

**CREATING MICROSOFT ACCESS REPORTS
USING MICROSOFT EXCEL
IMPORTING SPREADSHEETS INTO ACCESS
PRODUCING MAILING LABELS**

TRAINING GUIDE

OVERVIEW

The guide illustrates how to create a simple report in Microsoft Access using the Report Wizard, the basics of Microsoft Excel, how to import a spreadsheet into a Microsoft Access table, and how to produce mailing labels.

Examples used in this guide are geared towards union organizers and workers. Illustrative examples will follow sample spreadsheets and databases that have been created. The guide applies to users of Microsoft Office 2000.

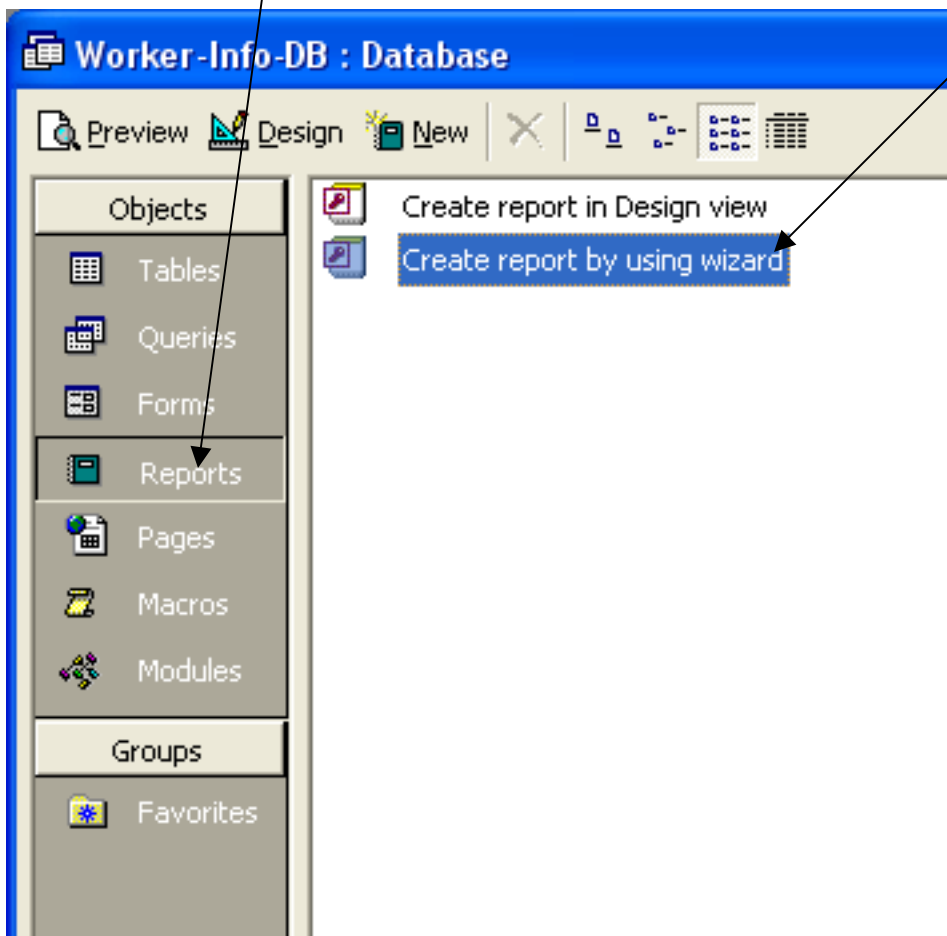
TABLE OF CONTENTS

	<u>Pages</u>
Creating a Microsoft Access Report.....	3 – 10
Basics of Microsoft Excel.....	11 – 27
Setting up the page for printing.....	12
Inserting New Spreadsheets into a Workbook.....	13
Renaming a Spreadsheet.....	13
Inserting New Rows into a Spreadsheet.....	14
Inserting New Columns into a Spreadsheet.....	15
Freezing Window Panes.....	16
Sorting Data.....	17 – 19
Finding An Average.....	20 – 22
Making a Chart in Excel.....	23 –27
Importing A Spreadsheet Into Access.....	28 – 36
Creating Mailing Labels From Excel.....	37 – 47
Creating Mailing Labels From Access.....	48
Contact Information.....	49

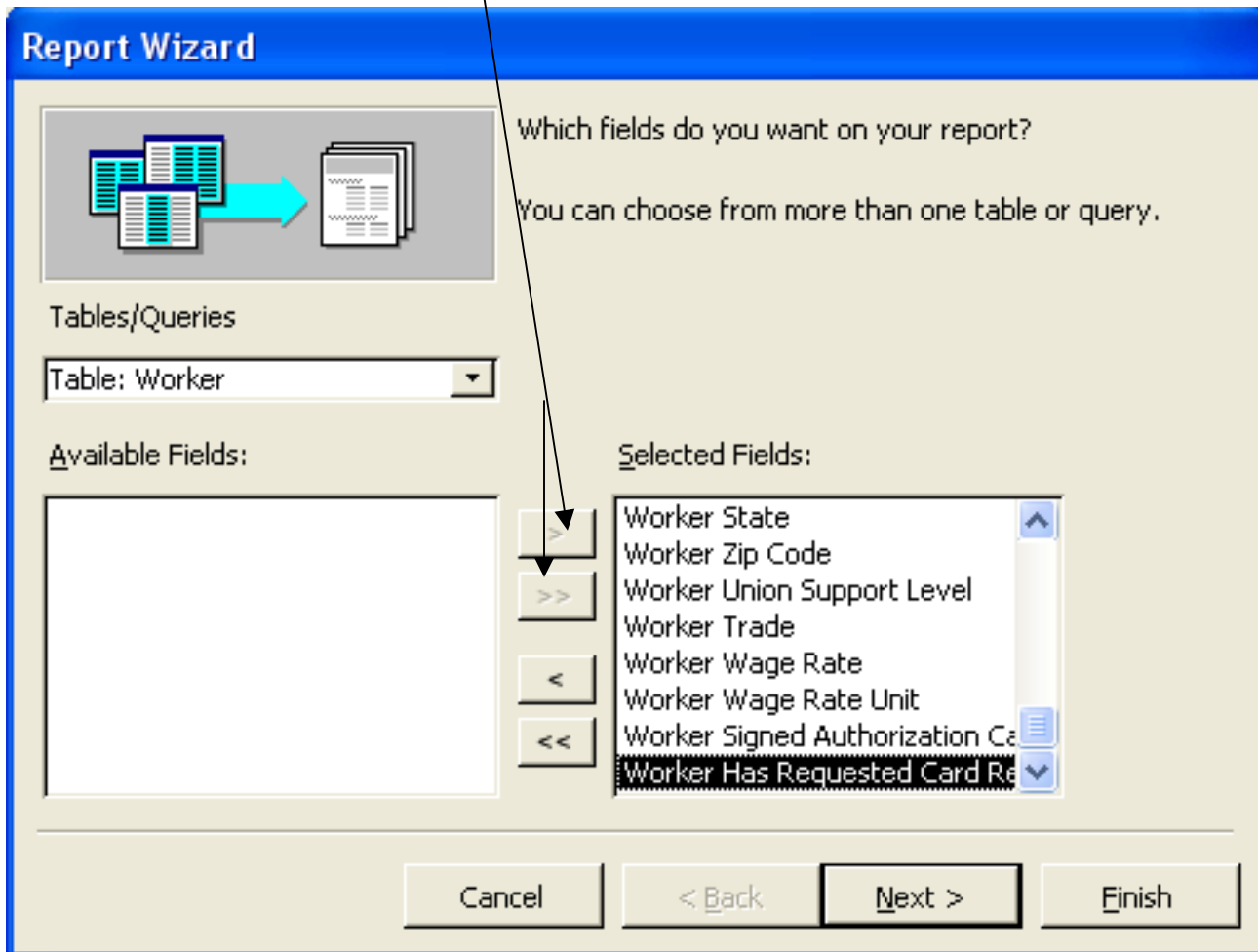
CREATING A MICROSOFT ACCESS REPORT

Using the Report Wizard

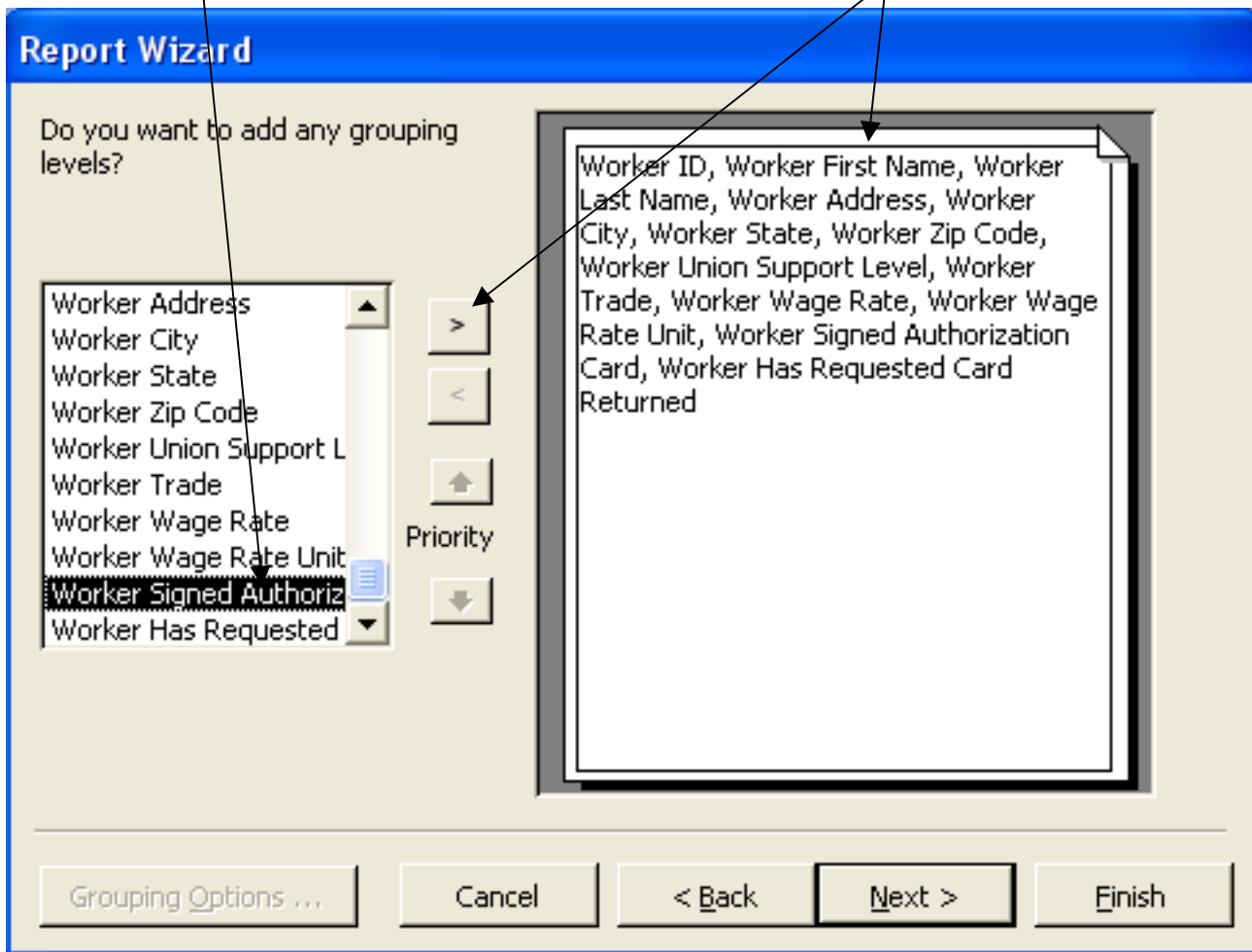
1. Open up the Microsoft Access database that will be used in creating a report. For the example used in this section, a sample database named Worker-Info-DB will be used. Once the database opens and the Database Main Menu appears (screen shown below), click on **Reports**, which is located under the **Objects** section. Then double-click the area labeled **Create report by using wizard**.



2. The first screen of the Report Wizard will allow you to select which database fields to include in the report. Use the single, right-pointed “carrot” (>) to select specific fields from a table one at a time. Use the double, right-pointed carrot (>>) to select all the fields from a table. For this example, all the fields are selected from the Worker table. Click the **Next >** button when ready to proceed.



3. The second screen of the Report Wizard allows you to group records together based on certain fields and their values. For instance, records containing 'Yes' and 'No' responses could be grouped together pertaining to whether a worker signed an authorization card. For this example, the Worker Signed Authorization Card field is used to group report results. To select a grouping field, highlight the appropriate field in the white scrolling text box and then click on the single, right-pointed carrot (>). The field you selected should show at the top of the sheet located below. When ready to move on to the next step, click on the **Next >>** button.

