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# Office Solutions Development

*Topic 3:*

*An Introduction to the Advanced Features and  
Functions of the Microsoft Office Suite*

# Scope and Coverage

*This topic will cover:*

- The advanced features and functions of the Microsoft Office Suite

# Learning Outcomes - 1

*By the end of this topic, students will be able to:*

- Explain what applications are available in the Microsoft Office Suite
- Describe what advanced features and functions are available in various applications
- Describe how these features and functions improve business performance

# Learning Outcomes - 2

*By the end of this topic, students will be able to:*

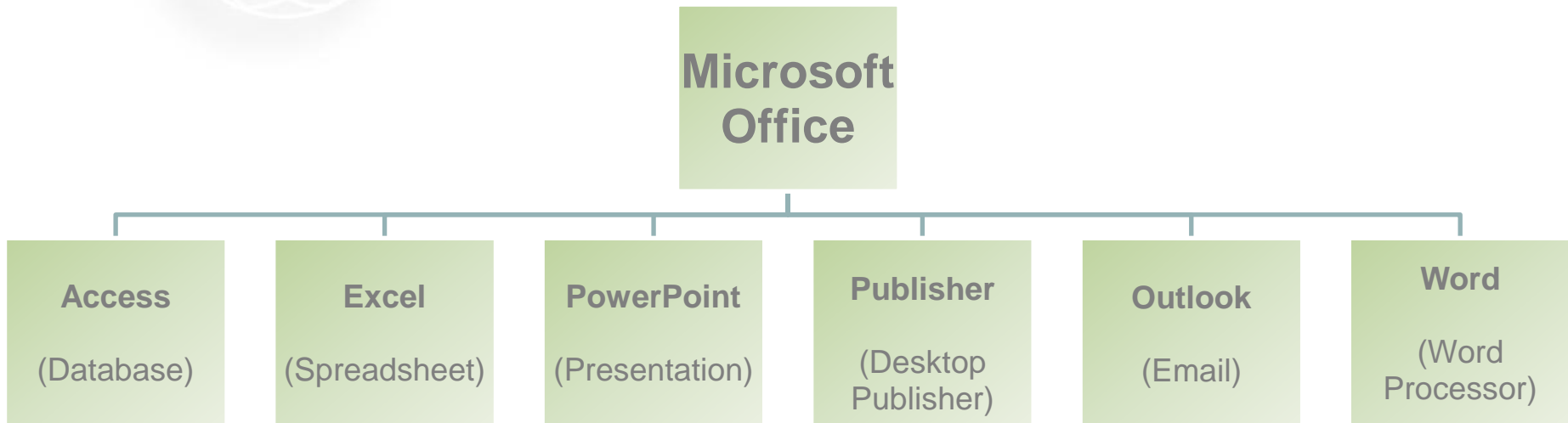
- Evaluate if the features and functions of the application software discussed address both user and business requirements
- Evaluate whether interface design principles have been applied when using these functions

# Terminology

- Terminology will be explained in the lecture, tutorial and laboratory session. You should take notes!
- Ask questions if you do not understand.

# An Introduction to the Microsoft Office Suite

- The Microsoft Office Suite is an example of ***integrated application software***; it contains several applications and the main ones are:

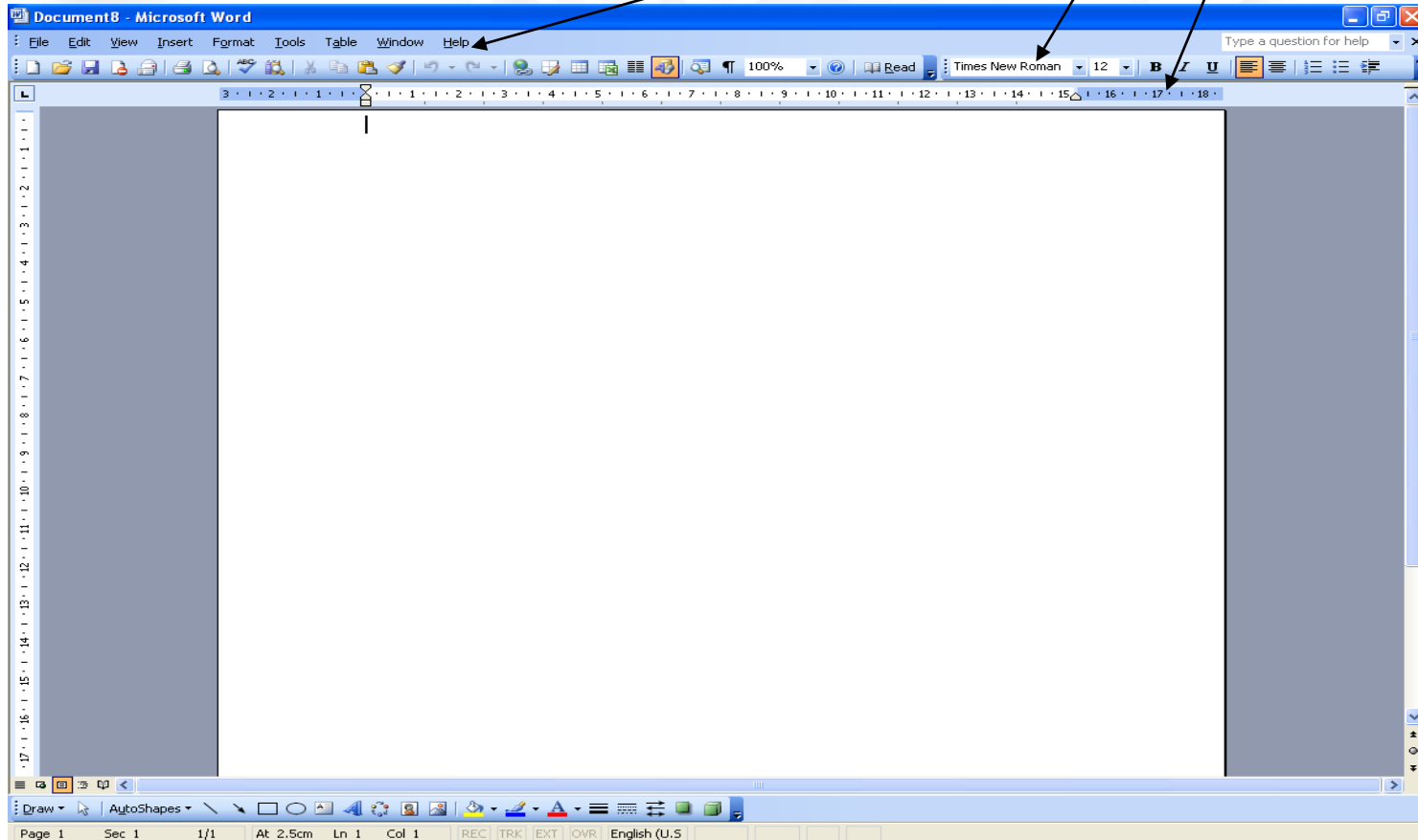


# Versions of Microsoft Office

- First released in 1990, it has undergone many changes
- Office 2003 is still used by many organisations.
- There were changes to the interface in Office 2007 and Office 2010; a new **Fluent User Interface** has been introduced that replaces the menus and toolbars of the 2003 version with a toolbar of tabs called a **Ribbon**.
- There are four versions of Office 2010 and only one version contains Access (Microsoft Office Professional Plus 2010).

