

Microsoft Access XP

Manual - Intermediate Level



SAMPLE

© 1995-2010 Cheltenham Courseware Pty. Ltd.

All trademarks acknowledged. E&OE.

No part of this document may be copied without written permission from Cheltenham Courseware unless produced under the terms of a courseware site license agreement with Cheltenham Courseware.

All reasonable precautions have been taken in the preparation of this document, including both technical and non-technical proofing. Cheltenham Courseware and all staff assume no responsibility for any errors or omissions. No warranties are made, expressed or implied with regard to these notes. Cheltenham Courseware shall not be responsible for any direct, incidental or consequential damages arising from the use of any material contained in this document. If you find any errors in these training modules, please inform Cheltenham Courseware. Whilst every effort is made to eradicate typing or technical mistakes, we apologise for any errors you may detect. All courses are updated on a regular basis, so your feedback is both valued by us and will help us to maintain the highest possible standards.

Sample versions of courseware from Cheltenham Courseware

(Normally supplied in Adobe Acrobat format): If the version of courseware that you are viewing is marked as NOT FOR TRAINING, SAMPLE, or similar, then it cannot be used as part of a training course, and is made available purely for content and style review. This is to give you the opportunity to preview our courseware, prior to making a purchasing decision. Sample versions may not be re-sold to a third party.

For current license information

This document may only be used under the terms of the license agreement from Cheltenham Courseware. Cheltenham Courseware reserves the right to alter the licensing conditions at any time, without prior notice. Please see the site license agreement available at: www.cheltenhamcourseware.com.au/agreement

Contact Information

Australia / Asia Pacific / Europe (ex. UK) / Rest of the World

Email: info@cheltenhamcourseware.com.au
Web: www.cheltenhamcourseware.com.au

USA / Canada

Email: info@cheltenhamcourseware.com
Web: www.cheltenhamcourseware.com

UK

Email: info@cctglobal.com
Web: www.cctglobal.com



SAMPLE

WORKING WITH THE NORTHWIND SAMPLE DATABASE	6
INSTALLING THE NORTHWIND DATABASE	6
<i>About Northwind</i>	6
<i>Checking for Northwind</i>	6
<i>Installing Northwind</i>	6
REVIEW QUESTIONS.....	7
DESIGNING TABLES IN ACCESS 2002	8
NORMALIZING DATA	8
<i>Setting a Primary Key</i>	8
<i>Removing Non-related Data</i>	9
<i>Removing Redundant Data</i>	9
<i>Removing Repeating Data</i>	9
<i>Setting Required Values in Columns</i>	9
ESTABLISHING RELATIONSHIPS.....	10
<i>Using the Relationship Tool</i>	10
<i>Identifying a Related Table</i>	11
<i>Creating Join Types</i>	11
<i>Enforcing Referential Integrity</i>	13
<i>Working with Cascading Updates and Deletes</i>	13
WORKING WITH INDEXES.....	14
<i>Creating a Single-Field Index</i>	14
<i>Creating a Multiple-Field Index</i>	15
<i>Setting the Index Sort Order</i>	16
<i>Setting Index Properties</i>	17
<i>Deleting Indexes</i>	17
WORKING WITH DATA TYPES.....	18
<i>Choosing Appropriate Data Types</i>	18
<i>Setting Column Data Types</i>	18
<i>Formatting Data Types</i>	19
<i>Converting Between Data Types</i>	19
REVIEW QUESTIONS.....	20
DESIGNING QUERIES IN ACCESS 2002	21
CREATING ACTION QUERIES.....	21
<i>Creating Update Queries</i>	21
<i>Creating Delete Queries</i>	23
<i>Creating Append Queries</i>	24
<i>Creating Make-Table Queries</i>	25
CREATING PARAMETER QUERIES.....	27
<i>Creating a One-Parameter Query</i>	27
<i>Creating a Two-Parameter Query</i>	28
<i>Using Wildcards as Parameters</i>	29
CREATING CALCULATED COLUMNS IN QUERIES.....	30
<i>Creating Calculated Fields</i>	30
<i>Using Common Functions in Calculated Fields</i>	30
JOINING TABLES.....	30
<i>Creating a Two-Table Join</i>	30
<i>Adding Fields from Different Tables to the Query Grid</i>	31
<i>Removing Tables from the Query Builder</i>	32
REVIEW QUESTIONS.....	33
DESIGNING FORMS IN ACCESS 2002.....	34

CREATING DATA ENTRY FORMS.....	34
<i>About Forms</i>	34
<i>Choosing an Appropriate Control</i>	35
<i>Placing Controls on a Form</i>	35
<i>Moving a Control</i>	37
<i>Resizing a Control</i>	37
<i>Setting Control Properties</i>	37
<i>Creating Page Headers and Footers</i>	38
<i>Creating Form Headers and Footers</i>	39
<i>Setting Form Properties</i>	39
<i>Working with Identifiers</i>	40
WORKING WITH SUBFORMS.....	42
<i>Creating a Subform</i>	42
<i>Creating a Form with Two Subforms</i>	44
<i>Creating Nested Subforms</i>	46
<i>Deleting a Subform</i>	47
CREATING POP-UP FORMS.....	47
<i>Creating a Modal Pop-up Form</i>	48
<i>Creating a Modeless Pop-up Form</i>	49
WORKING WITH SWITCHBOARDS.....	49
<i>Creating a Switchboard</i>	49
<i>Editing a Switchboard Item</i>	51
<i>Deleting a Switchboard</i>	51
REVIEW QUESTIONS.....	51
DESIGNING REPORTS IN ACCESS 2002	53
WORKING WITH STANDARD REPORTS.....	53
<i>About Reports</i>	53
<i>Placing Controls on a Report</i>	53
<i>Moving a Control</i>	55
<i>Resizing a Control</i>	55
<i>Setting Control Properties</i>	55
<i>Creating Page Headers and Footers</i>	56
<i>Creating Report Headers and Footers</i>	56
<i>Sorting Records on a Report</i>	57
<i>Grouping Records on a Report</i>	58
<i>Setting Report Properties</i>	59
WORKING WITH POP-UP REPORTS	60
<i>Creating a Modal Pop-up Report</i>	60
<i>Creating a Modeless Pop-up Report</i>	61
WORKING WITH SUBREPORTS.....	61
<i>Creating a Subreport</i>	61
<i>Creating a Report with Two Subreports</i>	63
<i>Deleting a Subreport</i>	66
WORKING WITH REPORT SNAPSHOTS.....	66
<i>Creating Report Snapshots</i>	66
<i>Distributing Report Snapshots</i>	67
DEVELOPING DATA ACCESS PAGES	67
<i>Using the New Data Access Page Wizard</i>	67
<i>Defining a Data Source for a Stand-Alone Data Access Page</i>	69
<i>Creating Stand-Alone Data Access Pages</i>	70
REVIEW QUESTIONS.....	72
WORKING WITH PIVOTTABLES AND PIVOTCHARTS	73
CREATING PIVOTTABLES AND PIVOTCHARTS.....	73

<i>Creating PivotTables</i>	73
<i>Creating PivotCharts</i>	73
<i>Selecting Elements of a PivotTable</i>	73
<i>Selecting Elements of a PivotChart</i>	74
CREATING PIVOTTABLE FORMS.....	75
<i>Using the PivotTable AutoForm Wizard</i>	75
<i>Deleting Items from a PivotTable</i>	76
<i>Filtering Items in the PivotTable List</i>	76
<i>Using the AutoCalc Feature</i>	76
<i>Displaying Subtotals</i>	77
CREATING PIVOTCHART FORMS.....	77
<i>Using the PivotChart AutoForm Wizard</i>	78
<i>Deleting Items from a PivotChart</i>	78
<i>Filtering Items in the PivotChart List</i>	78
<i>Changing PivotChart Types</i>	79
REVIEW QUESTIONS.....	79
IMPORTING AND EXPORTING	80
LINKING TO EXTERNAL DATA SOURCES.....	80
<i>Linking to Text Files</i>	80
<i>Linking to Microsoft Excel Spreadsheets</i>	81
<i>Linking to HTML Files</i>	82
<i>Linking to Other Access Databases</i>	83
<i>Linking to a SQL Server ODBC Data Source</i>	84
IMPORTING DATA INTO ACCESS.....	87
<i>Importing from Excel Files</i>	87
<i>Importing from Other Access Databases</i>	87
<i>Importing from ODBC Data Sources</i>	88
EXPORTING DATA FROM ACCESS.....	89
<i>Exporting to Files</i>	89
<i>Exporting to Access Databases</i>	89
<i>Exporting to ODBC Data Sources</i>	89
REVIEW QUESTIONS.....	90
BUILDING EXPRESSIONS.....	91
USING THE EXPRESSION BUILDER.....	91
<i>Using the Expression Builder in Queries</i>	91
<i>Using the Expression Builder in Forms</i>	92
<i>Using the Expression Builder in Reports</i>	93
USING COMMON BUILT-IN FUNCTIONS.....	93
<i>Using Date/Time Functions</i>	93
<i>Using Financial Functions</i>	94
<i>Using Math Functions</i>	95
<i>Using Text Functions</i>	95
REVIEW QUESTIONS.....	95

Working with the Northwind Sample Database

When you have completed this learning module you will have seen how to:

- Install Northwind
- Check for Northwind

Installing the Northwind Database

About Northwind

- **Northwind** is a sample database that ships with Access 2002. It contains product and sales data for the fictitious company **Northwind Traders**.
- It is recommended that Northwind be installed to follow the lessons in this manual.

Checking for Northwind

- Click the **Search** button on the **database** toolbar:



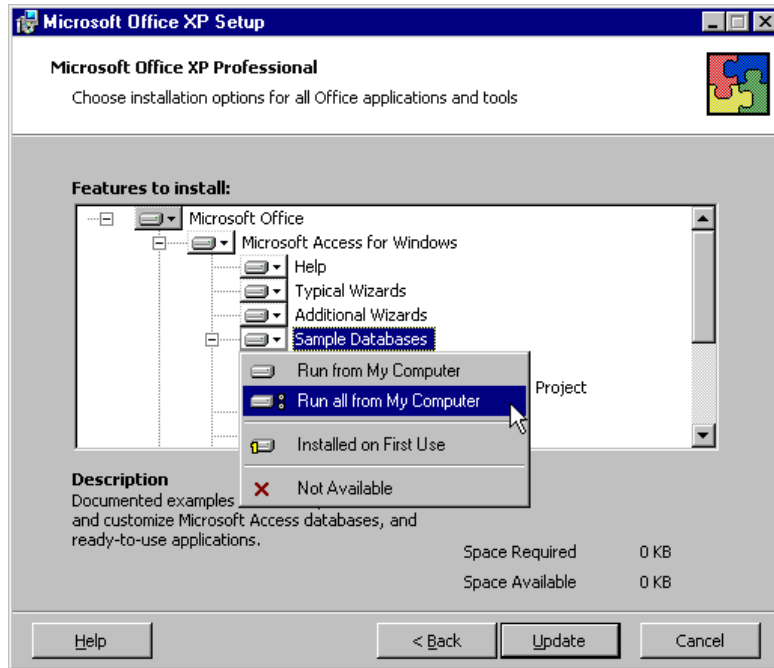
- In the Search text box, type Northwind.
- Click **Search**.
- If **Northwind.mdb** appears in the **Search Results**, click on the file to open it and proceed to the next chapter.
- If **Northwind** is not found in the **Search Results** it will need to be installed.

Installing Northwind

- Insert the Microsoft Office XP CD-ROM in the CD-ROM drive.
- Double-click **Setup**.

Note: If your computer has autorun enabled, you will be presented directly with the Microsoft Office XP setup screen.

- Select **Add or Remove Features**.
- Click **Next**.
- Under **Features to Install**, select the **Microsoft Access for Windows** subtree.
- Under **Sample Databases**, select **Run all from My Computer**:



- Click **Update**.
- Once the installer completes, click **OK** to finish.

Note: Once the **Northwind** database is installed, search for it again and open it.

Review Questions

How would you:

- Install Northwind?
- Check for Northwind?

SAMPLE

Designing Tables in Access 2002

When you have completed this learning module you will have seen how to:

- Set a Primary Key
- Remove Non-related Data
- Remove Redundant Data
- Remove Repeating Data
- Set Required Values in Columns
- Use the Relationship Tool
- Identify a Related Table
- Create Join Types
- Enforce Referential Integrity
- Work with Cascading Updates and Deletes
- Create a Single-Field Index
- Create a Multiple-Field Index
- Set the Index Sort Order
- Set Index Properties
- Delete Indexes
- Choose Appropriate Data Types
- Set Column Data Types
- Format Data Types
- Convert Between Data Types

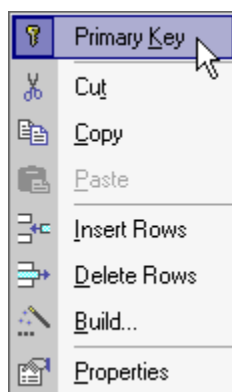
Normalizing Data

Setting a Primary Key

- A **primary key** is a field that uniquely identifies a row in a table and can be based on any alphanumeric value.

