Visual

Read Less-Learn More®

FULL COLOR

Teach Yourself VISUALLY™

Microsoft® Access® 2010

The Fast and Easy Way to Learn

Faithe Wempen

Visual

Read Less-Learn More®

FULL COLOR

Teach Yourself VISUALLY™

Microsoft® Access® 2010

The Fast and Easy Way to Learn

Faithe Wempen

Teach Yourself Visually® Access® 2010

Table of Contents

Chapter 1: Getting Started with Access 2010

An Introduction to Access 2010
Start and Exit Access
Create a Blank Database
Close a Database
Create a Database by Using a Template
Open a Database File
Understanding the Access 2010 Interface
Change the Navigation Pane View
Open and Close an Object
View an Object

Chapter 2: Entering and Editing Data

Enter New Records
Navigate between Records
Edit Records
Attach Files to Records
Open, Save, and Remove File Attachments
Insert an OLE Object
Open, Edit, and Remove OLE Objects
Enter Data in a Multivalued Field
Delete Records
Resize Datasheet Columns and Rows
Sort Records
Display Summary Statistics
Print a Datasheet or Form

Chapter 3: Working with Tables

- Plan Effective Tables
- Create a Table in Datasheet View
- Save a Table
- Create a Table in Design View
- Open a Table in Design View
- Rearrange Fields
- Insert and Delete Fields
- Understanding Data Types
- Change a Field’s Data Type
- Understanding Primary and Composite Keys
- Set the Primary or Composite Key
- Rename a Table
- Delete a Table
- Copy a Table

Chapter 4: Working with Fields

- Understanding Field Properties
- Understanding Field Sizes
- Change a Field Size
- Set a Field Caption
- Set a Field’s Format
- Set a Default Value
- Make a Field Required
- Index a Field
- Apply Smart Tags
- Create an Input Mask
- Create a Validation Rule
- Create a Record-Level Validation Rule

Chapter 5: Working with Relationships and Lookups

- Understanding Relationships
- Create a Relationship between Two Tables

Edit a Relationship
Remove a Relationship
Arrange the Relationships Window
Print a Relationship Report
View Object Dependencies
Document the Database
Understanding Lookups
Create a Table for Use as a Field Lookup
Create a Field Lookup Based on a Table
Create a Field Lookup with Values That You Specify
Set Up a Multivalued Field

Chapter 6: Finding and Filtering Data

Understanding Find and Replace
Find Data by Using Find and Replace
Replace Data by Using Find and Replace
Filter to Show Only Blank or Nonblank Entries
Filter by Selection
Filter for Multiple Values
Using Text Filters
Filter by Form
Save a Filter As a Query

Chapter 7:Creating Simple Queries

Understanding Queries
Create a Query with the Simple Query Wizard
Start a New Query in Query Design View
Insert, Arrange, and Remove Query Fields
Set Field Sorting
Add an Alias to a Query Field
Understanding Criteria
Filter a Query for a Specific Value
Specify a Range of Values
Specify a List of Values

Hide a Field in the Query Results
Combine Criteria
Limit the Records Returned

Chapter 8: Creating More Complex Queries

Understanding Summary Queries
Create a Summary Query with the Simple Query Wizard
Create a Summary Query in Query Design View
Understanding Calculated Fields
Create a Calculated Field
Understanding Action Queries
Run a Make Table Query
Run a Delete Query
Run an Append Query
Run an Update Query
Prompt the User for a Parameter
Understanding Parameter Syntax

Chapter 9: Creating Forms

Understanding Forms
Create and Save a Form
Create a Form with the Form Wizard
Create a Form in Layout View
Create a Form in Design View
Delete a Field from Design View
Arrange Fields on a Form
Group Fields Together
Define the Tab Order on a Form

Chapter 10: Modifying and Formatting Forms

Display the Header and Footer
Resize Sections of a Form
Select Sections of a Form
Add a Form Title

Apply a Theme
Apply a Font Theme or Color Theme
Create a Custom Font Theme
Create a Custom Color Theme
Create a Custom Theme
Browse for a Theme to Apply
Adjust Internal Margins and Padding
Add a Label
Format Label Text
Change the Background Color
Use a Background Image
Add a Hyperlink
Add a Tabbed Section
Insert a Logo or Image
Set Conditional Formatting