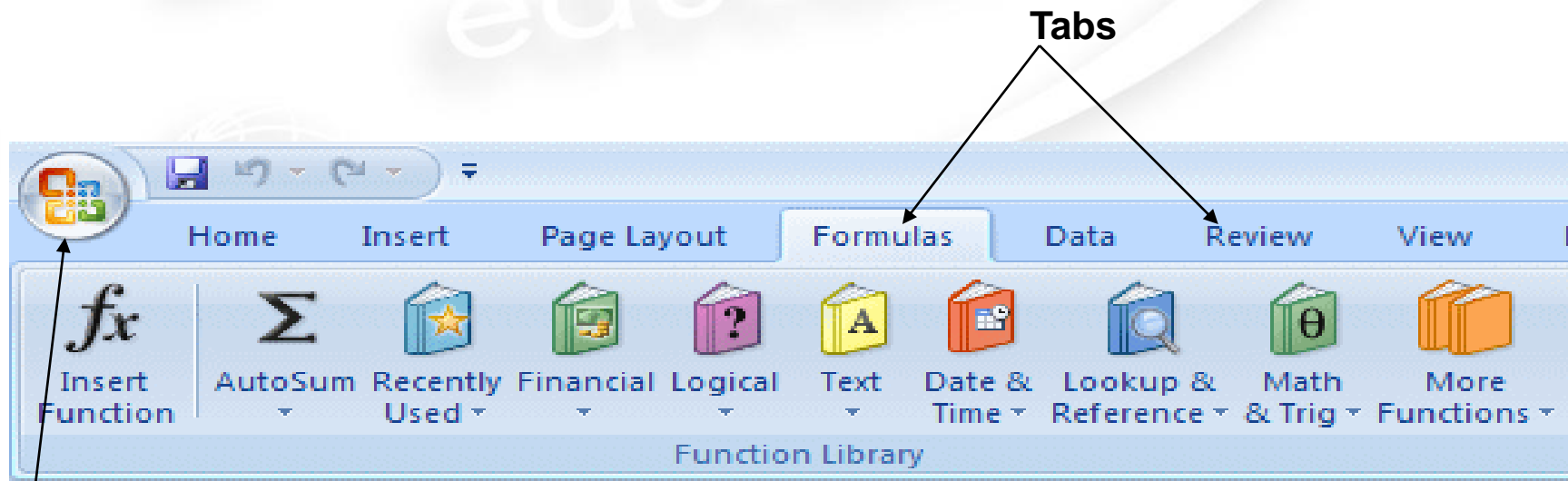
# The 2003 Interface

Menus, tool bar, ruler



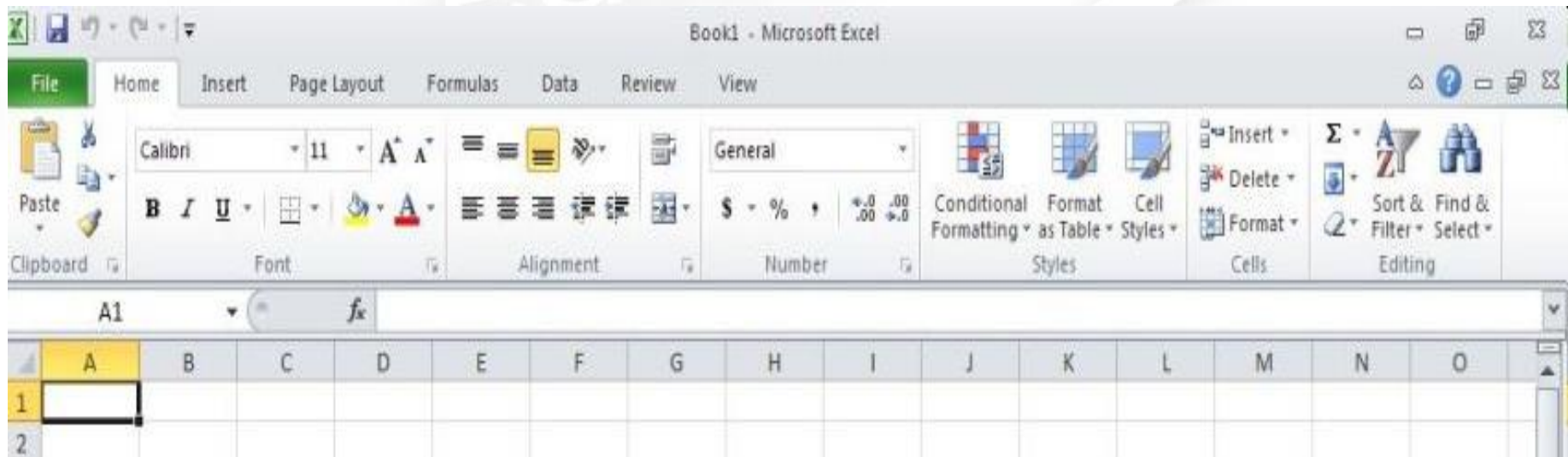


# The Ribbon Interface

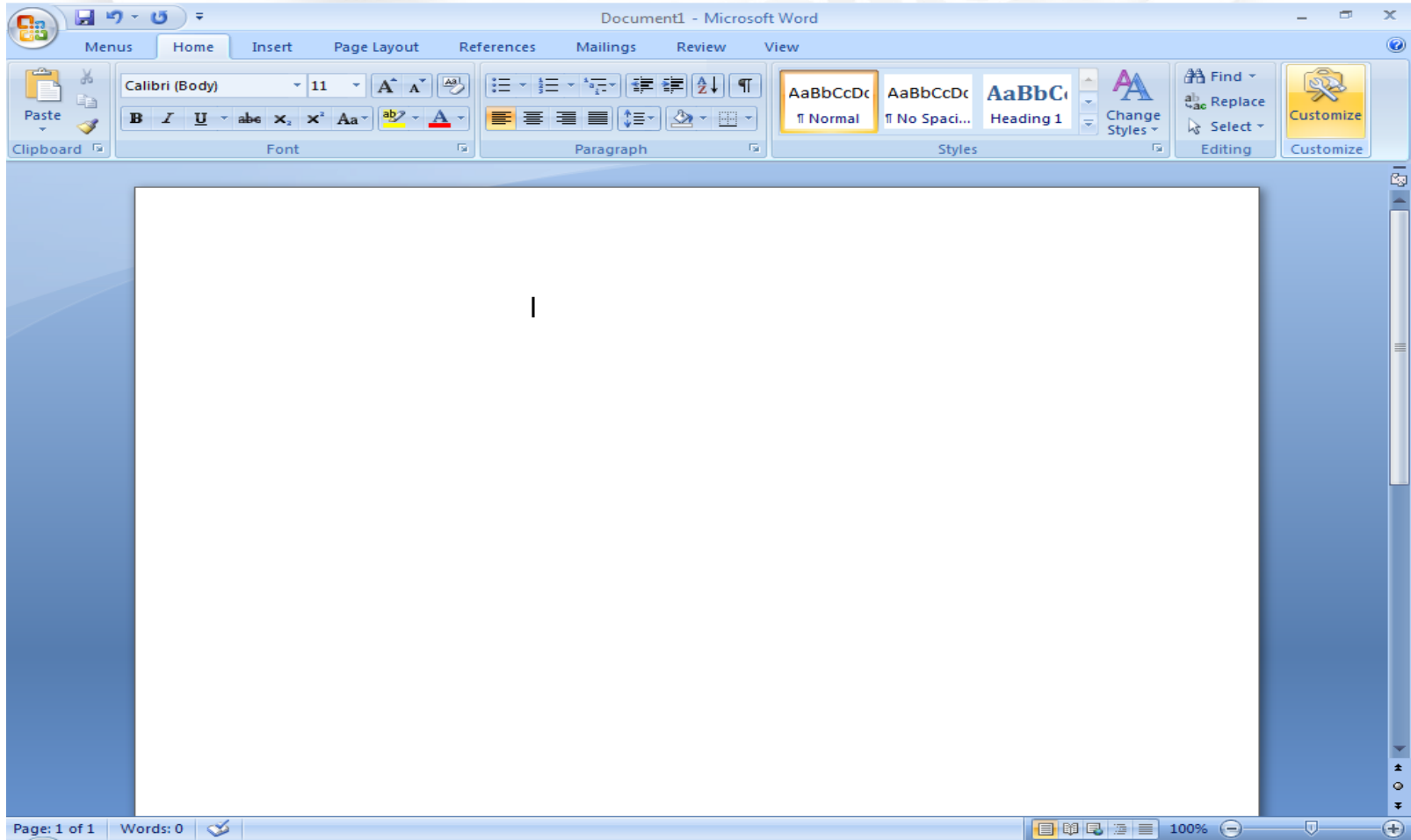


Office  
button

# Excel Ribbon



# Word Ribbon



# Advanced Features and Functions

- These are offered as part of the 2003, 2007 and 2010 suites:
  - advanced queries
  - templates
  - functions
  - pivot tables and charts
  - conditional formatting
  - validation
  - macros and VBA
  - user-level security

# Advanced Queries

- They allow complex searches of data.
- They can involve the use of a dedicated structured query language.
- They enable specific criteria to be asked.

# Templates

- A template is a document in which some parts are already created such as the layout, fonts, margins, and other features.
- They include word processed letters and invoices, spreadsheet worksheets, database reports.

