

Performance Reviews

Susan Long and Pete Vasquez are due for job performance reviews at Voyager Holidays. As their supervisor, you need to create a form to compile the results of each review. To complete the performance reviews, you **Create the Form in Word, Add Form Content Controls in Word, Compile Results in Excel,** and then **Link the Form and Results** for each employee.

Create the Form in Word

You set up the performance review form in Word and create a table to contain the data for the form.

STEPS





HINT

Use the Layout tab to change margins, and use the Design tab to apply a document theme and style.

1. Start a new blank document in Word, set the top and bottom margins to .6", apply the Droplet theme, select the Centered document style set, then save the document as PR 5-Performance Review Form to the location where you save the files for this book
2. Type Voyager Holidays, press [Enter], type Performance Review, press [Enter], select Voyager Holidays, click the Home tab, click Title in the Styles gallery, select Performance Review, then apply the Subtitle style
3. Select Voyager Holidays, change the font size to 26 pt, click the Layout tab, enter 6 pt for the After spacing, click the Home tab, right-click Title in the Styles gallery, then click Update Title to Match Selection
4. Click the blank line below "Performance Review", click the Insert tab, click the Table button in the Tables group, click Insert Table, type 4, press [Tab], type 12, click OK, then type the text for the table as shown in FIGURE 5-1

HINT

You use the [Ctrl] key to select non-adjacent rows in a table quickly so that you can apply formatting all at once.

5. Click to the left of row 1 (contains "Employee Information") to select the entire row, press and hold [Ctrl], click to the left of "Rankings", click to the left of "Ranking Summary", "Ranking Chart", and "Written Evaluation" to select them, then release [Ctrl]
6. Click the Table Tools Design tab, click the Shading list arrow in the Table Styles group, select Lime, Accent 3, Darker 25%, click the Home tab, click the Font Color list arrow  in the Font group, click the White, Background 1 color, then click the Increase Font Size button  in the Font group two times to increase the font size to 12 pt
7. Select row 1, click the Table Tools Layout tab, click the Merge Cells button in the Merge group, click the Align Center button  in the Alignment group, then use FIGURE 5-2 as your guide to merge cells and vertically and horizontally center text in each row from "Rankings" to the last row of the table even if the row does not contain text
8. Move the mouse to the left of the border between "Job Title" and "Review Period" to show the Insert control, click the Add row control  to insert a new row, then enter Department in the first cell and Manager in the third cell
9. Use [Ctrl] to select rows 1 through 6 ("Employee Information" through "Rankings"), and the rows containing "Ranking Summary", "Ranking Chart", and "Written Evaluation", click the Table Tools Layout tab, click Properties in the Table group, click the Row tab, click the Specify height check box, type .3 in the Specify height text box, click OK, then save the document

The document appears as shown in FIGURE 5-2.

HINT

Use [Ctrl] to select and center all the merged rows at once.

FIGURE 5-1: Table text

VOYAGER HOLIDAYS

Performance Review

Employee Information			
Employee Name		Date	
Job Title		Employee ID	
Review Period		To	
Rankings			
Ranking Summary			
Ranking Chart			
Written Evaluation			
Supervisor Comments			

These rows are left blank

Integration 2016

FIGURE 5-2: Table cells merged and formatted

VOYAGER HOLIDAYS

Performance Review

Employee Information			
Employee Name		Date	
Job Title		Employee ID	
Department		Manager	
Review Period		To	
Rankings			
Ranking Summary			
Ranking Chart			
Written Evaluation			
Supervisor Comments			

Text in these rows is centered vertically

New row inserted in Step 8

Row heights adjusted in Step 9






Each of these rows is merged and centered horizontally and vertically

Cells 2, 3, and 4 merged in last row

Add Form Content Controls in Word

You plan to use the same performance review form to record the performance reviews of numerous employees. You want the form to be an electronic one that you can complete on the computer. To make the form reusable, you need to insert form content controls. Your first step is to show the Developer tab so you can access the tools used to create forms.

STEPS

1. Click the File tab, click Options, click Customize Ribbon, click the Developer check box in the list of Main Tabs to select it, click OK, then click the cell to the right of "Employee Name"
2. Click the Developer tab, then click the Rich Text Content Control button  in the Controls group to insert a Rich Text content control
3. Press [Tab] twice to move to the blank cell to the right of "Date", click the Date Picker Content Control button  in the Controls group, click the Properties button in the Controls group, select the date format that corresponds to July 31, 2017, then click OK
When you fill in the form, you will only be able to enter a date in the cell to the right of "Date".
4. Click the cell to the right of "Employee ID", click the Legacy Tools button  in the Controls group, click the Text Form Field control button , double-click the shaded area to open the Text Form Field Options dialog box, click the Type list arrow, click Number, select the contents of the Maximum Length text box, type 4, compare the Text Form Field Options dialog box to FIGURE 5-3, then click OK
When you fill in the form, you will only be able to enter up to four digits in the cell to the right of Employee ID.
5. Add a Rich Text content control in the cells to the right of "Job Title" and "Manager", click the cell to the right of "Department", click the Combo Box Content Control button  in the Controls group, click Properties, click Add, type Administration, click OK, click Add, add the four departments shown in FIGURE 5-4, then click OK
6. Click the Date Picker content control to the right of Date, click the selection handle to the left of "Click" (it turns dark blue when selected), click the Home tab, click the Copy button in the Clipboard group, click the cell to the right of "Review Period", click the Paste button in the Clipboard group, click the cell to the right of "To", then click the Paste button
You can copy and paste fields that contain special formatting to save time.
7. Click the Developer tab, click in the cell to the right of "Supervisor Comments", insert a Rich Text content control, save the document, then save the document again as PR 5-Performance Review_Susan Long
8. Click the cell to the right of "Employee Name", type Susan Long, press [Tab] twice, click the Date Picker content control list arrow to show the calendar, scroll to April, 2017, then click 13
9. Enter the remaining data for Susan Long as shown in FIGURE 5-5, then save the document

HINT

You can also type the date in the Date Picker content control.

FIGURE 5-3: Text Form Field Options dialog box

FIGURE 5-4: Drop-Down List Properties

You can add text to describe the content control or you can leave the boxes blank

List of options

FIGURE 5-5: Form text for Susan Long

VOYAGER HOLIDAYS

Performance Review

Employee Information

Employee Name	Susan Long	Date	April 13, 2017
Job Title	Product Manager	Employee ID	4255
Department	Production	Manager	Your Name
Review Period	April 3, 2017	To	April 7, 2017

Rankings

Ranking Summary

Ranking Chart

Written Evaluation

Supervisor Comments	Susan was directly responsible for building our product offerings in the Southwest region.
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Compile Results in Excel

You need to create a worksheet in Excel into which you can enter the numerical results of the performance review. You also need to create a chart in Excel that summarizes the results.

STEPS

HINT

Use Copy and Paste to minimize typing time.







1. Start a new blank workbook in Excel, type Supervisor Rating in cell A1, select cells A1:B1, click the Merge and Center button in the Alignment group, apply bold, enter and enhance the text and adjust column widths as shown in FIGURE 5-6, add your name to cell A17, then save the workbook as PR 5-Performance Reviews to the location where you are saving the files for this book
2. Double-click the Sheet1 tab, type Susan, press [Enter], click cell B8, click the AutoSum button in the Editing group, press [Enter], then click cell E8 and use AutoSum to add the range E2:E7
3. Click cell B10, type $= (B2+E2)/2$, press [Enter], click cell B10, then drag the fill handle to fill cells B11:B15 with the formula in cell B10
This formula determines the average score between the Supervisor Rating and the Peer Rating.
4. Select cells A10:B15, click the Insert tab, click the Recommended Charts button in the Charts group, click OK to accept Clustered Column, click the Quick Layout button in the Chart Layouts group, click Layout 3, click the More button  in the Chart Styles group, select Style 16, click the Chart Title, press [Delete], click the Legend ("Series1" below the chart), then press [Delete]
5. Size and position the chart so that it extends from cell D10 through cell J26
6. Right-click the value axis (y-axis), click Format Axis, select the contents of the Maximum text box in the Format Axis pane, type 5, press [Enter], verify that Reset appears to the right, then click  to close the Format Axis pane
By retyping the value, you set the maximum scale for the value axis at 5 so that the scale remains the same regardless of the data entered in the chart.
7. Click the New sheet button  next to the Susan tab, double-click the Sheet2 tab, type Pete, press [Enter], click the Susan tab, click the Select All button  to the left of the "A" in the upper-left corner of the worksheet frame to select the entire worksheet, click the Copy button in the Clipboard group, click the Pete tab, then click the Paste button in the Clipboard group
8. Enter values for Pete in cells B2:B7 and cells E2:E7 as shown in FIGURE 5-7, then verify that the totals are updated
9. Right-click the chart, click Select Data, click the Collapse button  next to "Chart data range", click the Pete tab, then verify that cells A10:B15 are selected
When you copy the chart from the Susan worksheet to the Pete worksheet, the chart still references the cells in the Susan worksheet. You change the reference so that the chart shows data related to Pete's rankings.
10. Click the Expand button , click OK, click a blank cell, then save the workbook
The chart appears as shown in FIGURE 5-8.