Chapter 11: Creating and Formatting Reports

Understanding Report Views
Create a Simple Report
Apply a Theme to a Report
Preview and Print a Report
Create a Report with the Report Wizard
Create a Report in Layout View
Set the Page Size and Orientation
Change the Report Layout Type
Set Page Margins
Set Control Margins and Padding
Format Report Text
Size and Align Report Fields
Insert a Page-Numbering Code

Chapter 12: Grouping and Summarizing Data

Understanding Grouping and Summarizing
Group Report Results

Sort Report Results
Count Records
Add an Aggregate Function
Summarize a Datasheet with a PivotTable
Add and Delete Aggregate Functions in a PivotTable
Group and Ungroup PivotTable Content
Clear a PivotTable Grid
Switch a PivotTable to a PivotChart

Chapter 13: Creating Mailing Labels

Create Labels
Add a Field to an Existing Line
Add a Field to a Label as a Separate Line
Color the Label Background
Color the Label Text
Apply Font Formatting to Label Text
Export Labels to Word

Chapter 14: Creating Charts

Understanding Charts in Access
Open a PivotChart View
Start a PivotChart Form
Construct a PivotChart
Group Data in a PivotChart
Change the PivotChart Type
Change Chart Colors
Create an Embedded Chart Object

Chapter 15: Working with External Data

Import an Excel Worksheet
Link to an Excel Worksheet
Link to an Outlook Folder
Manage Linked Tables
Import a Table from Another Access Database

- Import Data from a Delimited Text File
- Export Data to Excel
- Export Data as HTML
- Export Data to a Plain Text File
- Save Import or Export Specifications
- Using Saved Import or Export Specifications

Chapter 16: Performing a Mail Merge with Microsoft Word

- Begin a Mail Merge
- Create the Main Document in Word
- Insert an Address Block
- Insert a Greeting Line
- Match Fields
- Insert Individual Fields
- Preview the Merge Results
- Filter the Recipient List
- Sort the Recipient List
- Merge to a New Document
- Merge Directly to a Printer
- Save the Merge for Later Use

Chapter 17: Maintaining a Database

- Set a Trusted Location
- Save in a Previous Version Format
- Convert to the Access 2007/2010 Format
- Back Up a Database
- Document a Database
- Compact and Repair a Database
- Password-Protect a Database
- Create a Switchboard
- Set Switchboard Startup Options

Teach Yourself Visually™
Access® 2010

by Faithe Wempen

Visual

Teach Yourself VISUALLY™ Access® 2010

Published by
Wiley Publishing, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256

www.wiley.com

Published simultaneously in Canada

Copyright © 2010 by Wiley Publishing, Inc., Indianapolis, Indiana

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, 201-748-6011, fax 201-748-6008, or online at http://www.wiley.com/go/permissions.

Library of Congress Control Number: 2010923552

ISBN: 978-1-118-08185-3

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

Trademark Acknowledgments

Wiley, the Wiley Publishing logo, Visual, the Visual logo, Teach Yourself VISUALLY, Read Less - Learn More and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates. Access is a registered trademark of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners. Wiley Publishing, Inc. is not associated with any product or vendor mentioned in this book.

Disclaimer

In order to get this information to you in a timely manner, this book was based on a pre-release version of Microsoft Office 2010. There may be some minor changes between the screenshots 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.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS

OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

FOR PURPOSES OF ILLUSTRATING THE CONCEPTS AND TECHNIQUES DESCRIBED IN THIS BOOK, THE AUTHOR HAS CREATED VARIOUS NAMES, COMPANY NAMES, MAILING, E-MAIL AND INTERNET ADDRESSES, PHONE AND FAX NUMBERS AND SIMILAR INFORMATION, ALL OF WHICH ARE FICTITIOUS. ANY RESEMBLANCE OF THESE

FICTITIOUS NAMES, ADDRESSES, PHONE AND FAX NUMBERS AND SIMILAR INFORMATION TO ANY ACTUAL PERSON, COMPANY AND/OR ORGANIZATION IS UNINTENTIONAL AND PURELY COINCIDENTAL.