# Functions

- Excel functions include:
  - financial functions (e.g. work out monthly payments on loans using the PMT function)
  - date and time functions (dynamic and static)
  - logical functions (evaluate conditions using IF statements)
  - statistical functions (SUM, AVERAGE, COUNT, MAX, MIN, MEDIAN)
  - lookup functions (look for data)
  - text functions (enable text entries in cells)

# Pivot Tables and Charts

- Can be used to analyse and summarise data from large amounts of information
- Can be used to create reports from the data that is extracted from the analysis
- The position of the fields in a table can be rearranged to provide the user with a different view that makes the data easier to read.
- You will create and use this feature in Topic 4.



# Conditional Formatting

- Allows a user to change the formatting of a cell based on the values that are in it, e.g. a list of customers contains details of the amount of money customers have spent on products and some customers have spent over £200. These amounts should be displayed in **green**.
- The cell automatically formats itself based on its value, so if a user changes the value, it can change its formatting.
- If £200 or more has been spent, the figure will be displayed in **green**. The condition refers to the amount and the formatting refers to the colour.

# Validation

- Enables data entry to be completed efficiently, accurately and quickly
- Invalid data can include: text entered into an integer cell, a decimal entered into a date cell, etc.
- It can be done by creating:
  - a data entry form
  - a check box
  - a combo box
  - creating input messages
  - creating error alerts

# User-Level Security

- Users can administer access rights to other users, deciding on how much access to give them, e.g. allowing them to only view data
- This includes setting password controls.

