shift D (inserts today's date as a field).
- 7 Press Enter twice.
- 8 At the bottom of the Task Pane click on  **Next: Starting document** .
- 9 Click on  **Next: Select recipients** .
- 10 The recipients have already been selected (from Access). Click on  **Next: Write your letter** .
- 11 Click on  **More items...** .

- 12 Select Title, then click on . Repeat for all name and address fields as shown in step 13 (they will be displayed across the page). Click on Close.
- 13 Space out the fields into the layout shown below using the Spacebar and Enter key. Remove paragraph spacing from between lines.

«Title» «FirstName» «LastName»
 «Address1»
 «Address2» «State» «PostCode»

Note There are two spaces between Address2 and State and two spaces between State and PostCode.
- 14 Click at the end of the last field name, i.e. «PostCode» and press Enter twice.
- 15 Click on .



- 16 Ensure the options shown in the above dialog box are selected. Click on OK.
(Alternatively fields can be inserted using the Insert Merge Field button.)
- 17 Press Enter.
- 18 You may wish to zoom in to see more of the text by clicking on the Zoom  and selecting Text Width.
- 19 Complete the letter by typing the text below and using  on the Task Pane to insert additional fields as indicated.

CERTIFICATE PRESENTATION

The «Department» Department will be holding a lunch for students on Thursday 18 December at 12.30 pm in Lecture Theatre 1 to present end of year certificates.

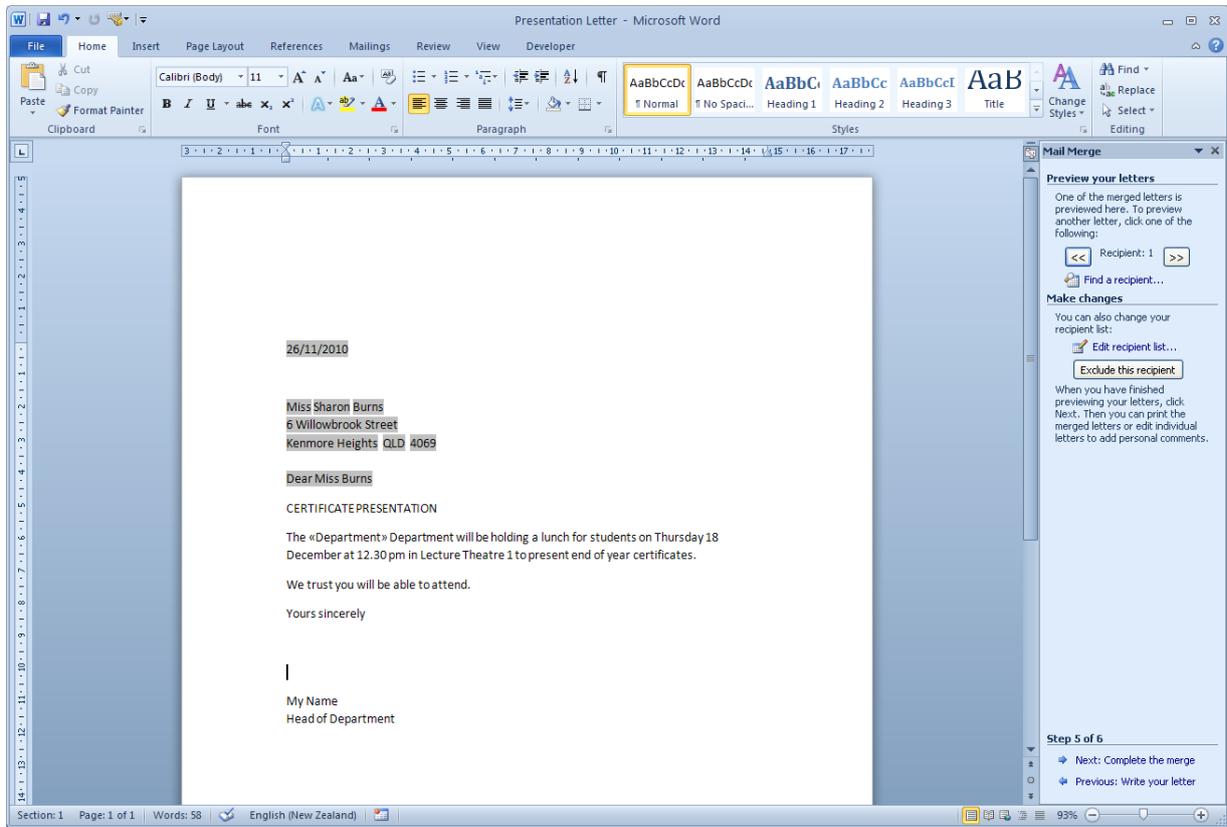
We trust you will be able to attend.

Yours sincerely

(type your name)
 Head of Department

20 Save the document with the file name **Presentation Letter**.

21 Click on .



22 View some of your letters using .

23 Click on .

24 Click on  then on OK (or you could click on Print, then specify letters to be printed).

The data in the Microsoft Access database will merge with the letter you have typed in Microsoft Word to a new document.

25 Close the form letters without saving.

At any point you can click on the Merge to New Document button in the merge letter to display the form letters.

26 Close the merge letter and save changes if required.

27 Exit from Microsoft Word.