

# Microsoft Access XP

Workbook - Intermediate Level



SAMPLE

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## Installing the Sample Files into the Hard Disk

### Installing the Sample Files

- Use Windows Explorer to create a folder called **Access XP Intermediate Samples**, in the **My Documents** folder.
- Copy the sample files for this course to the **My Documents\Access XP Intermediate Samples** folder. If these files have been copied to your network server, then ask your trainer/supervisor for more information about how to copy these files to your PC's hard disk.

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## Working with the Northwind Sample Database

### Installing the Northwind Database

- Open Microsoft Access 2002.
- 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.
- 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.

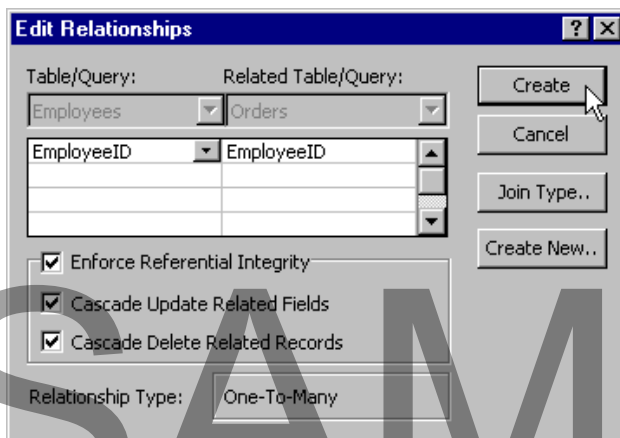
- Select **Add or Remove Features**.
- Click **Next**.
- Under **Features to Install**, select the Microsoft Access for Windows subtree.
- Under **Sample Databases**, select **Run all from My Computer**.
- Click **Update**.
- Once the installer completes, click **OK** to finish.
- Click the **Search** button on the **Database** toolbar.
- In the **Search** text box, type **Northwind**.
- Click **Search**.
- When **Northwind.mdb** appears in the **Search Results**, click on the file to open it and proceed to the next chapter.

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## Designing Tables in Access 2002

### Establishing Relationships

- With Northwind open, click **OK** on the **Northwind Traders** splash screen.
- At the Main Switchboard, click the **Display Database Window** button.
- Click the **Relationships** button on the **Database** toolbar.
- Right-click on the **relationship** between the **Employees** and **Orders** tables.
- From the pop-up menu, select **Delete**.
- Click the **Yes** button when prompted to delete the relationship.
- To re-create the relationship between the **Employees** and **Orders** tables, drag the **EmployeeID** field from the **Employees** table to the **EmployeeID** field in the **Orders** table.
- Click **Join Type** in the **Edit Relationships** dialog box.
- Select the option button labeled **2**.
- Click **OK**.
- Check the **Enforce Referential Integrity** box.
- Check the **Cascade Update Related Fields** check box.
- Check the **Cascade Delete Related Fields** check box:

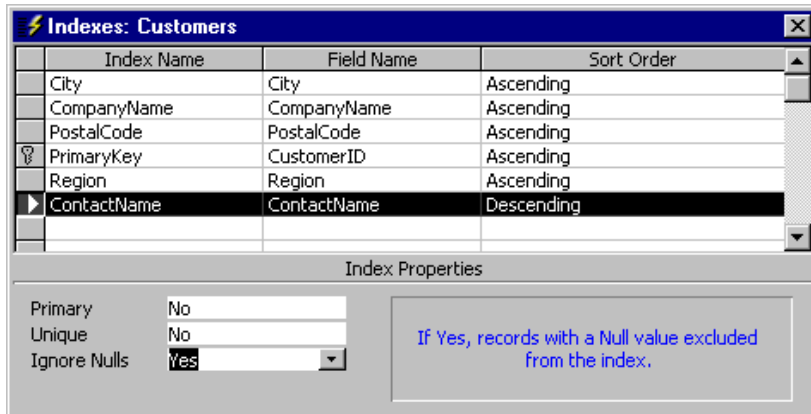


- Click **Create**.
- Click the **Save** button.
- Close the **Relationships** window.

### Working with Indexes

- Click on **Tables** in the **Objects** pane.

- Open the **Customers** table in **Design** view.
- Click the **Indexes** button on the **Table Design** toolbar.
- Type **ContactName** in the **Index Name** column.
- Select **ContactName** from the drop-down menu in the **Field Name** column.
- Select **Descending** from the drop-down menu in the **Sort Order** column.
- Select **Yes** from the **Ignore Nulls** drop-down menu in the **Index Properties** area:



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

## Working with Data Types

- Click on **Tables** in the **Objects** pane.
- Open the **Customers** table in **Design** view.
- Type a new field named **CompanySlogan** in the **Field Name** column.
- Select **Text** from the **Data Type** drop-down menu.
- In the **Field Properties** area, set the **Field Size** to 100.
- Click the **Save** button.
- Close the table.

## Designing Queries in Access 2002

### Creating Action Queries

- Click on **Queries** in the **Objects** pane.
- Click the **New** button to open the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select **Products** from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**.
- Click on the **Query Type** drop-down menu on the **Query Design** toolbar.
- Select **Update Query**.
- Select **UnitPrice** from the **Field** drop-down menu.
- Select the **Update To** section of the query grid and type **[UnitPrice]\*2**:

Field:	UnitPrice
Table:	Products
Update To:	[UnitPrice]*2
Criteria:	
or:	

- Click the **Run** button on the **Query Design** toolbar to execute the update.
- Click **Yes** to apply the changes.
- Save the update query as **Multiply Unit Price by Two**.
- Click **OK**.
- Right-click on the **Products** table in the query window.
- From the pop-up menu, select **Remove Table**.
- Click the **Show Table** button on the **Query Design** toolbar.
- Select **Orders** from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**.
- Click the **Query Type** drop-down menu on the **Query Design** toolbar.
- Select **Delete Query**.
- Select **OrderID** from the **Field** drop-down menu.
- Type **10249** in the **Criteria** section of the query grid:

Field:	OrderID
Table:	Orders
Delete:	Where
Criteria:	10249
or:	

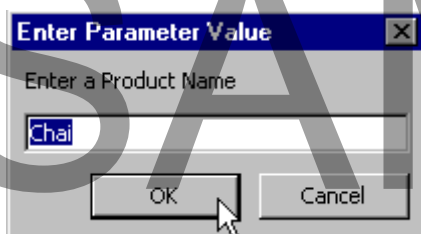
- Click the **Run** button on the **Query Design** toolbar to execute the delete.
- Click **Yes** to apply the changes.
- From the main menu, select **File > Save As**.
- Type **Delete OrderID 10249**.
- Click **OK**.
- Close the query window.