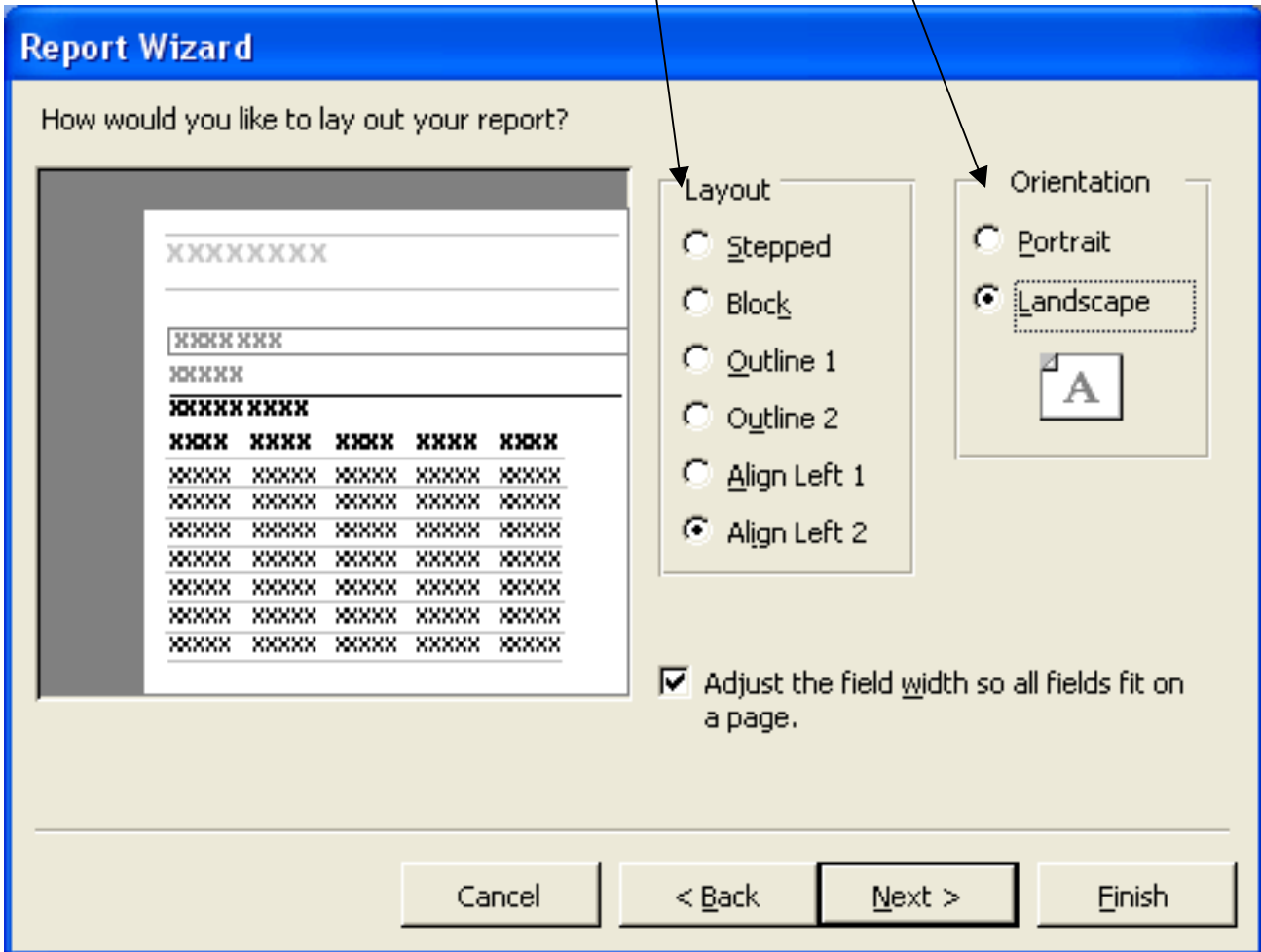


4. The third screen of the Report Wizard allows you to specify field(s) that can be used to sort the records that will appear in the report. If a grouping was selected, as indicated in the last step for this example, this filter acts as a supplemental sort where each group can be further sorted by specifying fields as show below. For this example, Worker Last Name will be used to sort the records.

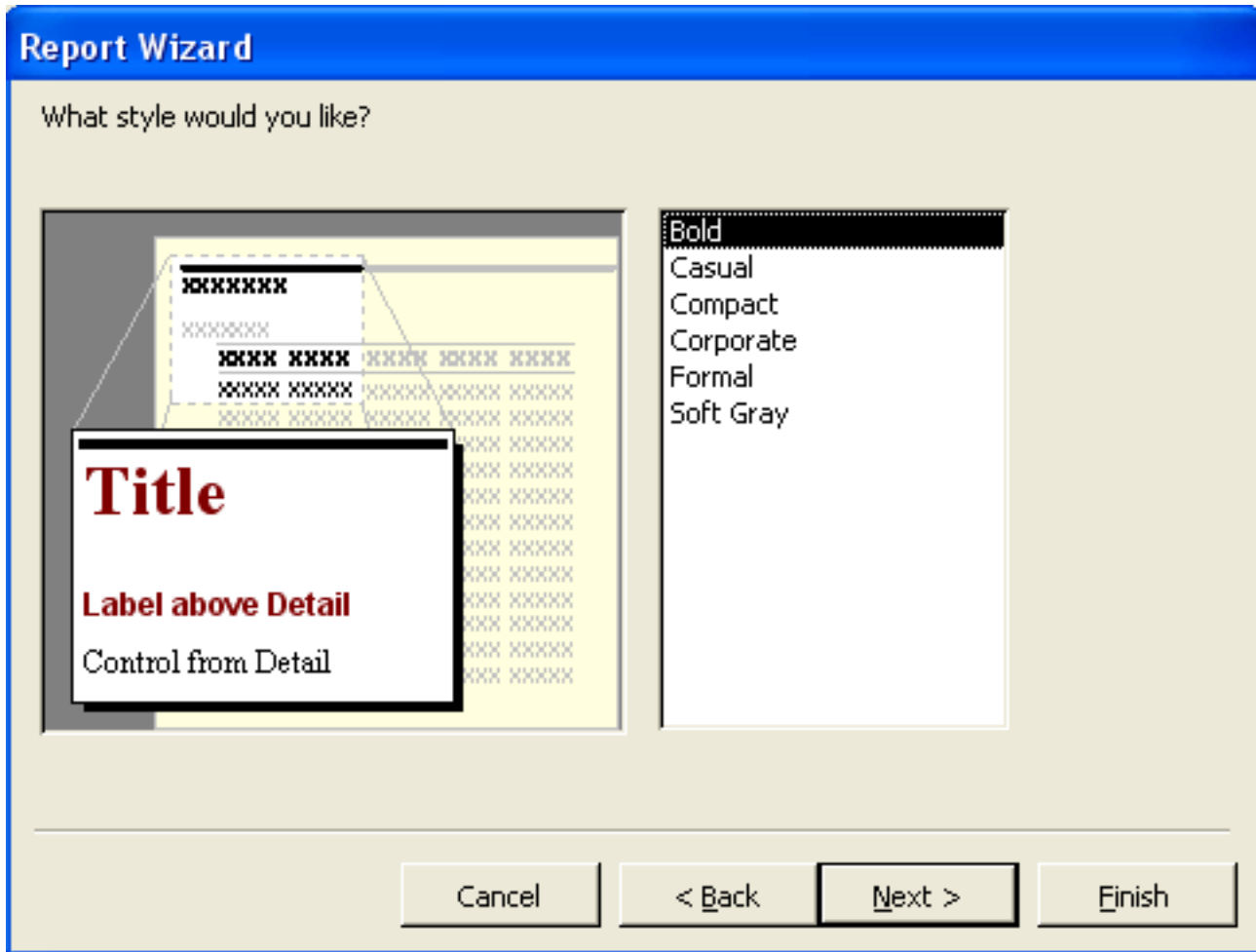
Select the field name from the first drop-down box and then indicate whether the sort should be in ascending or descending order by clicking on the corresponding box to the right. By default, sorting will go in ascending order. Click the **Next >** button when ready to proceed.

The screenshot shows the 'Report Wizard' dialog box with the title 'Report Wizard'. The main question is 'What sort order and summary information do you want for detail records?'. Below this, there is a preview window on the left showing a report layout with four columns labeled 1, 2, 3, and 4. The first column is sorted in ascending order (A-Z), and the other three columns are sorted in descending order (Z-A). To the right of the preview, there is a text box that says 'You can sort records by up to four fields, in either ascending or descending order.' Below this text box, there are four rows of controls. Each row has a drop-down menu and a button with 'A-Z' and a downward arrow. The first row has 'Worker Last Name' selected in the drop-down menu. Below these rows is a button labeled 'Summary Options ...'. At the bottom of the dialog box, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

5. The fourth screen of the Report Wizard allows you to specify the layout of the report. Click on each of the radio buttons located under the **Layout** section to view and/or select a layout. Then select how the report page(s) should be printed under the **Orientation** section. NOTE: If many fields will be included in the report, the Landscape orientation is the best choice since more fields can be fit across one page. Click the **Next >** button when ready to proceed.



6. The fifth screen of the Report Wizard allows you to specify the general style formatting of the report. For this example, Bold was chosen. Click the **Next >** button when ready to proceed.



7. Finally specify a title for the report. For this example, the title 'Worker Information Report' was used. When ready to complete the report setup process, click on the **Finish** button.

Report Wizard

What title do you want for your report?

Worker Information Report

That's all the information the wizard needs to create your report.

Do you want to preview the report or modify the report's design?

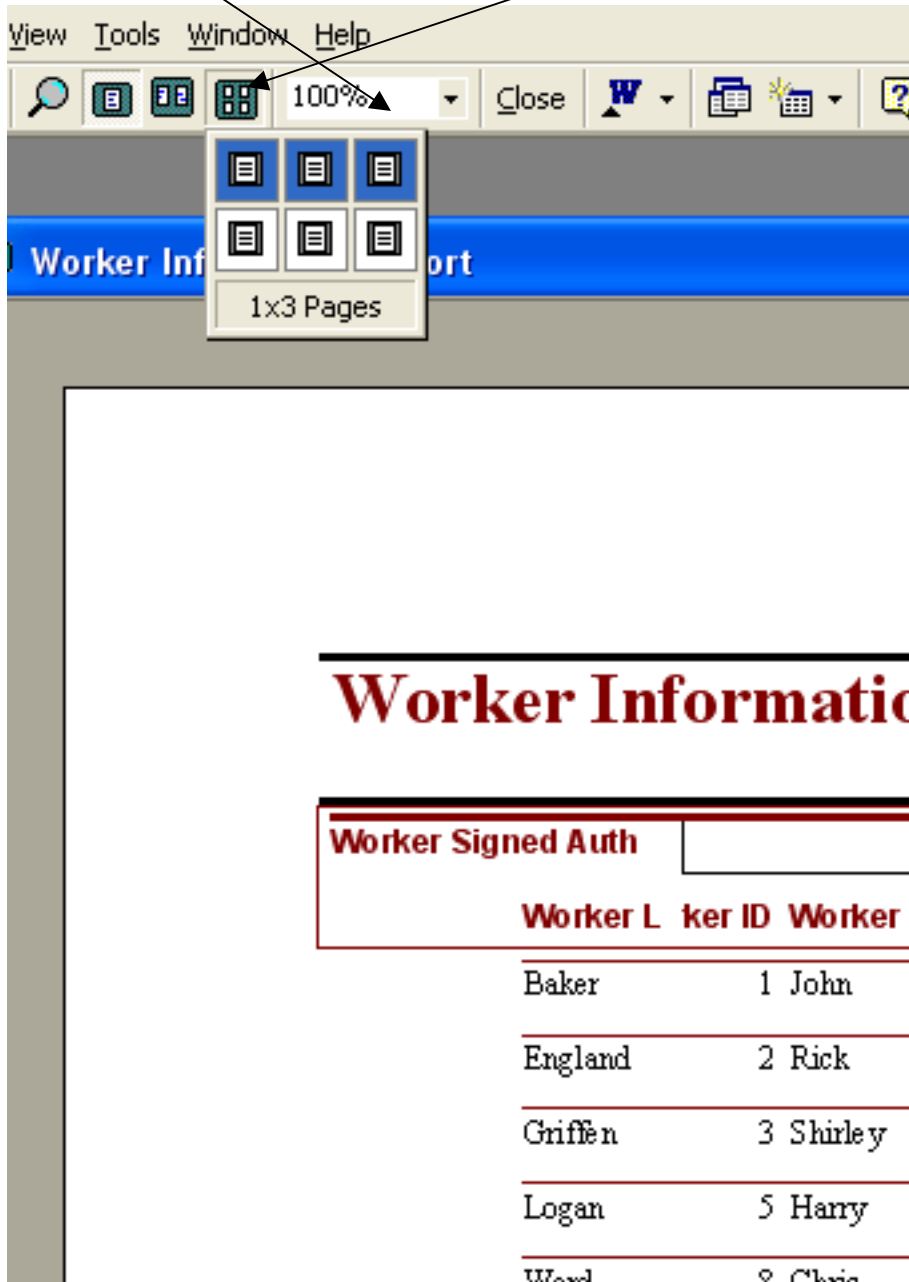
Preview the report.

Modify the report's design.

Display Help on working with the report?

Cancel < Back Next > Finish

8. When the report is previewed or open, you may need to use the Multiple Pages button or zoom drop-down box to adjust the viewing size of the report.



BASICS OF MICROSOFT EXCEL

This next section will cover some of the basic, more common functions of Microsoft Excel. In this Guide, a sample spreadsheet that lists a worker's contact information, union support level, and wage rate will be used to illustrate some of the functions that are covered. The sample spreadsheet is shown below:

The screenshot shows the Microsoft Excel interface. The title bar reads "Microsoft Excel - Excel-Training". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, Help, and Acrobat. The toolbar contains various icons for file operations, editing, and calculations. The spreadsheet below has the following data:

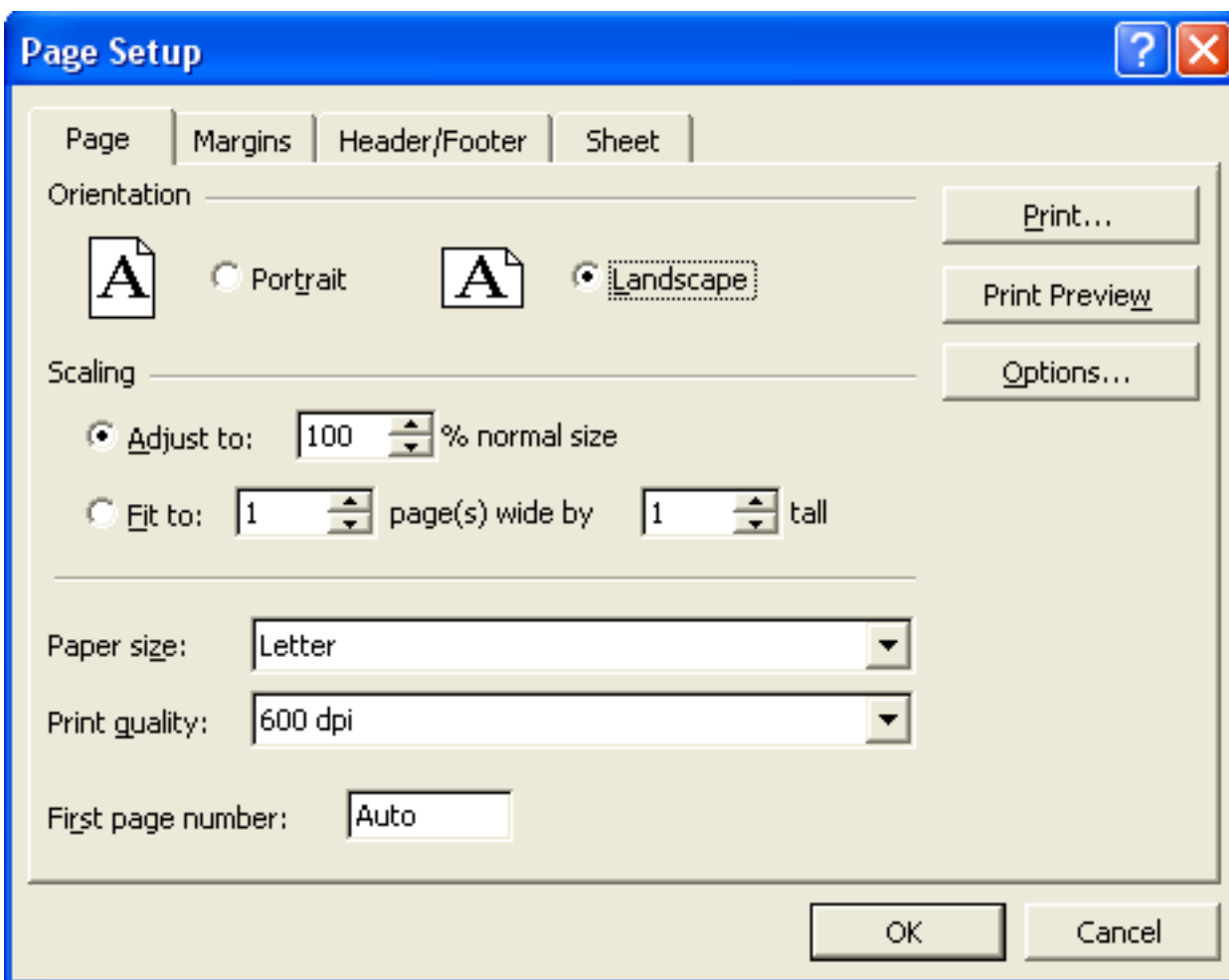
	A	B	C	D	E	F	G
1	First Name	Last Name	Address	City	State	Zip Code	Union Support
2	John	Baker	632 S. Bluff Rd.	Indianapolis	IN	46228	
3	Rick	England	1031 Maple Drive	Fort Wayne	IN	46805	
4	Shirley	Griffen	1717 S. Michigan	South Bend	IN	46619	
5	Derek	Johnson	10022 Green River Rd.	Evansville	IN	47714	
6	Harry	Logan	4256 Broadway	Gary	IN	46407	
7	Patricia	Perkins	897 Kentucky St.	New Albany	IN	47150	
8	Angela	Richardson	2324 E. 18th St.	Lafayette	IN	47909	
9	Chris	Ward	7652 Indian Hills Drive	Kokomo	IN	46902	
10	Jody	White	233 College Ave.	Bloomington	IN	47401	
11	Sam	Young	975 Larry Bird Rd.	Terre Haute	IN	47802	
12							