Contact Us

For general information on our other products and services please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993 or fax 317-572-4002.

For technical support please visit www.wiley.com/techsupport.

WILEY
Wiley Publishing, Inc.

Sales

Contact Wiley at (877) 762-2974 or fax (317) 572-4002.

Credits

Executive Editor

Jody Lefevere

Project Editor

Christopher Stolle

Technical Editor

Joyce Nielsen

Copy Editor

Marylouise Wiack

Editorial Director

Robyn Siesky

Business Manager

Amy Knies

Senior Marketing Manager

Sandy Smith

Vice President and Executive Group Publisher

Richard Swadley

Vice President and Executive Publisher

Barry Pruett

Project Coordinator

Lynsey Stanford

Graphics and Production Specialists

Carrie A. Cesavice
Andrea Hornberger

Jennifer Mayberry

Mark Pinto

Quality Control Technician

Jessica Kramer

Proofreading and Indexing

Shannon Ramsey

Johnna VanHoose Dinse

Screen Artist

Jill Proll

Illustrators

Rhonda David-Burroughs
Cheryl Grubbs

About the Author

Faithe Wempen, M.A., is a Microsoft Office Specialist Master Instructor and the author of over 100 books on computer hardware and software, including the *PowerPoint 2010 Bible, Microsoft Office 2010 for Seniors for Dummies, and A+ Certification Workbook for Dummies*.

Faithe is currently an adjunct instructor of computer information technology at IUPUI, where she teaches PC hardware and software architecture and A+ certification. Her online courses for corporate clients, including Hewlett Packard, Sony, and CNET, have educated over a quarter of a million students all over the world.

Author's Acknowledgments

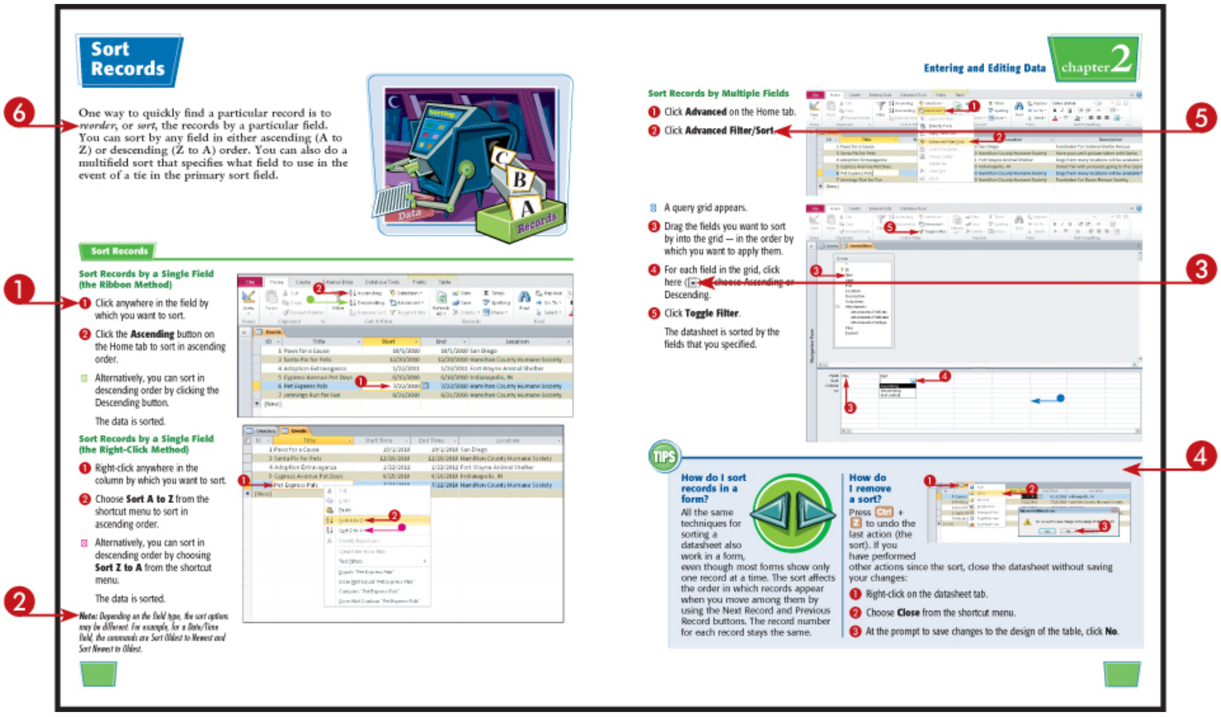
Thanks to my wonderful team of editors at Wiley for another job well done, including Jody Lefevere, Christopher Stolle, Marylouise Wiack, and Joyce Nielsen.

