

Teach Yourself

VISUALLY™

Microsoft® Office
Access™ 2007



by Faithe Wempen



Wiley Publishing, Inc.

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Access™ 2007



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Teach Yourself VISUALLY™

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Published by
Wiley Publishing, Inc.
111 River Street
Hoboken, NJ 07030-5774

Published simultaneously in Canada

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Library of Congress Control Number: 2006936756

ISBN: 978-0-470-04591-6

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

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Author's Acknowledgments

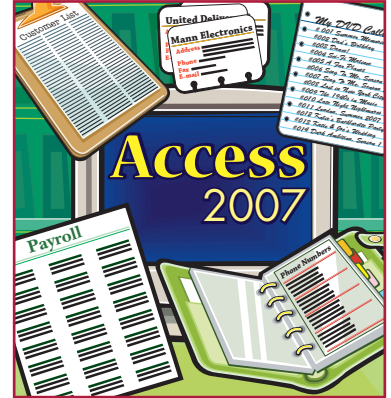
A big thanks to my great editors at Wiley for their hard work on this book.

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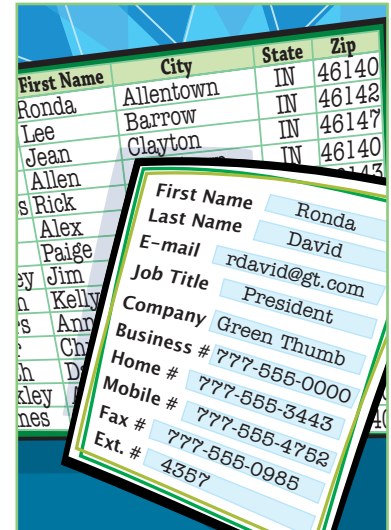
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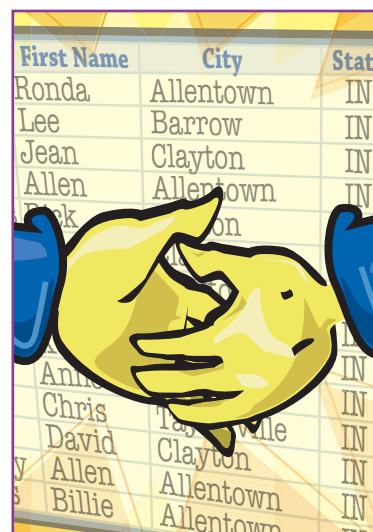
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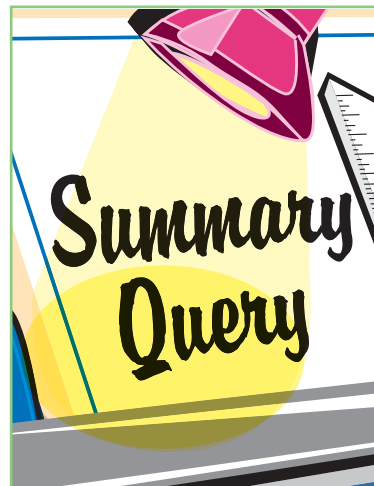


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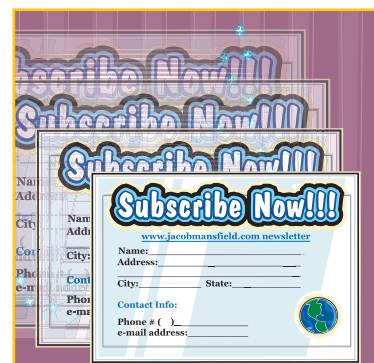
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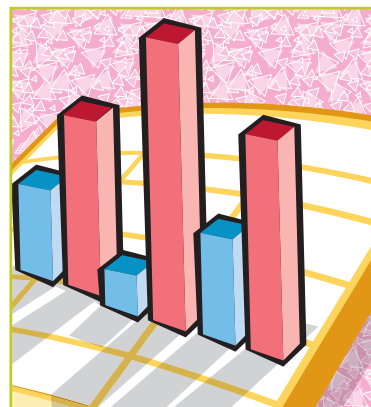
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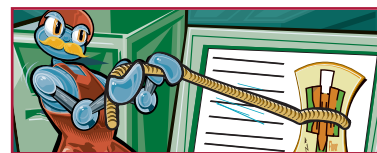
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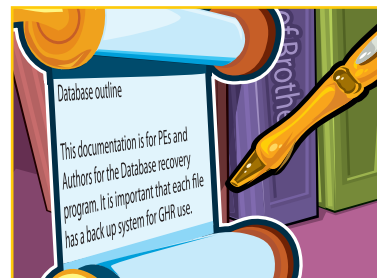
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How to Use This Book

How to Use This *Teach Yourself VISUALLY* Book

Do you look at the pictures in a book or newspaper before anything else on a page? Would you rather see an image instead of read about how to do something? Search no further. This book is for you. Opening *Teach Yourself VISUALLY Microsoft Office Access 2007* enables you to read less and learn more about Microsoft Office Access 2007.