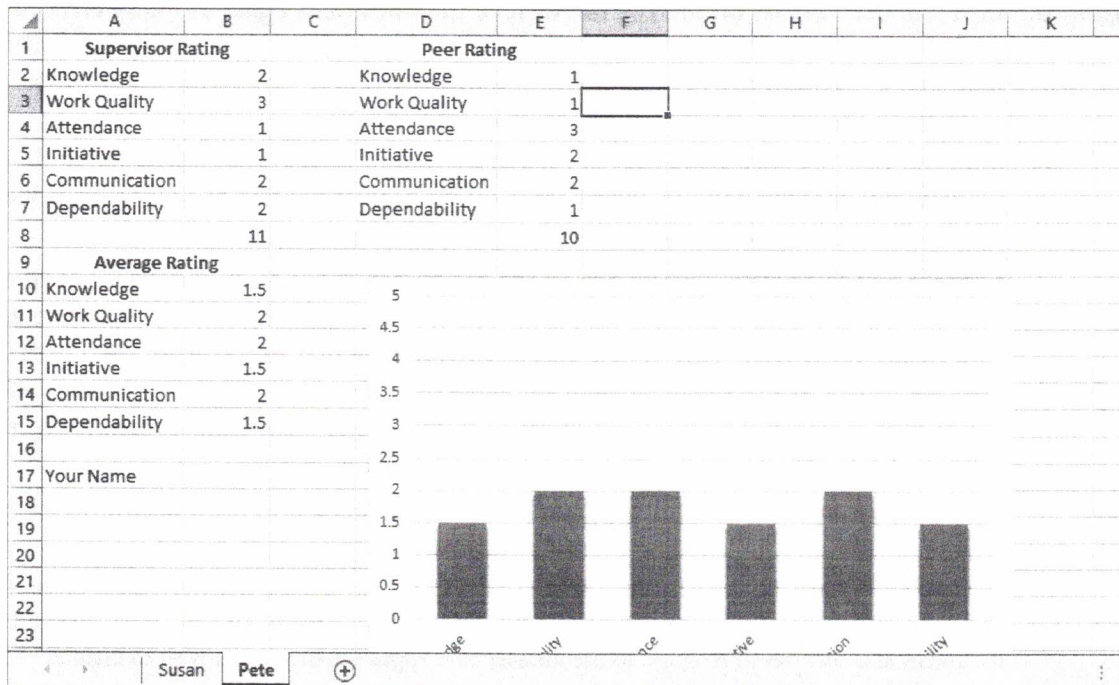
FIGURE 5-6: Worksheet labels and values

	A	B	C	D	E	F	G
1	Supervisor Rating			Peer Rating			
2	Knowledge	5		Knowledge	4		
3	Work Quality	5		Work Quality	3		
4	Attendance	4		Attendance	4		
5	Initiative	5		Initiative	4		
6	Communication	3		Communication	1		
7	Dependability	4		Dependability	4		
8							
9	Average Rating						
10	Knowledge						
11	Work Quality						
12	Attendance						
13	Initiative						
14	Communication						
15	Dependability						
16							
17	Your Name						
18	<input type="text"/>						
19							

FIGURE 5-7: Values for Pete

	A	B	C	D	E	
1	Supervisor Rating			Peer Rating		
2	Knowledge	2		Knowledge	1	
3	Work Quality	3		Work Quality	1	
4	Attendance	1		Attendance	3	
5	Initiative	1		Initiative	2	
6	Communication	2		Communication	2	
7	Dependability	2		Dependability	1	
8		11			10	




FIGURE 5-8: Pete's chart updated



Link the Form and Results

You need to copy Susan's performance results from Excel and paste them into the Word form as linked objects. After completing and saving Susan's performance review form, you need to save the document for Pete, edit the text to reflect Pete's information, and then change the source for the Excel performance results so the linked objects reflect Pete's information.

STEPS

1. Click the Susan tab, select cells A1:E8, click the Copy button in the Clipboard group, switch to Word, click the cell below "Rankings", click the Home tab, click the Paste list arrow in the Clipboard group, click Paste Special, click the Paste link option button, click Microsoft Excel Worksheet Object, then click OK
2. Switch to Excel, select cells A9:B15, copy them, switch to Word, click the cell below "Ranking Summary", click the Paste list arrow, click Paste Special, click the Paste link option button, click Microsoft Excel Worksheet Object, then click OK
3. Switch to Excel, click the chart, copy it, switch to Word, click the cell below "Ranking Chart", click the Paste list arrow, click the Use Destination Theme & Link Data button  in the selection of Paste Options, click the chart (be careful not to select any of the columns), click the Chart Tools Format tab, click the launcher  in the Size group, click the Lock aspect ratio check box to select it, select the contents of the Absolute Height text box, type 2.3, then click OK
4. Switch to Excel, change Susan's ranking for Attendance to 5 in both the Supervisor and the Peer cells (cell B4 and cell E4), switch to Word, verify the value for Attendance is "5" in the copied Excel objects and the top of the Attendance column in the chart is even with "5" on the value axis in Word, save the document, then save and close the Excel workbook
Susan's rankings for Attendance and the column chart are both updated in the Word document because the data is linked to the Excel workbook.
5. In Word, use Save As on the File tab to save the document again as PR 5-Performance Review_Pete Vasquez, scroll to and click the Employee Name table cell, press [Tab], then enter text for Pete in the Employee Information and Supervisor Comments sections as shown in the completed form in FIGURE 5-9
6. Click the File tab, click Edit Links to Files in the lower-right corner under Related Documents, click the top link in the Links dialog box, click Change Source, click Item, select Susan and type Pete as shown in FIGURE 5-10, then click OK
7. Click PR 5-Performance Reviews.xlsx in the list of files, click Open, click the second entry, click Change Source, click Item, change Susan to Pete, click OK, click the filename again, click Open, verify that "Pete" is the source item for the first two entries, then click OK
8. Click  to exit Backstage view, click the chart, click the Chart Tools Design tab, click Select Data in the Data group, select Susan in the Select Data Source dialog box, type Pete, click OK, then close Excel and save if prompted
9. Save the document, submit a copy of the Excel workbook and both performance review documents to your instructor, then close the document

The completed performance review for Pete appears as shown in FIGURE 5-9. If you wish to make changes to a Word document linked to an Excel workbook, open the Excel workbook first. Then, open the Word document and click Yes in response to the message that appears asking if you wish to maintain the link between the document and the workbook.

TROUBLE

The values in the Excel objects will not yet match
FIGURE 5-9.

HINT

Excel opens when you clicked Select Data in step 8.

MORE PRACTICE

For more practice with the skills presented in this project, complete Independent Challenge 1.