How to Use This Book

Who This Book Is For

This book is for the reader who has never used this particular technology or software application. It is also for readers who want to expand their knowledge.

The Conventions in This Book



Sort Records

One way to quickly find a particular record is to *reorder*, or *sort*, the records by a particular field. You can sort by any field in either ascending (A to Z) or descending (Z to A) order. You can also do a multifield sort that specifies what field to use in the event of a tie in the primary sort field.

Sort Records

Sort Records by a Single Field (the Ribbon Method)

❶ Click anywhere in the field by which you want to sort.

❷ Click the **Ascending** button on the Home tab to sort in ascending order.

- Alternatively, you can sort in descending order by clicking the Descending button.

The data is sorted.

Sort Records by a Single Field (the Right-Click Method)

❶ Right-click anywhere in the column by which you want to sort.

❷ Choose **Sort A to Z** from the shortcut menu to sort in ascending order.

- Alternatively, you can sort in descending order by choosing **Sort Z to A** from the shortcut menu.

The data is sorted.

Note: Depending on the field type, the sort options may be different. For example, for a Date/Time field, the commands are Sort Oldest to Newest and Sort Newest to Oldest.

Entering and Editing Data chapter 2

Sort Records by Multiple Fields

❶ Click **Advanced** on the Home tab.

❷ Click **Advanced Filter/Sort.**

- A query grid appears.

❸ Drag the fields you want to sort by into the grid — in the order by which you want to apply them.

❹ For each field in the grid, click here (▾) and choose Ascending or Descending.

❺ Click **Toggle Filter**.

The datasheet is sorted by the fields that you specified.

TIPS

How do I sort records in a form?

All the same techniques for sorting a datasheet also work in a form, even though most forms show only one record at a time. The sort affects the order in which records appear when you move among them by using the Next Record and Previous Record buttons. The record number for each record stays the same.

How do I remove a sort?

Press Ctrl + Z to undo the last action (the sort). If you have performed other actions since the sort, close the datasheet without saving your changes:

❶ Right-click on the datasheet tab.

❷ Choose **Close** from the shortcut menu.

❸ At the prompt to save changes to the design of the table, click **No**.

❶ Steps

This book uses a step-by-step format to guide you easily through each task. Numbered steps are actions you must do; bulleted steps clarify a point, step, or optional feature; and indented steps give you the result of the action.

❷ Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross-reference to a related area of the book.

❸ Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

❹ Tips

Tips offer additional information, including warnings and shortcuts.