To set a primary key:

- Open a table in **Design** view.
- Right-click on the field you want to set as the primary key.
- From the pop-up menu, select **Primary Key**:



Note: You must save the table to save the primary key.

Removing Non-related Data

- Part of the **normalization** process is to remove **non-related** values. For example, in the **Employees** table, it is incorrect to include customer data. That would result in a mixing of different areas of subject matter. Customer data should be stored in a separate table.

Removing Redundant Data

- Another part of the **normalization** process is to remove **redundant** values. A **redundant** value is one that appears multiple times in the same table. For example, in the **Suppliers** table it is incorrect to repeat all supplier data for each product a supplier sells. It is more efficient and manageable to create supplier data once and then relate supplier data to product data in the **Products** table. By doing this, supplier data only needs to be updated once in the **Suppliers** table rather than multiple times in the **Products** table.

Removing Repeating Data

- An additional part of the **normalization** process is to remove **repeating** values. **Repeating** values are similar values that appear across multiple columns of a table. For example, it is incorrect to create a new column for each product sold in the **Orders** table. Instead, it is more efficient and manageable to relate order data by **Order ID** to another table called **Order Details**. Each row in **Order Details** represents a line item on an order.

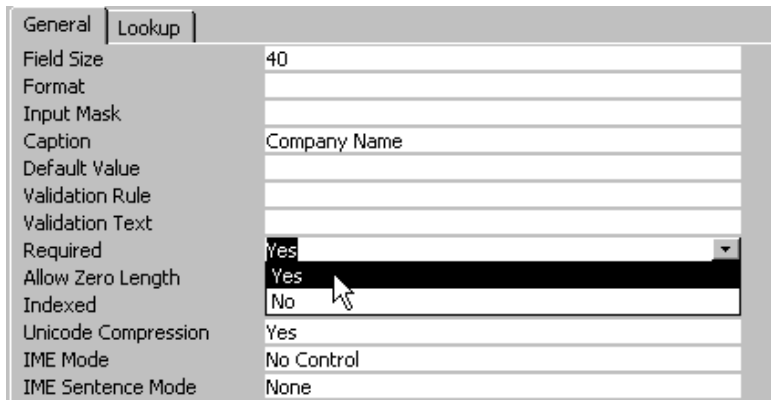
Setting Required Values in Columns

- Yet another part of the **normalization** process is to ensure that all fields have values. A well-designed table will not allow **null** values. A **null** value means that a value is unknown. This is different from a blank or zero-length value.

To set required fields:

- Open a table in **Design** view.
- Select the **Data Type** pane for the desired field.

- Find the **General** tab in the lower-left portion of the design window.
- In the **General** tab select the **Required** field.
- Choose **Yes** to make the field required:



Note: You must save the table to save the field change.

Establishing Relationships

Using the Relationship Tool

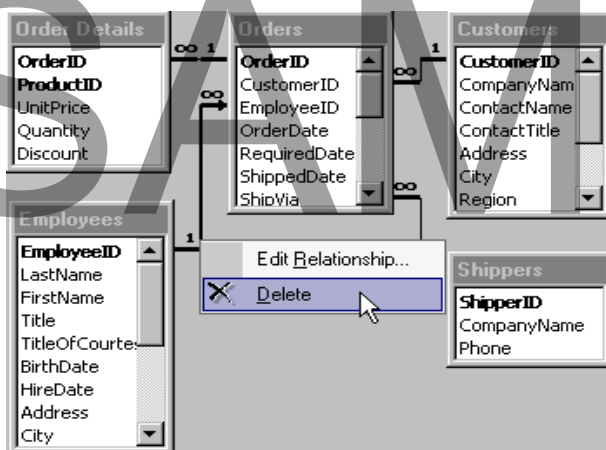
- The **Relationship** tool manages joins between related fields in different tables.

To delete a relationship:

- Click the **Relationships** button on the **Database** toolbar:



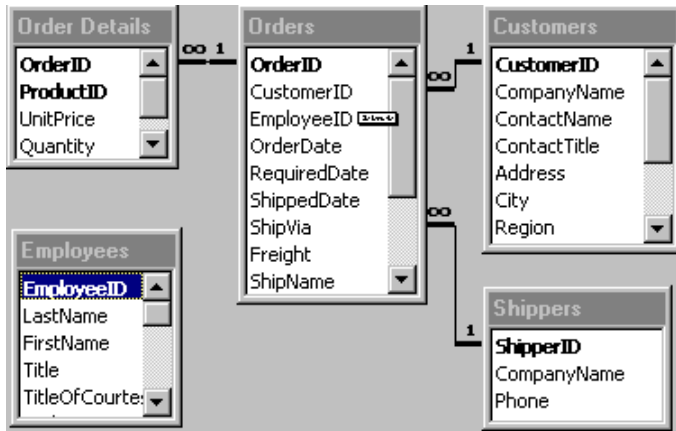
- Right-click on the **relationship** between two tables.
- From the pop-up menu, select **Delete**:



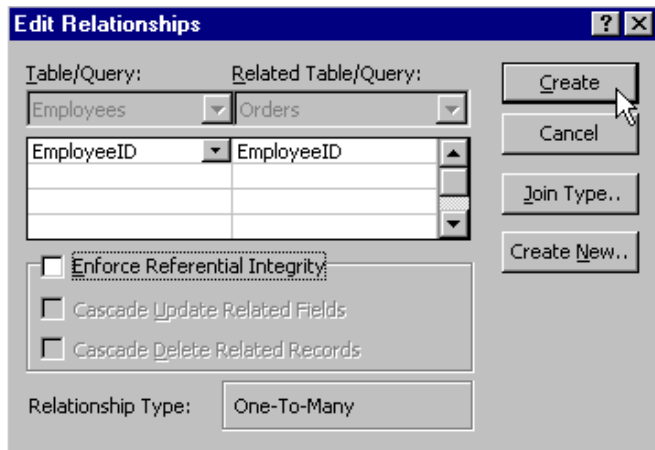
- Click **Yes** when prompted to delete the relationship.

To create a relationship:

- Click the **Relationships** button on the **Database** toolbar.
- Drag a field from one table to another table:



- This opens the **Edit Relationships** dialog box.
- Click **Create**:



Identifying a Related Table

- Tables that are related will have fields that are common between them. For example, **Shippers** and **Orders** are related by the **ShipperID** and **ShipVia** fields respectively. It is easier to identify **relationships** if the field names are the same. Related fields should have the same **data type**. For example, **EmployeeID** is defined as a **long integer** in both the **Orders** and **Employees** tables.

Note: **Data types** are discussed in more detail later in this training manual.

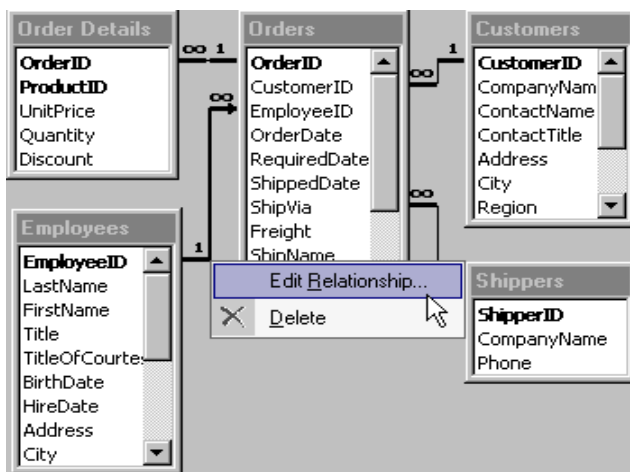
Creating Join Types

- There are three join types in Access: one-to-one, one-to-many, and many-to-many.

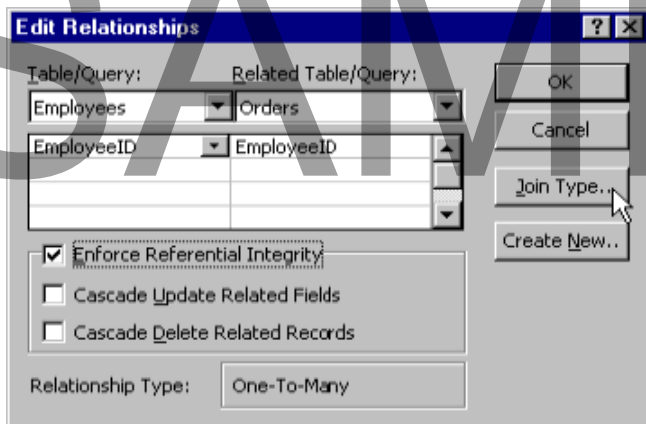
- A **one-to-one** relationship has only one matching row in each related table. **One-to-one** relationships are not common. An example would be a table with many columns divided into multiple tables that relate to one master key value.
- A **one-to-many** relationship has a row in one table that matches many rows in a related table. This is the most common type of relationship. An example is the relationship between the **Customers** and **Orders** table. This relationship is described as one customer having many orders and each order belonging to only one customer.
- A **many-to-many** relationship has many rows in one table that match many rows in a related table. This is a special relationship that involves a third table called a **junction** table. An example is the relationship between **Orders** and **Products**. These two tables are joined by a junction table called **Order Details**. This relationship is described as many orders having many products and many products belonging to many orders.

To create a join type:

- Right-click on the **relationship** between two tables.
- From the pop-up menu, select **Edit Relationship**:

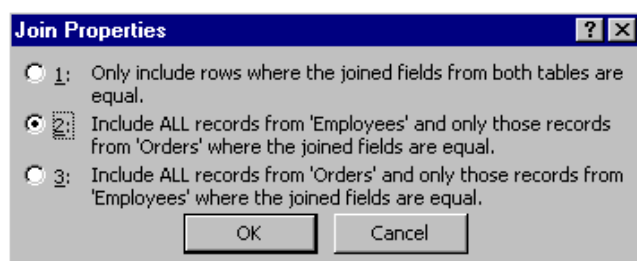


- This opens the **Edit Relationships** dialog box.
- Click **Join Type**:



- This opens the **Join Properties** dialog box.

- Select the desired relationship type:



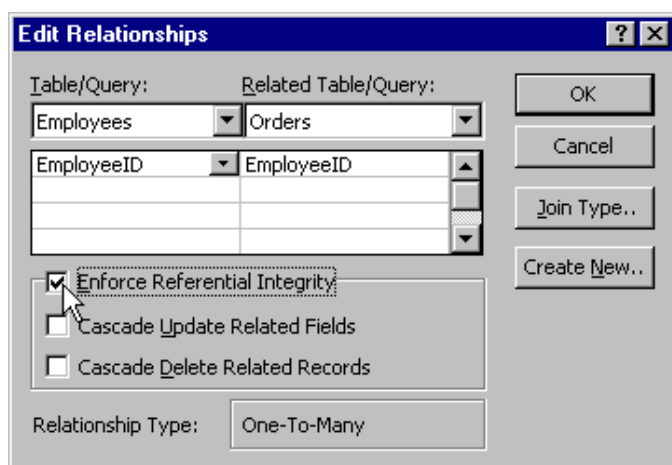
- Click **OK**.

Enforcing Referential Integrity

- **Referential integrity** ensures that related records between tables are valid.

To set referential integrity:

- Right-click on the join between two tables.
- From the pop-up menu, select **Edit Relationship**. This opens the **Edit Relationships** dialog box.
- Check the Enforce Referential Integrity box:



- Click **OK**.

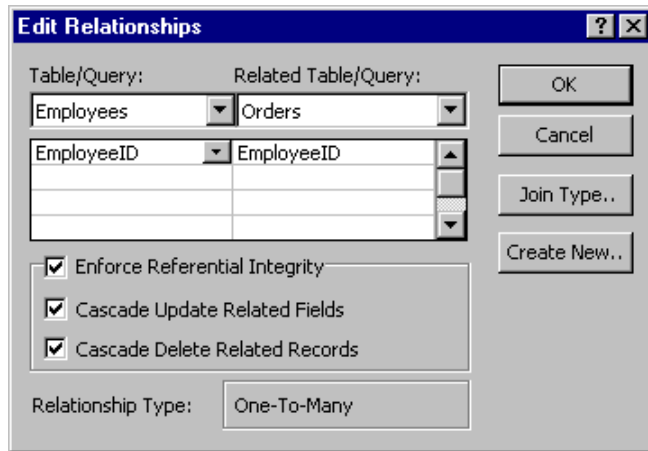
Working with Cascading Updates and Deletes

- **Cascading** allows for updates or deletes of related records without violating **referential integrity**. Use **cascading** when there is a need to propagate **foreign key** data changes. For example, if there is an update of **EmployeeID** in the **Employees** table, then all related records in **Orders** should also be updated with the new **EmployeeID** so that an employee's sales history is not lost. **Cascading** will make this change automatic.

To set cascading options:

- Right-click on the join between two tables.

- From the pop-up menu, select **Edit Relationship**. This opens the **Edit Relationships** dialog box.
- Check the **Cascade Update Related Fields** and/or **Cascade Delete Related Fields** box:



- Click **OK**.