FIGURE 5-9

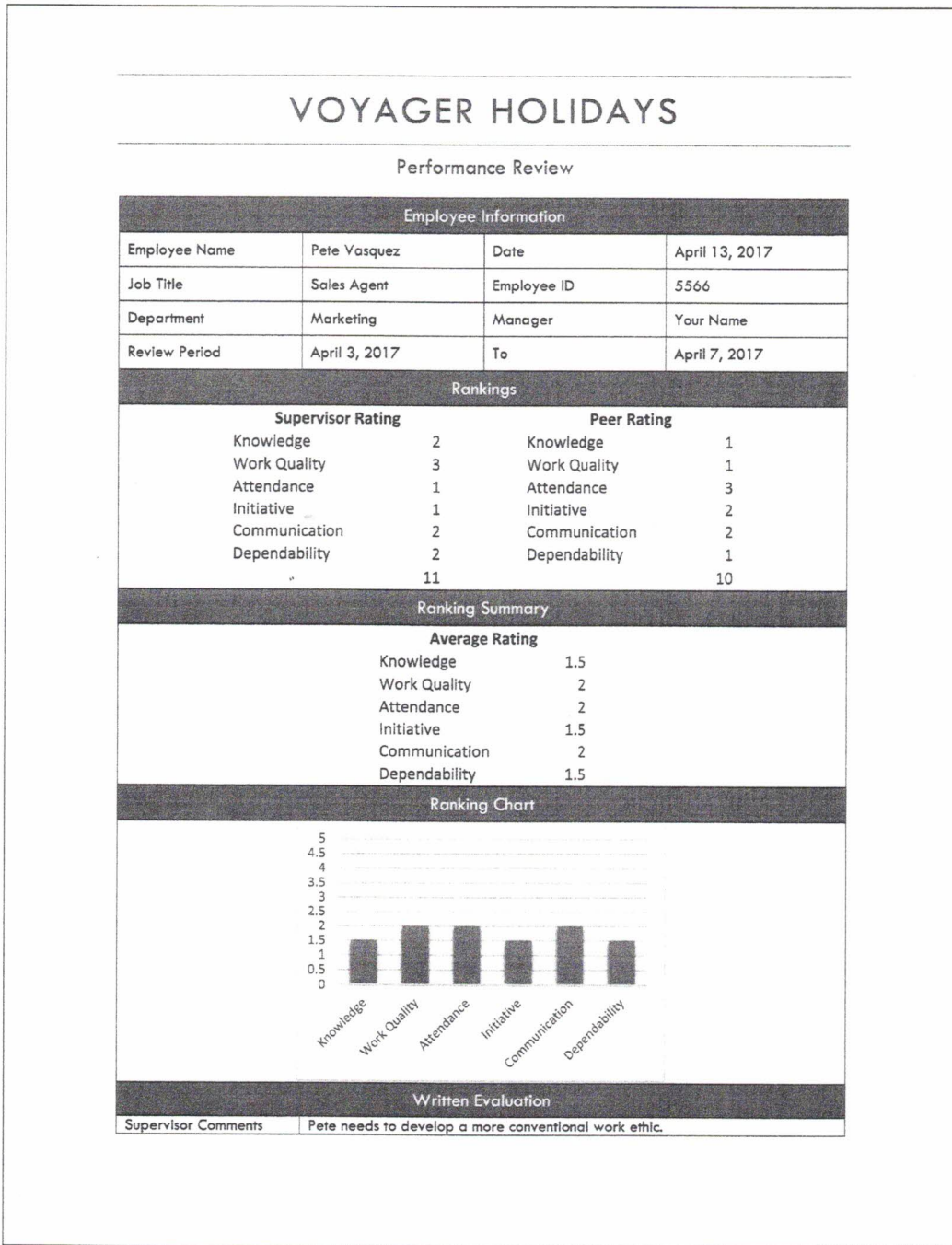
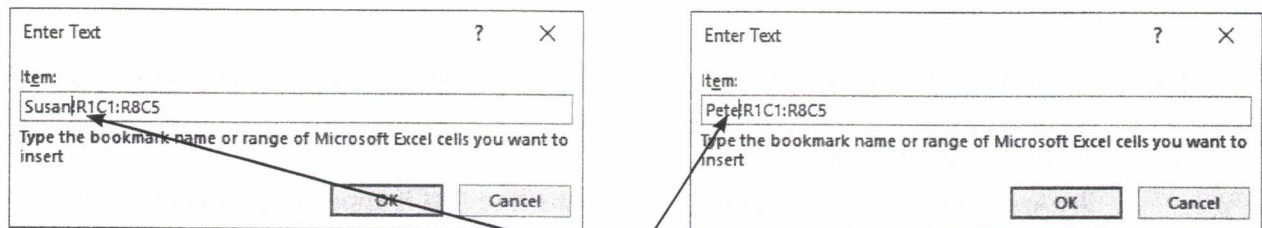


FIGURE 5-10



Delete Susan and replace with Pete; be sure an exclamation mark (!) follows Pete

Sales Report for Coastal Resorts

Coastal Resorts manages a chain of hotels on four islands off the coast of British Columbia: Hornby Island, Galiano Island, Saltspring Island, and Quadra Island. As the sales manager for the chain, you want to attract more guests to the hotels in the spring months of April, May, and June in order to ensure that those months are profitable. You need to determine the number of rooms to rent during these spring months in order to show a profit. For this project, you need to **Summarize Sales**, **Calculate Projected Sales**, and **Create the Sales Report**. The completed sales report appears as shown in **FIGURE 5-17** on page 125.

Summarize Sales

You need to enter labels and values in an Excel worksheet and then calculate total sales.

STEPS

1. Start a new workbook in Excel, enter and enhance the labels and values so that the worksheet appears as shown in **FIGURE 5-11**, then save the workbook as **PR 5-Coastal Resorts Sales Data** to the location where you save the files for this book
2. Click cell B8, enter the formula to multiply the Average Cost per Room by the Total Number of Rooms Rented, then copy the formula through cell E8, widening columns as needed
As you complete the required calculations, refer to **FIGURE 5-12** to verify your totals.
3. Click cell B13, enter the formula to multiply the Number of Rooms Available by the Operating Cost per Room, then copy the formula through cell E13
Note that the value for the Operating Cost per Room is based on the cost over a three-month period.
4. Click cell B15, enter the formula to add the Total Operating Costs to the Advertising Costs, then copy the formula through cell E15
5. Calculate the Net Revenue in cell B17 as the Total Expenses subtracted from the Total Room Rental Revenue, then copy the formula through cell E17, widening columns as needed
The hotels on Hornby Island and Galiano Island lost money during the spring months of April, May, and June. Only the Saltspring Island and Quadra Island hotels made a profit.
6. Select cells B7:F8, click the AutoSum button in the Editing group, then widen Column F as needed to fit content
7. Select cells B13:F17, click the AutoSum button, then verify that \$(8,400.00) appears in cell F17 as shown in **FIGURE 5-12**
8. Select cells B7:E7, click the Data tab, click What-If Analysis in the Forecast group, click Scenario Manager, click Add, type 2017 Rentals, click OK, click OK, then click Close
You create a scenario to preserve the existing data because in the next lesson you will change the data in order to calculate projected sales.
9. Apply borders and shading to the worksheet so that it appears as shown in **FIGURE 5-12**, then save the workbook

FIGURE 5-11: Worksheet setup

	A	B	C	D	E	F
1	Coastal Resorts					
2	<i>Sales Summary for April, May, June, 2017</i>					
3						
4		Hornby Island	Galiano Island	Saltspring Island	Quadra Island	Totals
5	REVENUE					
6	Average Cost per Room	\$ 150.00	\$ 125.00	\$ 175.00	\$ 175.00	
7	Total Number of Rooms Rented	200	300	700	400	
8	Total Room Rental Revenue					
9						
10	EXPENSES					
11	Number of Rooms Available	20	30	50	30	
12	Operating Cost per Room	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	
13	Total Operating Costs					
14	Advertising Costs	\$ 1,200.00	\$ 2,000.00	\$ 3,000.00	\$ 2,200.00	
15	Total Expenses					
16						
17	NET REVENUE					
18						
19						

Apply Accounting Number formatting and bold as shown

Integration 2016

FIGURE 5-12: Worksheet complete with calculations and formatting

	A	B	C	D	E	F	G
1	Coastal Resorts						
2	<i>Sales Summary for April, May, June, 2017</i>						
3							
4		Hornby Island	Galiano Island	Saltspring Island	Quadra Island	Totals	
5	REVENUE						
6	Average Cost per Room	\$ 150.00	\$ 125.00	\$ 175.00	\$ 175.00		
7	Total Number of Rooms Rented	200	300	700	400	1600	
8	Total Room Rental Revenue	\$ 30,000.00	\$ 37,500.00	\$122,500.00	\$ 70,000.00	\$260,000.00	
9							
10	EXPENSES						
11	Number of Rooms Available	20	30	50	30		
12	Operating Cost per Room	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00		
13	Total Operating Costs	\$ 40,000.00	\$ 60,000.00	\$100,000.00	\$ 60,000.00	\$260,000.00	
14	Advertising Costs	\$ 1,200.00	\$ 2,000.00	\$ 3,000.00	\$ 2,200.00	\$ 8,400.00	
15	Total Expenses	\$ 41,200.00	\$ 62,000.00	\$103,000.00	\$ 62,200.00	\$268,400.00	
16							
17	NET REVENUE	\$ (11,200.00)	\$ (24,500.00)	\$ 19,500.00	\$ 7,800.00	\$ (8,400.00)	
18							
19							

Border lines added to ranges A4:F8, A10:F15 and A17:F17

Calculate Projected Sales


You use the Goal Seek feature to determine how many rooms you should rent at the Hornby Island and Galiano Island hotels to increase the net revenue from these hotels, then create a bar chart to compare current and projected income from the rental of rooms at the Bowen Island and Galiano Island hotels.