Who Needs This Book

This book is for a reader who has never used this particular application. It is also for more computer-literate individuals who want to expand their knowledge of the different features that Access has to offer. I assume that you are already familiar with Windows XP or Windows Vista, whichever one you have on your PC, with basic skills such as clicking, double-clicking, dragging, and opening/closing windows.

Book Organization

Teach Yourself VISUALLY Microsoft Office Access 2007 has 15 chapters:

Chapter 1, "**Getting Started with Access 2007**," covers starting and exiting the program, opening files and objects, and creating a new database file.

Chapter 2, "**Entering and Editing Data**," discusses adding records to a database table, editing and deleting records, and viewing datasheets.

In Chapter 3, "**Working with Tables**," you will learn how to create new tables and SharePoint lists, set primary keys and composite keys, and rename and delete tables.

Chapter 4, "**Working with Fields**," covers setting up fields within tables, including inserting and deleting them, changing their data types, setting field properties, and constructing input masks and validation rules.

Chapter 5, "**Working with Relationships and Lookups**," covers creating relationships between tables, viewing object dependencies, and creating lookups from one table to another.

Chapter 6, "**Finding and Filtering Data**," discusses Find and Replace, filters by selection and by form, and saving filters as queries.

Chapter 7, "**Creating Simple Queries**," explains how to create queries with the Simple Query Wizard and in Query Design view, how to add sorting and aliases to queries, and how to define basic criteria.

Chapter 8, "**Creating More Complex Queries**," covers defining a calculated field, running action queries, and creating queries that prompt the user for parameters.

Chapter 9, "**Creating Forms**," covers building basic forms with the Form Wizard and in Form Design view.

In Chapter 10, "**Modifying and Formatting Forms**," you will find out how to create forms with multiple sections, apply AutoFormat styles, and create conditional formatting and tabbed sections.

Chapter 11, "**Creating and Formatting Reports**," covers creating and printing reports and changing a report's layout.

Chapter 12, "**Grouping and Summarizing Data**," explains creating summary reports, reports with aggregate functions, and PivotTables.

Chapter 13, "**Creating Mailing Labels and Charts**," describes creating and formatting labels and working with PivotChart views.

Chapter 14, "**Working with External Data**," covers linking, importing, and exporting data in popular formats, including Excel, Access, HTML, and plain text.

Chapter 15, "**Maintaining a Database**," covers setting up a trusted location, saving and opening files between different versions of Access, backing up a database, and compacting and repairing a database.

Chapter Organization

Each chapter of this book consists of sections, all listed in the book's table of contents. A *section* is a set of steps that shows you how to complete a specific computer task.

Each section, usually contained on two facing pages, has an introduction to the task at hand, a set of full-color screen shots and steps that walk you through the task, and a set of tips. This format enables you to quickly look at a topic of interest and learn it instantly.

Chapters group together seven or more sections with a common theme. A chapter may also contain pages that give you the background information needed to understand the sections in a chapter.

Using the Mouse

This book uses the following conventions to describe the actions that you perform when using the mouse:

Click

Press your left mouse button once. You generally click your mouse on something to select something on the screen.

Double-Click

Press your left mouse button twice. Double-clicking something on the computer screen generally opens whatever item you have double-clicked.

Right-Click

Press your right mouse button. When you right-click anything on the computer screen, the program displays a shortcut menu containing commands specific to the selected item.

Click and Drag and Release the Mouse

Move your mouse pointer and hover it over an item on the screen. Press and hold down the left mouse button. Now, move the mouse to where you want to place the item and then release the button. You use this method to move an item from one area of the computer screen to another.

The Conventions in This Book

A number of typographic and layout styles have been used throughout *Teach Yourself VISUALLY Microsoft Office Access 2007* to distinguish different types of information.

Bold

Bold type represents the names of commands and options that you interact with. Bold type also indicates text and numbers that you must type into a dialog box or window.

Italics

Italic words introduce a new term and are followed by a definition.

Numbered Steps

You must perform the instructions in numbered steps in order to successfully complete a section and achieve the final results.

Bulleted Steps

These steps point out various optional features. You do not have to perform these steps; they simply give additional information about a feature.

Indented Text

Indented text tells you what the program does in response to you following a numbered step. For example, if you click a certain menu command, a dialog box may appear, or a window may open. Indented text may also tell you what the final result is when you follow a set of numbered steps.

Notes

Notes give additional information. They may describe special conditions that may occur during an operation. They may warn you of a situation that you want to avoid, for example the loss of data. A note may also cross-reference a related area of the book. A cross-reference may guide you to another chapter or another section with the current chapter.

Icons and Buttons

Icons and buttons are graphical representations within the text. They show you exactly what you need to click to perform a step.



You can easily identify the tips in any section by looking for the TIPS icon. Tips offer additional information, including tips, hints, and tricks. You can use the TIPS information to go beyond what you have learned in the steps.