Note: The **Enforce Referential Integrity** box must be checked to set **cascading** options.

Working with Indexes

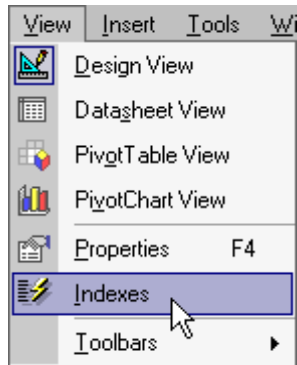
Creating a Single-Field Index

- An **index** is used to improve the performance of data searches. A **single-field index** is defined only on one field. Use a **single-field index** on a field that will participate in a **relationship**. For example, **CategoryID** in the **Products** table is defined as a **single-field index** and is related to the **CategoryID** field in the **Categories** table.

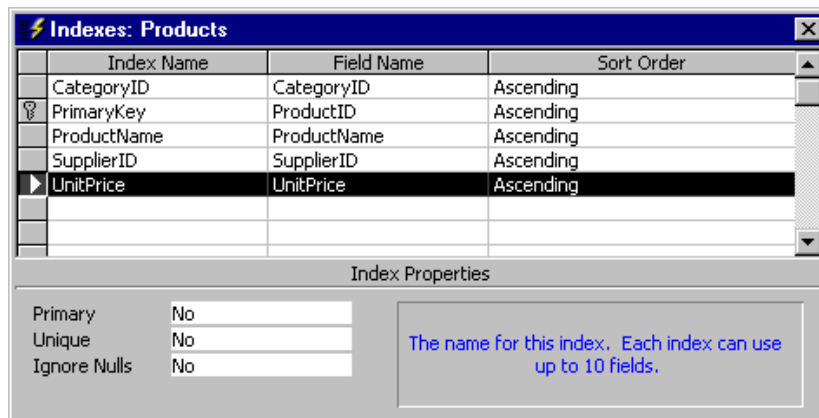
To create a single-field index:

- Open a table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar:

OR from the main menu, select **View > Indexes**:



- This opens the **Indexes** design grid.
- Type a name in the **Index Name** column.
- Select a desired field from the drop-down menu in the **Field Name** column:



- Click the **Close** button on the **Indexes** title bar.

Note: The default **Sort Order** is defined as **Ascending**. Setting the **sort order** is discussed later in this chapter.

Creating a Multiple-Field Index

- A **multiple-field index** is defined on two or more fields. Use a **multiple-field index** on fields that will be used in complex queries.

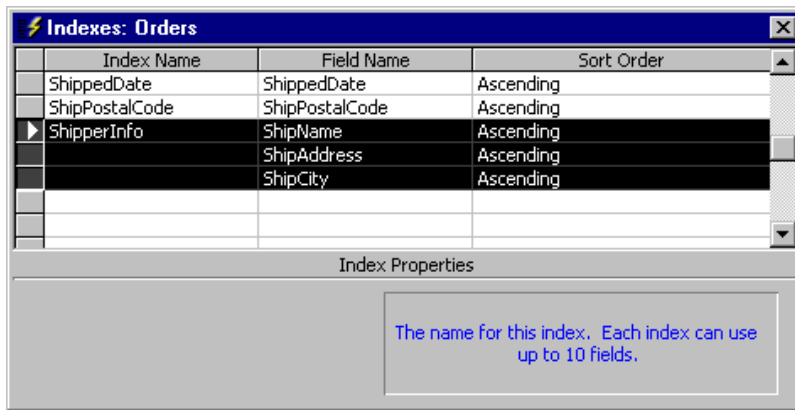
To create a multiple-field index:

- Open a table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar

OR from the main menu, select **View > Indexes**.

- This opens the **Indexes** design grid.
- Type a name in the **Index Name** column.

- Select multiple fields from the drop-down menu in the **Field Name** column:



- Click the **Close** button on the **Indexes** title bar.

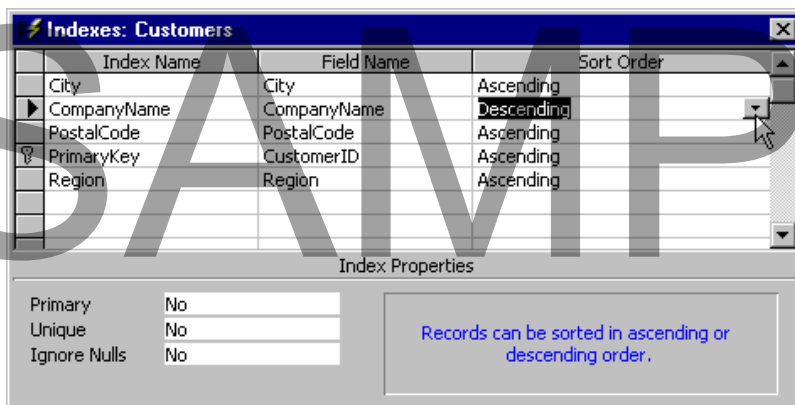
Note: Each **multiple-field index** can use up to 10 fields.

Setting the Index Sort Order

- The **index sort order** improves the performance of queries that use sorting functionality. For example, writing a query that sorts **CompanyName** in descending order from the **Customers** table would benefit from a **descending sort order** index.

To set the index sort order:

- Open a table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar **OR** from the main menu, select **View > Indexes**.
- This opens the **Indexes** design grid.
- Click the drop-down menu in the **Sort Order** column.
- Select **Descending** to change the sort order.



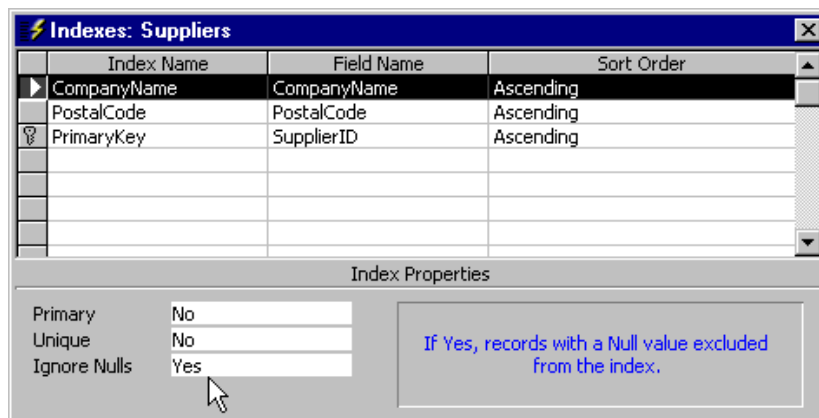
- Click the **Close** button on the **Indexes** title bar.

Setting Index Properties

- The behavior of an index can be controlled by setting the **properties** on the index. The available properties are **Primary**, **Unique**, and **Ignore Nulls**. The **Primary** property allows for an additional method of setting the **primary key** for a table. The **Unique** property determines if duplicate values are allowed in the index. The **Ignore Nulls** determines if unknown values are included in the index.

To set index properties:

- Open a table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar **OR** from the main menu, select **View > Indexes**.
- This opens the **Indexes** design grid.
- Select an index.
- Select a **Primary** property from the drop-down menu in the **Index Properties** section.
- Select a **Unique** property from the drop-down menu in the **Index Properties** section.
- Select an **Ignore Nulls** property from the drop-down menu in the **Index Properties** section:



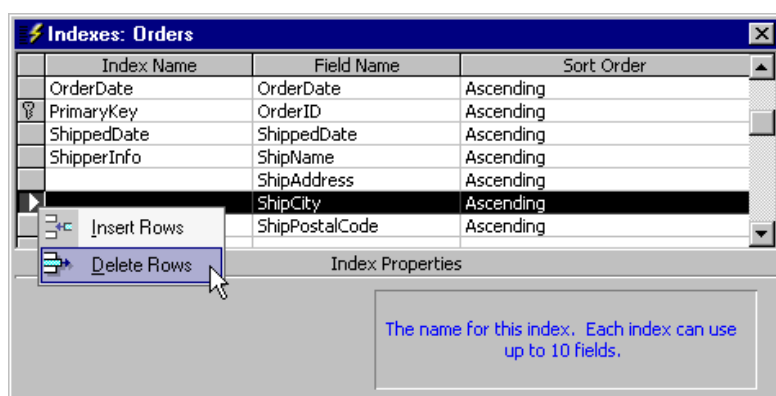
- Click the **Close** button on the **Indexes** title bar.

Note: Changing the **index properties** on an existing index can cause unexpected changes in the index behavior. The **Primary** property cannot be set on another field if the original **primary key** is part of a relationship.

Deleting Indexes

- Open a table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar **OR** from the main menu, select **View > Indexes**.
- This opens the **Indexes** design grid.
- Right-click on an **Index Name**.

- From the pop-up menu, select **Delete Rows**:



- Click the **Close** button on the **Indexes** title bar.

Working with Data Types

Choosing Appropriate Data Types

- Determining which **data type** to use for a field is a very important step in designing a table. The available data types are **Text**, **Memo**, **Number**, **Date/Time**, **Currency**, **AutoNumber**, **Yes/No**, **OLE Object**, and **Hyperlink**. The following are some important considerations when deciding which data types to use:

Storage requirements: For example, the **Number** data type can use 1, 2, 4, 8, or 16 bytes.

The domain of the data: This refers to what can be stored in the column. For example, **Text** cannot be stored in a **Number** field.

Establishing relationships: Generally, it is more efficient to establish relationships between **Number** or **Text** columns.

Sorting requirements: Sorting **Text** values may return unexpected results and **OLE Objects** cannot be sorted.

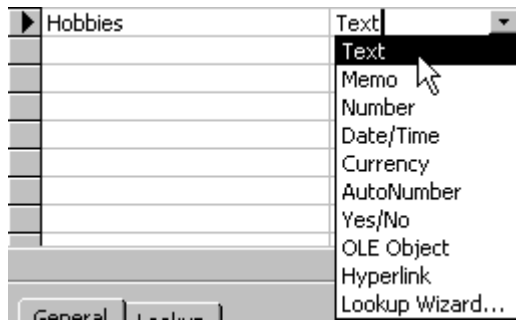
Indexing requirements: Indexing **Memo** fields can create very large indexes and **OLE Objects** cannot be indexed.

Calculation requirements: Certain calculations cannot be performed on fields defined as **Text** or **OLE Objects**.

Setting Column Data Types

- Open a table in **Design** view.
- Create a new field.

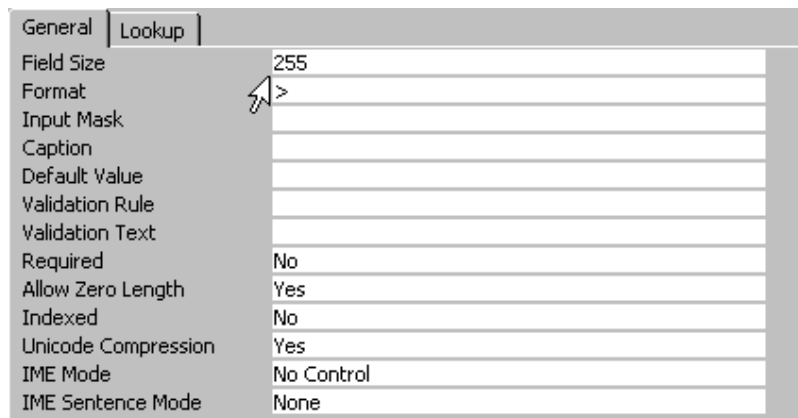
- Select the desired data type from the **Data Type** drop-down menu:



- **Close** the table.

Formatting Data Types

- Open a table in **Design** view.
- Select an existing field.
- Set the desired field size in the **Field Size** text box.
- Add an appropriate formatting symbol in the **Format** text box:



- **Close** the table.

Converting Between Data Types

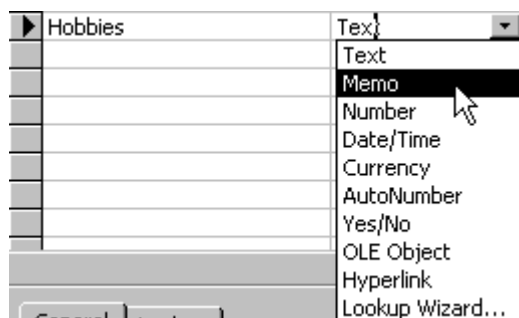
- Sometimes it may be necessary to change the data type for a column. For example, it may be necessary to change from a **Text** field, which has a maximum length of 255 characters, to a **Memo** field which has a maximum length of 65,536 characters.

Note: Changing between data types can result in a **loss of data**. This can happen when converting from a larger data type to a smaller data type or converting between incompatible data types such as changing from **Text** to **Number**.

To change a field to a different data type:

- Open a table in **Design** view.

- Select an existing field.
- Select the desired data type from the **Data Type** drop-down menu:



- **Close** the table.