## Creating Parameter Queries

- Click on **Queries** in the **Objects** pane.
- Click the **New** button to open the **New Query** dialog box.
- Select **Design View**.
- Click **OK**.
- Select **Products** from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**.
- Select **ProductID**, **ProductName**, and **SupplierID** from the **Field** drop-down menu.
- In the Criteria text box under **ProductName**, type *[Enter a Product Name]*:

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.
- Type **Chai**.
- Click **OK**:



- Save the query as **Search By Product Name**.
- Click **OK**.
- Close the query.

## Creating Calculated Columns in Queries

- Click on **Queries** in the **Objects** pane.
- Click the **New** button to open the **New Query** dialog box.
- Select Design View.
- Click **OK**.
- Select **Products** from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**.
- Select **ProductName** and **UnitPrice** from the **Field** drop-down menu.
- In the next field type **[UnitPrice]\*10**:

Field:	ProductName	UnitPrice	Expr1: [UnitPrice]*10	
Table:	Products	Products		
Sort:				
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Criteria: or:				

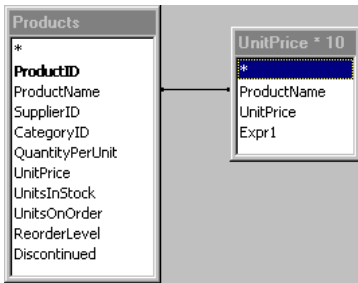
- Click the **Run** button on the **Query Design** toolbar to execute the query:

**Note:** Access automatically displays the calculated column as **Expr1**.

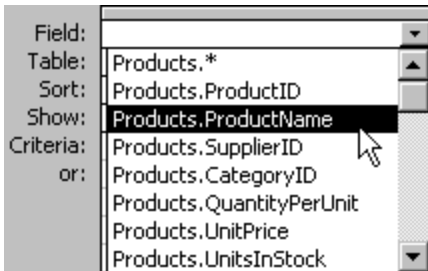
- Save the query as **UnitPrice \* 10**.
- Click **OK**.
- Close the query.

## Joining Tables

- Click **Queries** in the **Objects** pane.
- Click the **New** button to open the **New Query** dialog box.
- Select Design View.
- Click **OK**.
- Select **Products** from the **Tables** tab in the **Show Table** dialog box.
- Click **Add**.
- Select **Unit Price \* 10** from the **Queries** tab in the **Show Table** dialog box.
- Click **Add**.
- Click **Close**.
- Create a join between the tables by dragging and dropping the **ProductName** field from the **Products** table to the **ProductName** field in the **Unit Price \* 10** query:



- For the first field, select **Products.ProductName** from the **Field** drop-down menu:



- For the second field, select **Products.QuantityPerUnit** from the **Field** drop-down menu:
- For the third field, select **UnitPrice \* 10.Expr1** from the **Field** drop-down menu:

Field:	ProductName	QuantityPerUnit	Expr1
Table:	Products	Products	UnitPrice * 10
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.
- Save the query as **Join Product and Price \* 10**.
- Click **OK**.
- Close the query window.

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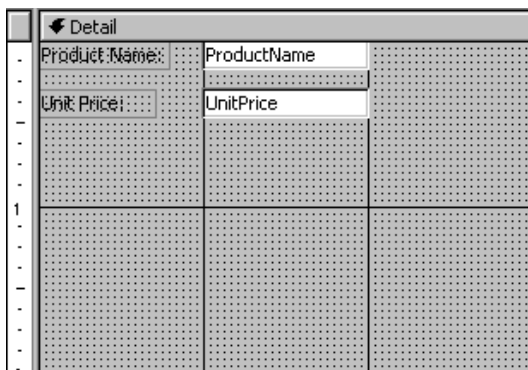
## Designing Forms in Access 2002

### Creating Data Entry Forms

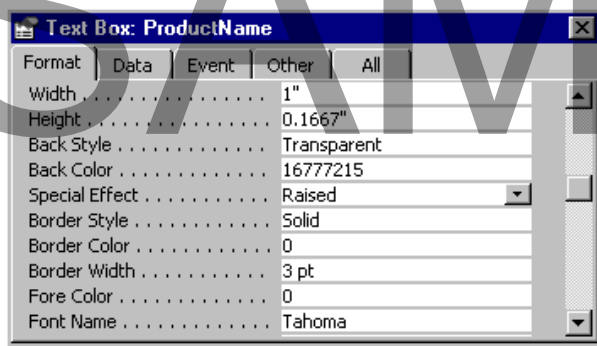
- Click **Forms** in the **Objects** pane.
- Click the **New** button.
- Select **Design View**.
- Select **Products** from the drop-down menu.
- Click **OK**.

**Note:** Close the **Form** properties dialog box if it appears.

- Drag and drop the **ProductName** and **UnitPrice** fields from the **Products** data source to the **Detail** area of the **form**:



- Right-click on the **ProductName** control.
- From the pop-up menu, select **Properties**.
- Select the **Format** tab.
- From the **Special Effect** drop down-menu, select **Raised**:

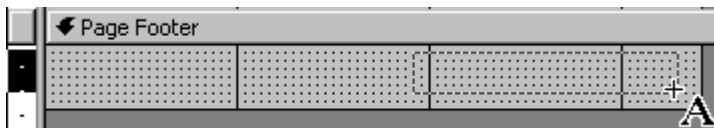


- Close the dialog box.
- Right-click in the **Detail** area of the form.