Operating System Differences

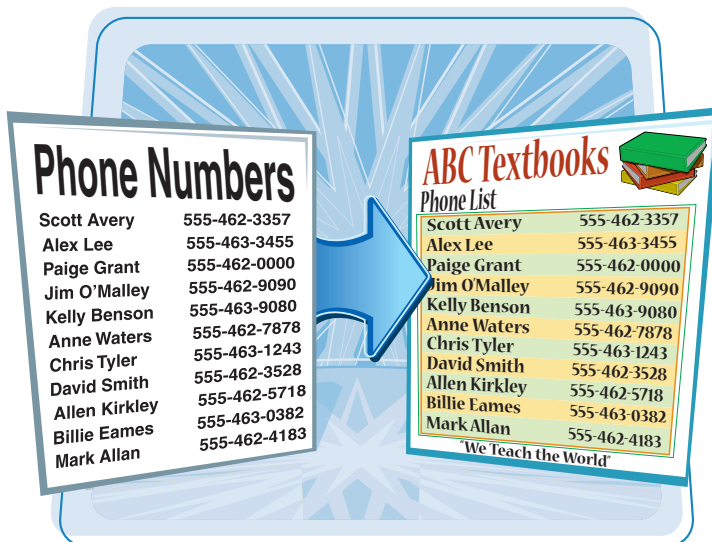
This book depicts Microsoft Office Access 2007 running under Windows Vista. If you are using Windows XP, you will notice minor differences in dialog boxes in which you are saving or opening files.

In order to get this information to you in a timely manner, this book was based on a prerelease version of Microsoft Vista/Microsoft Office 2007. There may be some minor changes between the screen shots in this book and what you see on your desktop. As always, Microsoft has the final word on how programs look and function; if you have any questions or see any discrepancies, consult the online help for further information about the software.

CHAPTER

1

Getting Started with Access 2007

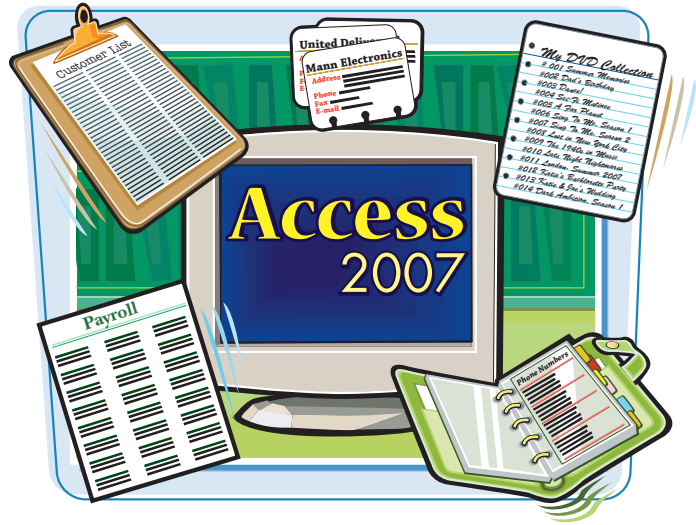


Are you new to Access or upgrading to the latest version? This chapter explains how to start a database and navigate through the new-and-improved Microsoft Office Access 2007 interface.

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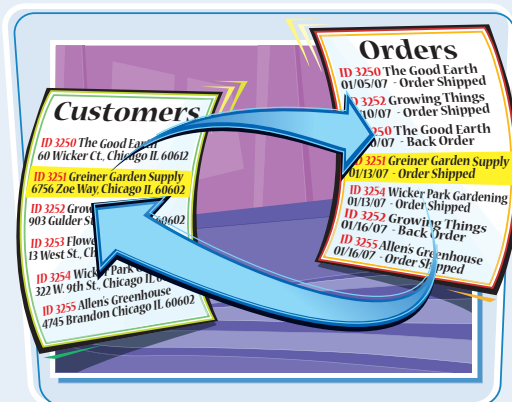
An Introduction to Access

Microsoft Access 2007 is a program for creating databases to store business or personal information. You can use Access to create, retrieve, and manage large or small collections of information.



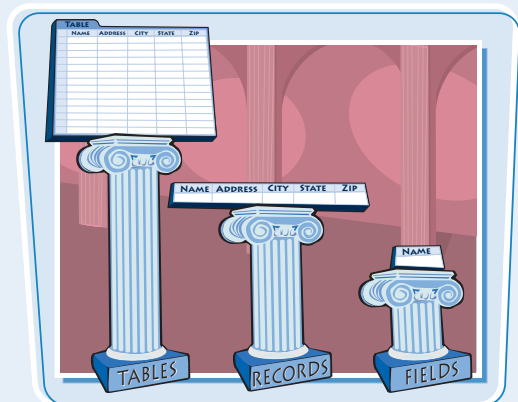
Relational Databases

Microsoft Access creates *relational databases* – that is, databases that can contain multiple tables with links between them. For example, a business may have a Customers table for storing customer contact information and an Orders table for storing information about orders placed. Each customer in the Customers table has a unique ID, and each order in the Orders table references a specific customer ID.