NOTE: An Excel file is also referred as a Workbook since it contains multiple spreadsheets.

Setting up the page for printing

Based on the number of columns (**fields**) of data that exist in a spreadsheet, you will need to set the spreadsheet orientation to either Portrait or Landscape. To fit as many columns across one page as possible, choose Landscape. To fit as many rows down one page as possible, choose Portrait.

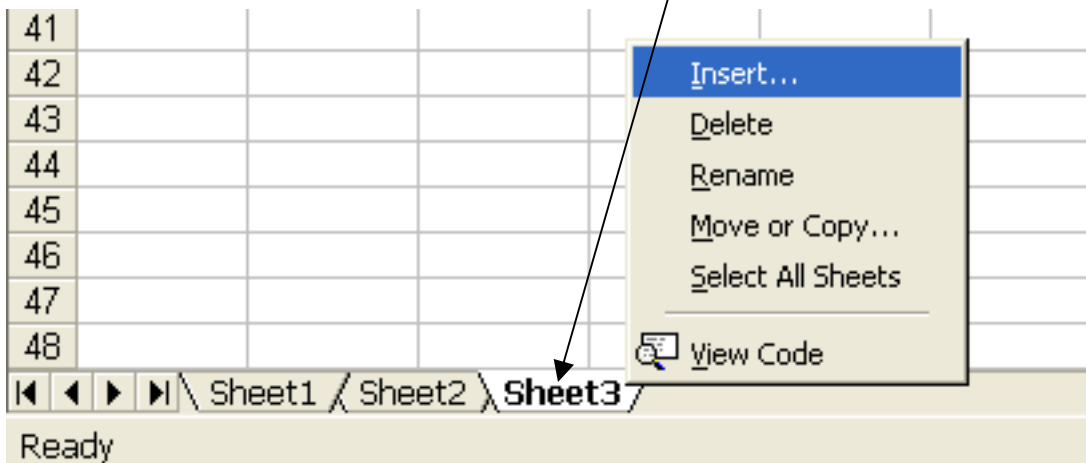
1. Click on the Microsoft Excel **File** menu and select **Page Setup**.
2. Select the **Page** tab and then make the appropriate orientation choice.
3. Click on the **OK** button.



Inserting New Spreadsheets into a Workbook (Excel file)

If you would like to insert a new spreadsheet into a current Excel file that is opened:

1. Right-click on one of the current spreadsheet tabs.
2. Select **Insert** from the pop-up menu.
3. In the resulting pop-up box, make sure **Worksheet** is selected and then select **OK**.



Renaming a Spreadsheet

1. Double-click on the spreadsheet tab that you want to rename.
2. Enter the new name for the spreadsheet.

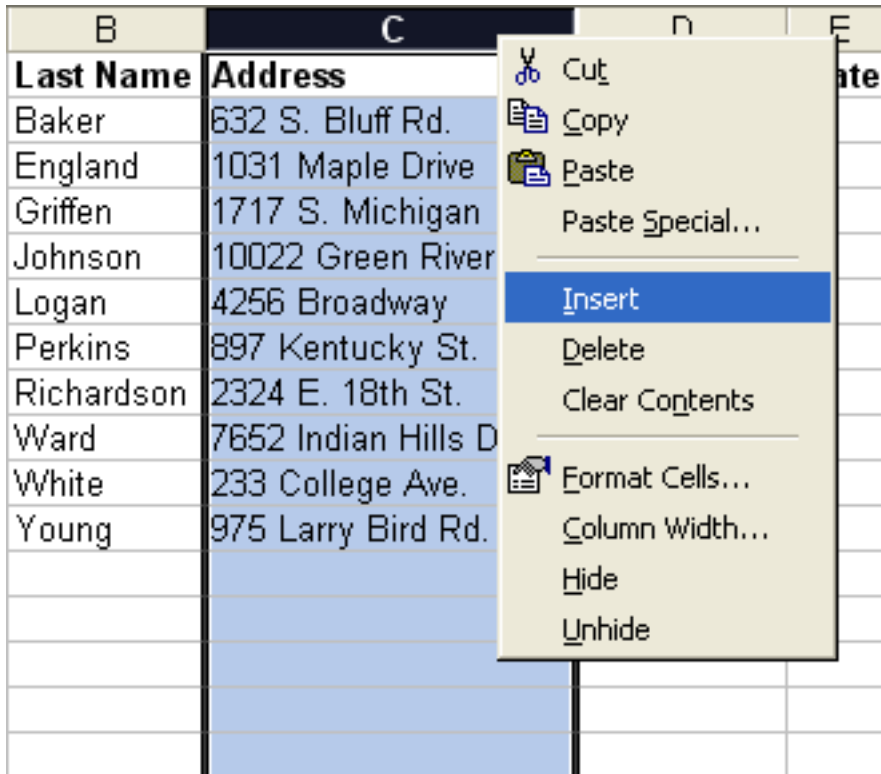
Inserting New Rows into a Spreadsheet

1. Move the cursor over the row number that is **just below** the point where you would like a new row to be inserted.
2. Right-click and select **Insert** from the drop-down menu.

	A	B	C
1	First Name	Last Name	Address
2	John	Baker	632 S. Bluff Rd.
3	Rick	England	1031 Maple Drive
4	Shirley	Griffen	1717 S. Michigan
5	Derek	Johnson	10022 Green River Rd.
6	Harry	Logan	4256 Broadway
7	Patricia	Perkins	897 Kentucky St.
8		son	2324 E. 18th St.
9			7652 Indian Hills Drive
10			233 College Ave.
11			975 Larry Bird Rd.
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			

Inserting New Columns into a Spreadsheet

1. Move the cursor over the column letter that is **just to the right** of the point where you would like a new column to be inserted.
2. Right-click and select **Insert** from the drop-down menu.

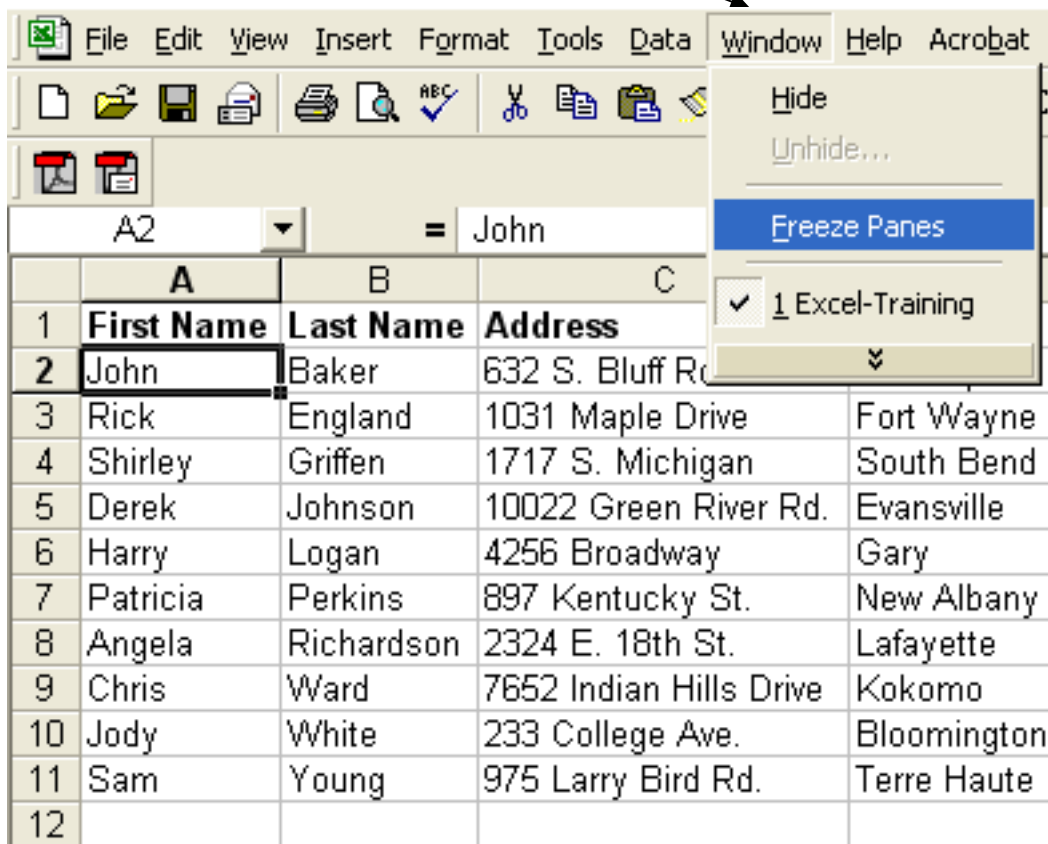


B	C	D	E
Last Name	Address		
Baker	632 S. Bluff Rd.		
England	1031 Maple Drive		
Griffen	1717 S. Michigan		
Johnson	10022 Green River		
Logan	4256 Broadway		
Perkins	897 Kentucky St.		
Richardson	2324 E. 18th St.		
Ward	7652 Indian Hills D		
White	233 College Ave.		
Young	975 Larry Bird Rd.		

Freezing Window Panes

If you would like a specific row to remain stationary while scrolling up or down a spreadsheet, you can “freeze” the row. In the example below, the column header row (featuring First Name, Last Name, Address) can be configured so the row always remains visible at the top as you scroll across or down a spreadsheet.

1. Click on the left-most cell in the row **just below** the row that will be frozen in place. For the example below, cell A2 is selected, which will indicate the first row should be frozen.
2. Go to the Microsoft Excel **Window** menu and select **Freeze Panes**. This action should freeze the first row.




If you would like to “unfreeze” any rows, simply click on any cell and then go to the Microsoft Excel **Window** menu. Select **Unfreeze Panes** from the drop-down menu.

Sorting Data

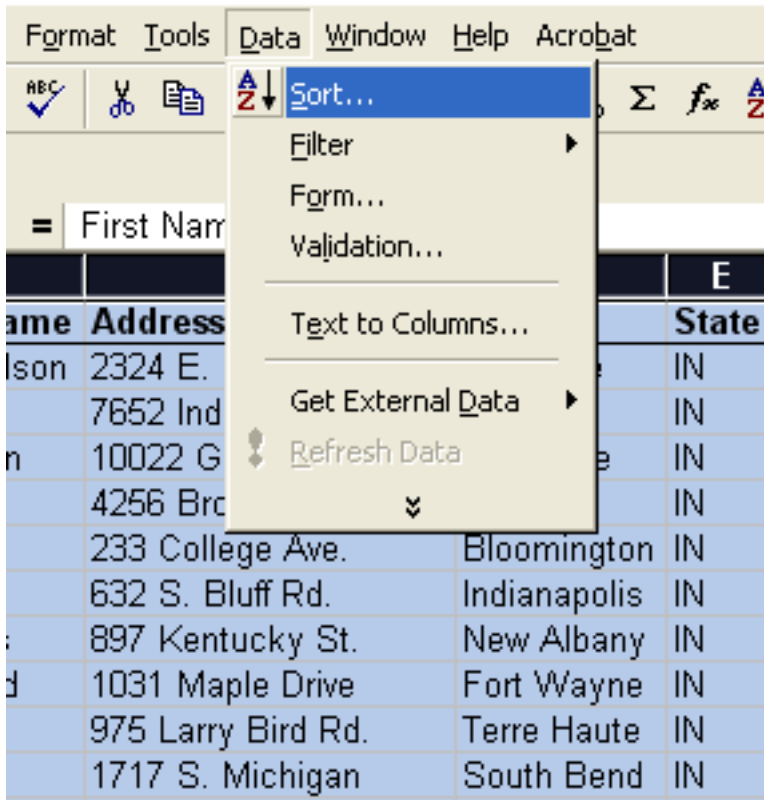
You can sort data in an Excel spreadsheet based on a certain column, or field, of data such as a worker's Last Name. Here is how you can sort data:

1. Click in the small box that is between Row 1 and Column A. This will highlight the entire spreadsheet and will indicate all data will be inclusive in a sort.