- From the pop-up menu, select **Page Header/Footer**.
- Click the **Label** control on the **Toolbox** toolbar.

**Note:** From the main menu, select **View > Toolbox** if the **Toolbox** toolbar is not open.

- Place the **Label** control on the **page footer** section of the form:



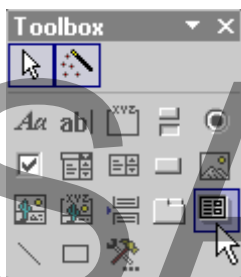
- Type **Product Entry Form**:



- Save the form as **Product Entry Form**.
- Click **OK**.
- Close the form.

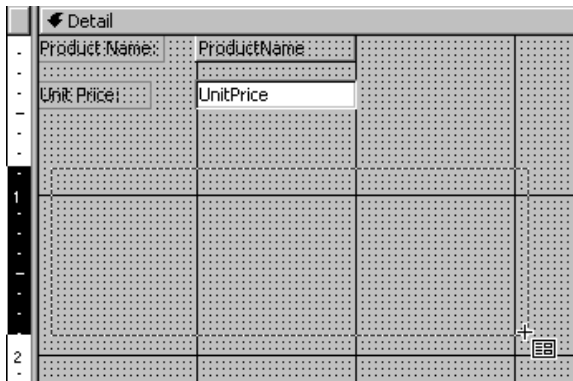
## Working with Subforms

- Open the Product Entry Form in Design view.
- Click the **Subform/Subreport** button on the **Toolbox** toolbar:



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- Create a **subform** in the **Detail** area of the form:



- Select the **Use existing Tables and Queries option** button.
- Click **Next**.
- Select **Table: Categories** from the **Tables/Queries** drop-down menu.
- Add the CategoryID, CategoryName and Description fields.
- Click **Next**.
- Select the **Choose from a list** option button.
- Click **Next**.
- Type *Show Categories Subform* as the name of the subform.
- Click **Finish**.
- Save the changes to the **Product Entry Form**.
- Close the form.

## Creating Pop-up Forms

- Open the **Product Entry Form** in Design view.
- If the **Form** properties dialog box is not open, 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:

Property	Value
Pop Up	Yes
Modal	Yes
Cycle	No
Menu Bar	
Toolbar	
Shortcut Menu	Yes
Shortcut Menu Bar	
Fast Laser Printing	Yes
Help File	
Help Context Id	0
Tag	
Has Module	No
Allow Design Changes	Design View Only

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

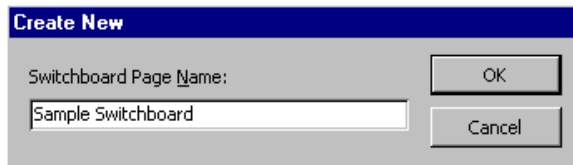
Property	Value
Pop Up	Yes
Modal	Yes
Cycle	No
Menu Bar	
Toolbar	
Shortcut Menu	Yes
Shortcut Menu Bar	
Fast Laser Printing	Yes
Help File	
Help Context Id	0
Tag	
Has Module	No
Allow Design Changes	Design View Only

- Close the **Form** properties dialog box.
- Save the changes to the **Product Entry Form**.
- Close the form.

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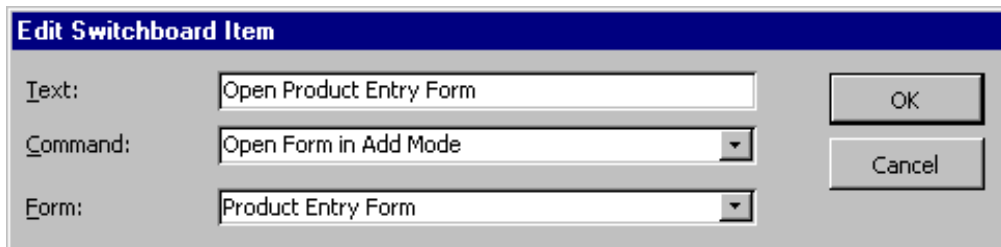
## Working with Switchboards

- From the main menu, select **Tools > Database Utilities > Switchboard Manager**.
- Click **New** in the **Switchboard Manager** dialog box.
- Type **Sample Switchboard** for the name of the **switchboard**:



The 'Create New' dialog box has a blue title bar. It contains a text field labeled 'Switchboard Page Name:' with the text 'Sample Switchboard' entered. To the right of the text field are two buttons: 'OK' and 'Cancel'.

- Click **OK**.
- Select **Sample Switchboard**.
- Click **Edit**.
- Click **New**.
- Type **Open Product Entry Form** in the Text field.
- Select **Open Form in Add Mode** from the **Command** drop-down menu.
- Select **Product Entry Form** in the **Form** drop-down menu:



The 'Edit Switchboard Item' dialog box has a blue title bar. It contains three rows of controls. The first row is labeled 'Text:' and has a text field containing 'Open Product Entry Form'. The second row is labeled 'Command:' and has a drop-down menu showing 'Open Form in Add Mode'. The third row is labeled 'Form:' and has a drop-down menu showing 'Product Entry Form'. To the right of these controls are two buttons: 'OK' and 'Cancel'.

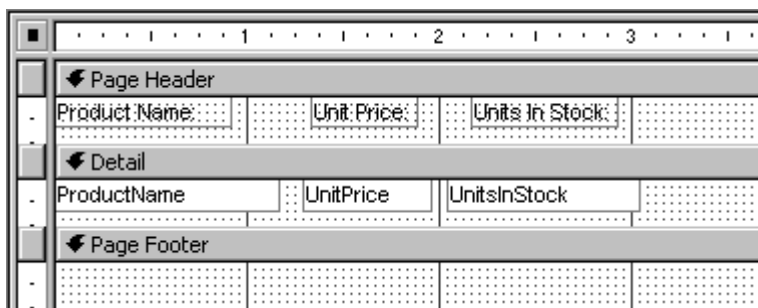
- Click **OK**.
- Click **Close**.
- Click the **Make Default** button.
- Click **Close**.