STEPS






HINT

You use Goal Seek to determine how many rooms you need to rent at the Hornby Island hotel to increase the net revenue to \$10,000.

- Click cell B17 (the net revenue for the Hornby Island hotel), click What-If Analysis in the Forecast group on the Data tab, click Goal Seek, click the text box next to "To value:", type 10000 (four zeroes), press [Tab], type B7 as shown in FIGURE 5-13, click OK, then click OK again

The value needed, 341.3333333, appears in cell B7.
- Click cell C17, click What-If Analysis, click Goal Seek, enter 8000 as the To value and C7 as the cell to change, click OK, click OK, select B7:F7, click the Home tab, apply the Comma style, then click the Decrease Decimal button  twice

Over the three months, you need to rent 341 rooms at the Hornby Island hotel to make a profit of \$10,000, and you need to rent 560 rooms at the Galiano Island hotel to make a profit of \$8,000.
- Click the Data tab, click What-If Analysis, click Scenario Manager, click Add, type Projected Rentals, enter B7:C7 as the changing cells, click OK, click OK, then click Close
- Double-click the Sheet1 tab, type 2017 Rentals, click the Select All button  in the upper-left corner of the worksheet frame to select all the data, click the Home tab, click the Copy button in the Clipboard group, add a new worksheet, click the Paste button in the Clipboard group, then name the new sheet tab Projected Rentals
- Show the 2017 Rentals worksheet, click the Data tab, click What-If Analysis, click Scenario Manager, click 2017 Rentals, click Show, click Close, then click cell A1

The net revenue in cell F17 of the 2017 Rentals sheet is again \$ (8,400.00).
- Go to the Projected Rentals worksheet, click the Insert tab, click the Insert Column or Bar Chart button  in the Charts group, click Clustered Bar in the 2D Bar section, click Select Data in the Data group, click the Chart data range Collapse button , click the 2017 Rentals tab, select cells B4:E4, press and hold [Ctrl], select cells B8:E8, click the Chart data range Expand button , then click OK
- Move the chart down so that it starts at cell A20, resize it so that it extends to cell G40, click Select Data in the Data group, click Edit under Legend Entries (Series), type 2017 Rentals as shown in FIGURE 5-14, click OK, click Add, type Projected Rentals, click the Series values Collapse button , select cells B8:E8 on the Projected Rentals tab, click the Expand button , click OK, then click OK
- Click Add Chart Element in the Chart Layouts group, point to Chart Title, click Above Chart, type Comparison of Current and Projected Room Rentals, press [Enter], click Add Chart Element, point to Legend, then click Bottom if necessary
- Click any orange bar so only the orange bars are selected, click the Chart Tools Format tab, change the Shape Fill color to Gold, Accent 4, Lighter 80%, click away from the chart, then save the workbook

The chart is shown in FIGURE 5-15.

FIGURE 5-13: Goal Seek dialog box

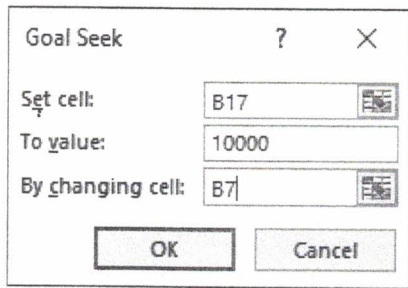


FIGURE 5-14: Edit Series dialog box

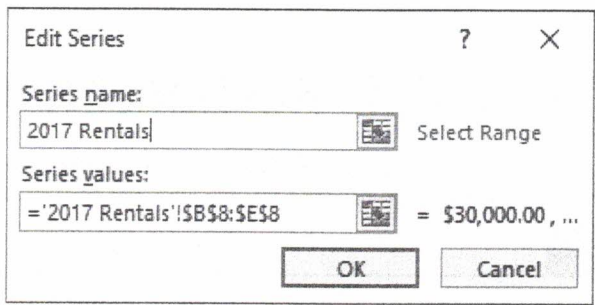
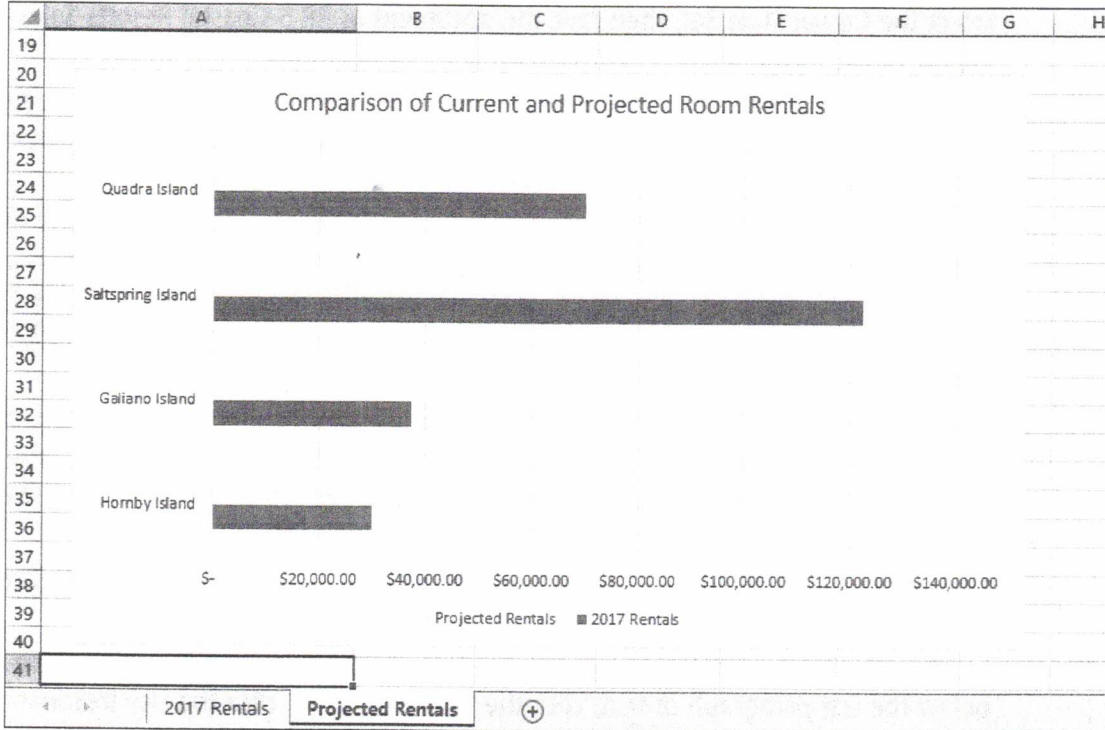


FIGURE 5-15: Chart comparing current rentals with projected rentals



Using Goal Seek

You use Goal Seek when you know the result you want a formula to produce, but you don't know what value you need to include in the formula to get the result. For example, suppose you want to make \$1000 a month from a part-time job. You know you can make \$15/hour, but you need to know how



many hours a month you need to work to make \$1000. You set up a worksheet with Hours Worked, Hourly Rate, and Total. The total cell must include a formula—in this case Hours Worked X Hourly Rate. You use Goal Seek to set the Total to \$1000 by changing the Hours Worked. **FIGURE 5-16** shows the result.

FIGURE 5-16: Goal Seek Example

Create the Sales Report

You need to compile all the data from the Excel workbook in a report you create in Word. The completed report is shown in FIGURE 5-17.