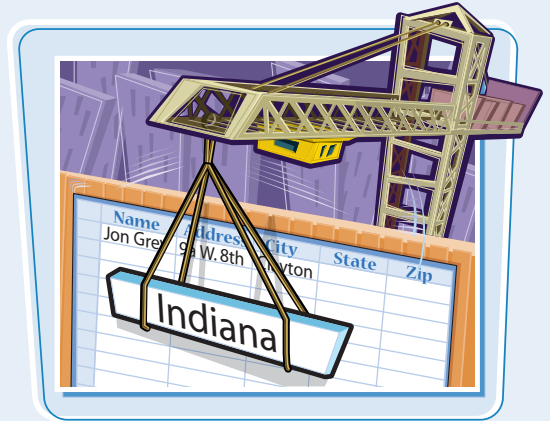
Tables, Records, and Fields

In Access, data is stored in *tables*, and each individual entry in the table is called a *record*. For example, in a Customers table, the information about each customer is a separate record. Each record is composed of one or more *fields* that contain individual pieces of data. For example, customer fields may include Name, Address, City, State, and Zip.



Datasheets and Forms

By default, each table appears as a spreadsheet grid called a *datasheet*. You can type directly into a datasheet. To make data entry more convenient, some people choose to create onscreen *forms*, which are like dialog boxes that prompt for field entries. An attractively formatted form is easier and more pleasant to use to enter new records than a plain datasheet.

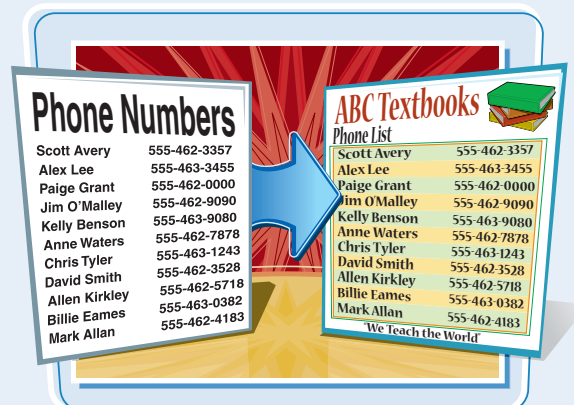


Filters and Queries

It is often useful to display a filtered view of a table. You can filter a table to show only certain records, only certain fields, or both. You can run a one-time filter, or you can create a *query*, which is like a saved filter. Queries also enable you to combine data from multiple related tables into a single datasheet of results.

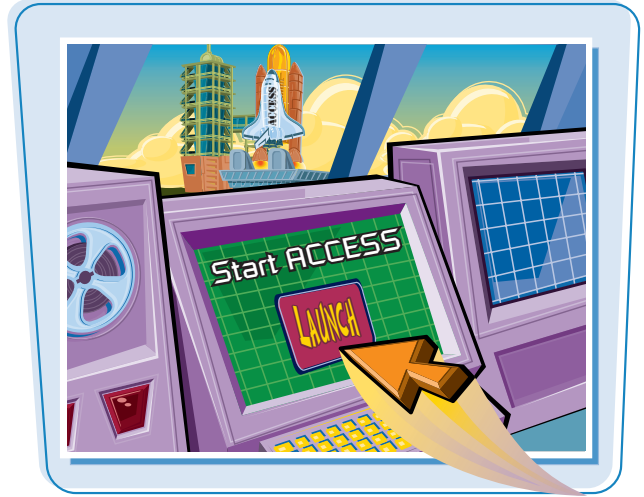
Reports

Tables and query results appear in plain datasheets, which are not very attractive when printed. Reports present data from tables and queries in an attractive, customizable format – complete with titles, headers and footers, and even logos and graphics.



Start and Exit Access

Before you can create or open a database file, you must first start Access. When you are finished working with Access, you should close the program.



Start and Exit Access

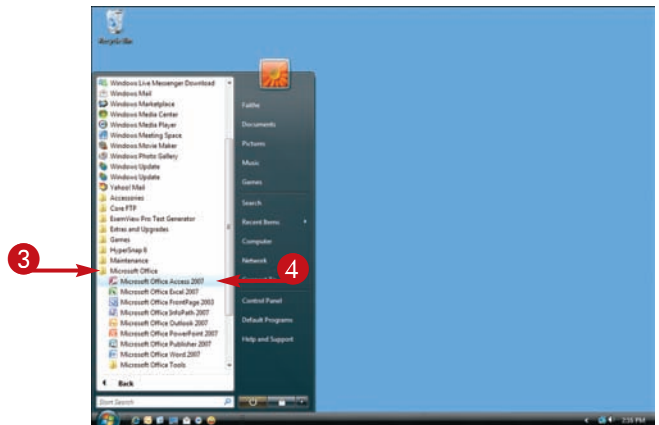
START ACCESS

- 1 Click **Start**.
- 2 Click **All Programs**.