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## Designing Reports in Access 2002

### Working with Standard Reports

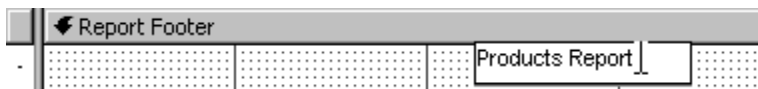
- Click **Reports** in the **Objects** pane.
- Click the **New** button.
- Select **Design View**.
- Select **Products** from the drop-down menu.
- Click **OK**.
- Drag and drop the **ProductName**, **UnitPrice**, and **UnitsInStock** fields from the products **data source** to the **Detail** area of the report.
- Cut the **Product Name**, **Unit Price**, and **Units In Stock** labels from the **Detail** area of the report and paste in the **Page Header** area of the report.
- Rearrange the labels and controls as shown below:



- Right-click in the **Detail** area of the report.
- From the pop-up menu, select **Report Header/Footer**.
- Click the **Label** control on the **Toolbox** toolbar.
- Place the **Label** control on the **Report Footer** section of the report:



- Type **Products Report**:

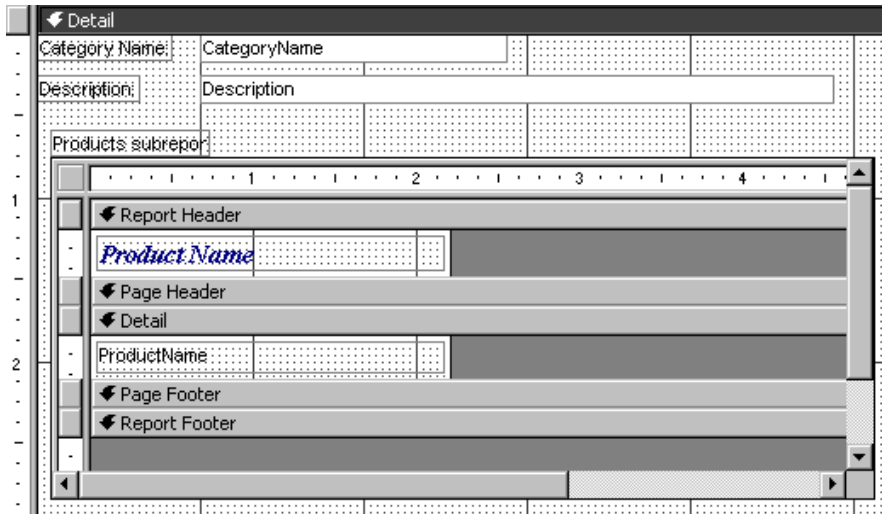


- Right-click in the **detail** area of the report.
- From the pop-up menu, select **Sorting and Grouping**.
- Select **UnitPrice** from the **Field/Expression** drop-down menu.

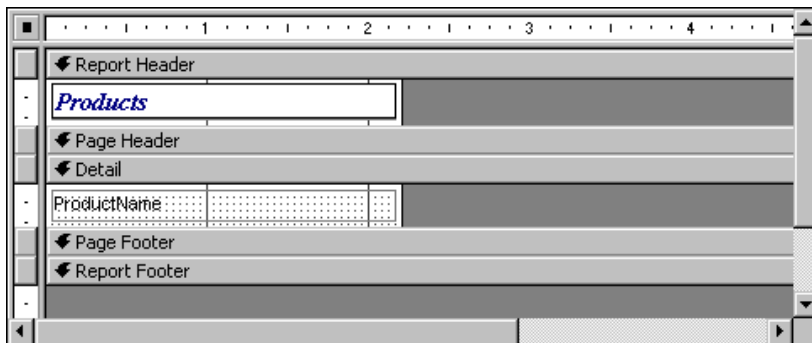


- Select the **Use existing Tables and Queries** option button.
- Click **Next**.
- Select **Table: Products** from the **Tables/Queries** drop-down menu.
- Add the **ProductName** field.
- Click **Next**.
- Select the **Choose from a list** option button:

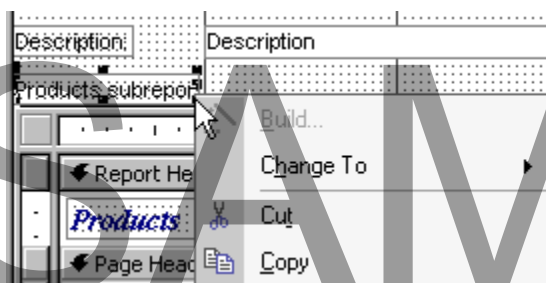
- Click **Next**.
- Type **Products subreport** as the name of the subreport.
- Click **Finish**.
- With the main report in **Design** view, move and resize the **Products subreport** as shown below:



- Change the Report Header for the Products subreport to **Products**:



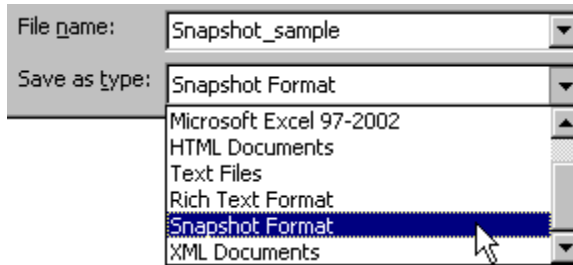
- Right-click on the **Product subreport** label just above the subreport as shown below:



- From the pop-up menu, select **Cut**.
- Save the report as **Categories and Products**.
- Click **OK**.
- Close the report.

## Working with Report Snapshots

- Click **Reports** in the **Objects** pane.
- Select the **Categories and Products** report.
- From the main menu, select **File > Export**.
- Locate your Access XP Intermediate Samples folder.
- Select **Snapshot Format** from the **Save as type** drop-down menu:

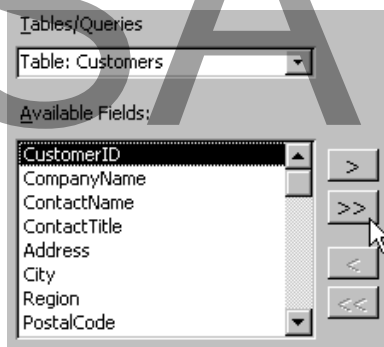


- Name the file **Categories and Products Snapshot**.
- Click **Export**.