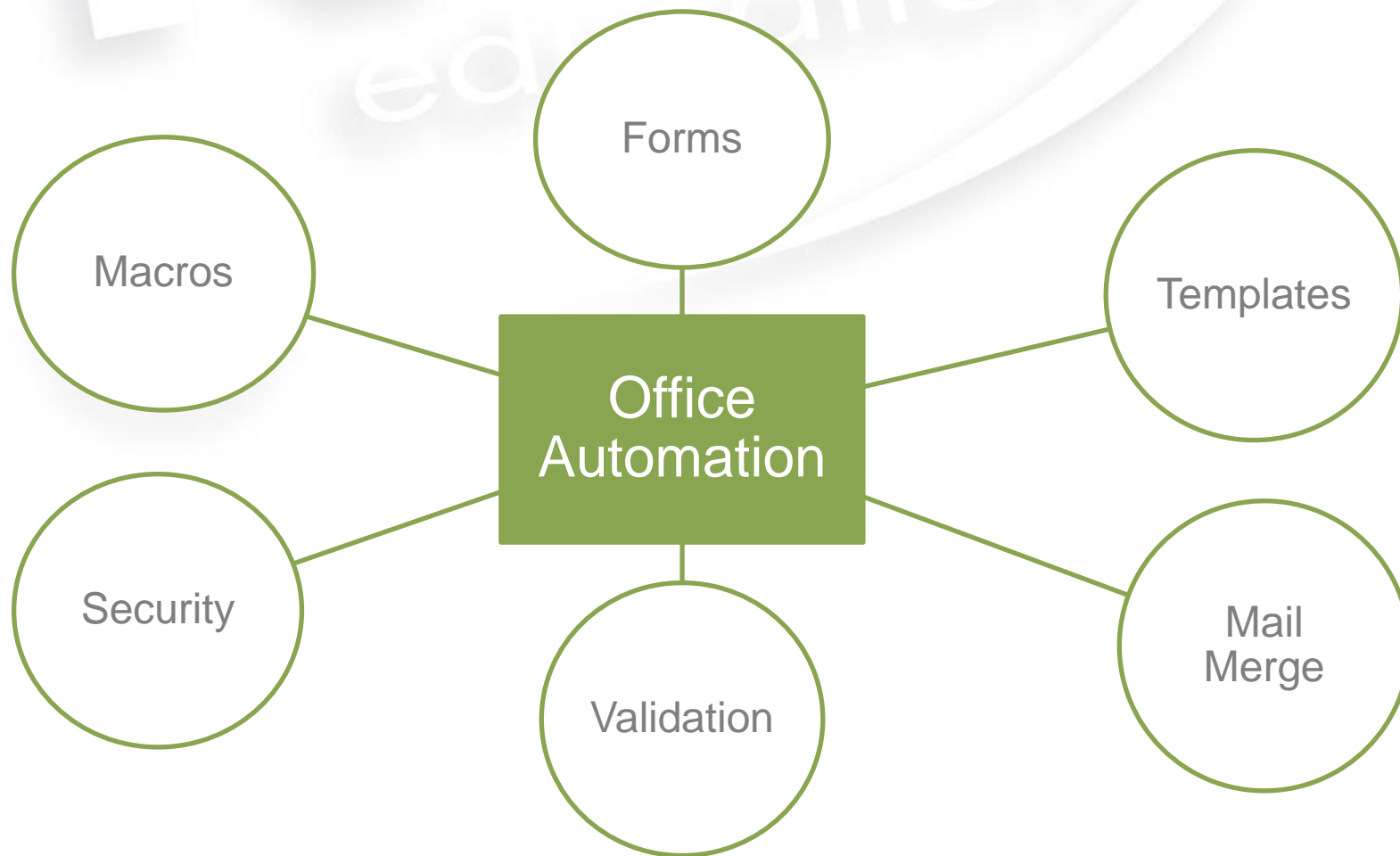
# How Advanced Features and Functions Improve Business Performance

- Make tasks easier to perform, e.g. automation, validation
- Improve the overall performance of the application, e.g. automation
- Improve the accuracy of data management, e.g. validation
- Increase productivity, e.g. data entry, functions
- Increase security, e.g. access controls