Review Questions

How would you:

- Set a Primary Key?
- Remove Non-Related Data?
- Remove Redundant Data?
- Remove Repeating Data?
- Set Required Values in Columns?
- Use the Relationship Tool?
- Identify a Related Table?
- Create Join Types?
- Enforce Referential Integrity?
- Work with Cascading Updates and Deletes?
- Create a Single-Field Index?
- Create a Multiple-Field Index?
- Set the Index Sort Order?
- Set Index Properties?
- Delete Indexes?
- Choose Appropriate Data Types?
- Set Column Data Types?
- Format Data Types?
- Convert Between Data Types?

SAMPLE

Designing Queries in Access 2002

When you have completed this learning module you will have seen how to:

- Create update queries
- Create delete queries
- Create append queries
- Create make-table queries
- Create a one-parameter query
- Create a two-parameter query
- Use wildcards as parameters
- Create calculated fields
- Use common functions in calculated fields
- Create a two-table join
- Add fields from different tables to the query grid
- Remove tables from the query builder

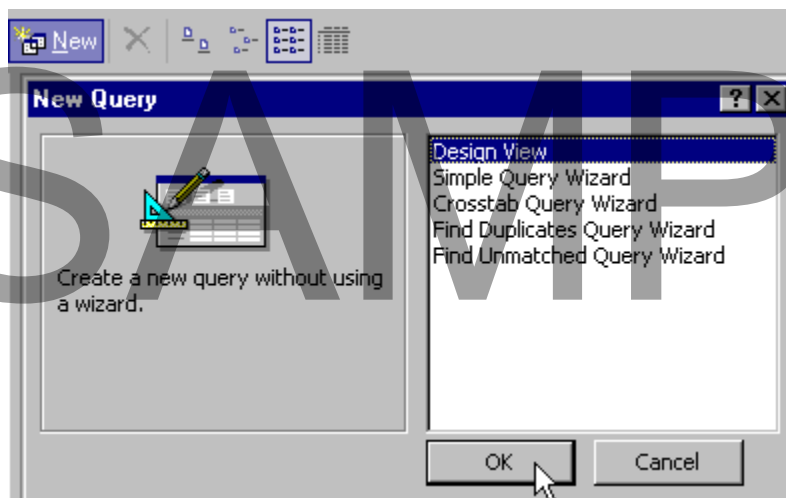
Creating Action Queries

Creating Update Queries

- An **Update Query** makes changes to a group of records. Updates can be made in one or more tables.

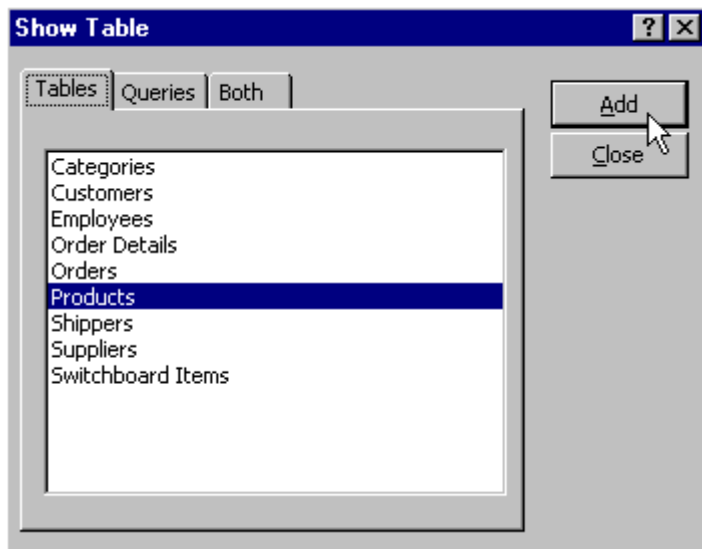
To create an Update Query:

- Click **Queries** in the **Objects** pane.
- Click the **New** button to open the **New Query** dialog box.
- Select **Design View**.
- Click **OK**:



- Select a table from the **Tables** tab in the **Show Table** dialog box.

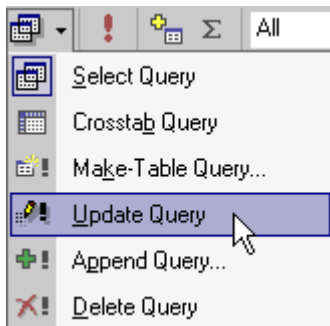
- Click **Add**:



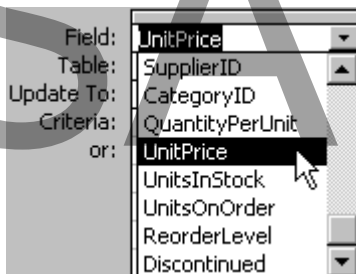
- Click **Close**. A representation of the table appears in the query grid.
- Click on the **Query Type** button on the **Query Design** toolbar:



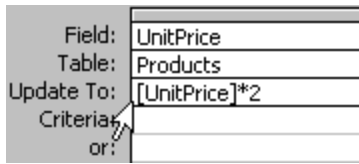
- Select Update Query to change from a Select Query to an Update Query:



- Select a field from the **Field** drop-down menu:



- Select the **Update To** section of the query grid and type a value:



- Click the **Run** button on the **Query Design** toolbar to execute the update:



- Click **Yes** to apply the changes.

Note: There is no **undo** feature for the update action. The change is permanent.

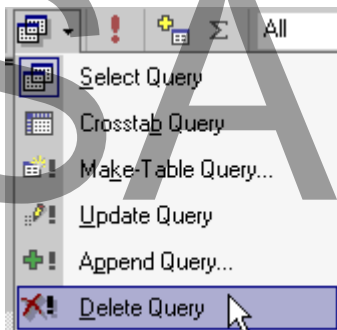
- **Close** the query design window.

Creating Delete Queries

- A **Delete Query** deletes groups of records. Deletes can be made in one or more tables.

To create a Delete Query:

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Click the **Query Type** button on the **Query Design** toolbar.
- Select **Delete Query** to change from a Select Query to a Delete Query:

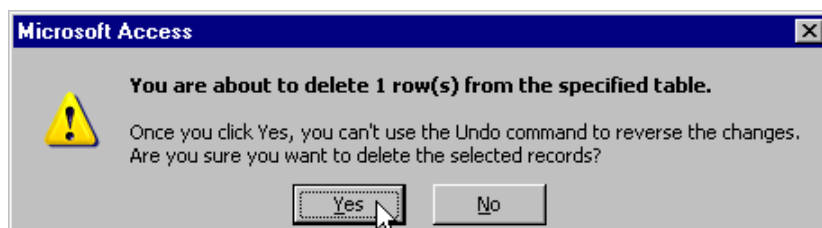


- Select a field from the **Field** drop-down menu.
- Select the **Criteria** section of the query grid and type a value:

Field:	ProductName
Table:	Products
Delete:	Where
Criteria:	"Tofu"
or:	

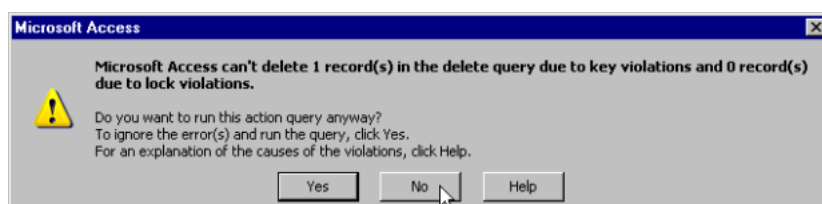
Note: This delete query uses a **where** filter to limit which rows are deleted.

- Click the **Run** button on the **Query Design** toolbar to execute the delete.
- Click **Yes** to apply the changes:



Note: An error will occur if a relationship has been previously defined for this field.

Click **No** to cancel or **Yes** to ignore the error and continue:



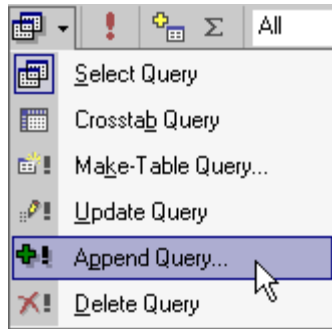
- **Close** the query design window.

Creating Append Queries

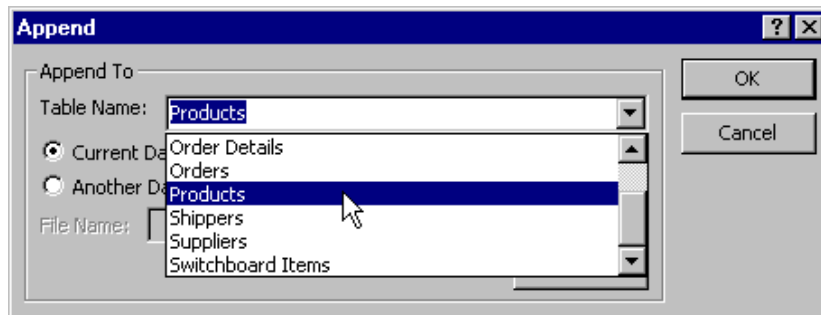
- An **Append Query** adds groups of records to the end of a table. Records can be added from one or more tables.

To create an Append Query:

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Click the **Query Type** button on the **Query Design** toolbar.
- Select **Append Query** to change from a Select Query to an Append Query:



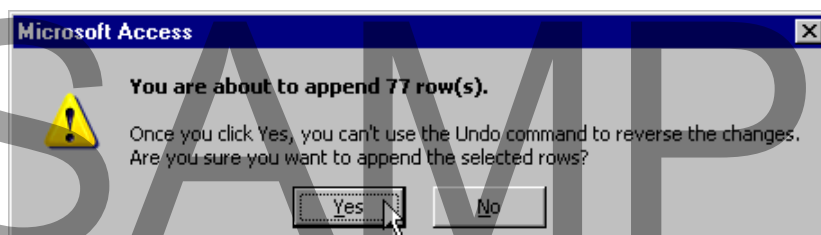
- This opens the **Append** dialog box.
- Select a table from the **Table Name** drop-down menu:



- Click **OK**.
- Select the desired fields to append:

Field:	ProductName	SupplierID	CategoryID	
Table:	Products	Products	Products	...
Sort:				
Append To:	ProductName	SupplierID	CategoryID	...
Criteria:				
or:				

- Click the **Run** button on the **Query Design** toolbar to execute the update.
- Click **Yes** to append the rows:



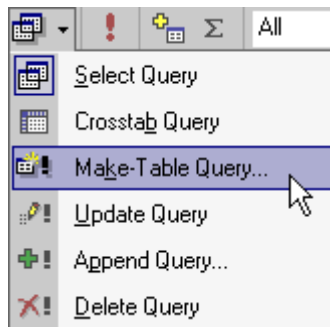
- **Close** the query design window.

Creating Make-Table Queries

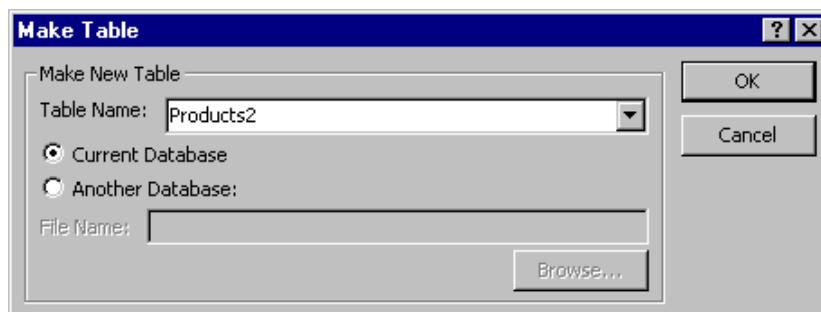
- A **Make-Table Query** creates a new table from data in another table. Records can be added from one or more tables.

To create a Make-Table Query:

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Click the **Query Type** button on the **Query Design** toolbar.
- Select Make-Table Query to change from a Select Query to a Make-Table Query:



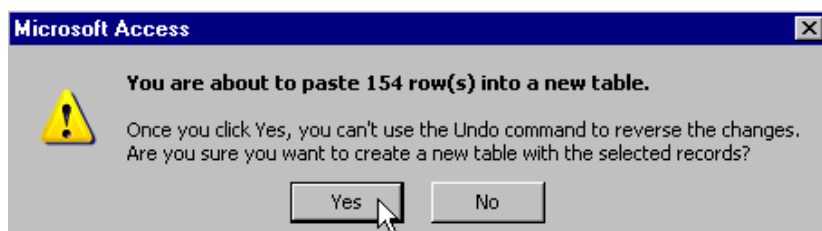
- This opens the **Make Table** dialog box.
- Select a table from the **Table Name** drop-down menu **OR** type a new table name:



- Click **OK**.
- Select the desired fields:

Field:	ProductName	SupplierID	CategoryID	
Table:	Products	Products	Products	...
Sort:				
Append To:	ProductName	SupplierID	CategoryID	...
Criteria:				
or:				

- Click the **Run** button on the **Query Design** toolbar to execute the update.
- Click **Yes** to paste the rows into the table:



Note: There will now be a new table in the **Tables** section.

- **Close** the query design window.