**Note:** To see a sample of this snapshot report, open *Categories and Reports Snapshot Sample.snp* in your Access XP Intermediate Samples folder.

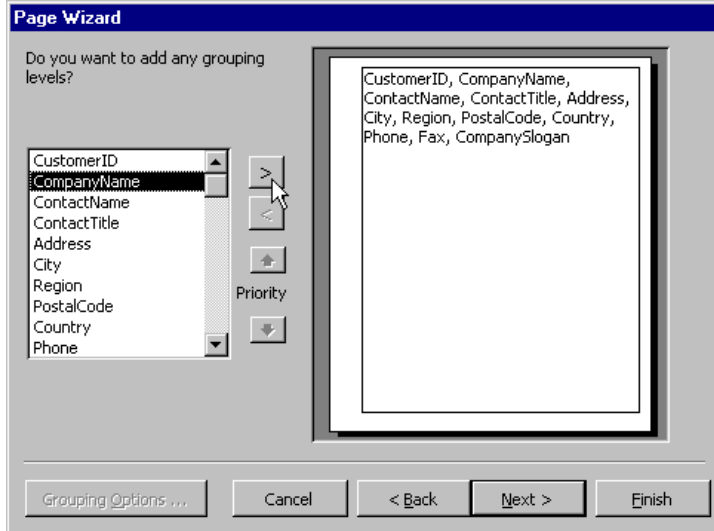
## Developing Data Access Pages

- Select **Pages** in the **Objects** pane.
- Click the **New** button.
- Select **Page Wizard**.
- Select **Customers** from the drop-down menu.
- Click **OK**.
- Select all fields from the **Available Fields** list:

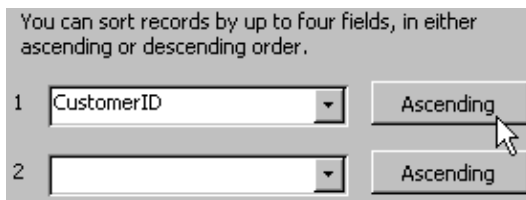


- Click **Next**.

- Select **CompanyName** for the grouping level:



- Click **Next**.
- From the sort order drop-down menu, select **CustomerID**.
- Set the sort order as **Ascending**:



- Click **Next**.
- Type **Customers** as the name for the **data access page**.
- Click **Finish**.
- This opens the **Customers** data access page in **Design** view.
- Save the file as **Customers.htm** in your Access XP Intermediate Samples folder.
- Click **Save**.
- Close the **Customers** data access page.

**Note:** To see a sample of what the **Customers** data access page should look like, open the **Customers Sample.htm** in your **Access XP Intermediate Samples** folder.

## Working with PivotTables and PivotCharts

### Creating Pivot Tables and Pivot Charts

- Click **Queries** in the **Objects** pane.
- Double-click the **Quarterly Orders by Product** query to open it in **Datasheet** view.
- From the main menu, select **View > PivotTable View**.
- From the **Pivot Table Field List** toolbox, drag and drop the **Product Name** field on the **row fields** portion of the worksheet:



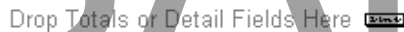
- Drag and drop the **OrderYear** field on the **filter fields** portion of the worksheet:



- Drag and drop the **CustomerID** field on the **column fields** portion of the worksheet:



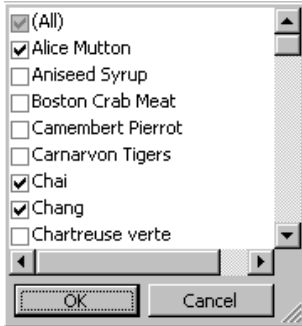
- Drag and drop the **Qtr 1** field on the **detail fields** portion of the worksheet:



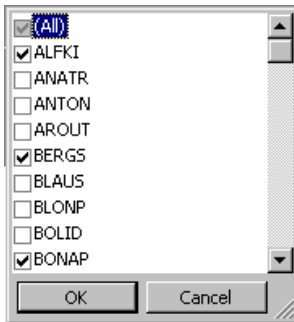
- Click the **Product Name** drop-down menu.
- Deselect the **All** check box.

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- Check the **Alice Mutton**, **Chai**, and **Chang** boxes:



- Click **OK**.
- Click the **CustomerID** drop-down menu.
- Deselect the **All** check box.
- Check the **ALFKI**, **BERGS**, and **BONAP** boxes:

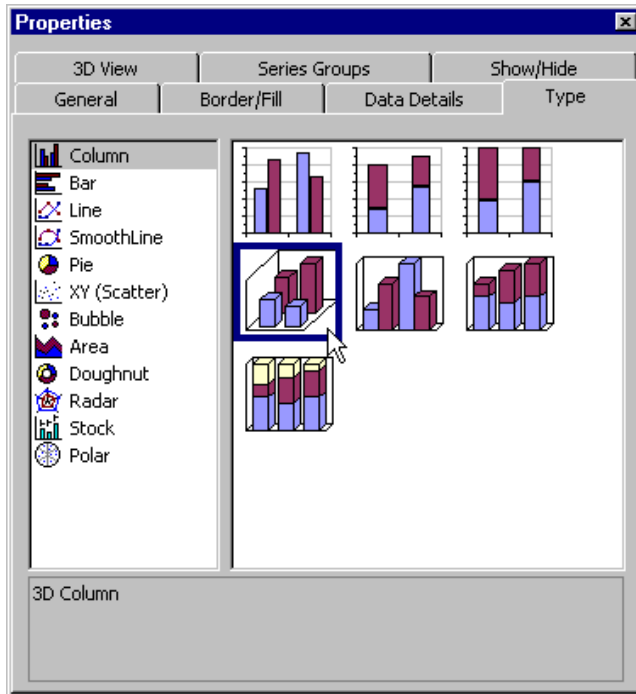


- Click **OK**.
- Save the changes.
- From the main menu, select **View > PivotChart View**.
- Drag and drop the **Qtr 1**, **Qtr 2**, **Qtr 3**, and **Qtr 4** fields on the **data fields** portion of the worksheet:



- From the main menu, select **PivotChart > Chart Type**.
- Click the **Type** tab.
- Change the chart type to a **3D Column** chart:

SAMPLE



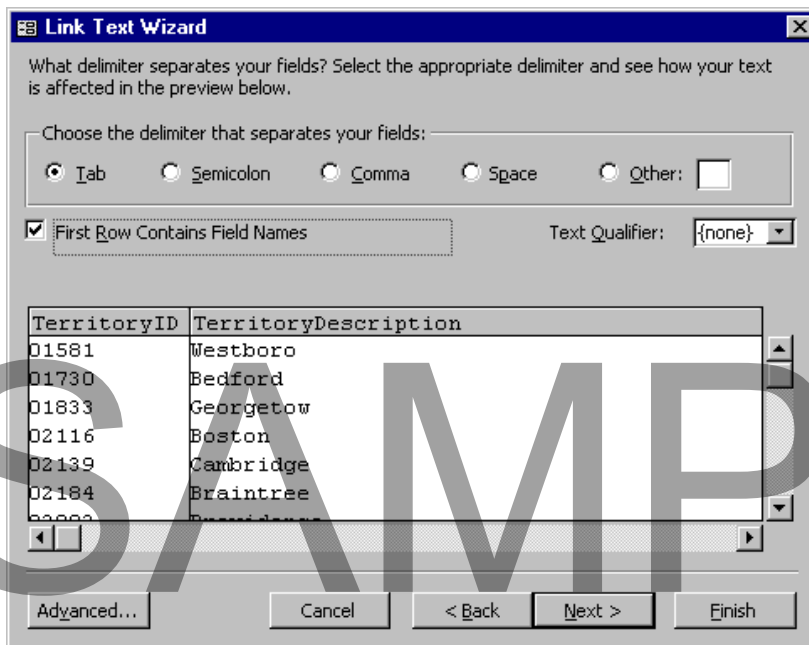
- Save the changes.
- Close the **Quarterly Orders by Product** pivot chart worksheet.

SAMPLE

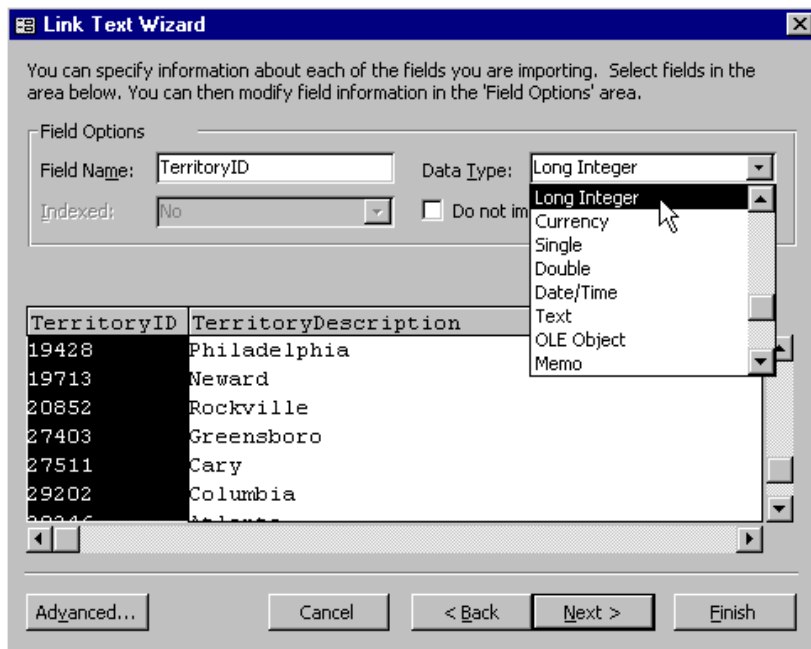
## Importing and Exporting

### Linking to External Data Sources

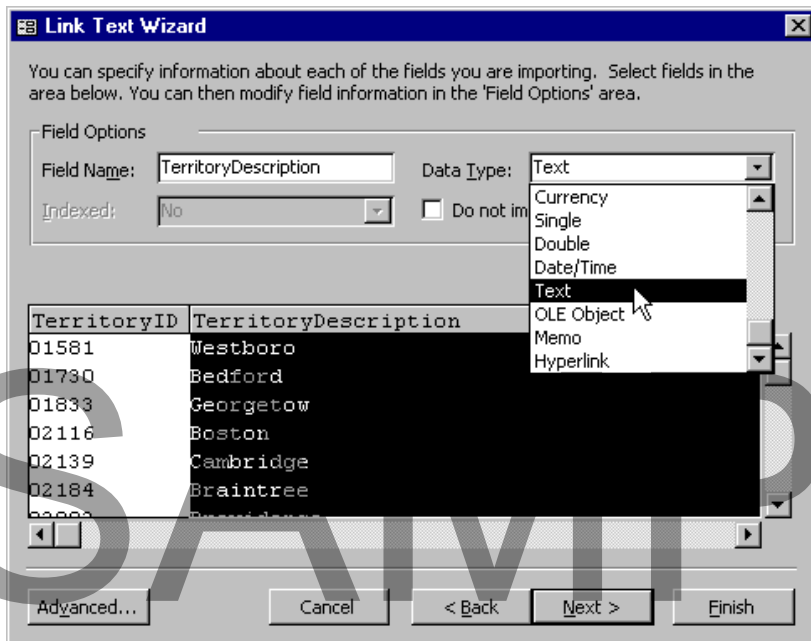
- Click **Tables** in the **Objects** pane.
- Click the **New** button.
- Select **Link Table**.
- Click **OK**.
- From the Files of type drop-down menu, select **Text Files (\*.txt; \*.csv; \*.tab; \*.asc)**.
- Locate your Access XP Intermediate Samples folder.
- Select the **Territories.txt** file.
- Click **Link**.
- Click the **Delimited** option button.
- Click **Next**.
- Click the **Tab** option button.
- Check the **First Row Contains Field Names** check box:



- Click **Next**.
- Select the **TerritoryID** column.
- From the **Data Type** drop-down menu, select **Long Integer**:



- Select the **TerritoryDescription** column.
- From the **Data Type** drop-down menu, select **Text**:

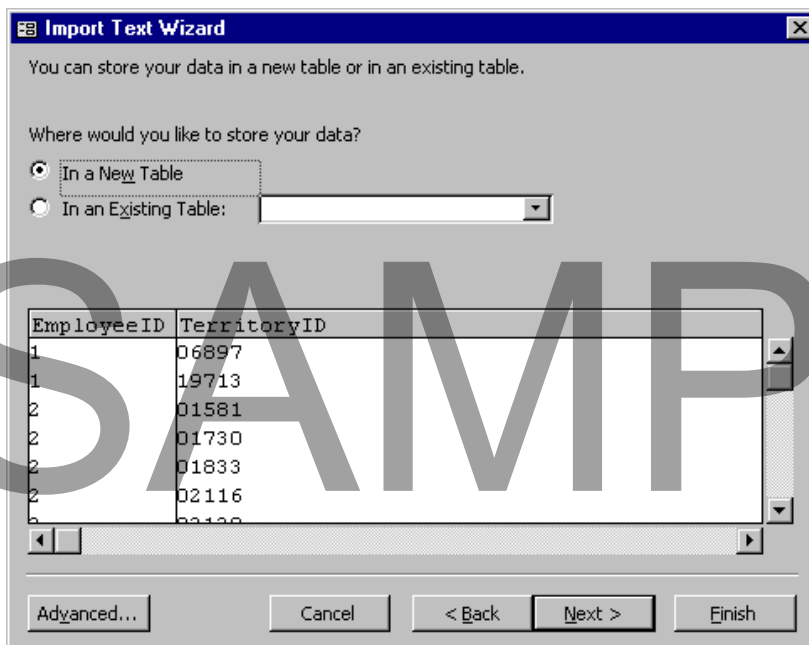


- Scroll to the right and select the **RegionID** column.
- From the **Data Type** drop-down menu, select **Integer**.
- Click **Next**.
- Name the linked table **Territories**.
- Click **Finish**.

- Click **OK** on the confirmation pop-up dialog box.

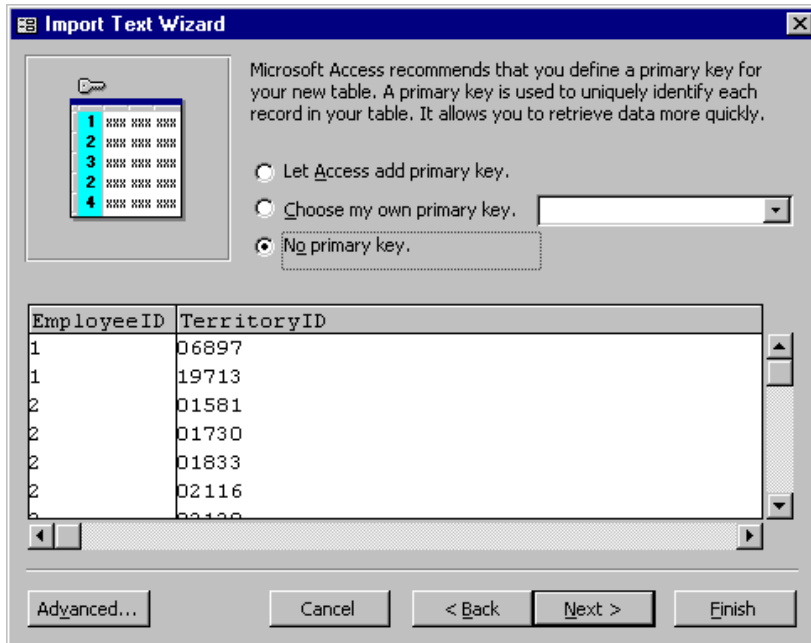
## Importing Data into Access

- Click **Tables** in the **Objects** pane.
- Click the **New** button.
- Select **Import Table**.
- Click **OK**.
- This opens the **Import** dialog box.
- From the Files of type drop-down menu, select **Text Files (\*.txt; \*.csv; \*.tab; \*.asc)**.
- Locate your Access XP Intermediate Samples folder.
- Select the **EmployeeTerritories.txt** file.
- Click **Import**.
- Click the **Delimited** option button.
- Click **Next**.
- Click the **Tab** option button.
- Check the **First Row Contains Field Names** check box.
- Click **Next**.
- Click the **In a New Table** option button:



- Click **Next**.
- Accept the defaults and click **Next**.

- Select the **No primary key** option button:



- Click **Next**.
- Name the new imported table **EmployeeTerritories**.
- Click **Finish**.
- Click **OK** on the confirmation pop-up dialog box.

## Exporting Data from Access

- Click **Tables** in the **Objects** pane.
- Select the **Products** table.
- From the main menu, select **File > Export**.
- Locate your Access XP Intermediate Samples folder.
- Type **Products** for the File name.
- From the Save as type drop-down menu, select **Text Files (\*.txt; \*.csv; \*.tab; \*.asc)**.
- Click **Export**.
- Click the **Delimited** option button.
- Click **Next**.
- Click the **Tab** option button.
- Check the **First Row Contains Field Names** check box.
- Click **Next**.
- Click **Finish**.
- Click **OK**.