STEPS

1. Start Word, open a new blank document, type Sales Report for Coastal Resorts, press [Enter], apply the Title style to the text, click the Design tab, select the Slice theme, select the Casual Style Set, then save the document as PR 5-Coastal Resorts Sales Report to the location where you save the files for this book
2. Click the Colors button in the Document Formatting group, scroll to and select the Red Orange color set, type the subtitle, then type the first paragraph of text as shown in the completed sales report in FIGURE 5-17
3. Switch to Excel, select cells A1:F17 in the Projected Rentals worksheet, click the Copy button in the Clipboard group, switch to Word, verify that the insertion point is at the end of the paragraph you just typed, press [Enter], click the Home tab, click the Paste list arrow, click Paste Special, click the Paste link option button, click Microsoft Excel Worksheet Object, then click OK
4. Right-click the pasted worksheet object in Word, click Picture, click the Size tab, set the Width of the object to 6", click OK, double-click below the worksheet object, type the paragraph of text under the copied worksheet object as shown in FIGURE 5-17, then press [Enter]
5. Double-click the pasted worksheet object, click cell A2, select Summary in the formula bar, type Projections, select 2017, type 2018, then press [Enter]
6. Scroll to the chart, click the chart, click the Copy button, switch to Word, double-click below the last paragraph of text, click the Paste list arrow, click the Use Destination Theme & Link Data button , set the Height of the chart to 3.1" and the Width to 6.7", switch to Excel, change the cost of the Saltspring Island rooms (cell D6) to 150, return to Word, scroll to verify that the Saltspring Island room cost was updated to \$150, then click anywhere in the text above the chart
7. Click the Insert tab, click Shapes in the Illustrations group, click the Rounded Rectangular Callout shape in the Callouts section, draw a shape above the chart, click the More button  in the Shape Styles gallery, click Subtle Effect - Gold, Accent 2, type Increase to 341 rooms, then resize and position the callout as shown in FIGURE 5-17
8. Click the border of the callout box, copy and paste the callout box, then enter the required text and position the callout box next to Galiano Island as shown in FIGURE 5-17
9. Save and close the document, switch to Excel, add your name below the chart, save and close the workbook, click No if prompted to save the copied objects, then submit both files to your instructor

By selecting the Use Destination Theme & Link Data option, you ensure that the chart uses the color scheme and theme associated with the Word document, not the original Excel workbook.

If you wish to make changes to the Word document linked to the Excel workbook, open the Excel workbook first. Then, open the Word document and click Yes in response to the message that appears asking if you wish to maintain the link between the document and the workbook.

TROUBLE

If the room rate was not updated, right-click the worksheet object, then click **Update Link**.

TROUBLE

You will need to drag the yellow circle handle to move the tail to the left side of the callout. You may need to drag and move several times to get the callout to look like you want.

MORE PRACTICE

For more practice with the skills presented in this project, complete Independent Challenge 2.

Sales Report for Coastal Resorts

Prepared by Your Name

In April, May, and June of 2017, both the Hornby Island and Galiano Island resorts lost money. To increase revenue at the Hornby Island resort, we need to rent 341 rooms instead of the current 200 rooms. To increase revenue at the Galiano Island resort, we need to rent 560 rooms instead of the current 300 rooms. By doing so, we increase the Hornby Island resort revenue to \$10,000 and the Galiano Island resort revenue to \$8,000.

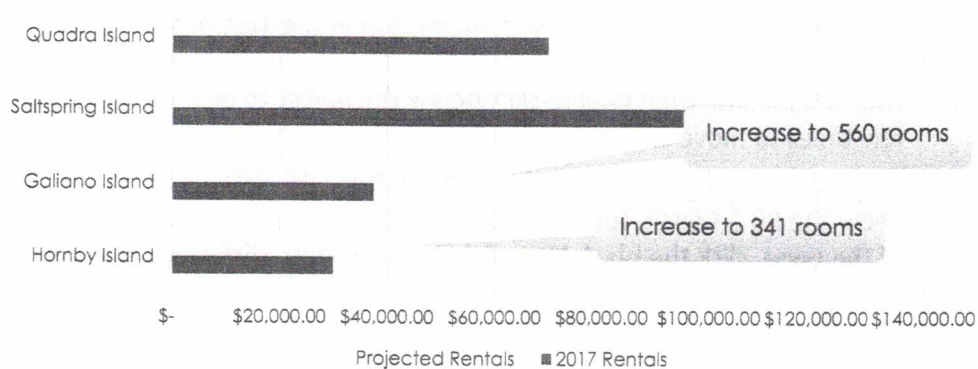
Coastal Resorts

Sales Projections for April, May, June, 2018

	Hornby Island	Galiano Island	Saltspring Island	Quadra Island	Totals
REVENUE					
Average Cost per Room	\$ 150.00	\$ 125.00	\$ 150.00	\$ 175.00	
Total Number of Rooms Rented	341	560	700	400	2,001
Total Room Rental Revenue	\$ 51,200.00	\$ 70,000.00	\$ 105,000.00	\$ 70,000.00	\$ 296,200.00
EXPENSES					
Number of Rooms Available	20	30	50	30	
Operating Cost per Room	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	
Total Operating Costs	\$ 40,000.00	\$ 60,000.00	\$ 100,000.00	\$ 60,000.00	\$ 260,000.00
Advertising Costs	\$ 1,200.00	\$ 2,000.00	\$ 3,000.00	\$ 2,200.00	\$ 8,400.00
Total Expenses	\$ 41,200.00	\$ 62,000.00	\$ 103,000.00	\$ 62,200.00	\$ 268,400.00
NET REVENUE	\$ 10,000.00	\$ 8,000.00	\$ 2,000.00	\$ 7,800.00	\$ 27,800.00

The bar chart shown below compares the current room rentals in April, May, and June of 2017 with the projected room rentals in April, May, and June of 2018.

Comparison of Current and Projected Room Rentals



Marketing Update for Classic Tours

Classic Tours hosts four two-week tours of Mediterranean countries. As the office manager, you need to create a one-page marketing update that describes the tours offered by the company and summarizes current sales. You **Create the Update in Word** and then **Add Linked Data from Excel**. The completed document is shown in FIGURE 5-21 on page 129.

Create the Update in Word

You need to enter the text for the marketing update, create an attractive header in another document and insert it as a screenshot into the update, then enter sales data in Excel.

STEPS

1. Start Word, open a new blank document, change the top and bottom margins to .6", type the text as shown in FIGURE 5-18, then save the document as PR 5-Classic Tours Marketing Update to the location where you save the files for this book

As noted in FIGURE 5-18, this document will contain linked data from Excel.

2. Open PR 5-01.docx from the location where you store files for this book, then save it as PR 5-Classic Tours Header

This file contains a picture that you will use to create an attractive heading to insert into the Marketing Update as a screenshot.


3. Click the picture, click the Picture Tools Format tab, click the Crop list arrow, point to Crop to Shape, then click the Flowchart Document shape in the Flowchart section of shapes (7th selection in the first row of the Flowchart section)

4. Click the launcher  in the Size group, click the Lock Aspect Ratio check box to deselect it, enter 1.2 for the Absolute Height and 6 for the Absolute Width, click OK, then save the document

5. Click the Insert tab, click the WordArt button in the Text group, select the Fill - Gold, Accent 4, Soft Bevel style, type Classic Tours, drag the WordArt down to position it over the picture, then double-click below the object to deselect it and press [Enter] a few times to move the insertion point down

You move the insertion point down so it doesn't appear in the screen clipping.

6. Show the PR 5-Classic Tours Marketing Update document, add a blank line at the top of the page, click the blank line, click the Insert tab, click Screenshot in the Illustrations group, then click Screen Clipping

7. Drag  from the upper-left corner of the image to the bottom-right corner to select the graphic as shown in FIGURE 5-19

The graphic appears in the Word document.

8. Start Excel, open a new blank workbook, apply the Banded theme, then enter and enhance the labels and values, calculate totals, and apply borders and shading as shown in FIGURE 5-20

9. Name the Sheet1 tab Sales, add a new sheet and name it Chart, then save the workbook as PR 5-Classic Tours Marketing Data to the location where you save the files for this book

HINT

Refer to FIGURE 5-19 for placement.

HINT

Remember to calculate totals; do not type the values in cells B7 and C7.

FIGURE 5-18: Text for the marketing update

Classic Tours conducts tours in four categories each year to various destinations in the Mediterranean countries. The focus of each tour is the exploration of the remnants of ancient civilizations. The four tours are Greek Voyager, Mysterious Crete, Roman Odyssey, and Western Mediterranean. All of the tours run by Classic Tours are two weeks in duration.

Since its incorporation in 2010, Classic Tours has consistently sold virtually all of the Greek Voyager and Roman Odyssey tours. In most years, 80% of the Mysterious Crete tours are sold. The Western Mediterranean tours were first offered in 2014 and are steadily gaining in popularity. Shown below is a breakdown of tour sales by category.

In 2017, Classic Tours offered a total of XX tours and sold XX tours. The column chart shown below displays the number of tours sold in each category relative to the number of tours available. Greek Voyager tours rank the highest in terms of the number of tours sold relative to the tours available.