Creating Parameter Queries

Creating a One-Parameter Query

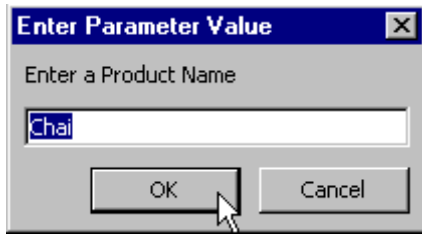
- A **parameter query** is a special query that prompts a user for input. This is useful for creating generic queries where users can specify custom select criteria.

To create a one-parameter query:

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Select a field from the **Field** drop-down menu.
- Add a prompt in the **Criteria** text box:

Field:	ProductID	ProductName	SupplierID
Table:	Products	Products	Products
Sort:			
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:		[Enter a Product Name]	
or:			

- Click the **Run** button on the **Query Design** toolbar to execute the query. This opens the **Enter Parameter Value** dialog box.
- Input a value.
- Click **OK**:



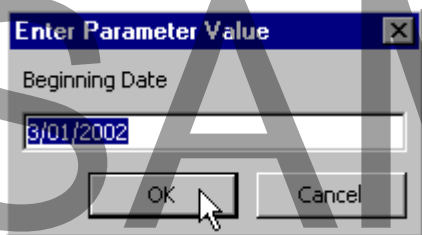
- The results of the query are displayed.
- **Close** the query results window.

Creating a Two-Parameter Query

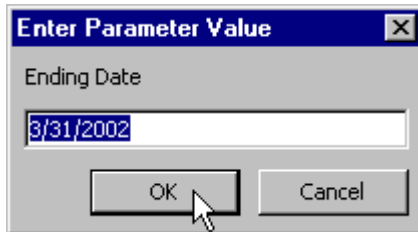
- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Select a field from the **Field** drop-down menu.
- Add two prompts in the **Criteria** text box:

Field:	ShippedDate	Country
Table:	Orders	Employees
Sort:		
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:	Between [Beginning Date] And [Ending Date]	
or:		

- Click the **Run** button on the **Query Design** toolbar to execute the query. This opens the first **Enter Parameter Value** dialog box.
- Input a value.
- Click **OK**:



- This opens the second **Enter Parameter Value** dialog box.
- Input a value.
- Click **OK**:



- The results of the query are displayed.
- **Close** the query results window.

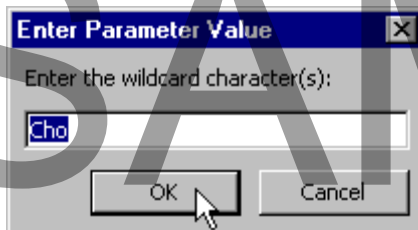
Using Wildcards as Parameters

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Select a field from the **Field** drop-down menu.
- Add a wildcard prompt in the **Criteria** text box:

Field:	ProductName	SupplierID	CategoryID
Table:	Products	Products	Products
Sort:			
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:	Like [Enter the wildcard character(s):] & "*"		
or:			

Note: The **Like** operator is used for pattern searches.

- Click the **Run** button on the **Query Design** toolbar to execute the query. This opens **Enter Parameter Value** dialog box.
- Input a value.
- Click **OK**:



- The results of the query are displayed.
- **Close** the query results window.

Creating Calculated Columns in Queries

Creating Calculated Fields

- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.
- Select a field from the **Field** drop-down menu.
- Enter an expression for the calculated field:

Field:	ProductName	UnitPrice	[UnitPrice]*1.5
Table:	Products	Products	
Sort:			
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:			
or:			

- Click the **Run** button on the **Query Design** toolbar to execute the query.
- The results of the query are displayed.
- **Close** the query results window.

Using Common Functions in Calculated Fields

- There are a large number of functions that can be used in **calculated fields**. **Functions** in Access can be divided into groups. Common groups are **Date/Time**, **Financial**, **Math**, and **Text** functions. Some common functions within each group include:

Date/Time: Date, DatePart, Day, Hour, Minute.

Financial: FV, PV, IRR, Pmt.

Math: Exp, Rnd, Sqr.

Text: LTrim, RTrim, Replace, Len.

- **Functions** will only work correctly when supplied with the correct number of arguments. A tool included within Access, called the **Expression Builder**, simplifies using functions in **calculated fields**. The **Expression Builder** is discussed later in this training manual.

Joining Tables

Creating a Two-Table Join

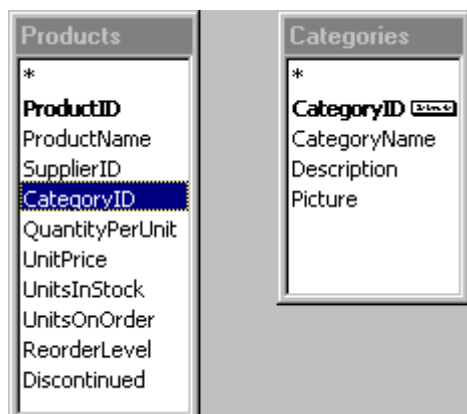
- A two-table join links related fields between two different tables.

To create a two-table join:

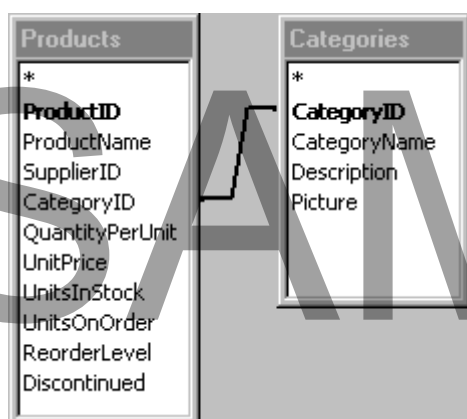
- Click **Queries** in the **Objects** pane.
- Click the **New** button. This opens the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select a table from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**. A representation of the table appears in the query grid.

To add another table to the query grid:

- Click the **Show Table** button on the **Query Design** toolbar. This opens the **Show Table** dialog box.
- Select the desired table.
- Click **Add**.
- Create a join between the tables by dragging and dropping a field from the first table to the related field in the second table:



- The final result will be a join link between the two tables:



Adding Fields from Different Tables to the Query Grid

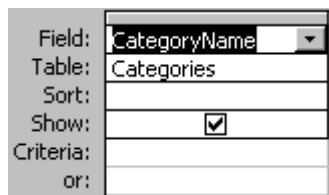
- Select the desired field from the **Field** drop-down menu.

OR

- Select the desired table from the **Table** drop-down menu:



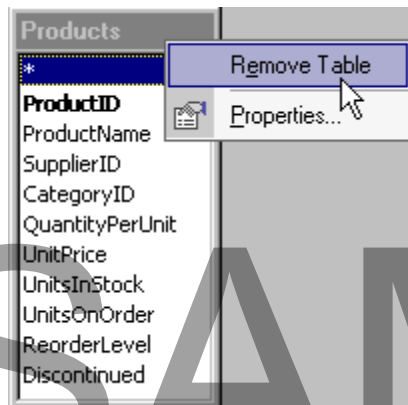
- Select the desired field from the **Field** drop-down menu:



- Click the **Run** button on the **Query Design** toolbar to execute the query.
- The results of the query are displayed.
- **Close** the query results window.

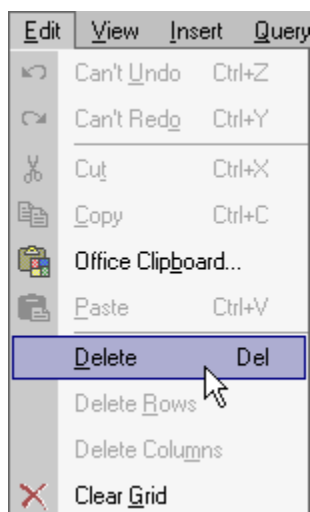
Removing Tables from the Query Builder

- Right-click on the table you want to remove in the query grid.
- From the pop-up menu, select **Remove Table**:



OR from the main menu, select **Edit > Delete**:

SAMPLE



Review Questions

How would you:

- Create Update Queries?
- Create Delete Queries?
- Create Append Queries?
- Create Make-Table Queries?
- Create a One-Parameter Query?
- Create a Two-Parameter Query?
- Use Wildcards as Parameters?
- Create Calculated Fields?
- Use Common Functions in Calculated Fields?
- Create a Two-Table Join?
- Add Fields from Different Tables to the Query Grid?
- Remove Tables from the Query Builder?

SAMPLE

Designing Forms in Access 2002

When you have completed this learning module you will have seen how to:

- Choose an Appropriate Control
- Place Controls on a Form
- Move a Control
- Resize a Control
- Set Control Properties
- Create Page Headers and Footers
- Create Form Headers and Footers
- Set Form Properties
- Work with Identifiers
- Create a Subform
- Create a Form with Two Subforms
- Create Nested Subforms
- Delete a Subform
- Create a Modal Pop-up Form
- Create a Modeless Pop-up Form
- Create a Switchboard
- Edit a Switchboard Item
- Delete a Switchboard

Creating Data Entry Forms

About Forms

- Forms can be used for data entry, displaying data in a user-friendly format, and as a navigational tool.

The screenshot shows a data entry form titled "Products". At the top right, there is a button labeled "Preview product list" and a checkbox labeled "Output product list as HTML". The form contains the following fields:

Product ID:	1
Product Name:	Cha
Supplier:	Exotic Liquids
Category:	Beverages
Quantity Per Unit:	10 boxes x 20 bags
Unit Price:	\$18.00
Units In Stock:	39
Units On Order:	0
Reorder Level:	10
Discontinued:	<input type="checkbox"/>

Choosing an Appropriate Control

- Controls are objects that can be placed on forms, reports, or data access pages that display data, perform actions, or can be used for visual display. Controls shipped with Access 2002 include:

Text Boxes: Used to display data on a form. Text boxes can be **bound** to a data source or **unbound** to accept input or display a calculation.

Labels: Used to display text on a form. Labels are useful for descriptive of instructional text. Labels are not associated with a data source.

List Boxes: Used to display a pre-determined list of values. List boxes are useful when limiting selection choices or when enforcing data integrity.

Command Buttons: Used to execute a pre-defined set of actions in a macro or event procedure written in visual basic.

Check Boxes: Used to set **Yes/No** values from an underlying query or table.

Option Groups: Used to select a limited list of choices. Sometimes interchangeable with **List Boxes** when selecting from only a few pre-defined options.

Toggle Buttons: Used to set **Yes/No** values from an underlying query or table. Useful when combined with an **Option Group** to select values that are **Yes/No**.

Image: Used when displaying a digital image on a form. An example would be the display of a company logo.

Tabbed Pages: Used when presenting different sections of information as one logical set. Useful when separating levels of information related to a common topic such as employee, company, or personal information.

Rectangles and Lines: Used when displaying limited geometric shapes. Useful when displaying breaks between fields or sections within a form.

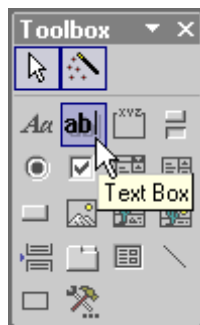
Subform: An advanced control that displays child data that is related to data on the parent form. **Subforms** are discussed later in this training manual.

Placing Controls on a Form

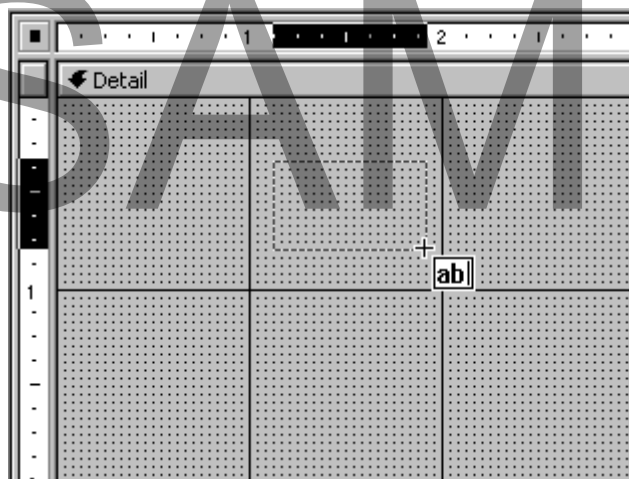
- Click **Forms** in the **Objects** pane.
- Click the **New** button. This opens the **New Form** dialog box.
- Select **Design View**.
- Select a data source for the **form** from the drop-down menu:



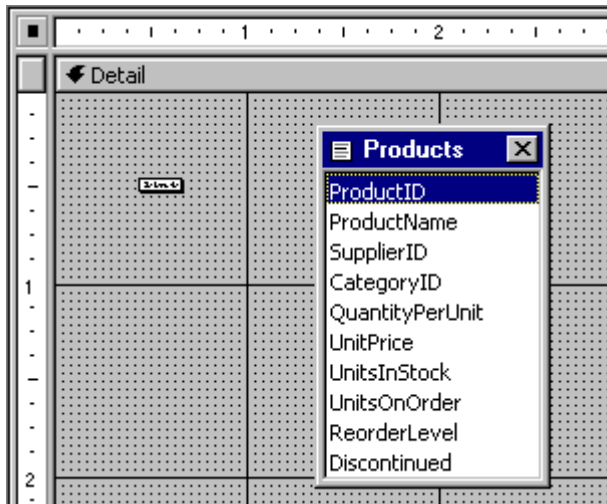
- Click **OK**.
- Access opens into **Form Design** view showing the **Detail** area, **Data Source**, and **Toolbox**.
- Click the desired control to place on the **form** on the **Toolbox** toolbar:



- Click and drag the **control** in the **Detail** area of the **form**:

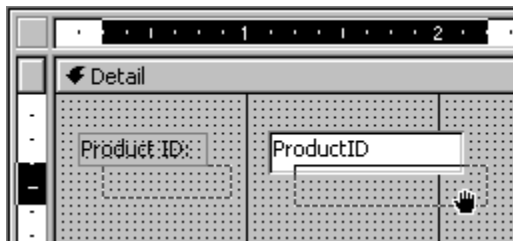


OR drag and drop a field from the **data source** to the **Detail** area of the form:



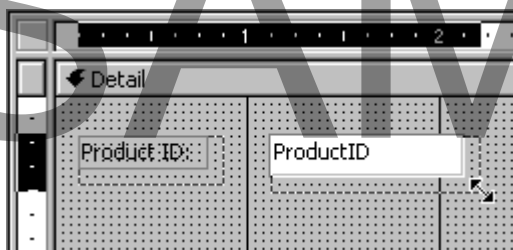
Moving a Control

- Select the control you want to move.
- Place the cursor over the **control** until the cursor changes to a hand.
- Drag the control to its new location:



Resizing a Control

- Select the control you want to resize.
- Place the cursor over the **control** until the cursor changes to a double arrow.
- Drag control to the desired size:



Setting Control Properties

- Control properties can be divided into five categories:

Format: Sets visual properties for a control.