	A	B	C
1	First Name	Last Name	Address
2	John	Baker	632 S. Bluff Rd.
3	Rick	England	1031 Maple Drive
4	Shirley	Griffen	1717 S. Michigan
5	Derek	Johnson	10022 Green River Rd.
6	Harry	Logan	4256 Broadway
7	Patricia	Perkins	897 Kentucky St.
8	Angela	Richardson	2324 E. 18th St.
9	Chris	Ward	7652 Indian Hills Drive
10	Jody	White	233 College Ave.
11	Sam	Young	975 Larry Bird Rd.
12			

2. Go to the Microsoft Excel **Data** menu and select **Sort** from the drop-down menu.



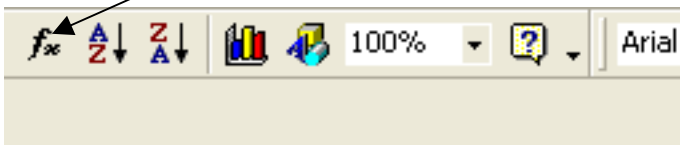
3. On the Sort screen, choose a field you would like to sort by from the first drop-down menu. Then select whether to sort the field values in ascending or descending order. In this example, the City field was used. When ready to proceed, click the **OK** button.



Basic Mathematical Function: Finding an Average

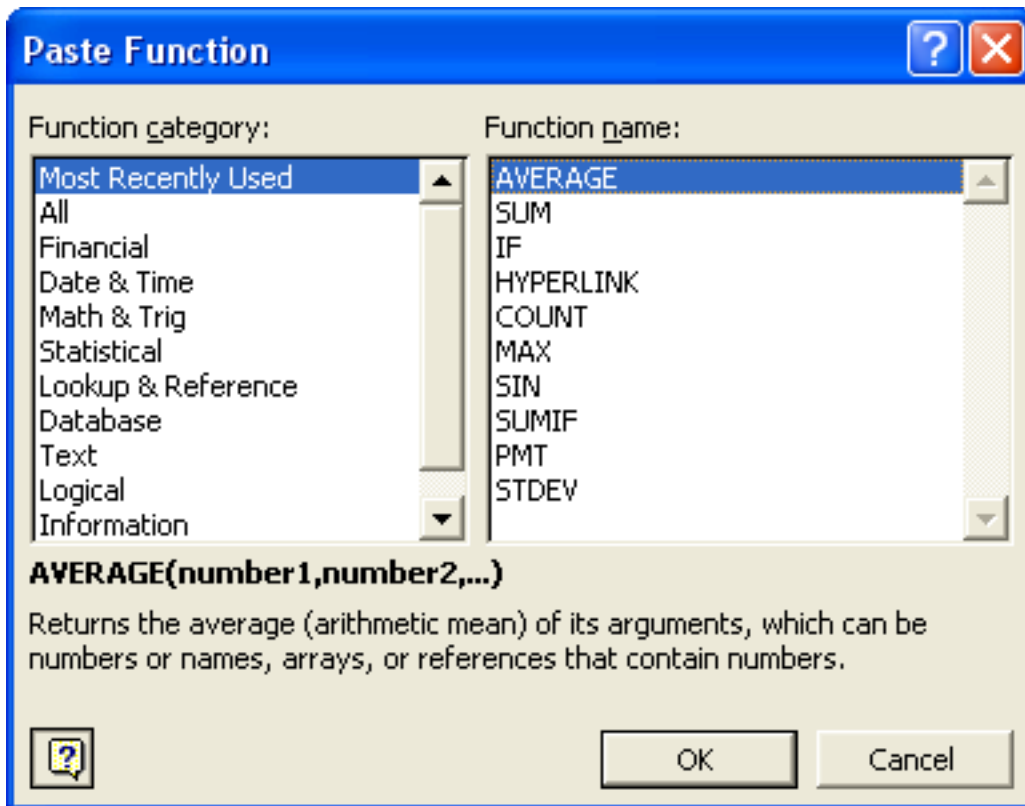
One of the more common math functions used in Excel is to find the average for a group of numbers. In the example to follow, calculating the average for union support level will be shown. To calculate an average, do the following:

1. Click on the cell where you would like the outputted average to be placed.
2. Click on the **fx** button in the toolbar.



E	F	G	
State	Zip Code	Union Support Level	
IN	47401		4
IN	47714		2
IN	46805		3
IN	46407		1
IN	46228		4
IN	46902		4
IN	47909		2
IN	47150		3
IN	46619		3
IN	47802		3

3. In the resulting pop-up box, make sure **Most Recently Used** is selected on the left-hand side scrolling text box and **Average** is selected on the right-hand side text box. Then click on **OK**.



4. Select the range of cells to be included in calculating the average. Click on the first cell to be included in the range. Then hold the left mouse key and drag downward until the last cell to be in the range is selected. Click **OK**.

The screenshot shows an Excel spreadsheet with a dialog box for the AVERAGE function. The dialog box is open over a table. The table has columns for address, city, state, and zip code, and a column for 'Union Support Level'. The dialog box shows the range G2:G11 selected, with a list of values {4;2;3;1;4;4;2;3;3;3} and a calculated average of 2.9. The spreadsheet data is as follows:

					G
					Union Support Level
					4
					2
					3
					1
					4
					4
					2
					3
					3
					3
g	975 Larry Bird Rd.	Terre Haute	IN	47802	
					=AVERAGE(G2:G11)

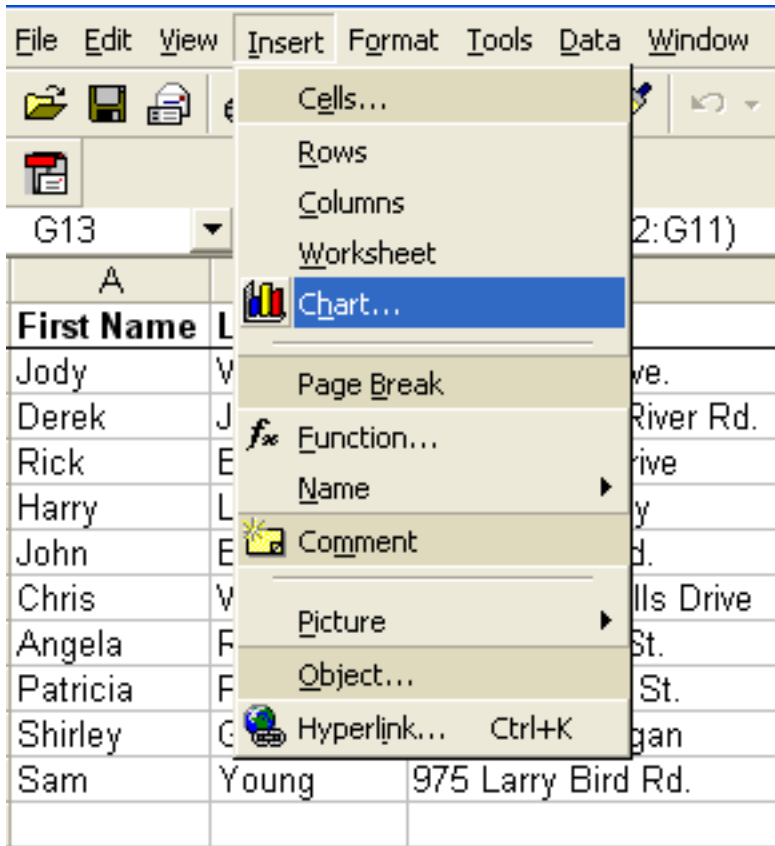
Making a Chart in Excel

A variety of charts are offered in Excel, which allow you to illustrate selected data in a graphical format. For the example in this section, all worker data for union support level and wage rate will be associated with a chart. To begin the chart creation process:

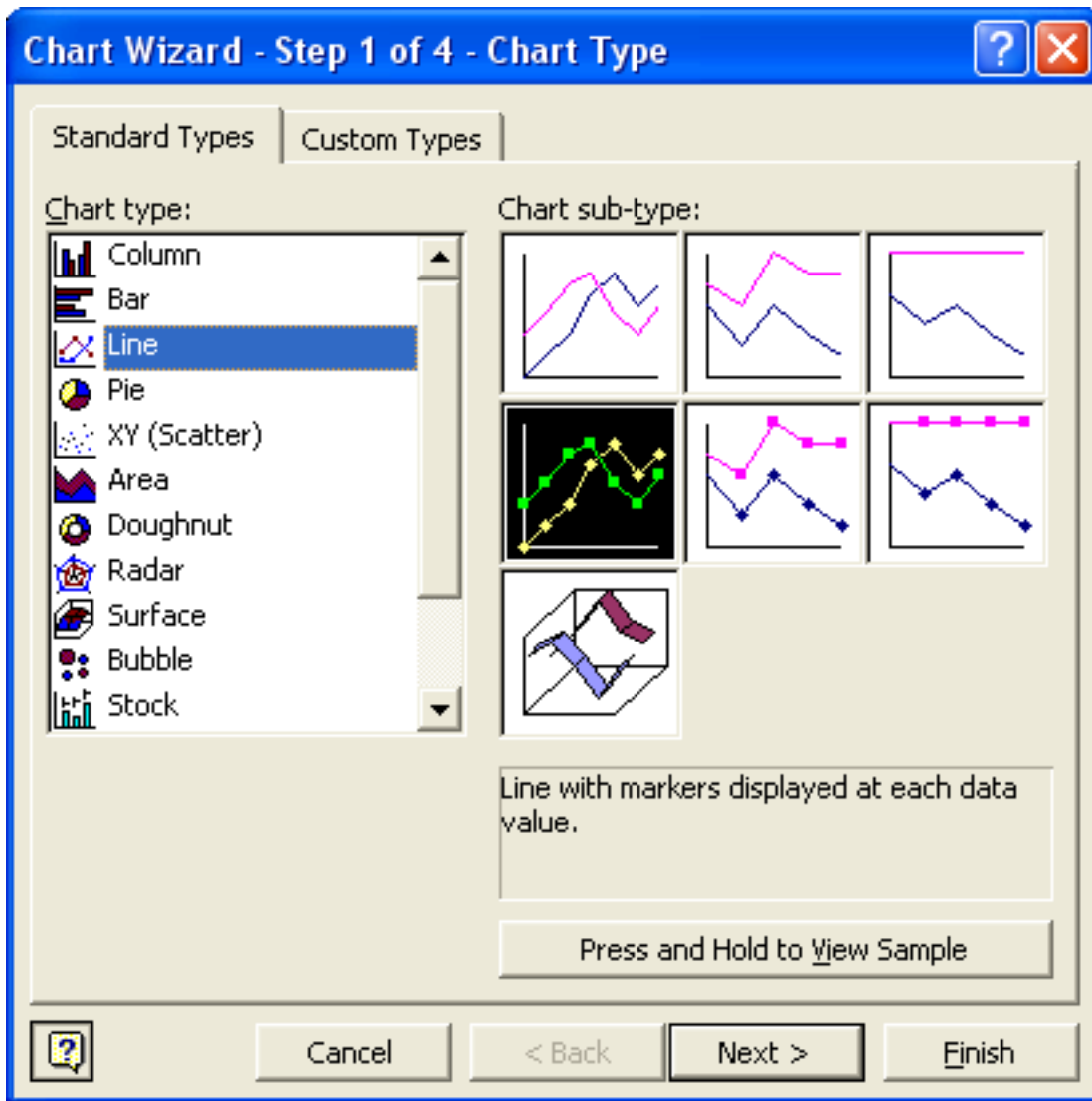
1. Select a range of cells with data that will be represented in the chart. Click on first cell to be included in the range and then hold the left mouse key down while dragging down and across until the last cell in the desired range is selected.

G	H
Union Support Level	Wage Rate
4	10.00
2	12.00
3	11.50
1	12.25
4	9.00
4	11.00
2	10.25
3	9.75
3	10.25
3	11.25

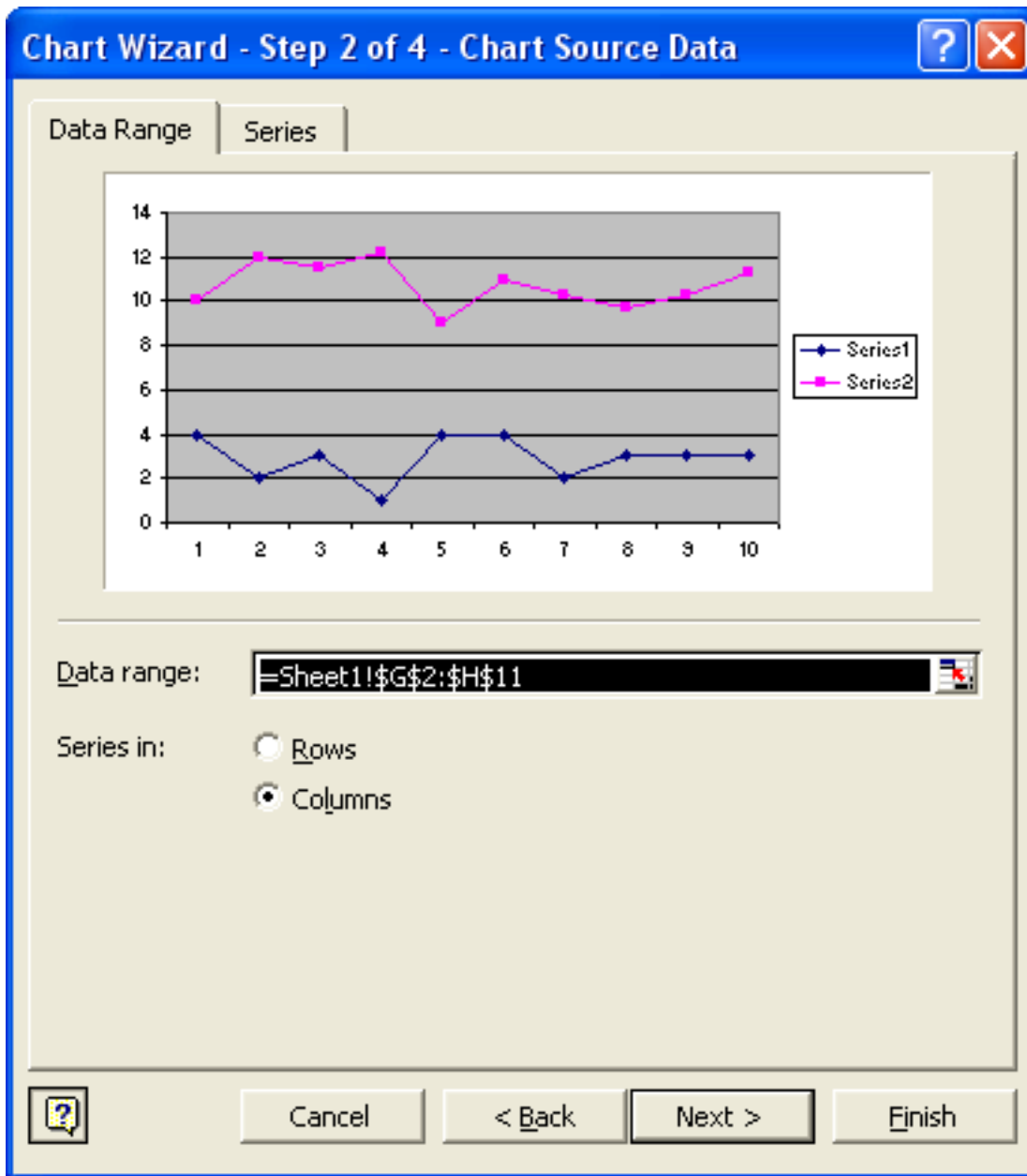
2. Go to the Microsoft Excel **Insert** menu and select **Chart** from the drop-down menu.