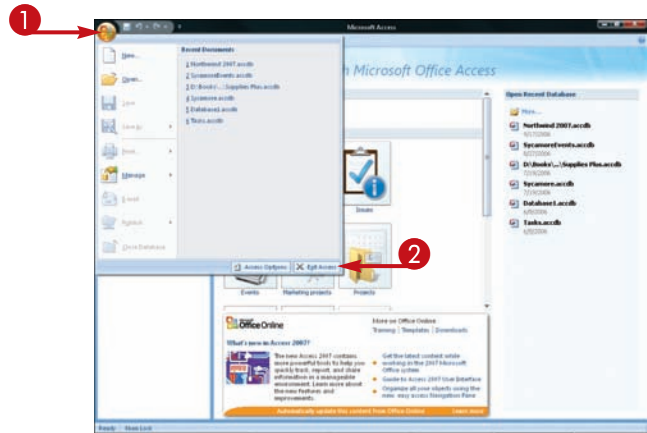
- 3 Click **Microsoft Office**.
- 4 Click **Microsoft Office Access 2007**.

The Access program window opens, and the Getting Started with Microsoft Office Access screen appears.



EXIT ACCESS USING THE OFFICE BUTTON

- 1 Click the Office button ().
- 2 Click **Exit Access**.



EXIT ACCESS USING THE CLOSE BUTTON

- 1 Click the Close button ().

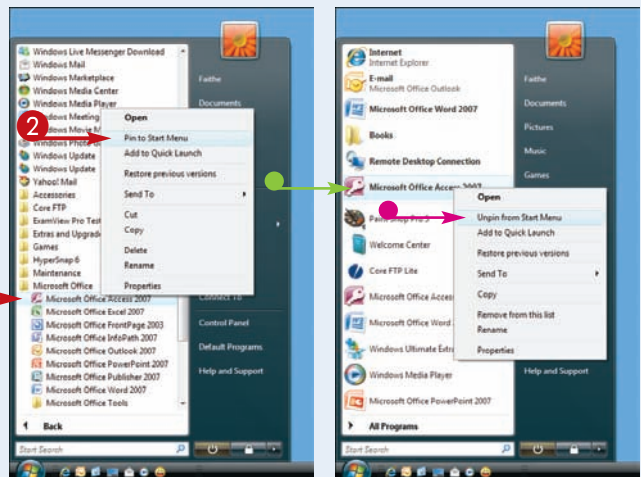


TIP

Can I start Access from the shortcut above All Programs on the Start menu?

Yes, if Access appears there. That is a list of recently used programs, and it is constantly changing with your Windows usage. To permanently pin the Access shortcut to that top-level menu, follow these steps:

- 1 Right-click **Microsoft Office Access 2007**.
 - 2 Click **Pin to Start Menu**.
- The shortcut appears at the top of the Start menu.
 - To unpin it from there, right-click it and choose **Unpin from Start Menu**.



Create a Blank Database

A blank database contains no database objects: no tables, no data, and no helper items such as queries or forms. It provides the freedom to create exactly the objects that you want for your project.

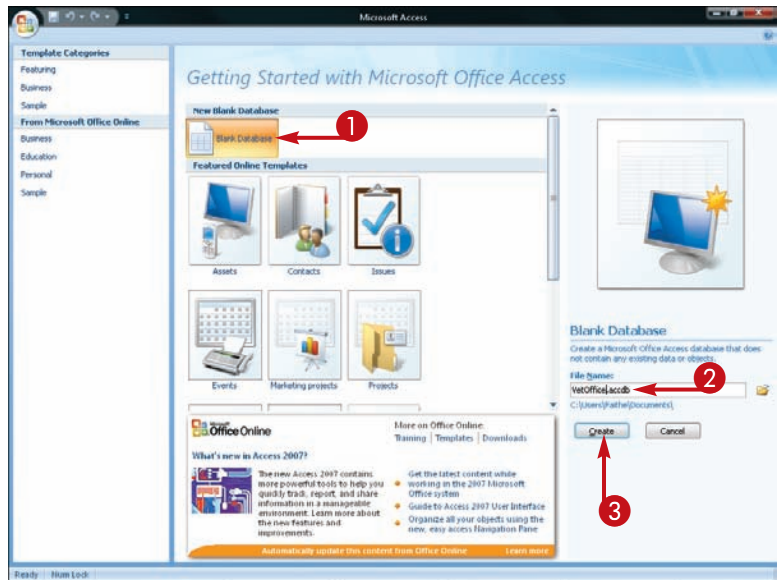


Create a Blank Database

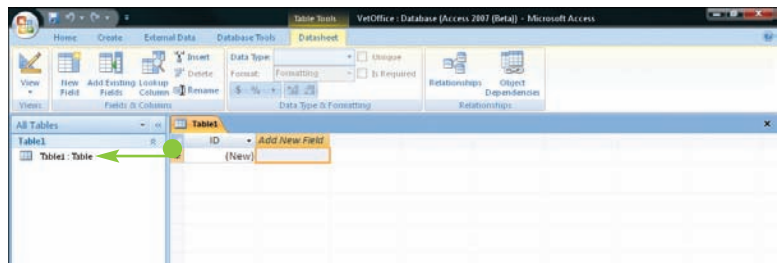
- 1 From the Getting Started with Microsoft Office Access window, click **Blank Database**.

The Blank Database options appear.