❺ Bold

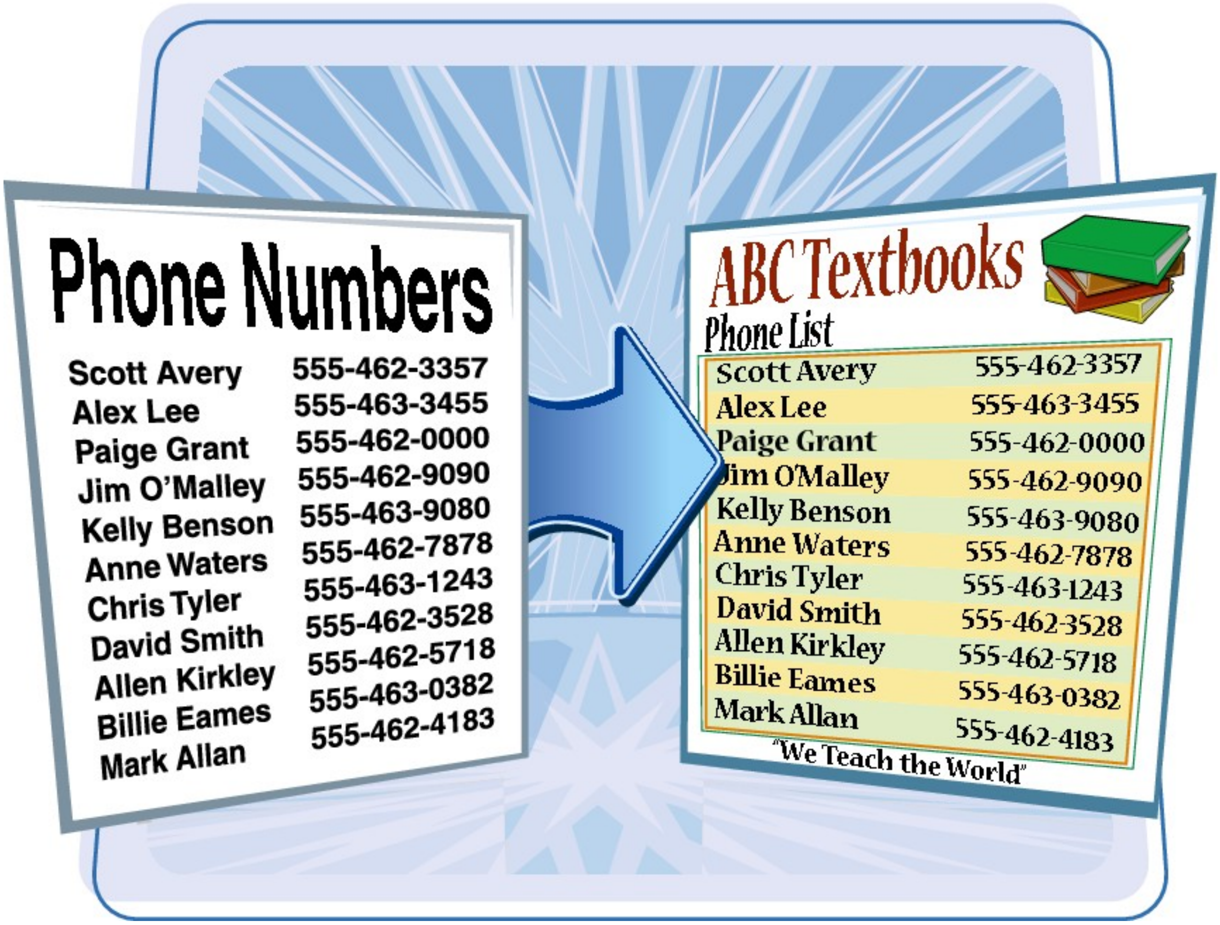
Bold type shows command names, options, or text or numbers you must type.

❻ Italics

Italic type introduces and defines a new term.

Chapter 1: Getting Started with Access 2010

Are you new to Access or upgrading to the latest version? This chapter explains how to create a database as well as how to navigate through the new-and-improved Microsoft Office Access 2010 interface.


Phone Numbers
Scott Avery 555-462-3357
Alex Lee 555-463-3455
Paige Grant 555-462-0000
Jim O'Malley 555-462-9090
Kelly Benson 555-463-9080
Anne Waters 555-462-7878
Chris Tyler 555-463-1243
David Smith 555-462-3528
Allen Kirkley 555-462-5718
Billie Eames 555-463-0382
Mark Allan 555-462-4183
ABC Textbooks
Phone List
Scott Avery 555-462-3357
Alex Lee 555-463-3455
Paige Grant 555-462-0000
Jim O'Malley 555-462-9090
Kelly Benson 555-463-9080
Anne Waters 555-462-7878
Chris Tyler 555-463-1243
David Smith 555-462-3528
Allen Kirkley 555-462-5718
Billie Eames 555-463-0382
Mark Allan 555-462-4183
"We Teach the World"