You will replace the "XX" references with linked data later

FIGURE 5-19: Creating a screen clipping

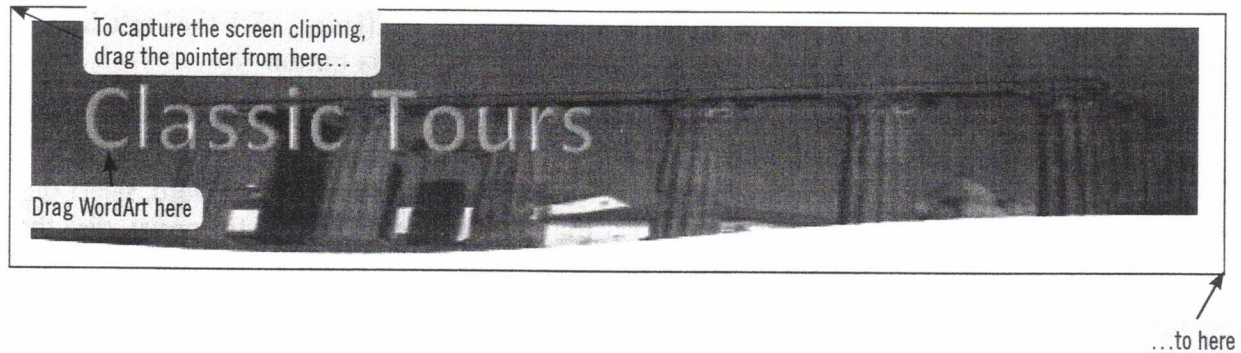



FIGURE 5-20: Sales data in Excel

	A	B	C	D
1	2017 Sales by Category			Bold, 16 pt with Pink, Accent 4, Lighter 80%
2	Tour Name	Tours Available	Tours Sold	
3	Greek Voyager	40	36	
4	Mysterious Crete	30	22	
5	Roman Odyssey	20	10	
6	Western Mediterranean	25	20	
7		115	88	
8				
9				


Add Linked Data from Excel

You need to create a chart in Excel, and then copy the sales data and chart into Word as linked objects. The completed report is shown in FIGURE 5-21.

STEPS

1. Select cells A2:C6 on the Sales tab, click the Insert tab, click Recommended Charts, select the Clustered Column chart (fourth selection), click OK, click the Move Chart button in the Location group, click the Object in list arrow, click Chart, then click OK
2. Click the chart title and type Tours Sold Compared to Tours Available, size and position the chart so that it extends from cell A1 through cell J21, click the Sales tab, then save the workbook
3. Select cells A1:C7, copy them, switch to Word, click after "category" at the end of the second paragraph, press [Enter], click the Paste list arrow, then click the Link & Keep Source Formatting button 

The data is pasted into Word as a linked object that uses the formatting you applied in Excel.

4. Switch back to Excel, click the Chart tab, click the chart, copy it, switch to Word, click after "available" at the end of the last paragraph, press [Enter], click the Paste list arrow, then click the Keep Source Formatting & Link Data button 
5. Click the chart, click the Chart Tools Format tab, then set the height of the chart to 2.9" and the width to 5.5"
6. Switch to Excel, show the Sales sheet, click cell B7, copy it, switch to Word, select the first XX in line 1 of paragraph 3, click the Paste list arrow, click Paste Special, click the Paste link option button, click Unformatted Text, then click OK
7. Copy cell C7 from Excel and paste it as a link (Unformatted Text) over the second XX in paragraph 3, switch to Excel, change the number of available tours for Western Mediterranean in cell B6 to 35, switch to Word, then verify that the tours available are now 125 in the table and the paragraph (update if necessary), and that the yellow Tours Available column for Western Mediterranean in the chart extends to the 35 line
8. Double-click the footer area below the chart, then type your name and right-align it
9. Adjust the spacing of objects as needed so that all content fits on one page, save the document, switch to Excel, add your name to cell A10 in the Sales worksheet, save the workbook in Excel, save and close the Header document, then submit all files to your instructor, then close all files

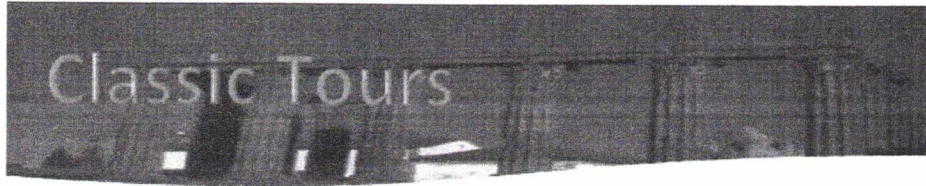
If you wish to make changes to the Word document linked to the Excel workbook, open the Excel workbook first. Then, open the Word document and click Yes in response to the message that appears asking if you wish to maintain the link between the document and the workbook.

TROUBLE

Add a space after the value if needed.

MORE PRACTICE

For more practice with the skills presented in this project, complete Independent Challenge 3.

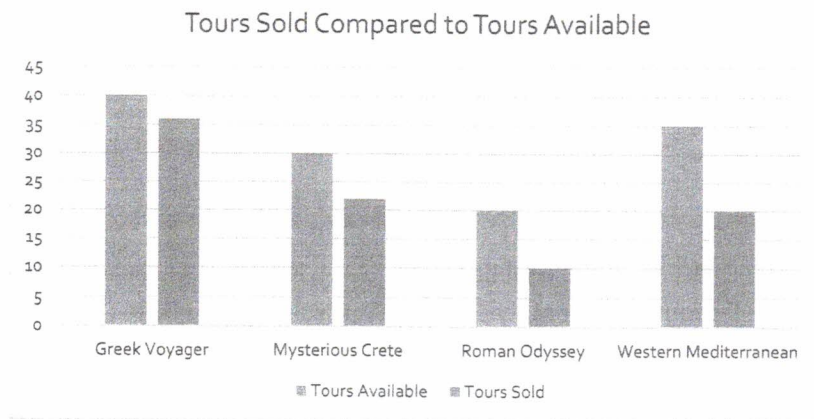


Classic Tours conducts tours in four categories each year to various destinations in the Mediterranean countries. The focus of each tour is the exploration of the remnants of ancient civilizations. The four tours are Greek Voyager, Mysterious Crete, Roman Odyssey, and Western Mediterranean. All of the tours run by Classic Tours are two weeks in duration.

Since its incorporation in 2010, Classic Tours has consistently sold virtually all of the Greek Voyager and Roman Odyssey tours. In most years, 80% of the Mysterious Crete tours are sold. The Western Mediterranean tours were first offered in 2014 and are steadily gaining in popularity. Shown below is a breakdown of tour sales by category.

2017 Sales by Category		
Tour Name	Tours Available	Tours Sold
Greek Voyager	40	36
Mysterious Crete	30	22
Roman Odyssey	20	10
Western Mediterranean	35	20
	125	88

In 2017, Classic Tours offered a total of 125 tours and sold 88 tours. The column chart shown below displays the number of tours sold in each category relative to the number of tours available. Greek Voyager tours rank the highest in terms of the number of tours sold relative to the tours available.



Your Name

Report for Harmony Teas

Harmony Teas is a small business in Vancouver, BC, that sells specialty loose leaf teas from all over the world. The company has researched an opportunity to partner with Capilano Inn, a local boutique hotel, to feature their teas in the guest rooms and restaurant. A draft of a report describing the partnership has already been written. To complete the report, you need to **Import an Excel Workbook**, **Create the Report in Word**, and then **Add Excel and Access Objects**. The three pages of the completed report are shown in FIGURE 7-18 on page 179.

Import an Excel Workbook

You need to create an Access database containing a Product List table, add records for some of the company's products, and then import an Excel workbook that contains data about the herbal teas into the Product List table. Often companies enter data into Excel first and then export it to Access.

STEPS

HINT

Make sure you change the data type for Price to Currency.

1. Start Access, then create a new database called PR 7-Harmony Teas.accdb saved to the location where you save the files for this book
2. Click the View button, save the table as Product List, type Product # as the first Field Name, change the Data Type to Number, then enter the remaining fields as shown in FIGURE 7-12, changing the Data Type for Price to Currency
3. Click the Category Data Type list arrow, click Lookup Wizard, click Open if prompted, click the "I will type in the values that I want." option button, click Next, press [Tab], type Green and Black as the two lookup values, then click Finish
4. Click the View button, click Yes, enter the data and widen columns as shown in FIGURE 7-13, then close the table, saving if prompted
5. Start Excel, open the file PR 7-04.xlsx from the location where you store your Data Files, then save the file as PR 7-Harmony Teas_Herbal.xlsx

The worksheet contains three columns. Before you can import this worksheet into the Access table, you need to ensure that both the Excel worksheet and the Access table contain the exact same column headings and data types.