Data: Sets the underlying data source for a control.

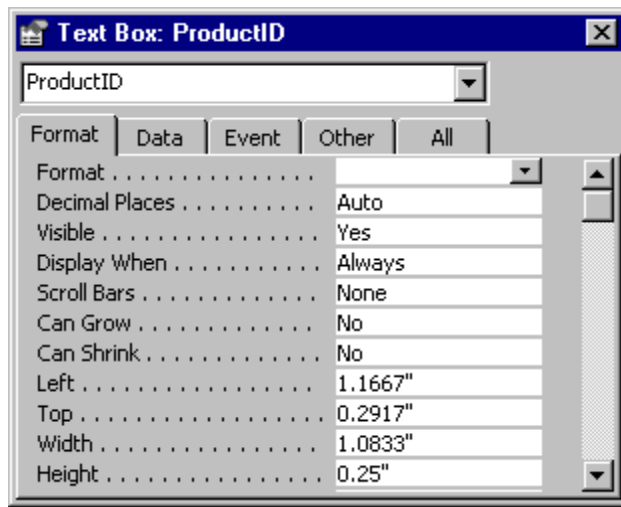
Event: Sets action behavior for a control. Typically used to tie a macro or event procedure to a specific control action.

Other: Sets the behavior for the control such as tab stop behavior or the tab order.

All: Used to view all categories in the same pane.

To set a property on a control:

- Right-click on the control.
- From the pop-up menu, select **Properties**. This opens the **control properties** dialog box:



- Select the desired control properties.

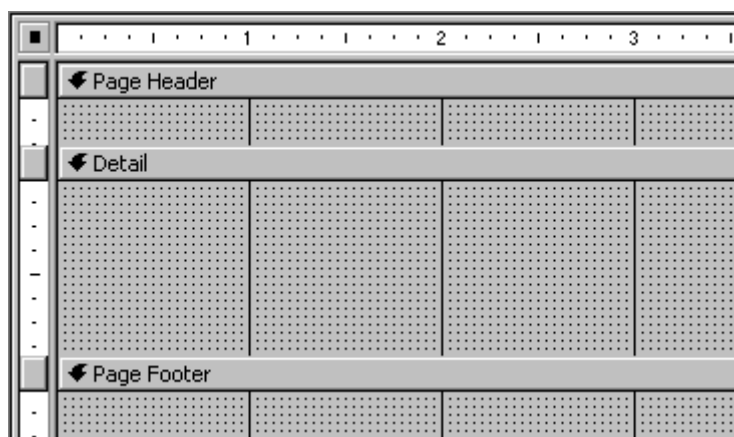
Note: The available control properties will vary depending on the type of control used.

Creating Page Headers and Footers

- **Page headers** and **page footers** appear at the top and bottom of each page and can display information such as a column heading.

To create page headers and footers:

- Right-click in the **Detail** area of the form.
- From the pop-up menu, select **Page Header/Footer**. This opens the **Page Header** and **Page Footer** panes:



- Place the desired control on the **page header** or **page footer**.

Creating Form Headers and Footers

- **Form headers** and **form footers** appear at the top and bottom of each page and can display items such as the date, page number, or company logo.

To create form headers and footers:

- Right-click in the **Detail** area of the form.
- From the pop-up menu, select **Form Header/Footer**. This opens the **Form Header** and **Form Footer** panes.
- Place the desired control on the **form header** or **form footer**.

Note: **Page headers and footers** and **Form headers and footers** can both appear on the same form.

Setting Form Properties

- Form properties can be divided into five categories:

Format: Sets visual properties for a form.

Data: Sets the underlying data source for a form.

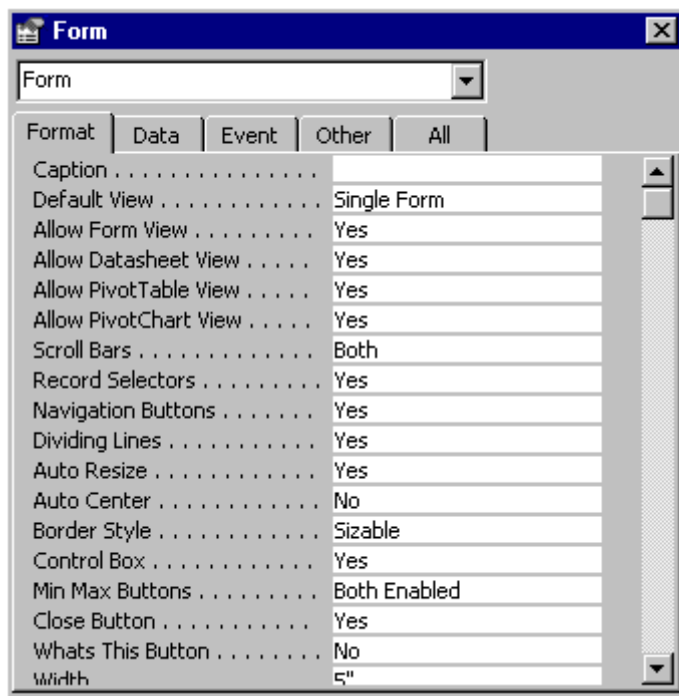
Event: Sets action behavior for a form. Typically used to tie a macro or event procedure to a specific form action.

Other: Sets the behavior for the form such as the **modal** or **pop-up** properties.

All: Used to view all categories in the same pane.

To set a form property:

- Right-click on the form.
- From the pop-up menu, select **Properties**. This opens the **Form** properties dialog box:



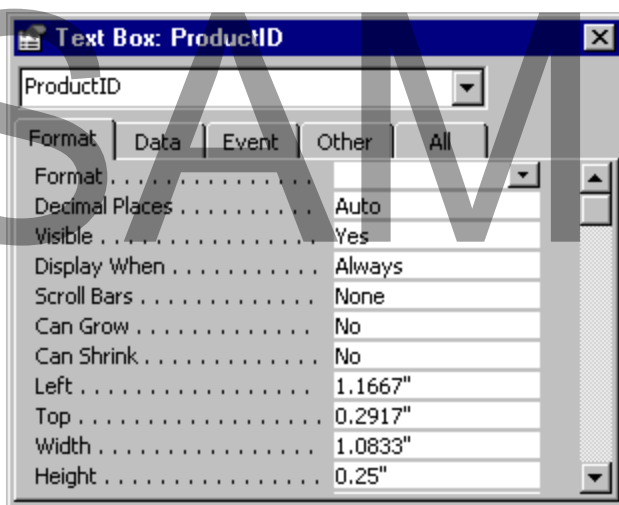
- Select the desired **form** properties.

Working with Identifiers

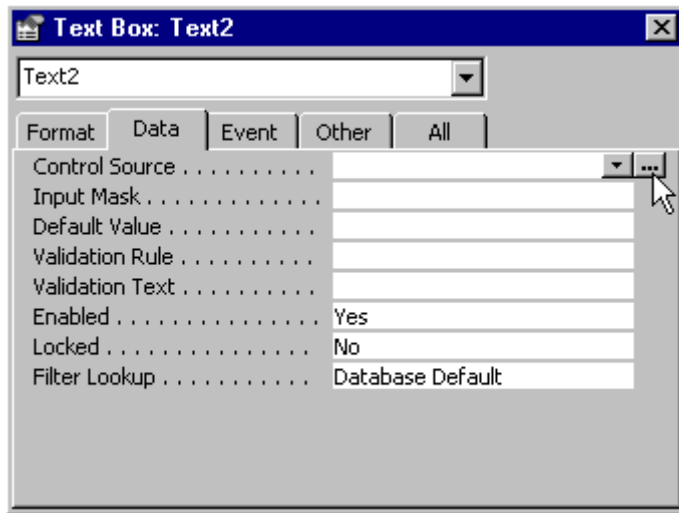
- When referencing an object or property in another form or subform, it is necessary to use an **object identifier**. This is the fully qualified name of the object or property. For example, when referencing the **order date** in the **Orders** form, it is necessary to use the **object identifier** Forms![Orders]![OrderDate].

To add an object identifier in a control:

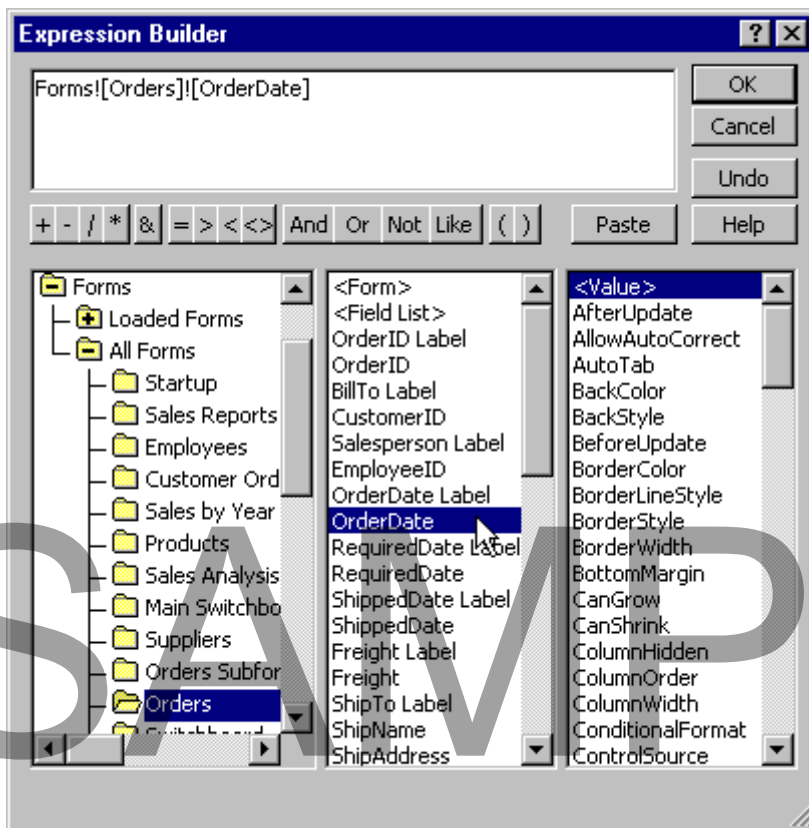
- Right-click on a control.
- From the pop-up menu select **Properties**. This opens the **control properties** dialog box:



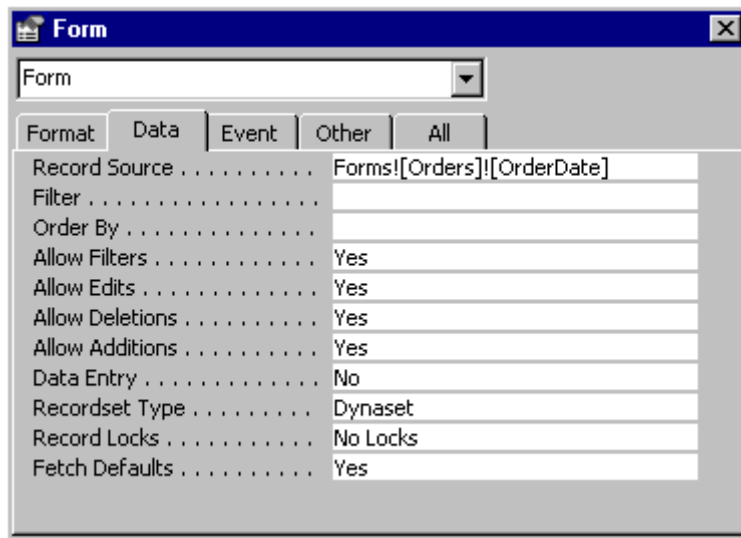
- Click the **Data** tab.
- Click the **Expression Builder** button next to the **Control Source** field:



- This opens the Expression Builder.
- Add the desired object from the **Expression Builder** window:



- The external object is now referenced in the current control using its **Object Identifier**:



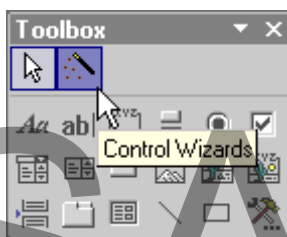
Working with Subforms

Creating a Subform

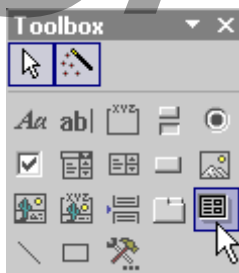
- A **subform** is a form inside another form. Subforms are useful for displaying **one-to-many relationships** where the main form displays the **one** side of the relationship and the subform displays the **many** side of the relationship. A form/subform combination is sometimes called a parent/child form.