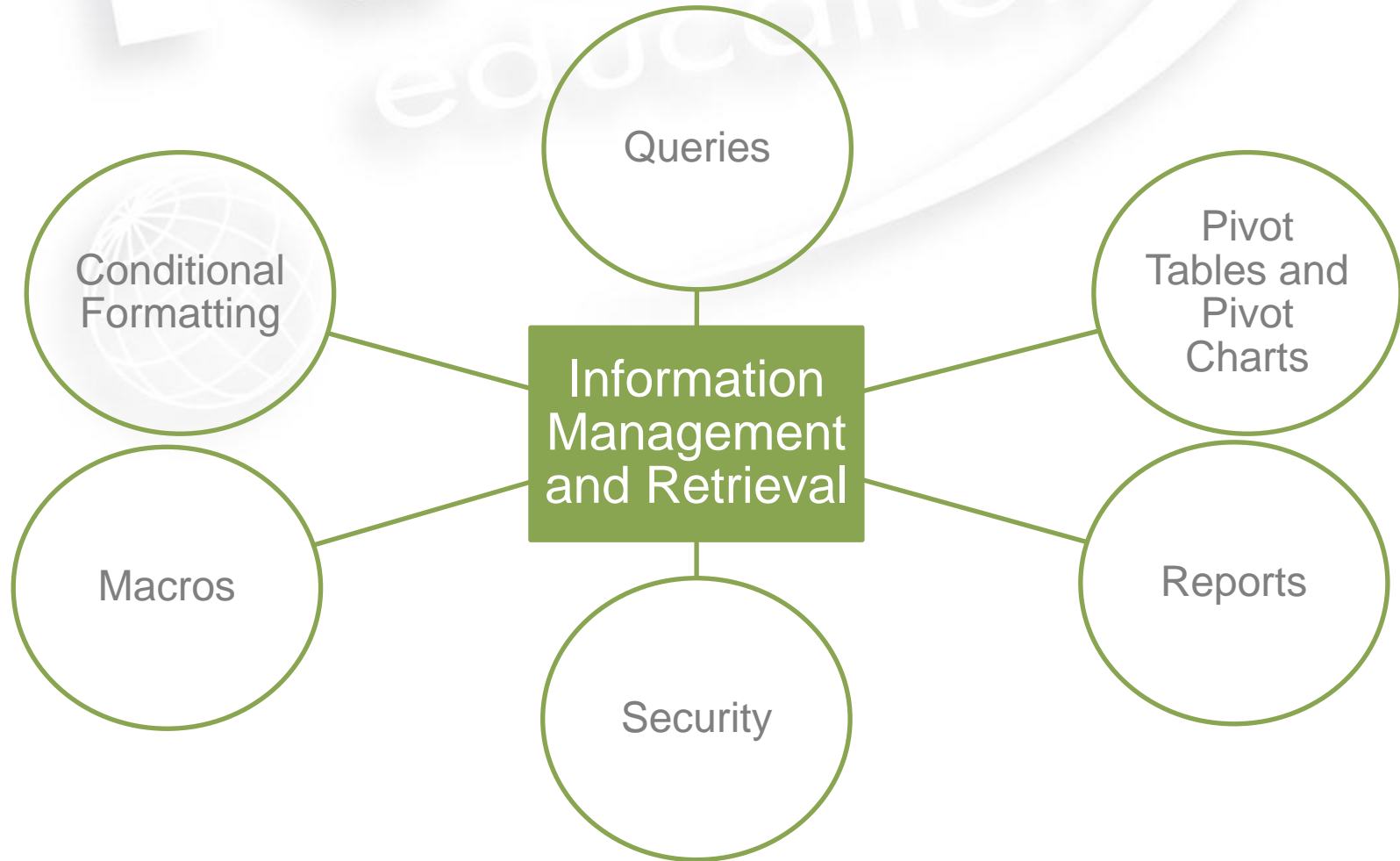
# Business Processes that are Improved by Advanced Features and Functions