6. Select column C, click the right mouse button, click Insert, type Category in cell C1, click cell C2, type Herbal, drag the fill handle to cell C27 to fill all the cells with the Herbal label, then adjust the column width
7. Save and close the workbook without exiting Excel, return to Access, click Product List in the list of All Access Objects, click the External Data tab, click Excel in the Import & Link group, click the Browse button, navigate to the location where you save the files for this book, then double-click PR 7-Harmony Teas_Herbal.xlsx
8. Click the "Append a copy of the records to the table:" option button, click OK, click Open if prompted, click Next, click Finish, then click Close
9. Double-click Product List to open it, widen the Description column, scroll down so you can see the five records you originally entered in the Product List table at the bottom of the list along with some of the new records as shown in FIGURE 7-14, then close and save the table

TROUBLE

If a "Subscript out of range" message appears when appending the Excel records to the Access database, close the database and reopen it. Enable content if requested.

FIGURE 7-12: Fields for the Product List table

Field Name	Data Type
Product #	Number
Description	Short Text
Category	Short Text
Price	Currency

FIGURE 7-13: Records for the Product List table

Product #	Description	Category	Price	Click to Add
5800	Ceylon Blend	Black	\$18.00	
5801	Orange Pekoe	Black	\$15.00	
5802	Dragon Jasmine	Green	\$17.00	
5803	Zen Moment	Green	\$22.00	
5804	Cold Zinger	Green	\$14.00	
*	0		\$0.00	

FIGURE 7-14: Excel data imported into the Product List table

The screenshot shows the Microsoft Access interface with the Product List table open in Datasheet View. The table contains 31 records. The first 27 records (product numbers 3562 to 5804) are highlighted in light blue, indicating they were imported from an Excel workbook. The last 4 records (product numbers 5800 to 5804) are highlighted in light gray, indicating they were entered directly in Access. The status bar at the bottom shows 'Record: 1 of 31'.

Annotations in the image include:


- An arrow pointing to the 27 records imported from the Excel workbook with the text: "Some of the records appended from the Excel workbook".
- An arrow pointing to the 4 records entered in Access with the text: "Records entered in Access".
- An arrow pointing to the scroll bar on the right with the text: "Scroll up to see additional records for a total of 31 records".


Create the Report in Word

The report consists of three pages that will include objects copied from Excel and Access. First, you need to set up the document in Word and then you need to insert the text. You will insert the Excel and Access objects in the next lesson.

STEPS

HINT

Click the Show/Hide button  in the Paragraph group on the Home tab to show paragraph marks.

1. Start Word and create a blank document, click the Layout tab, click the Margins button in the Page Setup group, click Custom Margins, change the Left margin to 2, click OK, click the Design tab, click the Themes button, select the Ion Boardroom theme, then save the document as PR 7-Harmony Teas Partnership Report.docx to the location where you save the files for this book
2. Click the Insert tab, click the Header button in the Header & Footer group, click Blank, click the Insert tab, click the Insert WordArt button in the Text group, select the Fill - Red, Accent 3, Sharp Bevel style (2nd row, last column), then replace [Type here] with Partnership Report
3. Select Partnership Report, click the Home tab and increase the font size to 48 pt, center the text if it is not centered, click the launcher  in the Font group, click the Advanced tab, click the Spacing list arrow, click Expanded, select the contents of the By text box, type 5, press [Tab], compare the dialog box to FIGURE 7-15, then click OK
4. Click the Drawing Tools Format tab, click Text Direction in the Text group, click Rotate all text 270°, then switch to One Page view and use the alignment guides to position the WordArt object as shown in FIGURE 7-16
5. Click the Header & Footer Tools Design tab, click the Go to Footer button in the Navigation group, change the zoom to 100%, type your name at the left margin, press [Tab] twice, click the Page Number button in the Header & Footer group, point to Current Position, then click Plain Number
6. Click the Close Header and Footer button in the Close group, click the Insert tab, click the Object list arrow in the Text group, click Text from File, navigate to the location where you store your Data Files, then double-click PR 7-05.docx
 The text required for the report is inserted into the document.
7. Scroll to the top of the document, select INTRODUCTION, click the Home tab, then click Heading 1 in the Styles gallery
8. Format all the headings in the document that are formatted in uppercase letters with the Heading 1 style, then format all the headings in the document that are formatted in title case with the Heading 2 style
 FIGURE 7-17 shows some of the formatted headings.
9. Save the document

HINT

If the Alignment guides are not visible, click the Layout tab, click the Align list arrow, then click Use Alignment Guides.

FIGURE 7-15: Setting character spacing

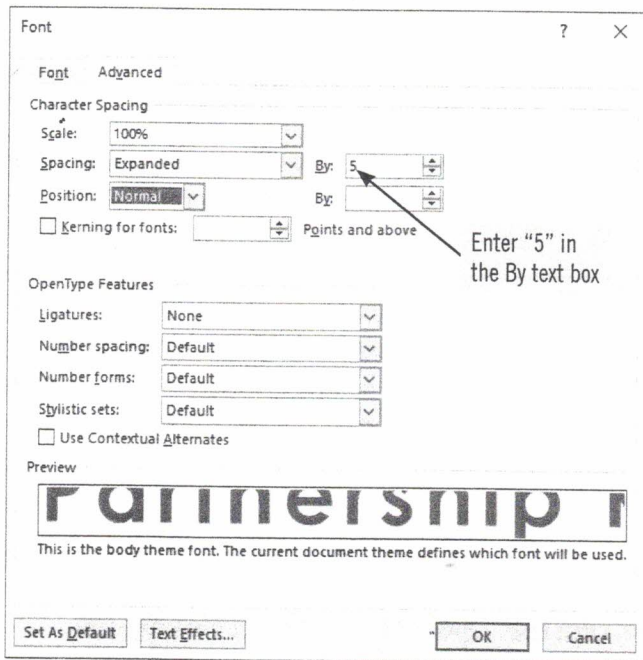


FIGURE 7-16: Completed WordArt object in One Page view

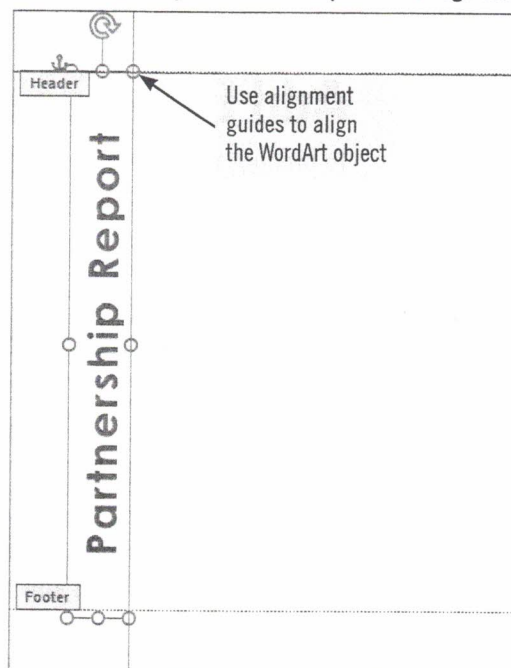
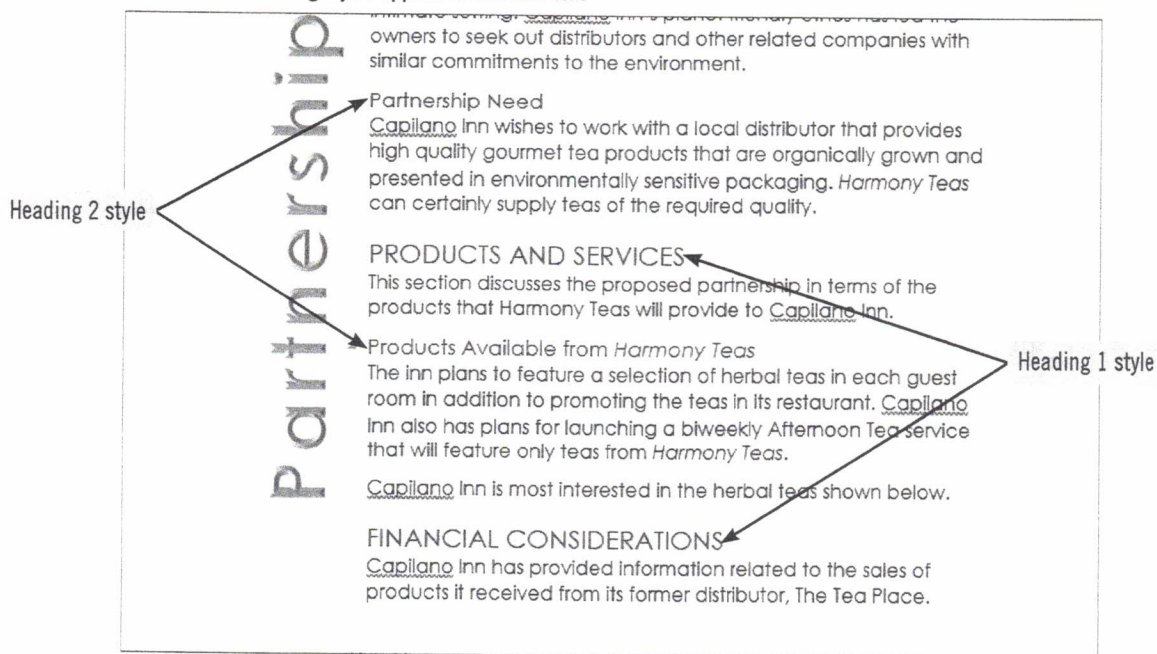