To add a subform to a form:

- Open a form in **Design** view.
- Click the **Control Wizards** button on the **Toolbox** toolbar:



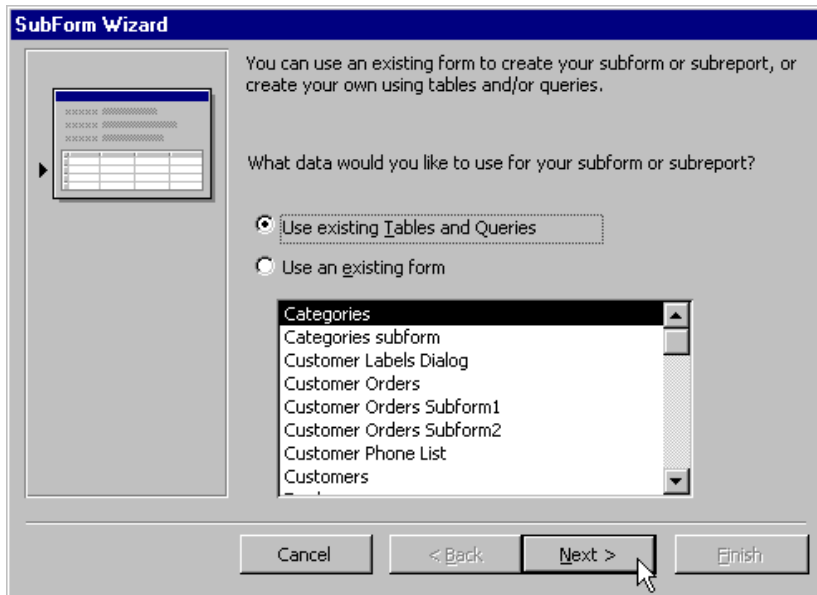
- Click the **Subform/Subreport** button on the **Toolbox** toolbar:



- Click and drag the **control** in the **Detail** area of the form:

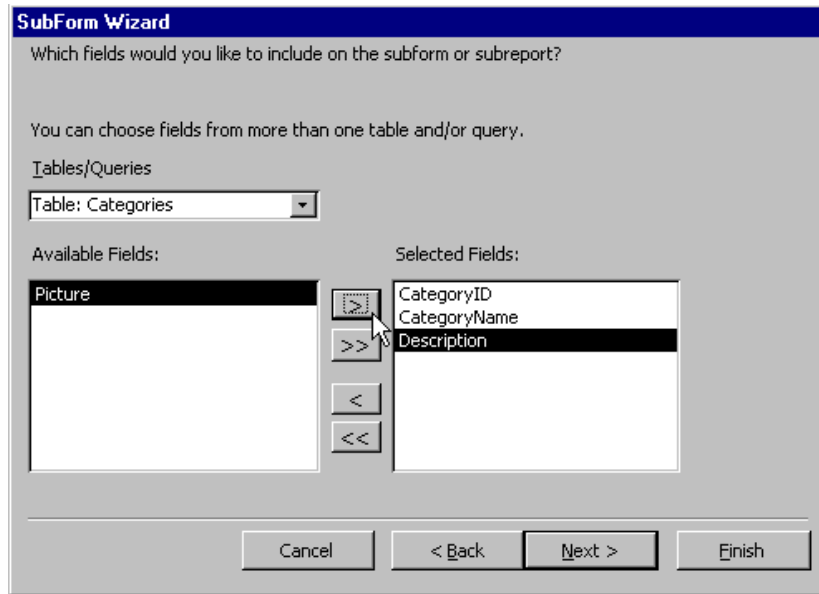


- This opens the **SubForm Wizard**.
- Select the Use existing Tables and Queries option button.
- Click **Next**:

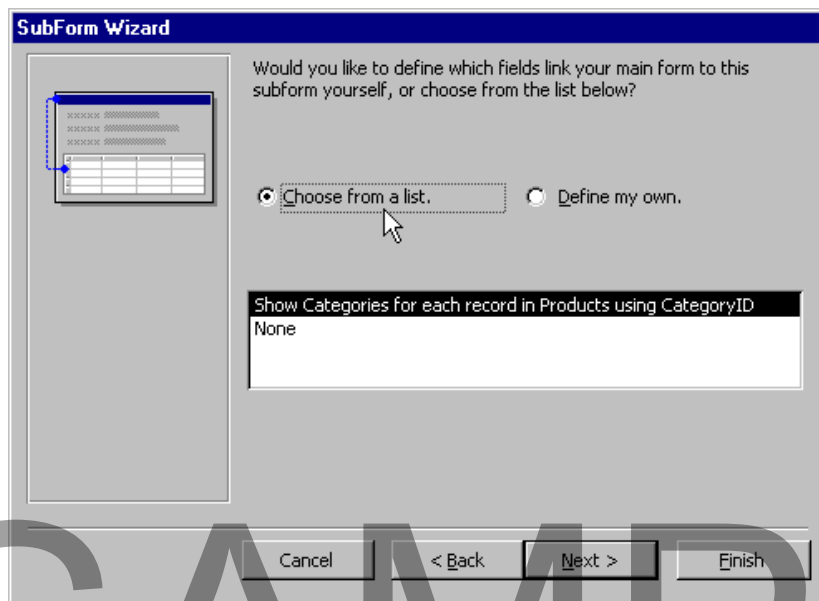


- Select a table from the **Tables/Queries** drop-down menu.
- Select a field from the **Available Fields** area.
- Click the single right arrow to add the field
OR click the double right arrow to add all fields:

SAMPLE



- Click **Next**.
- Select the **Choose from a list** option button
OR select the **Define my own** option button:



Note: If **Define my own** is selected, the wizard will require the link between the main **form** and **subform** to be manually defined.

- Click **Next**.
- Type a name for the **subform**.
- Click **Finish**.

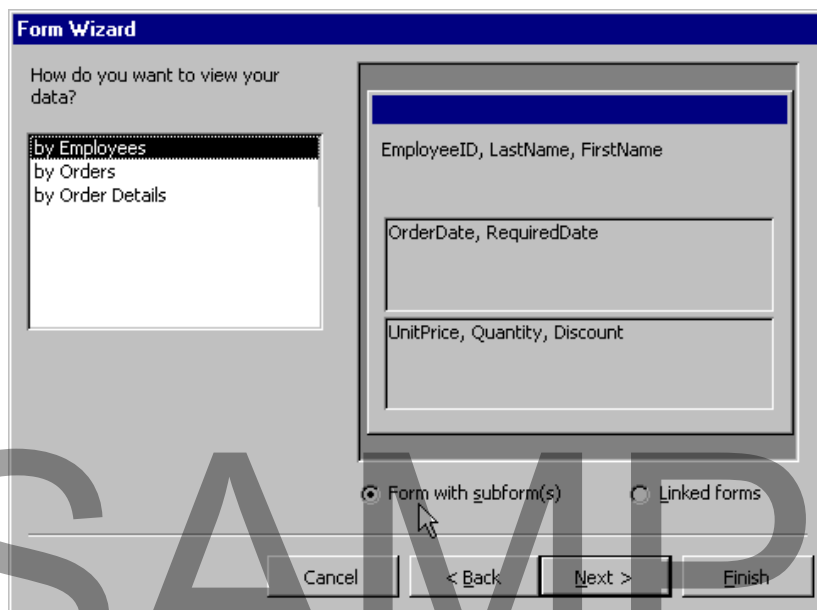
Creating a Form with Two Subforms

- A **form** with two **subforms** is often used when one **subform** is related to another **subform** within the same main **form**. The first **subform** is related

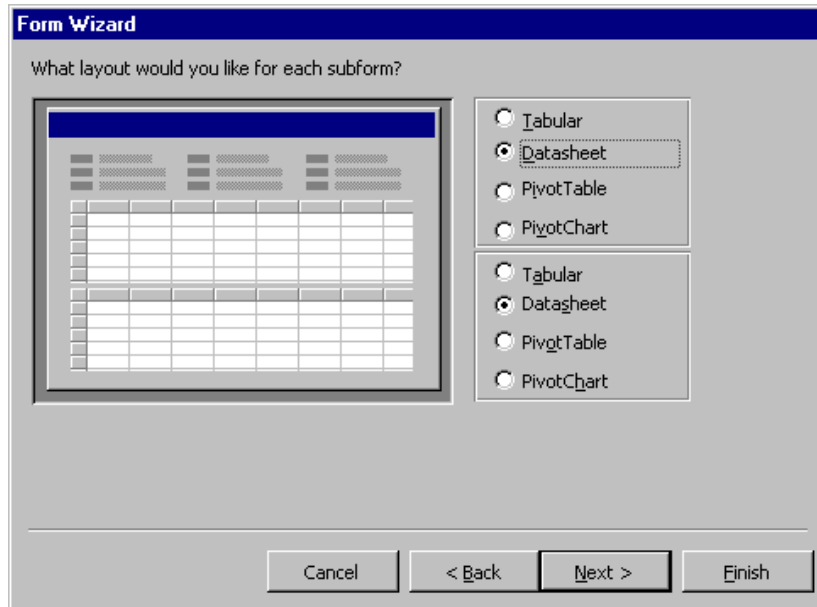
to a key value in the main **form**. The second **subform** is related to the first **subform** by a different key value.

To create a form with two subforms:

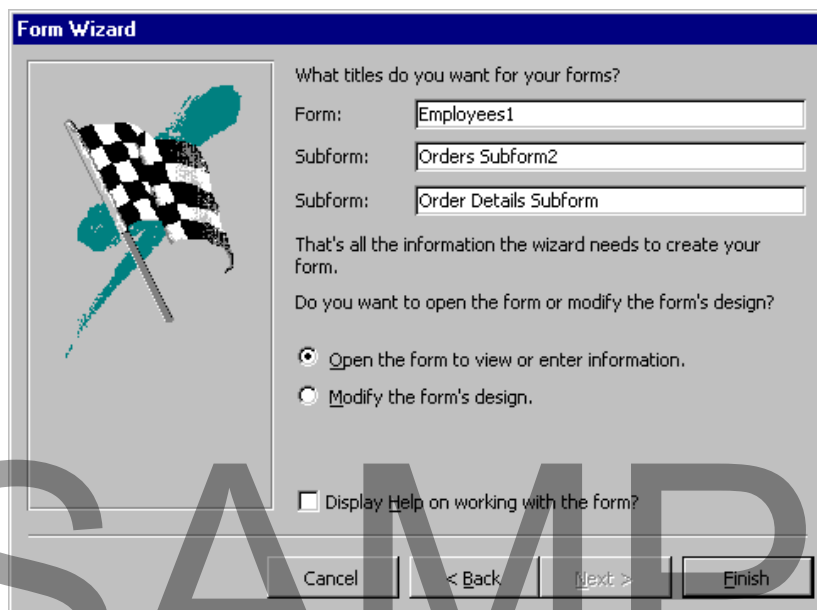
- Click **Forms** in the **Objects** pane.
- Click the **New** button on the database window. This opens the **New Form** dialog box.
- Select Form Wizard.
- Click **OK**.
- Select a table from the **Tables/Queries** drop-down menu.
- Add the desired fields.
- Select another table from **Tables/Queries** drop-down menu. This will be the first **subform**.
- Add the desired fields.
- Select another table from **Tables/Queries** drop-down menu. This will be the second **subform**.
- Add the desired fields.
- Click **Next**.
- Select the desired view in the **How do you want to view your data** dialog box.
- Select the **Form with subform(s)** option button:



- Click **Next**.
- Select the desired **layout** for each subform:



- Click **Next**.
- Select the desired **form style**.
- Click **Next**.
- Enter the title for the main form and each subform:



- Click **Finish**.

Creating Nested Subforms

- Creating a **nested subform** is similar to creating a form with two **subforms**. The main difference between the two is that the second **subform** is embedded in the first **subform** instead of in the **main form**.

To create a nested subform :

- Create a **subform** within a **main form**.

Note: Creating subforms within a form was previously discussed in this training manual.