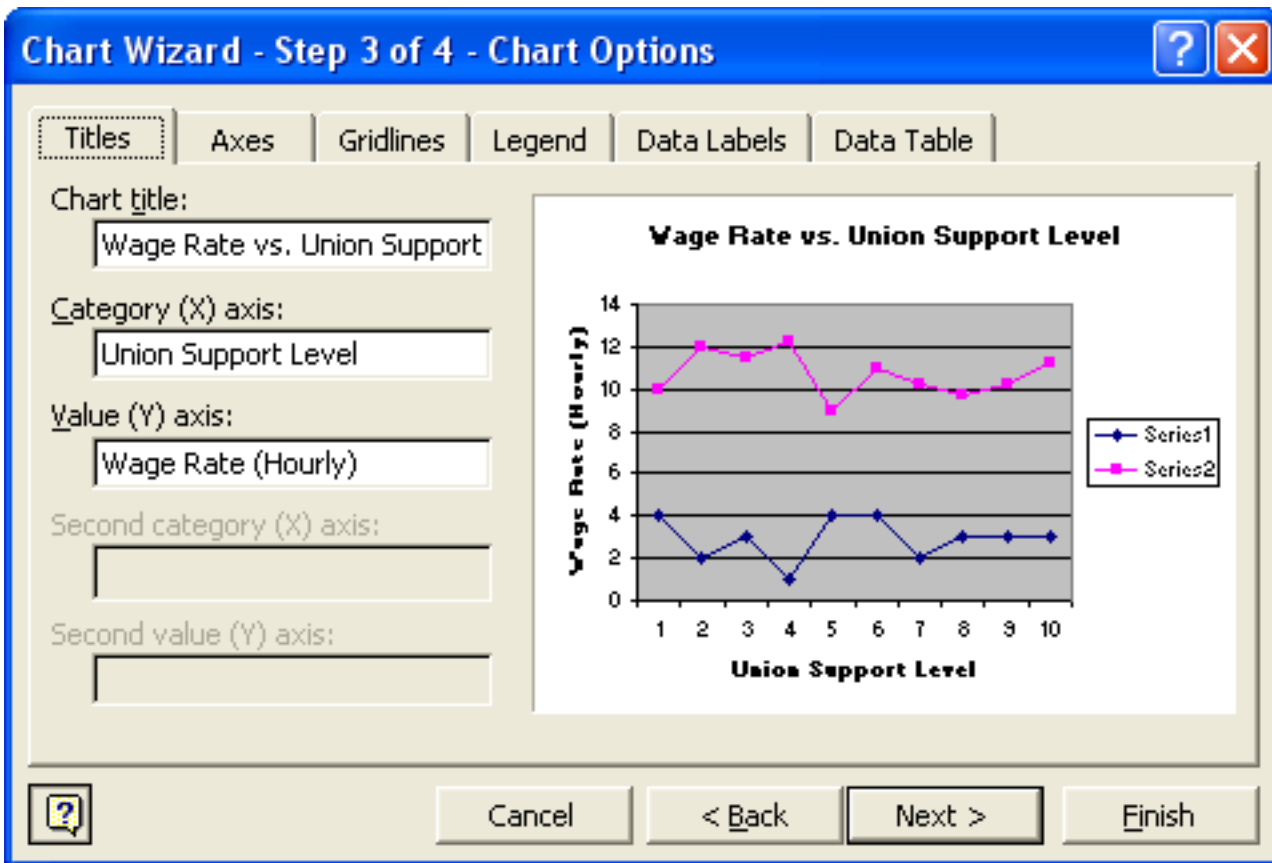
3. In the resulting pop-up box, make sure the **Standard Types** tab is selected. Choose the type of chart you desire from the left-hand side scrolling text box and the **chart sub-type** at the right. For this example, a line chart will be used. Click the **Next >** button when ready to move on.



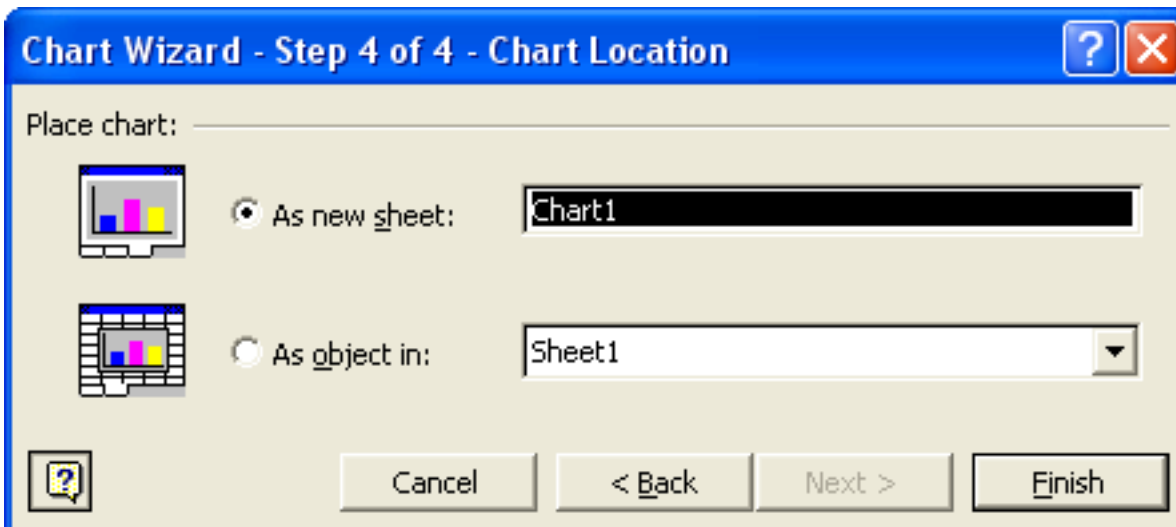
4. For the next step, make sure the **Data Range** tab is selected. For this example, Columns will be selected for **Series in**: Click the **Next >** button when ready to move on.



5. For the next step, give the chart a title and label both sides of the graph. The data represented along the horizontal line is the (X) axis. The data represented along vertical line is the (Y) axis. Click the **Next >** button when ready to move on.



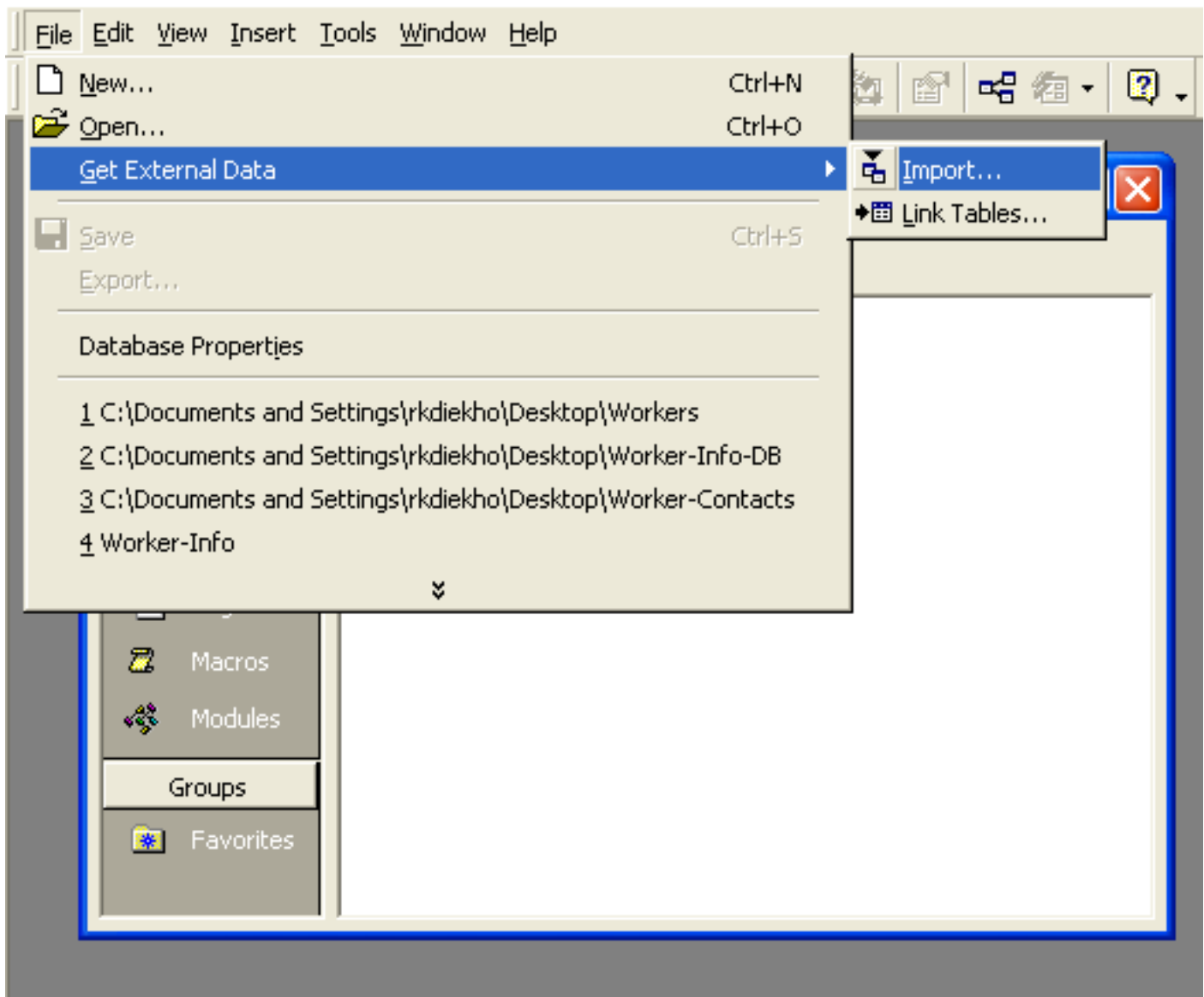
6. In the final step, indicate where the chart should be placed. For this example, the chart will be placed in a new spreadsheet. Click the **Finish** button when you're ready to complete the process.



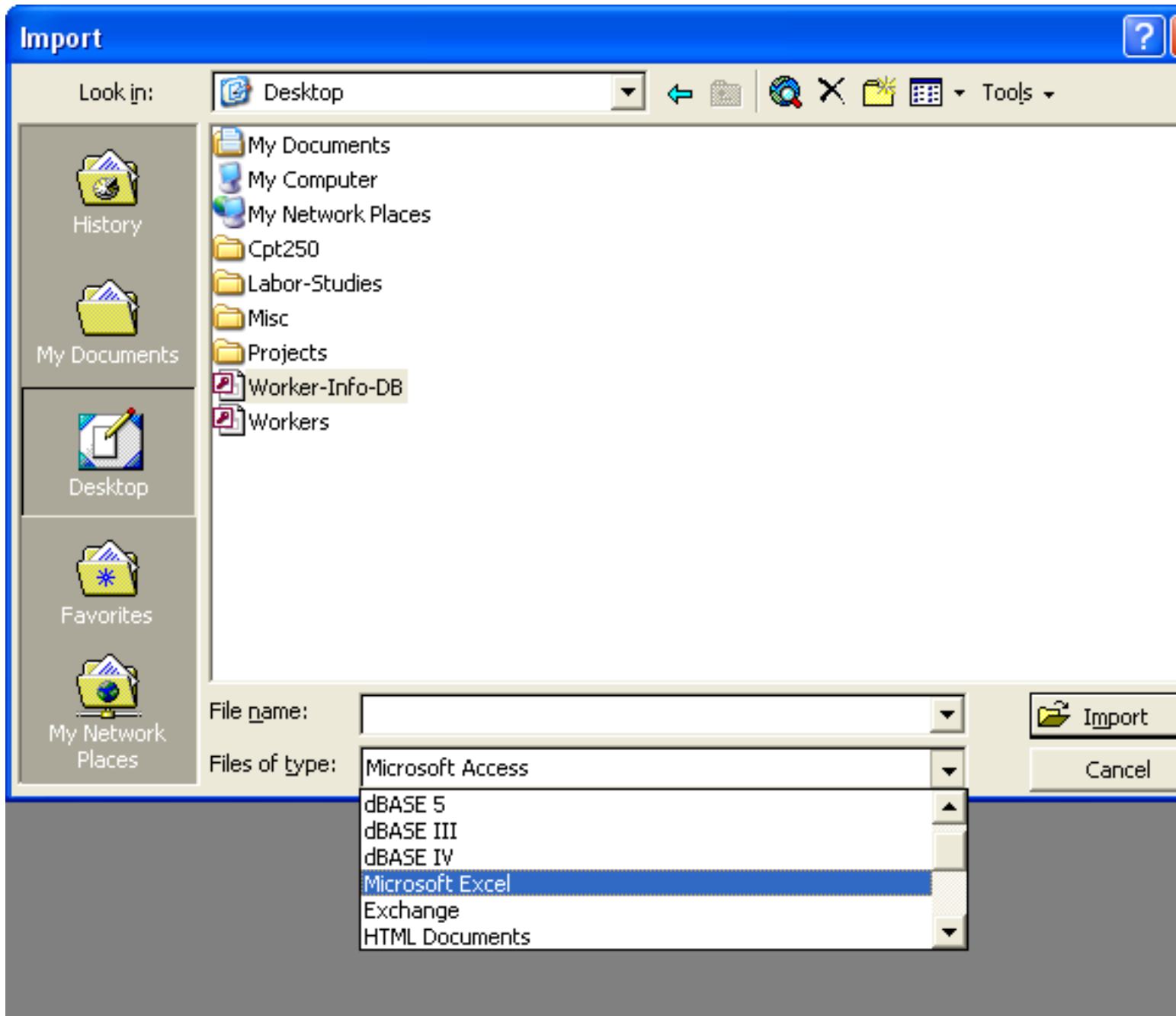
IMPORTING A SPREADSHEET INTO ACCESS

Because of the good integration between Microsoft Excel and Microsoft Access, spreadsheets can be imported into a Microsoft Access database table. The following example will show how to import a worker information spreadsheet into an Access table called Workers. The process:

1. Open up Microsoft Access from **Start >> Programs**.
2. Select **Blank Access Database** from the resulting box and then click on **OK**.
3. Select the location to save the new database from the **Save in:** drop-down box and then type a name for the database in the **File name:** textbox. Click the **Create** button when you're ready to create the new database. For this example, Workers was the file name used.
4. Once the new database opens, go to the Microsoft Access **File** menu, select **Get External Data**, and then select **Import** (see next page).