FIGURE 7-17: Heading styles applied to selected text



Add Excel and Access Objects to Word

To produce the three pages of the completed report shown in FIGURE 7-18, you need to insert spreadsheet data, create a query table in Access and publish it in Word, and then copy a chart from Excel.

STEPS

1. Switch to Access, click the Create tab, click the Query Wizard button in the Queries group, click OK, move all the records in the Product List table to the Selected Fields list box, click Next, click Next, then click Finish
2. Switch to Design view, type Herbal in the Criteria cell for Category, click the Run button in the Results group, then close and save the query
3. Click Product List Query in the list of Access Objects, click the External Data tab, click the More button in the Export group, click Word, click the Browse button, navigate to the location where you save the files for this book, change the name of the file to PR 7-Harmony Teas Query, click Save, click the "Open the destination file after the export operation is complete." check box, then click OK
The table opens in a Word document named PR 7-Harmony Teas Query.rtf.
4. Return to Access, click Close, return to the query in Word, select the table, click the Copy button, click the View tab, click the Switch Windows button in the Window group, click PR 7-Harmony Teas Partnership Report.docx, click at the end of the second paragraph below the "Products Available from Harmony Teas" heading toward the bottom of page 1 (ends with the text "teas shown below"), press [Enter], then click the Paste button on the Home tab
5. Scroll up and add a page break to the left of the paragraph above the table, select the table, click the Table Tools Design tab, click the More button  in the Table Styles group, then select the Grid Table 2 - Accent 3 style
6. In Excel, open the file PR 7-06.xlsx, save the file as PR 7-Harmony Teas_Revenue.xlsx, select cells A1:E12, copy them, then switch to the report in Word
7. On the second page, at the end of the second paragraph, following "tourist season," press [Enter], click the Paste list arrow, then click the Picture button 
You can select the Picture option when you don't need to modify the contents of the Excel file.
8. Switch to Excel, click the Projected Sales sheet tab, select cells A1:E3, click the Insert tab, click the Insert Column or Bar Chart button in the Charts group, click the Clustered Column chart style, then change the chart title to Projected Sales
9. Copy the chart, switch to the report in Word, click at the end of the paragraph above the "CONCLUSION" heading, press [Enter], click the Paste list arrow, click the Use Destination Theme & Embed Workbook button , click the chart, click the Chart Tools Format tab, select the contents of the Height box in the Size group, type 2.5, then press [Enter]
10. Click the View tab, click the Zoom button in the Zoom group, click the Many Pages button and drag to select 1 x 3 Pages, click OK, add a page break to the left of the last paragraph on page 2 (starts with "Shown below"), compare the completed report to FIGURE 7-18, make adjustments as needed, save the document, submit all files to your instructor, then close all files and exit all programs

HINT

The .rtf extension stands for Rich Text Format.

TROUBLE

If the Word document opens in WordPad, copy the text and paste it into a blank Word document and then save it as an RTF file.

MORE PRACTICE

For more practice with the skills presented in this project, complete Independent Challenge 2.

FIGURE 7-18: Completed report

Partnership Report

INTRODUCTION

Harmony Teas has an opportunity to partner with Capilano Inn, a boutique-style hotel that has just opened in Vancouver and is interested in offering its guests premium quality teas. This report describes the partnership issues in terms of three factors: Partnership Requirements, Products and Services, and Financial Considerations.

PARTNERSHIP REQUIREMENTS

This section provides background information about Capilano Inn and discusses how the partnership could benefit both companies.

Background Information

Capilano Inn has made steady progress in a receptive marketplace. The boutique-style hotel caters to guests with discerning tastes who want a luxury experience in a small, intimate setting. Capilano Inn's planet-friendly ethos has led owners to seek out distributors and other related companies with similar commitments to the environment.

Partnership Need

Capilano Inn wishes to work with a local distributor that provides high quality gourmet tea products that are organically grown and presented in environmentally sensitive packaging. Harmony Teas can certainly supply teas of the required quality.

PRODUCTS AND SERVICES

This section discusses the proposed partnership in terms of products that Harmony Teas will provide to Capilano Inn.

Products Available from Harmony Teas

The inn plans to feature a selection of herbal teas in each room in addition to promoting the teas in its restaurant. Capilano Inn also has plans for launching a biweekly Afternoon Tea that will feature only teas from Harmony Teas.

Your Name

Capilano Inn is most interested in the herbal teas shown below.

Product #	Description	Category	Price
3550	Licorice Candy	Herbal	\$18.00
3551	Cinnamon Burst	Herbal	\$15.00
3552	Red Pepper Surprise	Herbal	\$12.00
3553	Lemongrass	Herbal	\$17.00
3554	Coconut Chai	Herbal	\$18.00
3555	Vanilla Apple	Herbal	\$16.00
3556	Lemon Spearmint	Herbal	\$15.00
3557	Juniper	Herbal	\$14.00
3558	Eucalyptus	Herbal	\$16.00
3559	Ginger Punch	Herbal	\$18.00
3560	Lovely Lavender	Herbal	\$12.00
3561	Guava	Herbal	\$16.00
3562	Goji Berry	Herbal	\$14.00
3563	Citrus Pop	Herbal	\$19.00
3564	Mango Fruit	Herbal	\$12.00
3565	Mulberry Chamomile	Herbal	\$14.00
3566	Soothing Chamomile	Herbal	\$13.00
3567	Spearmint Remedy	Herbal	\$15.00
3568	Myrtle	Herbal	\$18.00
3569	Peppermint Surprise	Herbal	\$16.00
3570	Wintergreen	Herbal	\$17.00
3571	Raspberry Rooibos	Herbal	\$12.00
		Herbal	\$13.00
		Herbal	\$12.00
		Herbal	\$15.00
		Herbal	\$19.00

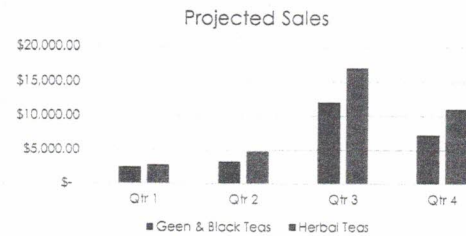
Partnership Report

Shown below are projected sales of Harmony Teas to Capilano Inn over the three busiest months of the tourist season.

Harmony Teas Sales Projection				
	July	August	September	Total
Revenue				
Black and Green Teas	\$ 2,800.00	\$ 3,080.00	\$ 3,388.00	\$ 9,268.00
Herbal Teas	\$ 5,000.00	\$ 5,500.00	\$ 6,050.00	\$ 16,550.00
Total Revenue	\$7,800.00	\$8,580.00	\$ 9,438.00	\$25,818.00
Expenses				
Advertising	1,500.00	1,500.00	1,500.00	4,500.00
Cost of Sales: 60%	4,680.00	5,148.00	5,662.80	15,490.80
Total Expenses	\$6,180.00	\$6,648.00	\$ 7,162.80	\$19,990.80
Net Revenue	\$1,620.00	\$1,932.00	\$ 2,275.20	\$ 5,827.20

Projected Revenues

The chart illustrated below shows the revenues projected for each quarter in the first year of the proposed partnership with Capilano Inn.



CONCLUSION

Harmony Teas has the opportunity to increase its market share by partnering with Capilano Inn. Both companies are seriously committed to the environment and to providing their customers with a high-quality tea drinking experience.

Your Name

3

FINANCIAL

Information related to the sales of the distributor, The Tea Place. Harmony Teas could expect a minimum volume of products to Capilano Inn.

2