- Click the **Subform/Subreport** control button on the **Toolbox** toolbar.
- Click and drag the **control** in the **Detail** area of the existing subform. This opens the **SubForm Wizard**.
- Select the Use existing Tables and Queries option button.
- Click **Next**.
- Select a table from the **Tables/Queries** drop-down menu.
- Select a field from the **Available Fields** area.
- Click the single right arrow to add a field
OR click the double right arrow to add all fields.
- Click **Next**.
- Select the **Choose from a list** option button
OR select the **Define my own** option button.

Note: If **Define my own** is selected, the wizard will require the link between the main form and subform to be manually defined.

- Click **Next**.
- Type a name for the **subform**.
- Click **Finish**.

Deleting a Subform

- Open the **main form** in **Design** view.
- Right-click on the subform.
- From the pop-up menu, select **Cut**.

OR

- Right-click on the subform in the **Forms** database window.
- From the pop-up menu, select **Delete**.

Note: Deleting the subform directly from the **Forms** database window without deleting it from the parent form will cause an error when opening the parent form.

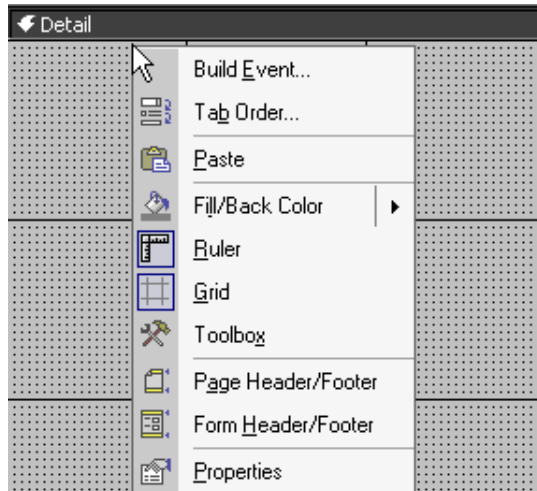
Creating Pop-up Forms

Creating a Modal Pop-up Form

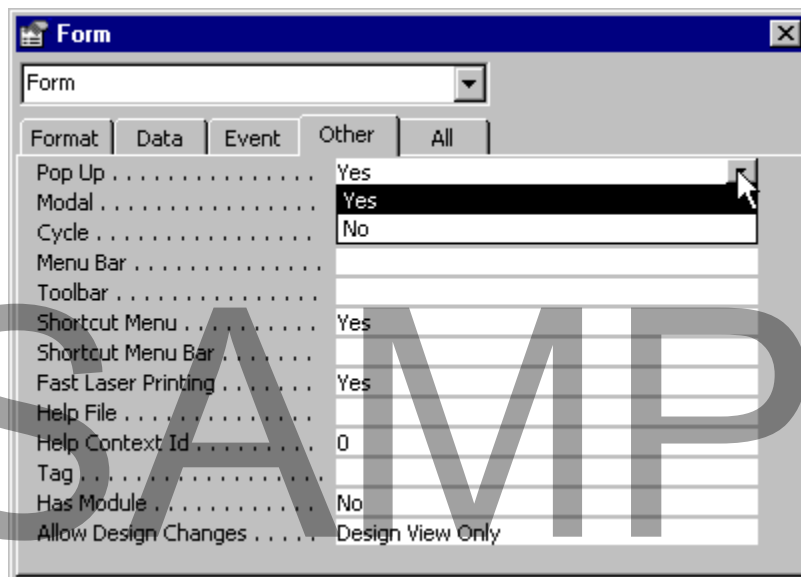
- A **modal** form is one that has exclusive focus when it is open. Other database objects are not accessible while the form is open.

To create a modal pop-up form:

- Open a form in **Design** view.
- Right-click on the main **form** area:

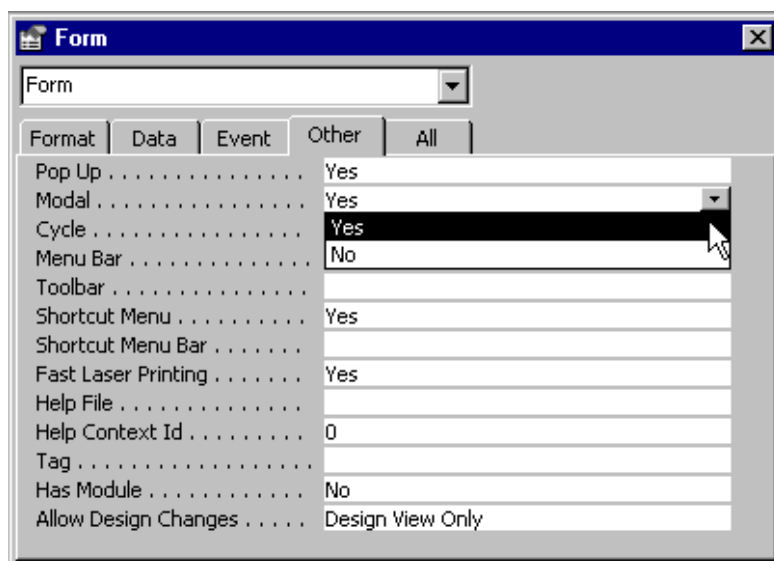


- From the pop-up menu, select **Properties**.
- Click the **Other** tab.
- Select **Yes** from the **Pop Up** drop-down menu:



SAMPLE

- Select **Yes** from the **Modal** drop-down menu:



Creating a Modeless Pop-up Form

- A **modeless** form is one that has non-exclusive focus when it is open. Other database objects are accessible while the form is open.

To create a modeless pop-up form:

- Open a form in **Design** view.
- Right-click on the main **form** area.
- From the pop-up menu, select **Properties**.
- Click the **Other** tab.
- Select **Yes** from the **Pop Up** drop-down menu.
- Select **No** from the **Modal** drop-down menu.

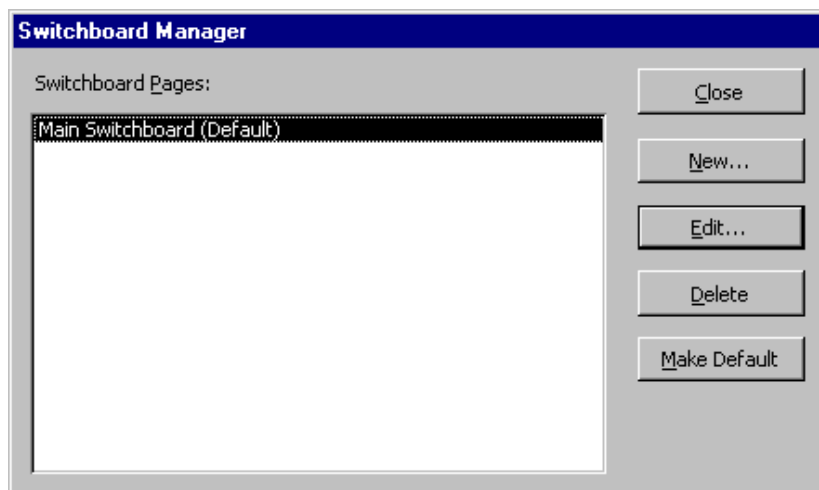
Working with Switchboards

Creating a Switchboard

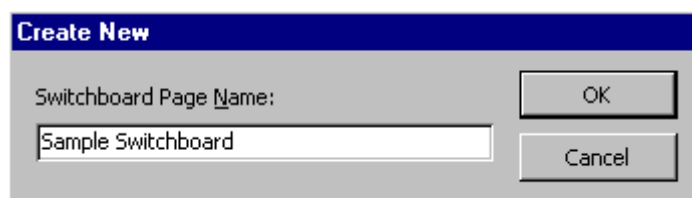
- A **Switchboard** is a special form that acts as a central navigation aide to help users access objects within a database. **Switchboards** are useful when creating a custom user interface that allows a fixed number of options.

To create a Switchboard:

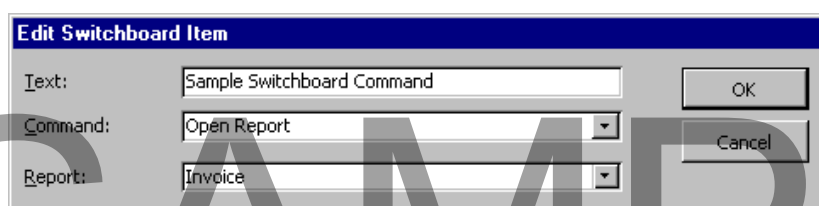
- From the main menu, select **Tools > Database Utilities > Switchboard Manager**. This opens the Switchboard Manager dialog box:



- Click **New**. This opens the **Create New** dialog box.
- Type a new name for the **switchboard**:



- Click **OK**.
- Click **Edit** to edit the switchboard properties.
- Click **New**. This opens the **Edit Switchboard Item** dialog box.
- Type the name of the **switchboard** item in the **Text** box.
- Select a command from the **Command** drop-down menu.
- Select the object to open in the third drop-down menu:

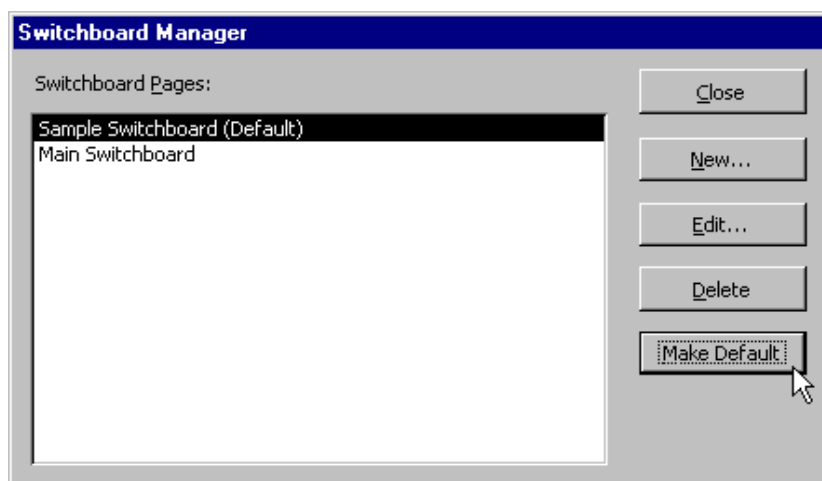


Note: The third drop-down menu will change depending on the type of **command** selected. For example, if the **Open Report** command is selected then the third drop-down menu is named **Report**.

- Click **OK**.
- Click **Close**.

To make the new switchboard the default:

- Click the **Make Default** button:



- Click **Close**.

Editing a Switchboard Item

- From the main menu, select **Tools > Database Utilities > Switchboard Manager**. This opens the Switchboard Manager dialog box.
- Select the **switchboard** to edit.
- Click **Edit**. This opens the **Edit Switchboard Page** dialog box.
- Select the switchboard item to edit.
- Click **Edit**.
- Make the edits you want.
- Click **OK**.
- Click **Close**.
- Click **Close** again to exit the **Switchboard Manager** dialog box.

Deleting a Switchboard

- From the main menu, select **Tools > Database Utilities > Switchboard Manager**. This opens the Switchboard Manager dialog box.
- Select the switchboard to delete.
- Click **Delete**.

Note: The default switchboard cannot be deleted.

- Click **Yes** to confirm the delete.
- Click **Close** to exit the **Switchboard Manager** dialog box.

Review Questions

How would you:

- Choose an Appropriate Control?
- Place Controls on a Form?

- Move a Control?
- Resize a Control?
- Set Control Properties?
- Create Page Headers and Footers?
- Create Form Headers and Footers?
- Set Form Properties?
- Work with Identifiers?
- Create a Subform?
- Create a Form with Two Subforms?
- Create Nested Subforms?
- Delete a Subform?
- Create a Modal Pop-up Form?
- Create a Modeless Pop-up Form?
- Create a Switchboard?
- Edit a Switchboard Item?
- Delete a Switchboard?

SAMPLE

End of the preview sample



This sample is approximately half of the full course. Please see the table of contents at the beginning of this document to see the full list of topics covered in the full course.

To purchase the rights to use the full training manuals at your training centre please see our web site at:

<http://www.cctglobal.com>

A courseware licence allows you to make unlimited copies for use at your training centre.

The IT Computer Courseware Library
A complete library of quality training courses

Includes Windows 7 and Office 2010 Courseware

- ▶ GET THE RIGHTS TO A COMPLETE LIBRARY OF TRAINING COURSES INCLUDING ALL THE MAJOR APPLICATIONS
- ▶ HIGH QUALITY, LOW COST COURSES
- ▶ ADD YOUR OWN NAME AND LOGOS
- ▶ PRINT AS MANY COPIES AS YOU NEED
- ▶ INTRANET VERSION ALSO AVAILABLE

The advertisement features a photograph of a diverse group of people smiling, representing the target audience for the courseware.

In addition you get HTML formatted versions of each course, included with our printable courseware.

Invest in a complete Computer Courseware Library, including Windows 7 & Office 2010

The most cost effective courseware solution for your IT training needs. Get ALL our courses, and all new courses released within 12 months.

Over
7,000
Web Pages

Included when you purchase
the 'IT Courseware Library'.

SAMPLE