5. In the resulting pop-up box, select the location of the spreadsheet that will be imported from the **Look in:** drop-down box. Be sure to select **Microsoft Excel** from the **Files of type:** drop-down box. Click on the correct Excel file in the middle white area and then click the **Import** button.



6. The next screen shows the columns of data that will represent fields in the new database table. Click the **Next >** button.

Your spreadsheet file contains more than one worksheet or range. Which worksheet or range would you like?

Show Worksheets
 Show Named Ranges

Sheet1
Sheet2
Sheet3

Sample data for worksheet 'Sheet1'.

	First Name	Last Name	Address	City
1	Jody	White	233 College Ave.	Bloomi
2	Derek	Johnson	10022 Green River Rd.	Evansv
3	Rick	England	1031 Maple Drive	Fort W
4	Harry	Logan	4256 Broadway	Gary
5	John	Baker	632 S. Bluff Rd.	Indian
6				

Cancel < Back Next > Finish

7. The next screen will allow you to specify whether to use the column headings (if available) in the imported Excel spreadsheets as field names in the new table. In this example, the column headings will be used. Click the **Next >** button when ready to proceed.

Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

First Row Contains Column Headings

	First Name	Last Name	Address	City
1	Jody	White	233 College Ave.	Bloomi
2	Derek	Johnson	10022 Green River Rd.	Evansv
3	Rick	England	1031 Maple Drive	Fort W
4	Harry	Logan	4256 Broadway	Gary
5	John	Baker	632 S. Bluff Rd.	Indian
6	Chris	Ward	7652 Indian Hills Drive	Kokomo

Buttons: Cancel, < Back, Next >, Finish

8. The next screen will allow you to specify which table to store the imported data. Since there haven't been any tables created yet in this example, **In a New Table** is selected. Click the **Next >** button when ready to proceed.

You can store your data in a new table or in an existing table.

Where would you like to store your data?

In a New Table

In an Existing Table:

	First Name	Last Name	Address	City
1	Jody	White	233 College Ave.	Bloomi
2	Derek	Johnson	10022 Green River Rd.	Evansv
3	Rick	England	1031 Maple Drive	Fort W
4	Harry	Logan	4256 Broadway	Gary
5	John	Baker	632 S. Bluff Rd.	Indian
6	Chris	Ward	7652 Indian Hills Drive	Kokomo

Cancel < Back Next > Finish

9. The next screen is used to specify certain attributes for each field that will be imported. Microsoft Access tends to “auto-identify” the data type for each field, which may disallow you from changing the data type. You can check out the attributes for each field by clicking on each of the columns shown below: Click the **Next >** button when ready to proceed.

The screenshot shows the 'Import Spreadsheet Wizard' dialog box. The title bar reads 'Import Spreadsheet Wizard'. Below the title bar, there is a close button (X) and a help icon. The main text says: 'You can specify information about each of the fields you are importing. Select fields in the area below. You can then modify field information in the 'Field Options' area.'

The 'Field Options' section contains the following controls:

- Field Name:
- Data Type:
- Indexed:
- Do not import field (Skip)

Below the field options is a table with the following data:

	First Name	Last Name	Address	City
1	Jody	White	233 College Ave.	Bloomi
2	Derek	Johnson	10022 Green River Rd.	Evansv
3	Rick	England	1031 Maple Drive	Fort W
4	Harry	Logan	4256 Broadway	Gary
5	John	Baker	632 S. Bluff Rd.	Indian
6	Chris	Ward	7652 Indian Hills Drive	Kokomo

At the bottom of the dialog are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a thick border.

9. The next screen allows you to specify a primary key for the new table that will be created. Make the appropriate choice by clicking on one of the radio buttons. For this example, Access will be adding a primary key simply called ID. Click the **Next >** button when ready to proceed.

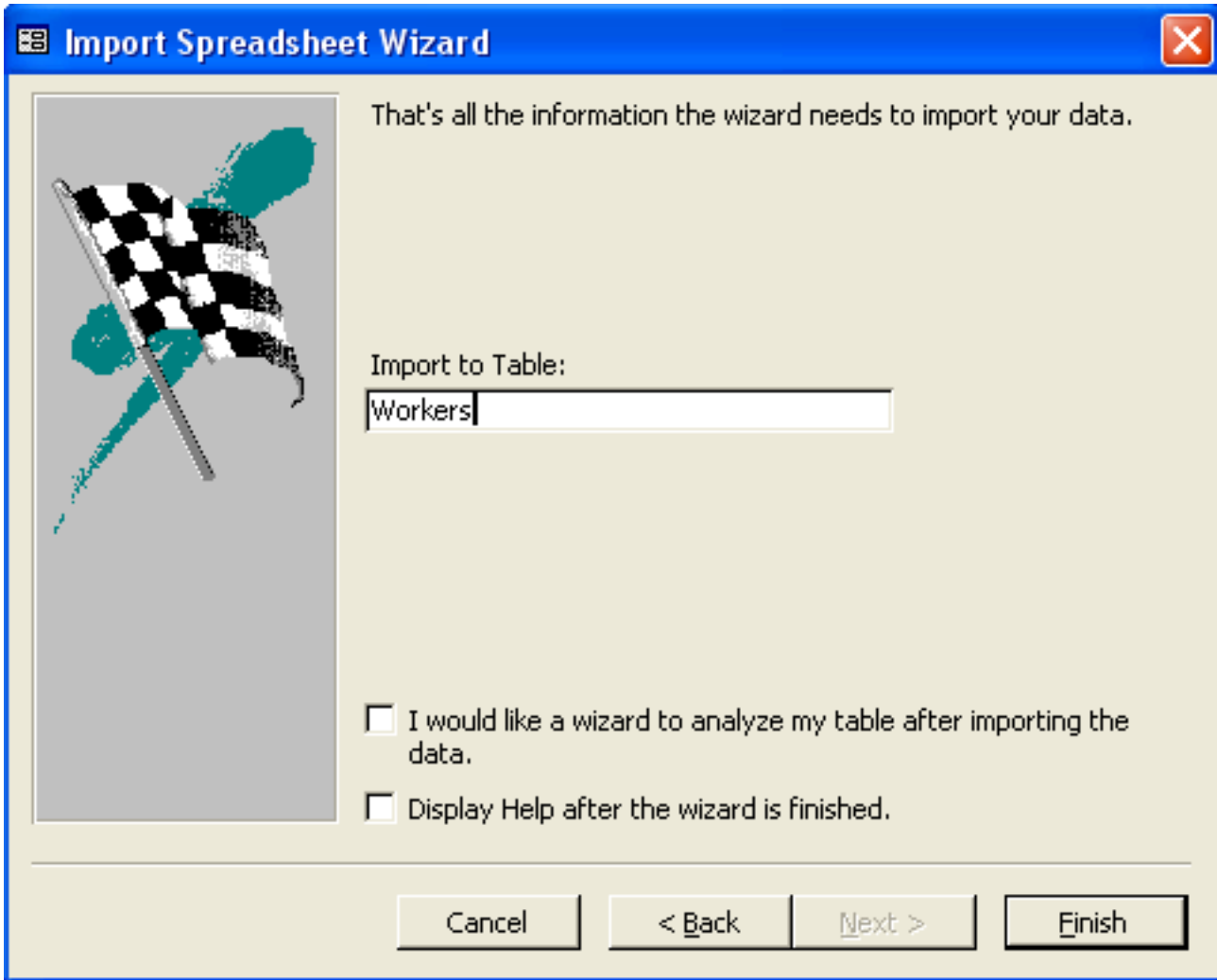
Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

Let Access add primary key.
 Choose my own primary key. First Name
 No primary key.

	ID	First Name	Last Name	Address
1	1	Jody	White	233 College Ave.
2	2	Derek	Johnson	10022 Green River Rd.
3	3	Rick	England	1031 Maple Drive
4	4	Harry	Logan	4256 Broadway
5	5	John	Baker	632 S. Bluff Rd.
6	6	Chris	Ward	7652 Indian Hills Drive

Cancel < Back Next > Finish

10. The final screen in the process will ask you to name the table that will store the imported Excel spreadsheet data. In this example, Workers was the name used. Then, click **Finish** to complete the process.



CREATING MAILING LABELS FROM EXCEL

1. Open up an Excel spreadsheet containing contact information.
2. Highlight the range of cells that will be used in the mailing labels, including column headings. Click on first cell to be included in the range and then hold down the left mouse key while dragging down and across until the last cell in the desired range is selected.

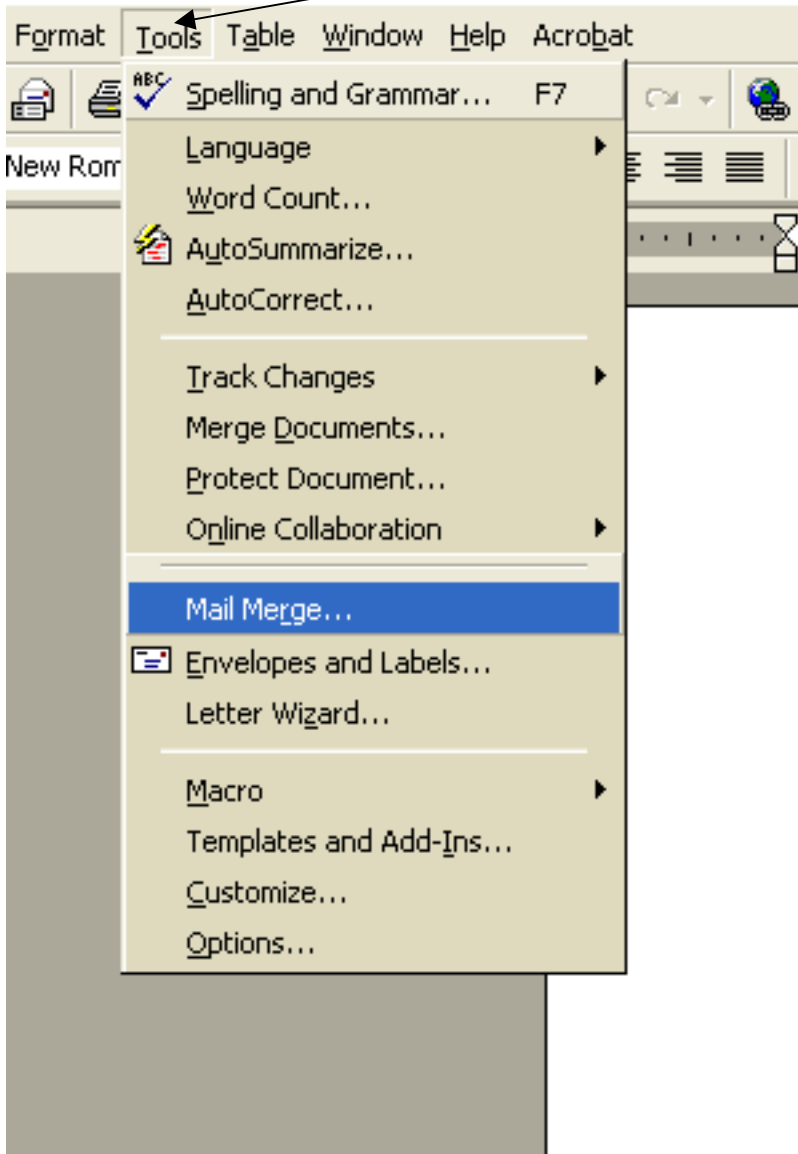
	A	B	C	D	E	F
1	First Name	Last Name	Address	City	State	Zip Code
2	Jody	White	233 College Ave.	Bloomington	IN	47401
3	Derek	Johnson	10022 Green River Rd.	Evansville	IN	47714
4	Rick	England	1031 Maple Drive	Fort Wayne	IN	46805
5	Harry	Logan	4256 Broadway	Gary	IN	46407
6	John	Baker	632 S. Bluff Rd.	Indianapolis	IN	46228
7	Chris	Ward	7652 Indian Hills Drive	Kokomo	IN	46902
8	Angela	Richardson	2324 E. 18th St.	Lafayette	IN	47909
9	Patricia	Perkins	897 Kentucky St.	New Albany	IN	47150
10	Shirley	Griffen	1717 S. Michigan	South Bend	IN	46619
11	Sam	Young	975 Larry Bird Rd.	Terre Haute	IN	47802

3. In the box located just above Column A, name the range of cells just highlighted. In this example, Mailing_Info is used.