- Office Automation
- Decision Support
- Information Management and Retrieval

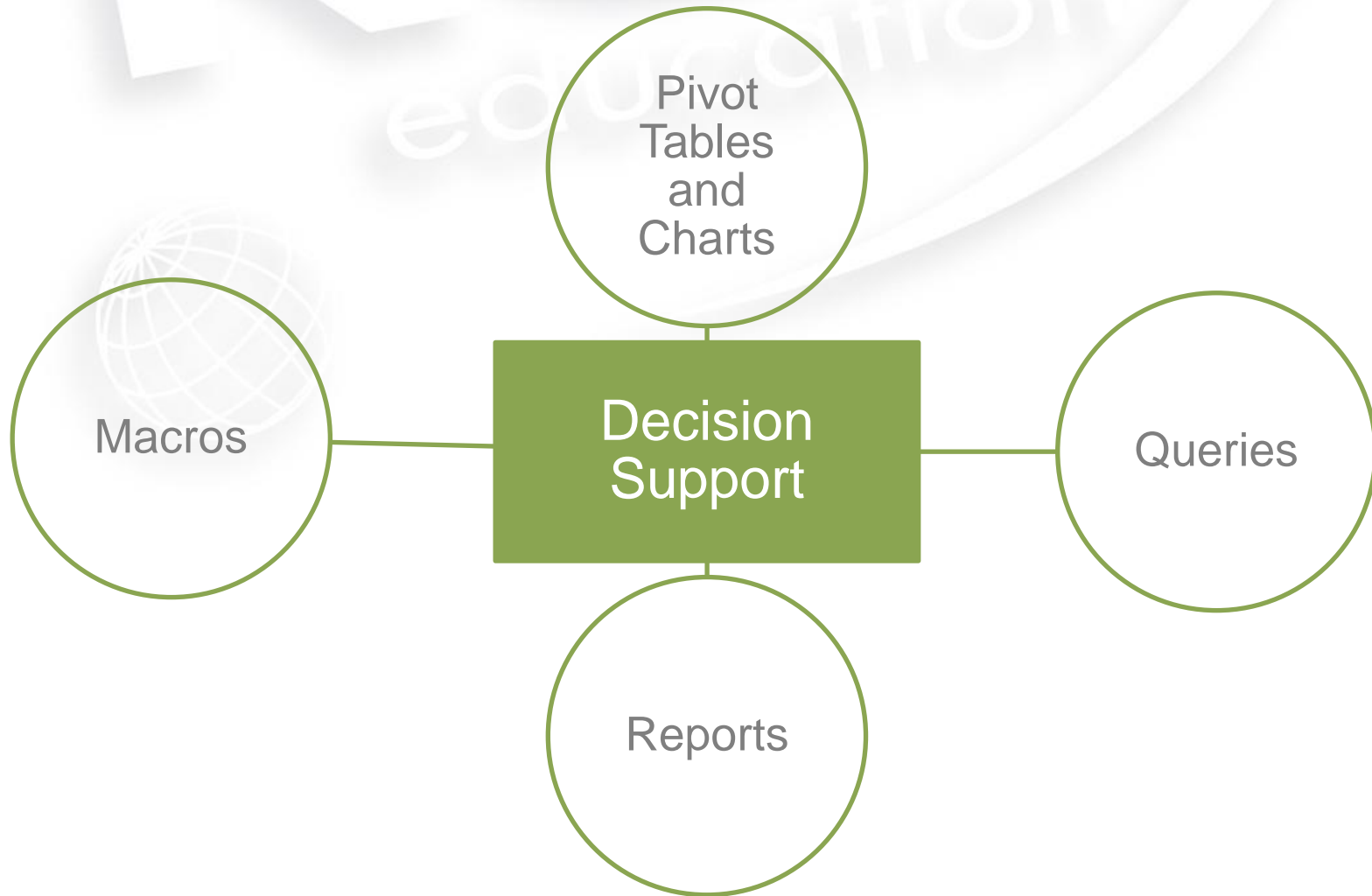
# Advanced Features and Functions - 1



# Advanced Features and Functions -2



# Advanced Features and Functions - 3





# Access, Excel and Word

- We will concentrate on the advanced features and functions of Access, Excel and Word and look at them in greater detail in Topics 4-9.

# Access Advanced Features and Functions

- In order to store, retrieve, manage and analyse data quickly and effectively, the following can be used:
  - Advanced queries
  - Forms
  - Templates
  - Automating with macros
  - User-level security

# Excel Advanced Features and Functions

- Templates
- Conditional formatting
- Validation
- Functions
- Pivot tables and charts
- Automating with macros
- User-level security

# Word Advanced Features and Functions

- Templates
- Mail merge
- Automating with macros
- User-level Security

# Using the Advanced Features and Functions

- You will create and use each of the Access, Excel and Word features and functions in Topics 4-9.

# References

- Jaxworks Small Business Spreadsheets Factory. (2010). [Available Online]
  - <http://www.jaxworks.com>
- Microsoft Office
  - <http://office.microsoft.com>

# Topic 3 – An Introduction to the Advanced Features and Functions of the Microsoft Office Suite

*Any Questions?*



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