An Introduction to Access 2010

Start and Exit Access 2010

Create a Blank Database

Close a Database

Create a Database by Using a Template

Open a Database File

Understanding the Access 2010 Interface

Change the Navigation Pane View

Open and Close an Object

View an Object

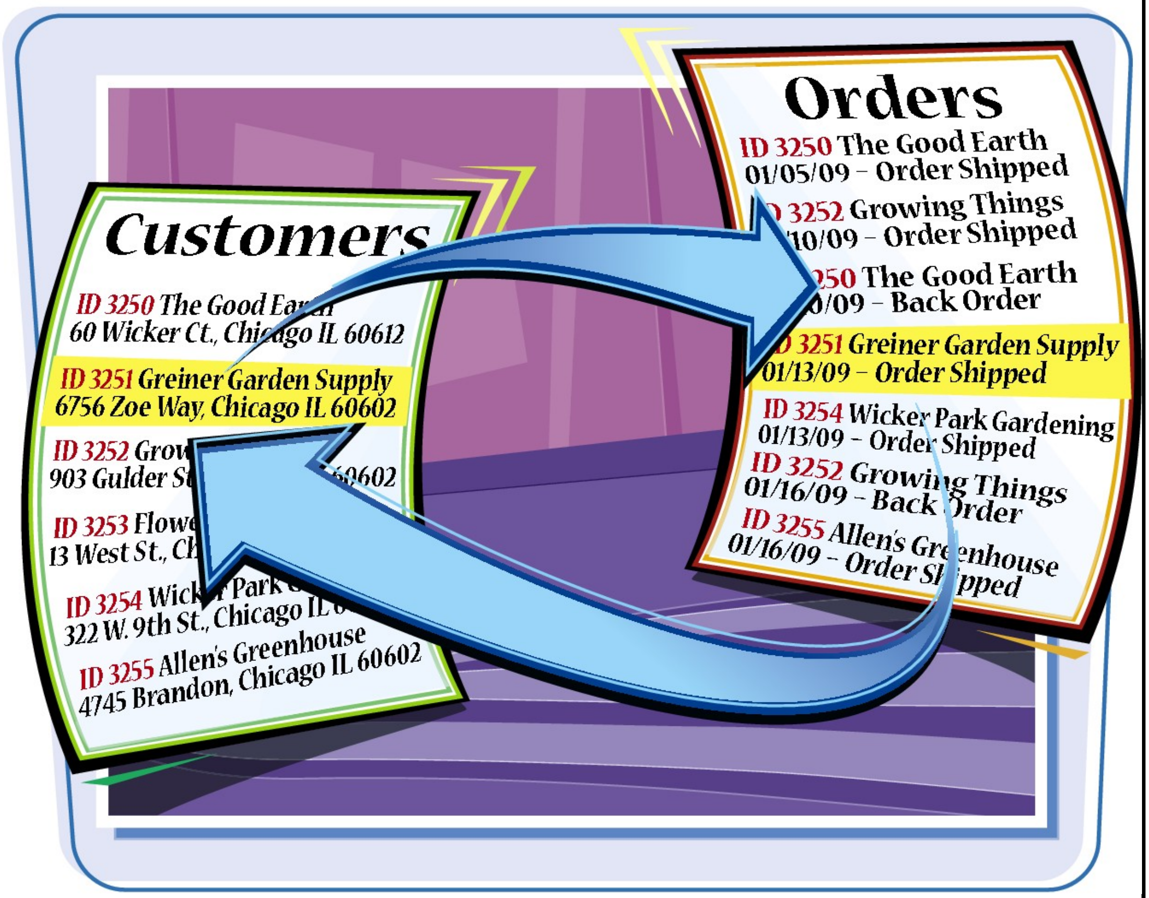
An Introduction to Access 2010

Microsoft Access 2010 is a program for creating databases to store business or personal data. You can use Access to create, retrieve, and manage large or small collections of information.