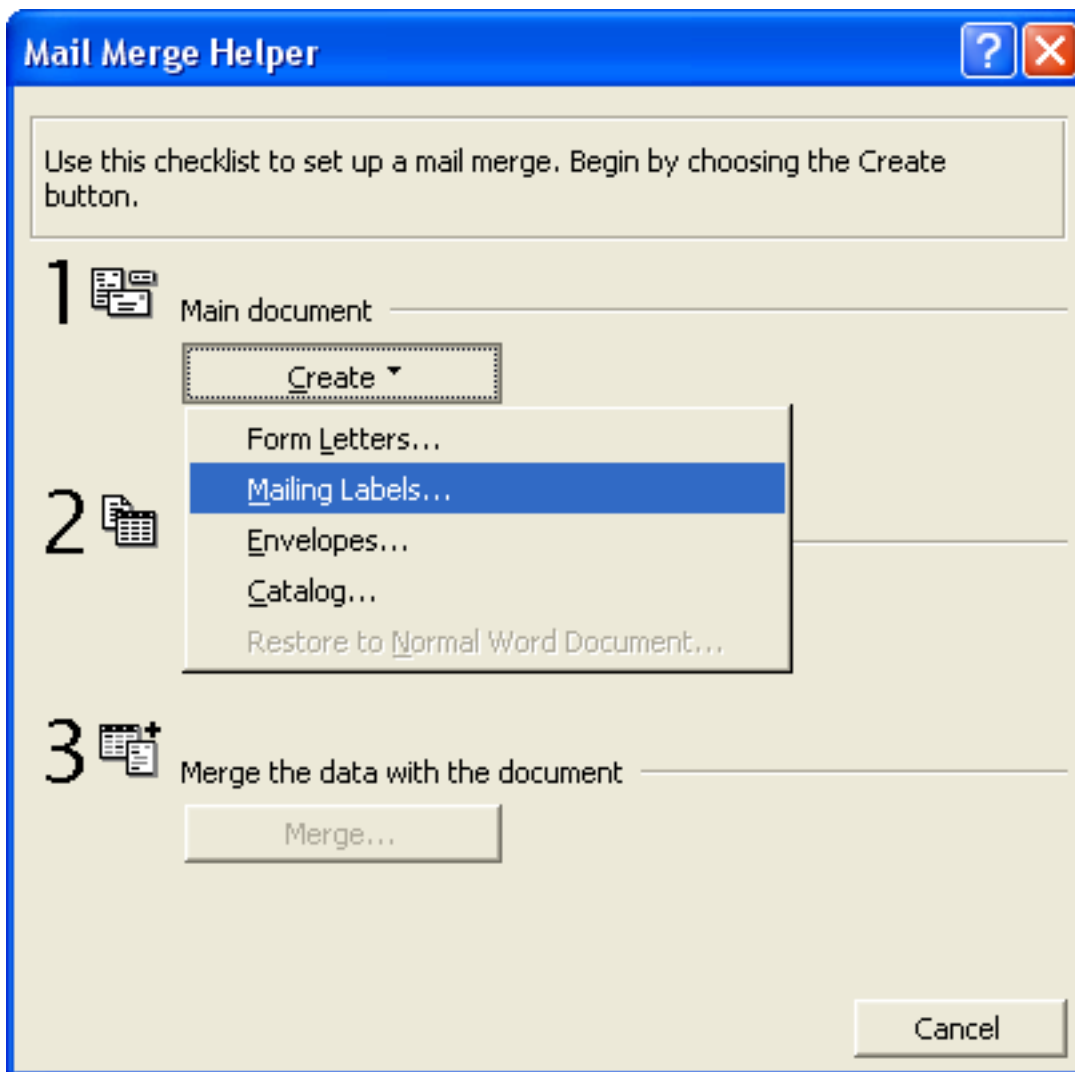
The screenshot shows the Microsoft Excel interface with the Mailing Labels Wizard open. The 'Mailing_Info' dropdown is set to '= First Name'. Below the wizard, a portion of the spreadsheet is visible, showing columns A, B, and C with data for rows 1 through 4.

	A	B	C
1	First Name	Last Name	Address
2	Jody	White	233 College Ave.
3	Derek	Johnson	10022 Green River Rd.
4	Rick	England	1031 Maple Drive

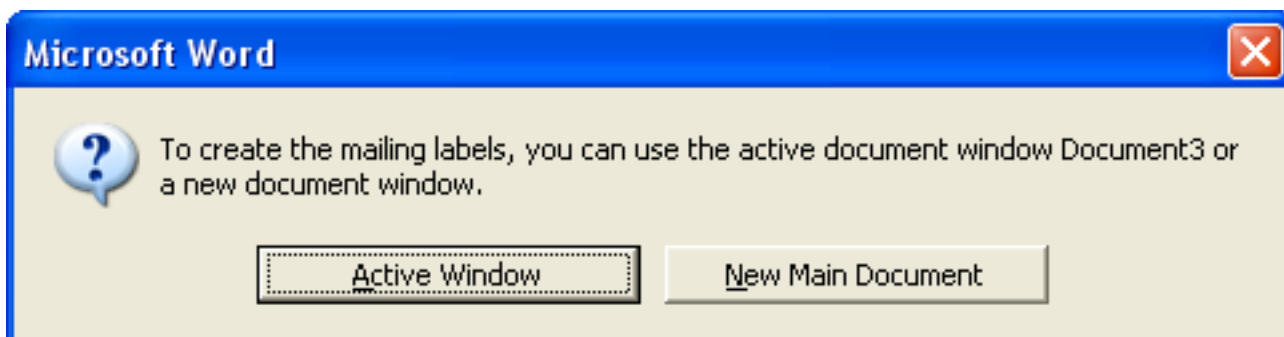
4. Open up **Microsoft Word** by going to the **Start** Menu, selecting **Programs**, and finally selecting Microsoft Word.
5. Go to the Microsoft Word **Tools** menu and select **Mail Merge** from the drop-down menu.



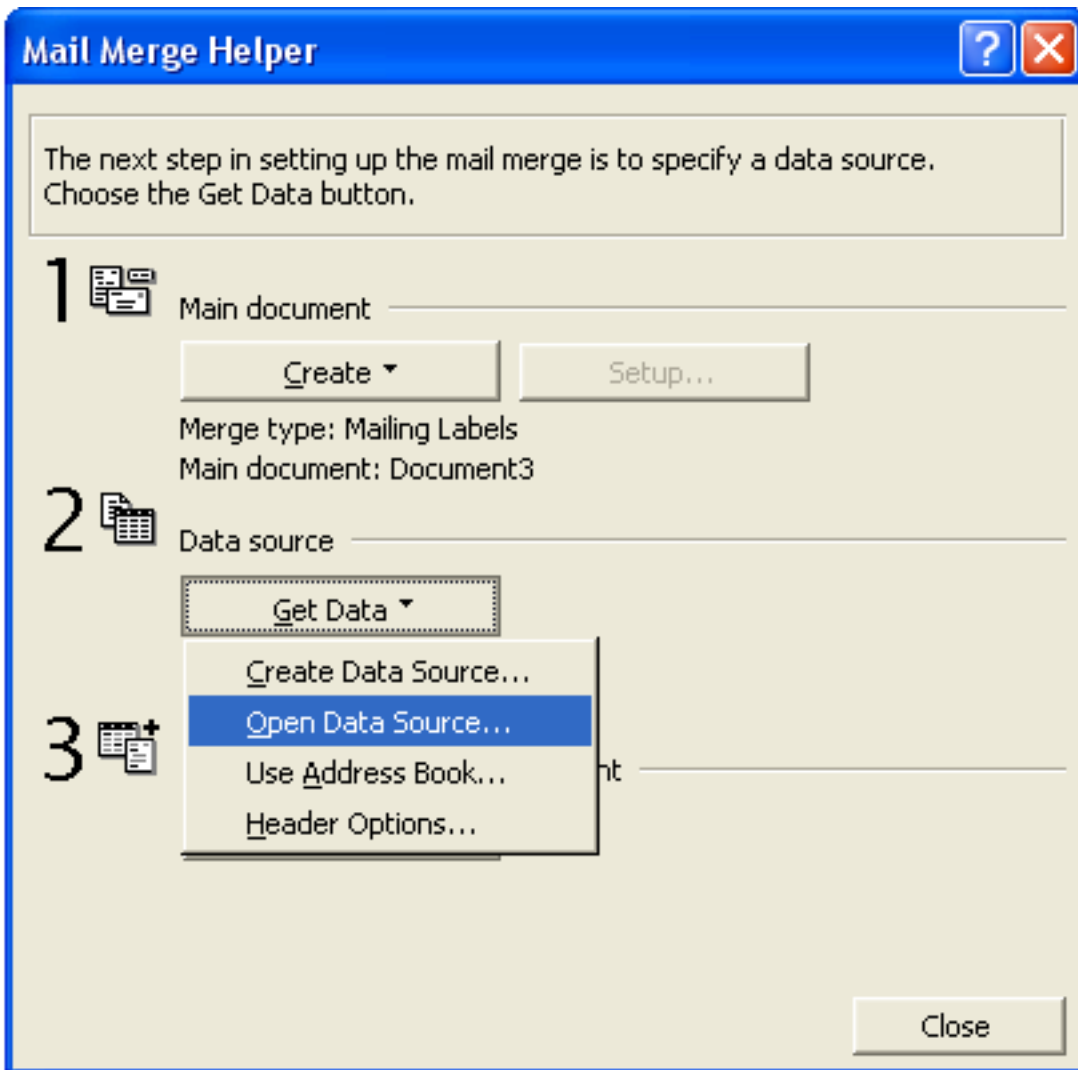
6. For Step 1 of the Mail Merge Helper, click on the **Create** button and select **Mailing Labels** from the drop-down.



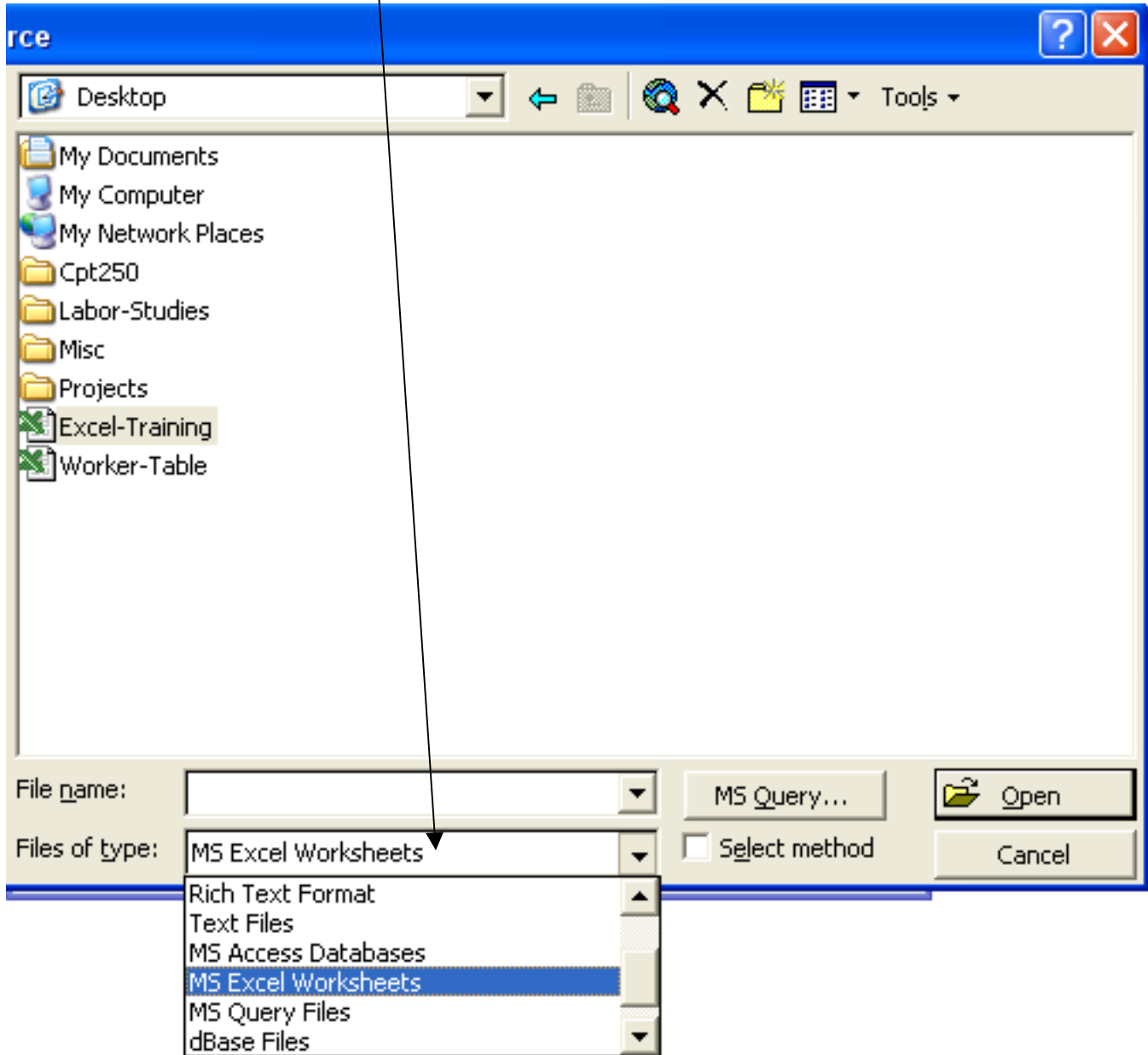
7. Click the **Active Window** button from the pop-up box.



8. For Step 2 of the Mail Merge Helper, click the **Get Data** button and select **Open Data Source** from the drop-down menu.



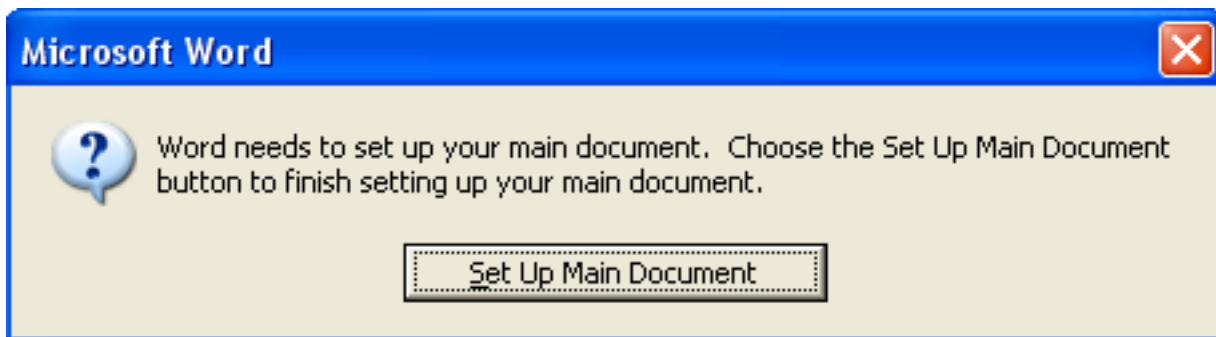
9. Find the location of the Excel file containing the contact information. Be sure to select **MS Excel Worksheets** from the **Files of type:** drop-down box. Once the file is found, click on the file in the middle white area and then click the **Open** button.



10. In the resulting pop-up box, type in the name used to identify the range of cells selected in the Excel spreadsheet. In this example, Mailing_Info is entered since this was the name specified. Click the **OK** button.



11. Click **Set Up Main Document**



12. The next screen will allow you to choose the specific type of labels you will printing. Make the appropriate selection and then click the **OK** button.