- 2 Type a name for the database file.
- 3 Click **Create**.



- A new database opens, with a new blank table started.

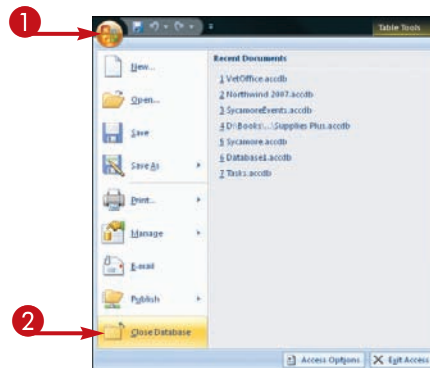


You can close a database without closing Access 2007 itself. Multiple databases can be open at once, but closing a database when you are finished with it frees up your PC's memory.



Close a Database

- 1 Click .
- 2 Click **Close Database**.



The Getting Started with Microsoft Office Access screen reappears.



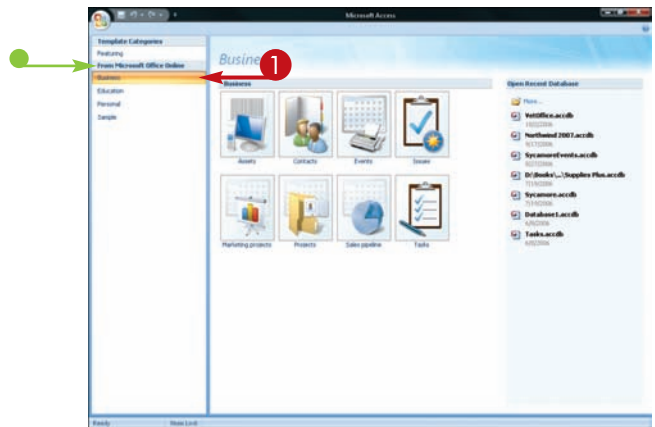
Create a Database Using a Template

You can create a new database based on a template. Templates provide a jumpstart in creating a database by supplying tables, forms, and queries that you are likely to need.



Create a Database Using a Template

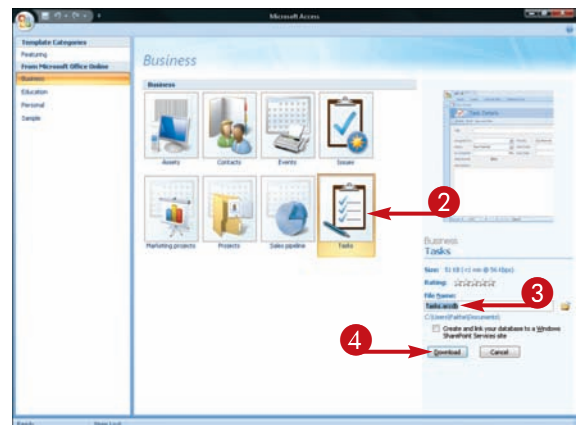
- 1 From the Getting Started with Microsoft Office Access screen, click the template category that you want.
- 2 The templates you see may be different than shown here.




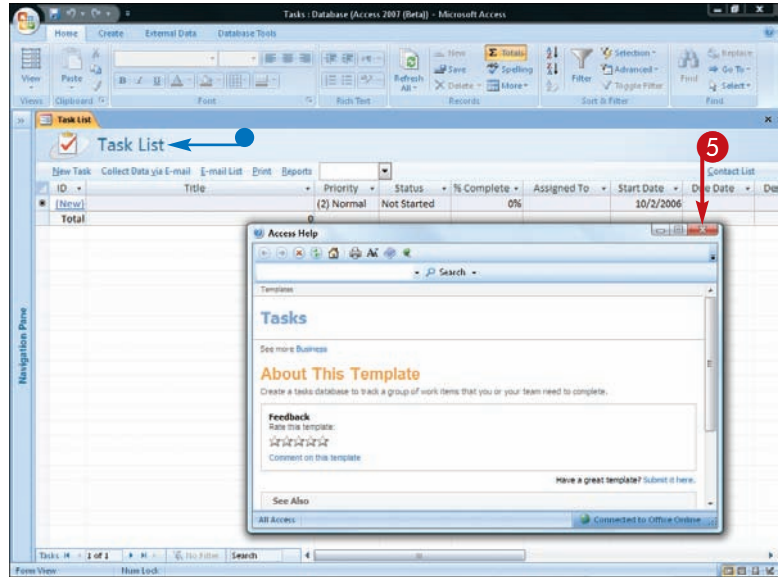
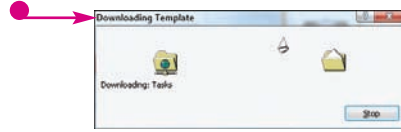
The screen for the template that you chose appears.

- 2 Click the template that best matches your needs.
- 3 Type a name for the database file.
- 4 Click **Download**.

Note: If you chose a template stored on your local hard drive, the button name in step 4 is **Create**.




- For an online template, the template is downloaded from the Internet.
- A form appears. The form and its appearance depend on the template that you used.
- 5 Click  to close the Access Help box.