Customer List
United Delivery
Mann Electronics
Address
Phone
Fax
E-mail
My DVD Collection
# 001 Summer Memories
#002 Dad's Birthday
#003 Dance!
#004 Sci-Fi Matinee
#005 A Far Planet
#006 Sing to Me, Season 1
#007 Sing to Me, Season 2
#008 Lost in New York City
#009 The 1940s in Music
#010 Late Night Nightmares
#011 London, Summer 2007
#012 Katie's Bachelorette Party
#013 Katie & Joe's Wedding
#014 Dark Ambition, Season 1
Access
2010
Payroll
Phone Numbers

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.


Customers
ID 3250 The Good Ear
60 Wicker Ct., Chicago IL 60612
ID 3251 Greiner Garden Supply
6756 Zoe Way, Chicago IL 60602
ID 3252 Grow
903 Gulder St
ID 3253 Flowe
13 West St., Ch
ID 3254 Wick
322 W. 9th St., Chicago IL
ID 3255 Allen's Greenhouse
4745 Brandon, Chicago IL 60602
Orders
ID 3250 The Good Earth
01/05/09 – Order Shipped
3252 Growing Things
10/09 – Order Shipped
250 The Good Earth
0/09 – Back Order
3251 Greiner Garden Supply
01/13/09 – Order Shipped
ID 3254 Wicker Park Gardening
01/13/09 – Order Shipped
ID 3252 Growing Things
01/16/09 – Back Order
ID 3255 Allen's Greenhouse
01/16/09 – Order Shipped

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 Code.