Label Options

Printer information

Dot matrix

Laser and ink jet Tray: Default tray (Automatically Sel) ▼

Label products: Avery standard ▼

Product number:

- 2160 Mini - Address
- 2162 Mini - Address
- 2163 Mini - Shipping**
- 2164 - Shipping
- 2180 Mini - File Folder
- 2181 Mini - File Folder
- 2186 Mini - Diskette

Label information

Type: Shipping

Height: 2"

Width: 4"

Page size: Mini (4 1/4 x 5 in)

OK

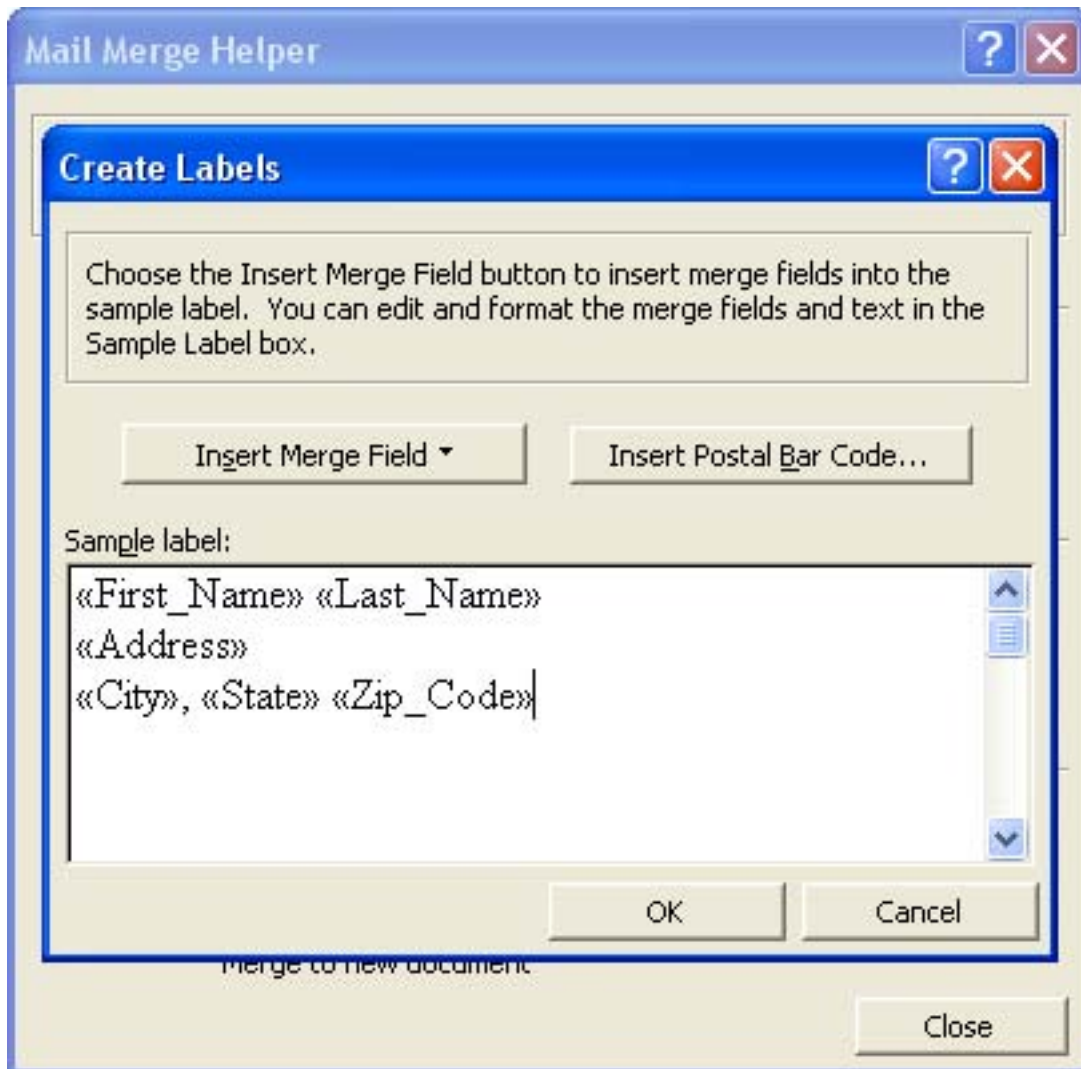
Cancel

Details...

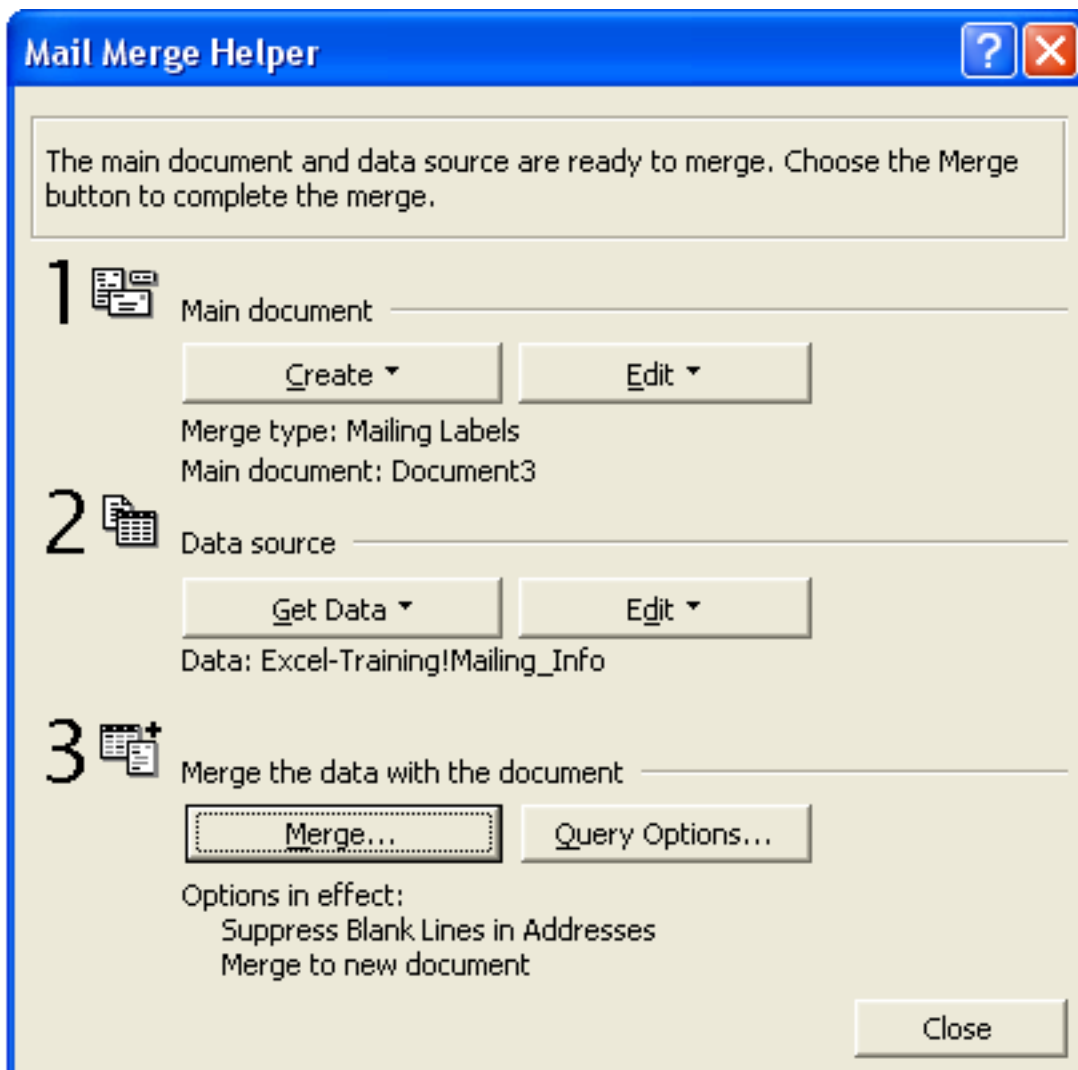
New Label...

Delete

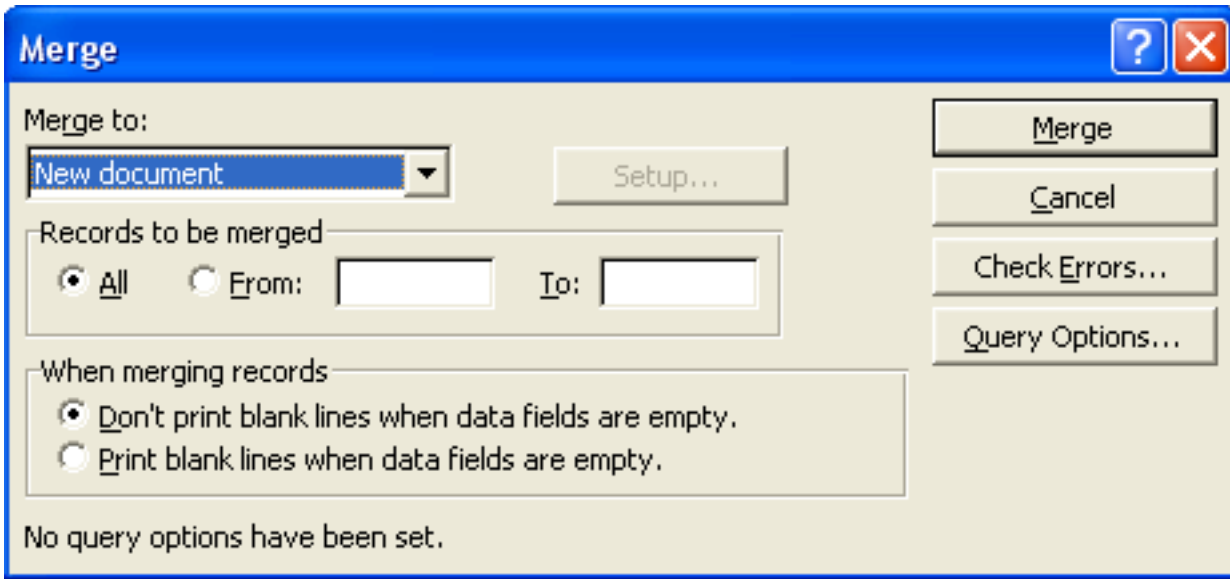
13. The next screen will allow you to insert the appropriate fields into the **Sample label:** area. Click on the **Insert Merge Field** button to insert a merged field. Lay out the merged fields on the sample label as needed. When ready to proceed, click on the **OK** button.



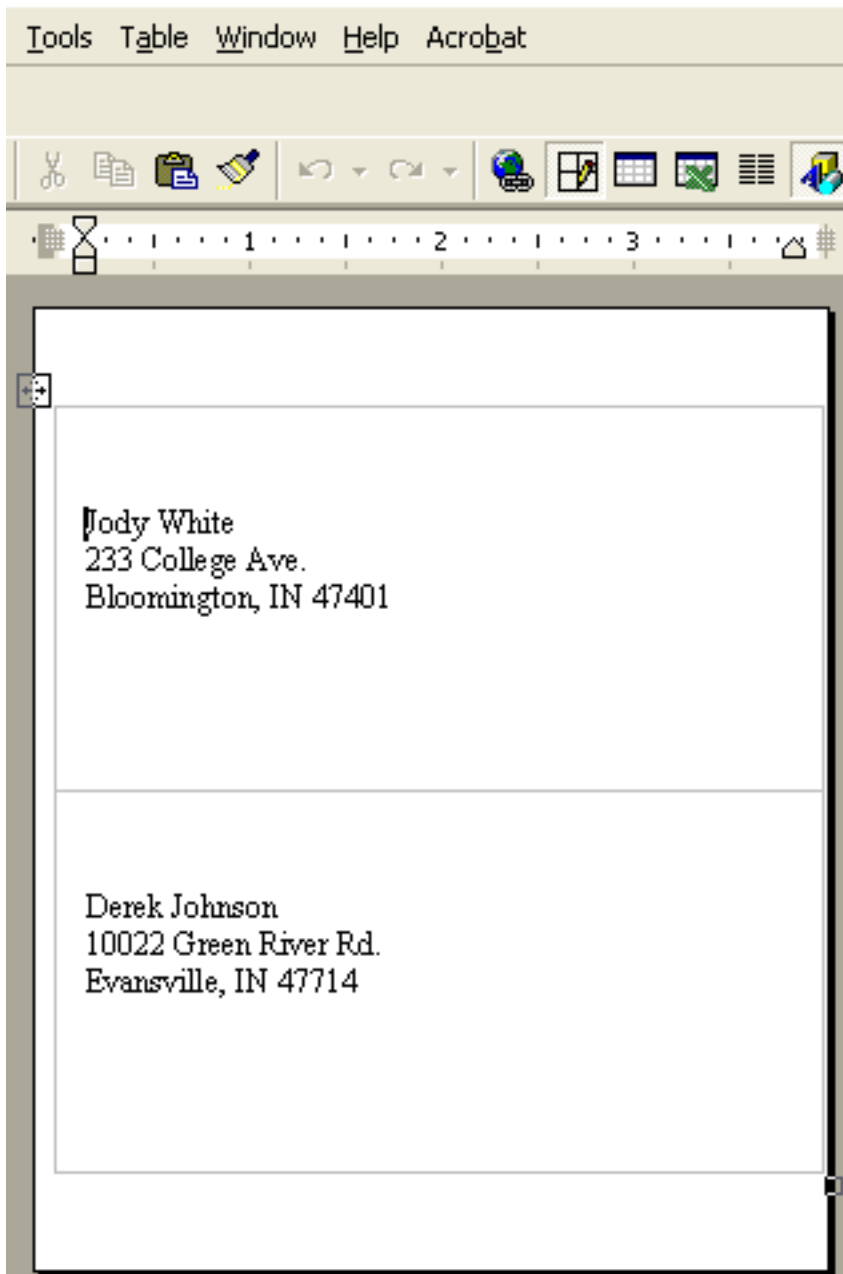
14. For the third and final step of the Mail Merge Helper, click the **Merge** button.



15. In the resulting box, make sure the selection in the **Merge to:** drop-down list says **New Document** and then click the **Merge** button. This will merge the selected data from the Excel spreadsheet into labels that will be dynamically created.



Here is a small example of what the resulting labels should look like:



CREATING MAILING LABELS FROM ACCESS

Creating mailing labels from a Microsoft Access Database table is similar to creating mailing labels from an Excel spreadsheet. Just follow steps 4 – 15 from the “Creating Mailing Labels from Excel” section with these modifications:

On Step #9, specify MS Access Databases instead of MS Excel Worksheets.

On Step #10, specify a Microsoft Access table to merge instead of an Excel worksheet or a named range in a worksheet.

CONTACT INFORMATION

For questions on this guide, contact:

Ryan Diekhoff
Technology Specialist
Indiana University Division of Labor Studies
Direct Line: (317) 278-9954
Toll-Free Main Line: 1-800-822-4743
Fax: (317) 278-2280
Email: rkdiekho@iupui.edu

For questions on the Organize Indiana Project, contact:

David Williams
Lecturer and Non-Credit Program Coordinator
Indiana University Division of Labor Studies
Direct Line: (317) 274-2518
Toll-Free Main Line: 1-800-822-4743
Fax: (317) 278-2280
Email: dawilli1@iupui.edu
<http://www.organizeindiana.org>