SAMPLE

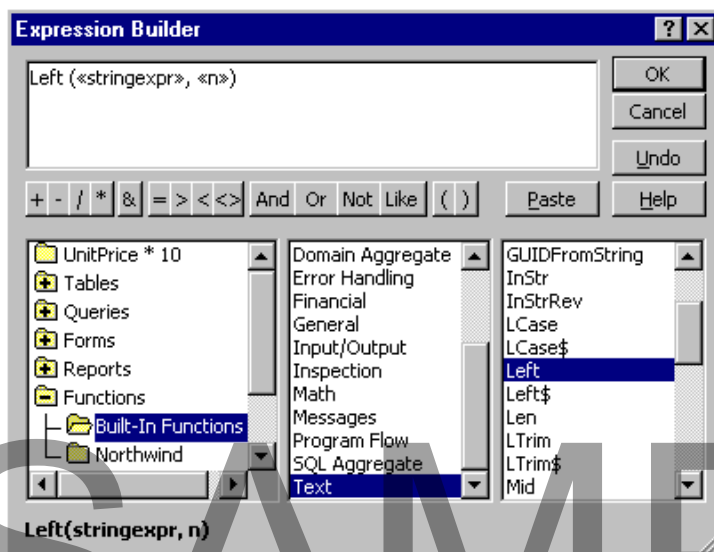
## Building Expressions

### Using the Expression Builder

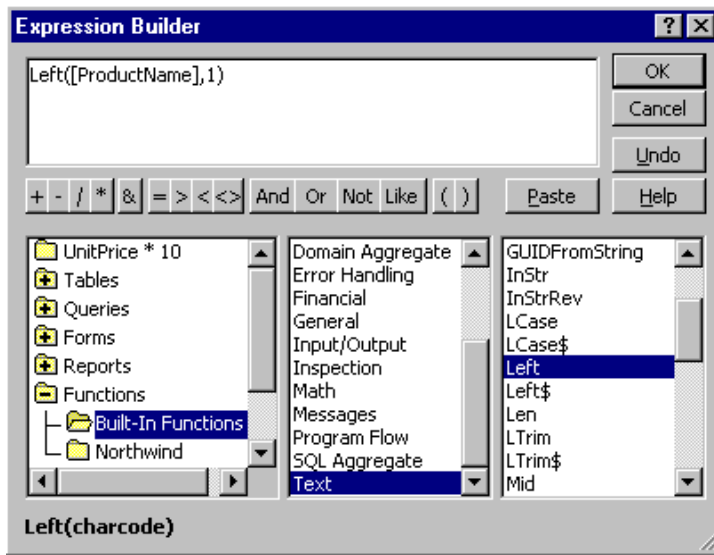
- Click **Queries** in the **Objects** pane.
- Open the **UnitPrice \* 10** query in **Design** view.
- Click in a blank field on the query grid.
- Click the **Build** button on the **Query Design** toolbar:



- In the **Expression Builder**, double-click the **Functions** folder.
- Click **Built-In Functions**.
- Click **Text**.
- Double-click the **Left** function to add it to the expression builder pane:



- Replace «stringexpr» with **[ProductName]**.
- Replace «n» with **1**:



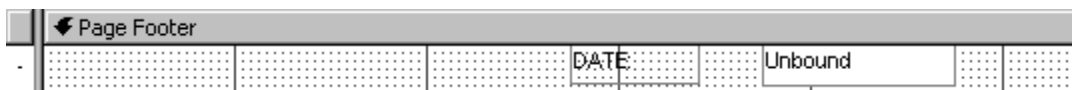
- Click **OK**.
- Rename the column from **Expr2** to **Rolodex**.
- Change the sort order to **Ascending**:

Field:	Rolodex: Left([ProductName],1)
Table:	
Sort:	Ascending
Show:	<input checked="" type="checkbox"/>
Criteria:	
or:	

- **Run** the query.
- Save the changes.
- Close the **UnitPrice \* 10** query.

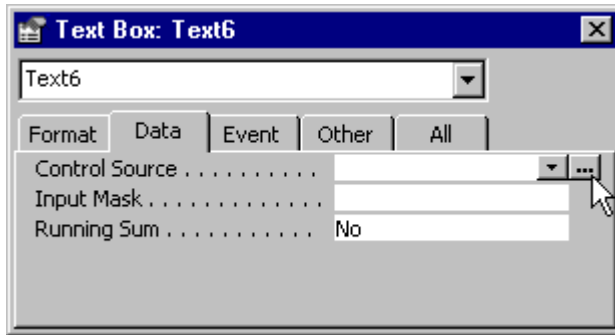
## Using Common Built-in Functions

- Click **Reports** in the **Objects** pane.
- Open the **Categories and Products** report in Design view.
- Click the **Text Box** button on the **Toolbox** toolbar.
- Add a **Text Box** control to the **Page Footer** section of the report.
- Label the new control **DATE**:

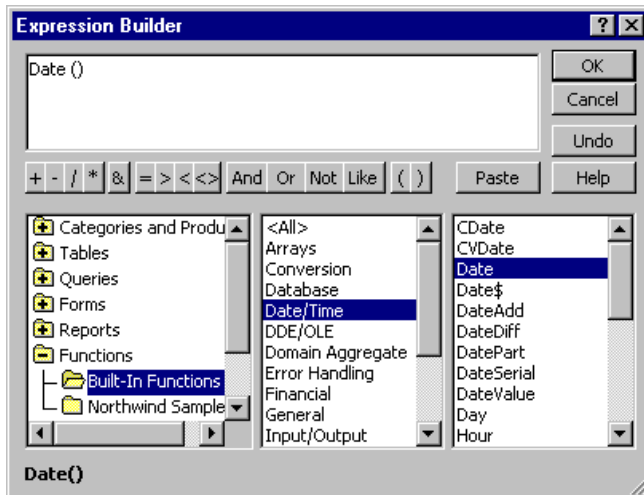


- Double-click on the **unbound** portion of the **DATE** control.
- Click the **Data** tab.

- Click the ellipses next to the **Control Source** field:



- Double-click **Functions**.
- Click **Built-In Functions**.
- Click **Date/Time**.
- Double-click **Date** to add it to the control:



- Click **OK**.
- Save the changes to the **Categories and Products** report.
- Close the report.
- Exit Microsoft Access 2002.

SAMPLE