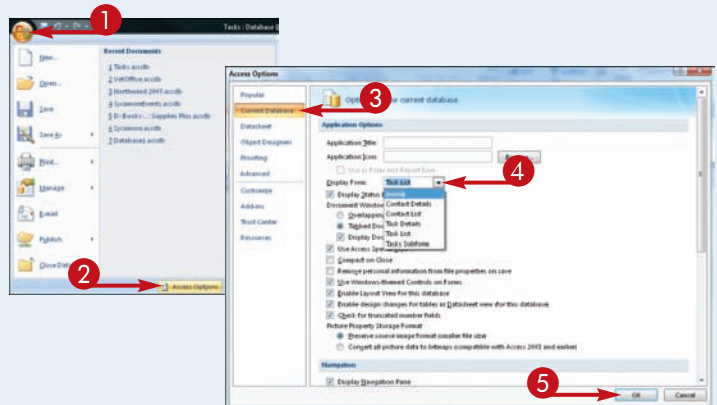


TIP

How can I prevent the startup form from opening when a database opens?

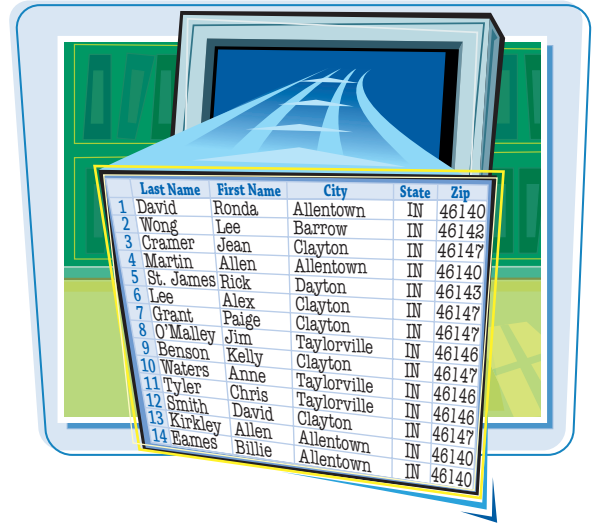
Databases based on Microsoft-supplied templates commonly load a startup form as a navigational aid. To prevent the form from opening automatically, follow these steps:

- 1 Click .
- 2 Click **Access Options**.
The Access Options dialog box appears.
- 3 Click **Current Database**.
- 4 Click here and then select **None**.
- 5 Click **OK**.



Open a Database File

You can open a database that you previously created to continue creating its structure, entering data into it, or analyzing its data. Database files can be stored on a local hard drive or on a network or SharePoint server.



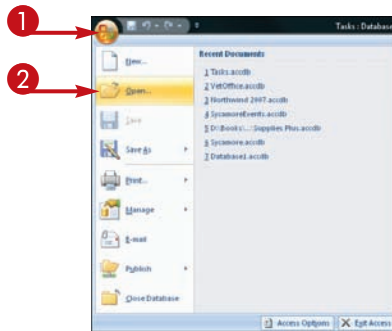
Open a Database File

BROWSE FOR AND OPEN A DATABASE FILE

1 Click .

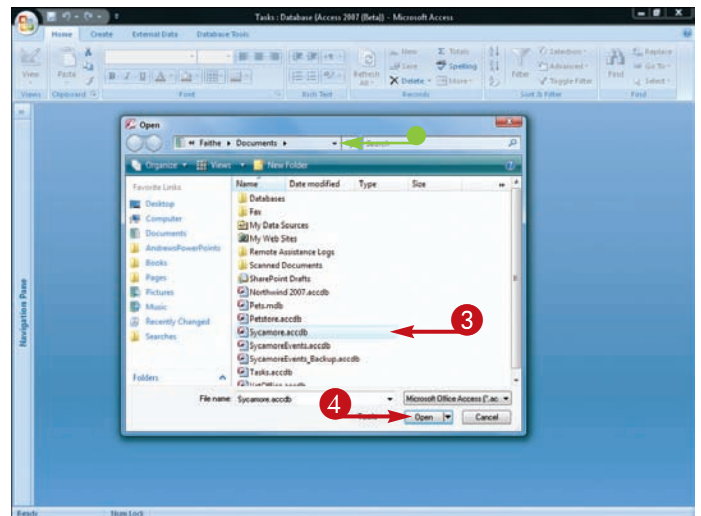
2 Click **Open**.

*Note: Alternatively, you can press **Ctrl** + **O** instead of performing steps 1 to 2.*



The Open dialog box appears.

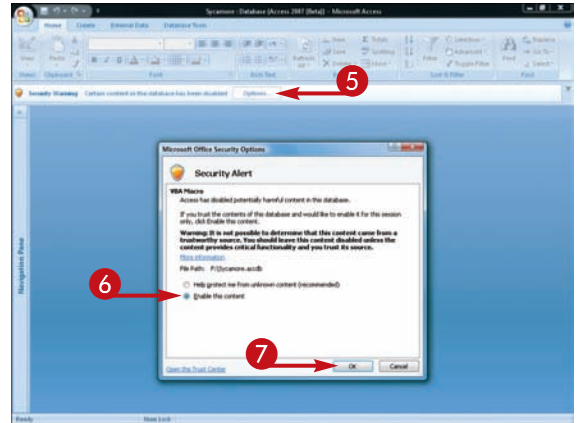
- If needed, you can click here and navigate to a different location.
- 3 Click the name of the file that you want to open.
- 4 Click **Open**.




IF A SECURITY ALERT BAR APPEARS

- 5 Click **Options**.
- 6 Click **Enable this content**.
- 7 Click **OK**.

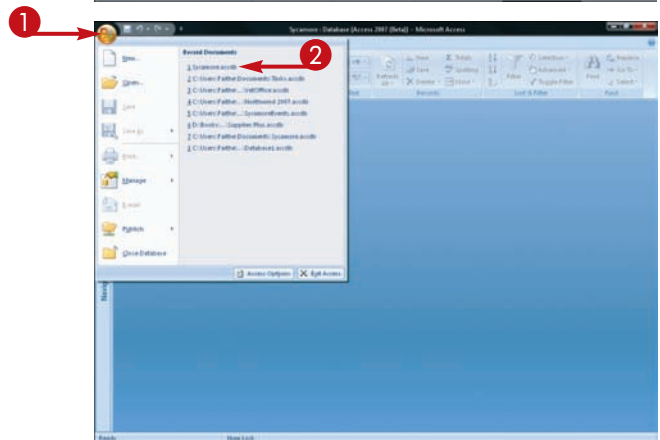
The database file opens.

**OPEN A RECENTLY USED FILE**

- 1 Click .
- 2 Click the recently used database file that you want to open.

Note: This list of recently used databases also appears on the *Getting Started with Microsoft Office Access* screen when *Access* starts, so you can click the file from there.

The database file opens.

**TIPS****Why does the Security Alert bar appear?**

A security alert appears when you are opening a database that is stored in a location that is not trusted. The message implies that the file contains dangerous content, but that is not necessarily so; even a blank database can trigger the warning.

**How can I prevent the security alert from appearing?**

Add the location to your Trusted Locations list to prevent the Security Alert bar from appearing. To do so, see Chapter 15.



Understanding the Access 2007 Interface

Access 2007 has a consistent user interface with that of other Office 2007 applications, including Word and Excel. It contains an Office button, a multiple-tabbed Ribbon, and a status bar.

Office button

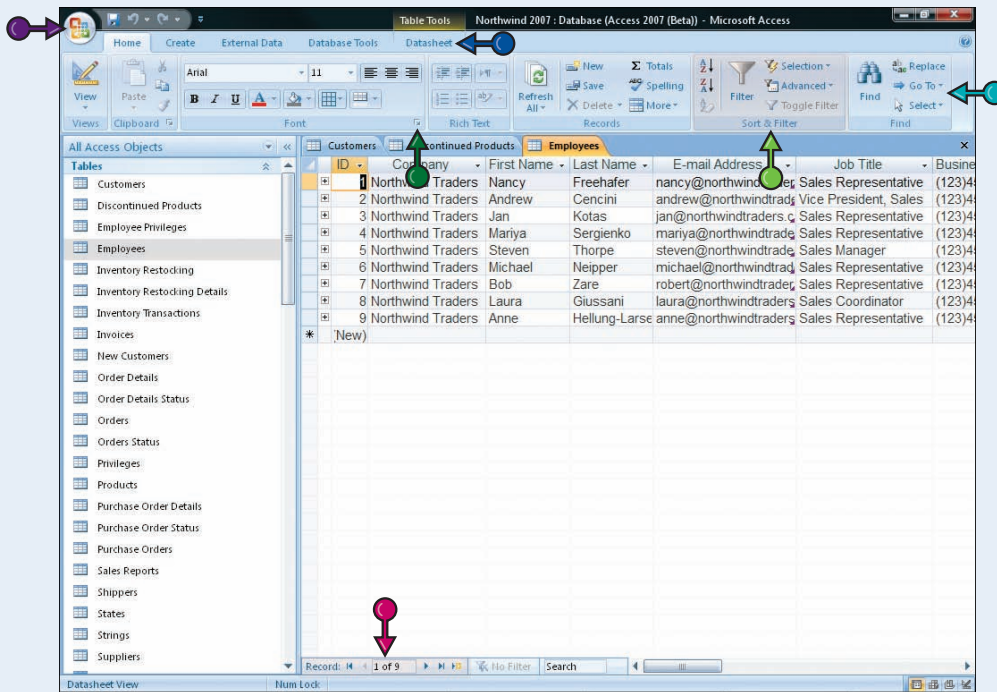
Displays a menu of database commands.

Tabs

Contain buttons and other controls for working with data.

Ribbon

Displays and organizes tabs.



Groups

Organize controls into sections within tabs.

Dialog box launcher

Opens a dialog box related to the group.

Record selector

Displays the current record number and navigates to other records.