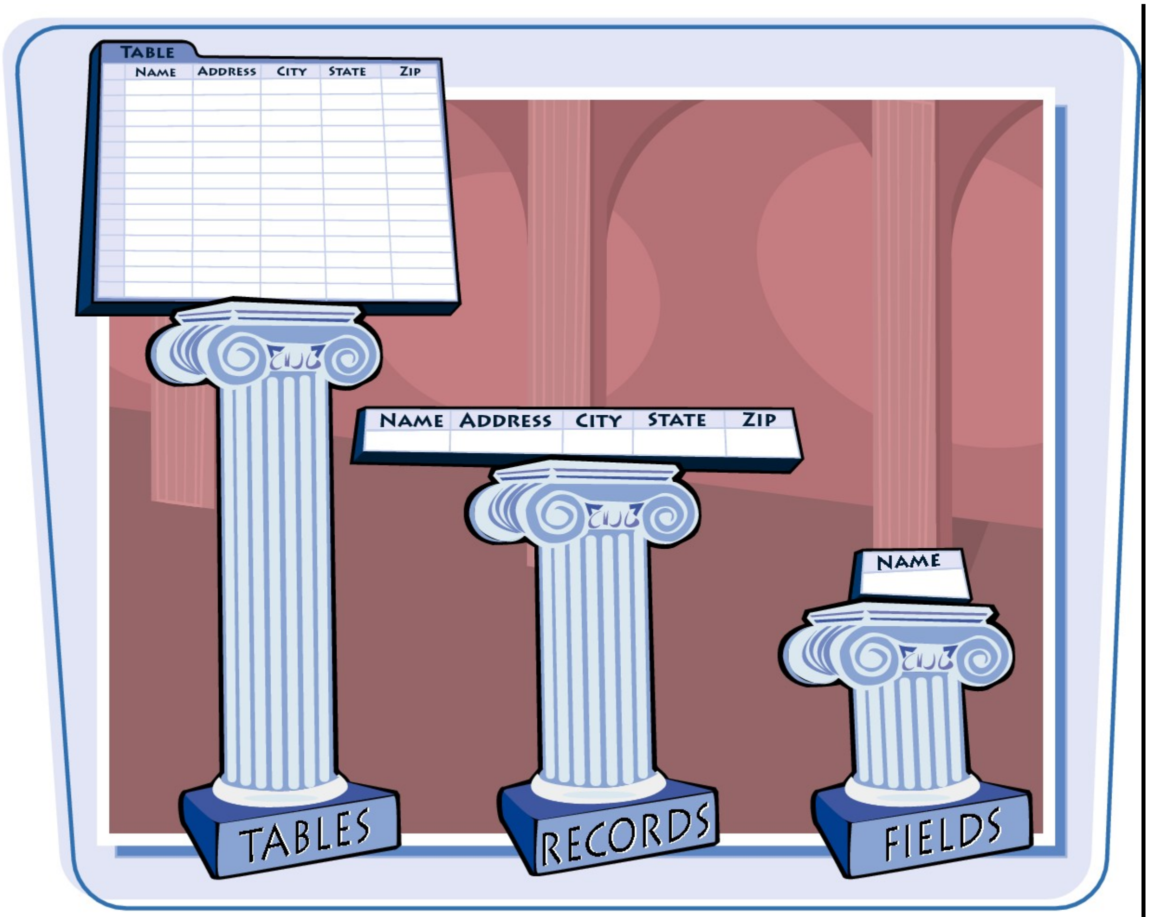
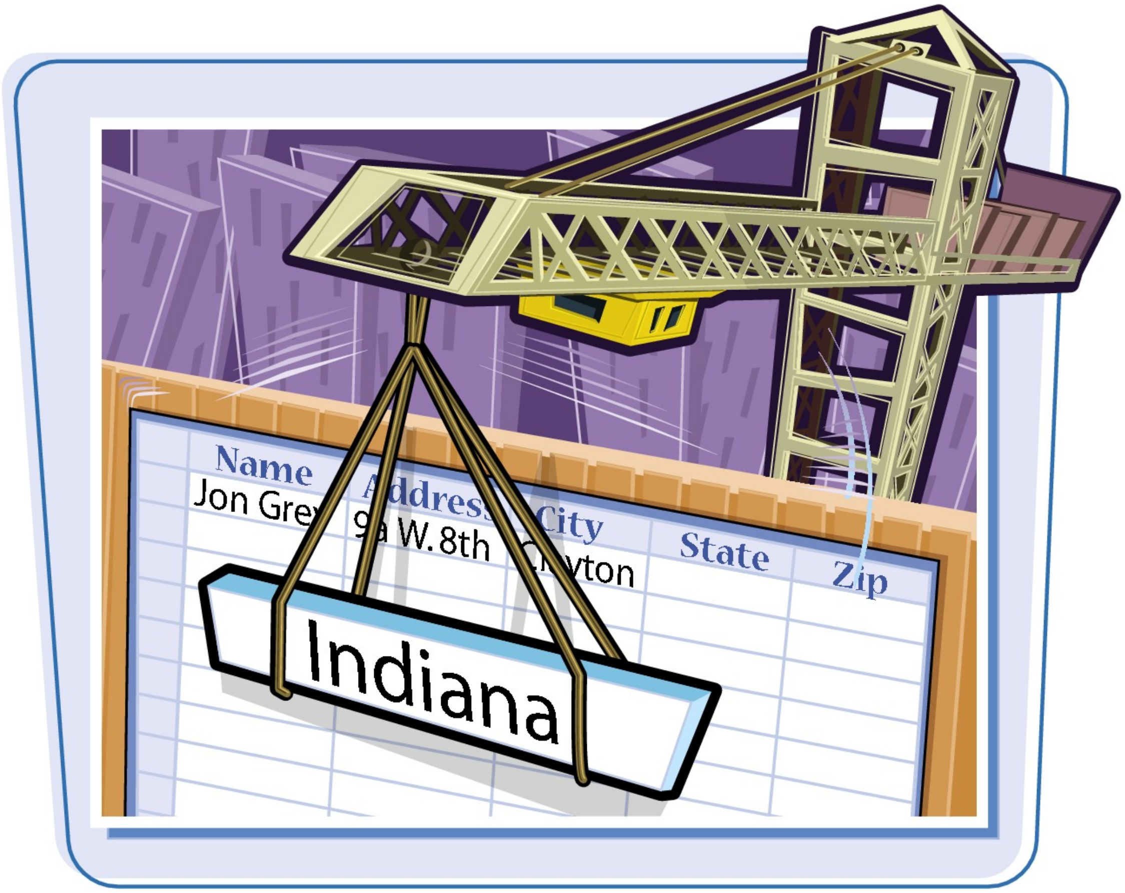


TABLE
NAME
ADDRESS
CITY
STATE
ZIP
NAME
ADDRESS
CITY
STATE
ZIP
NAME
TABLES
RECORDS
FIELDS

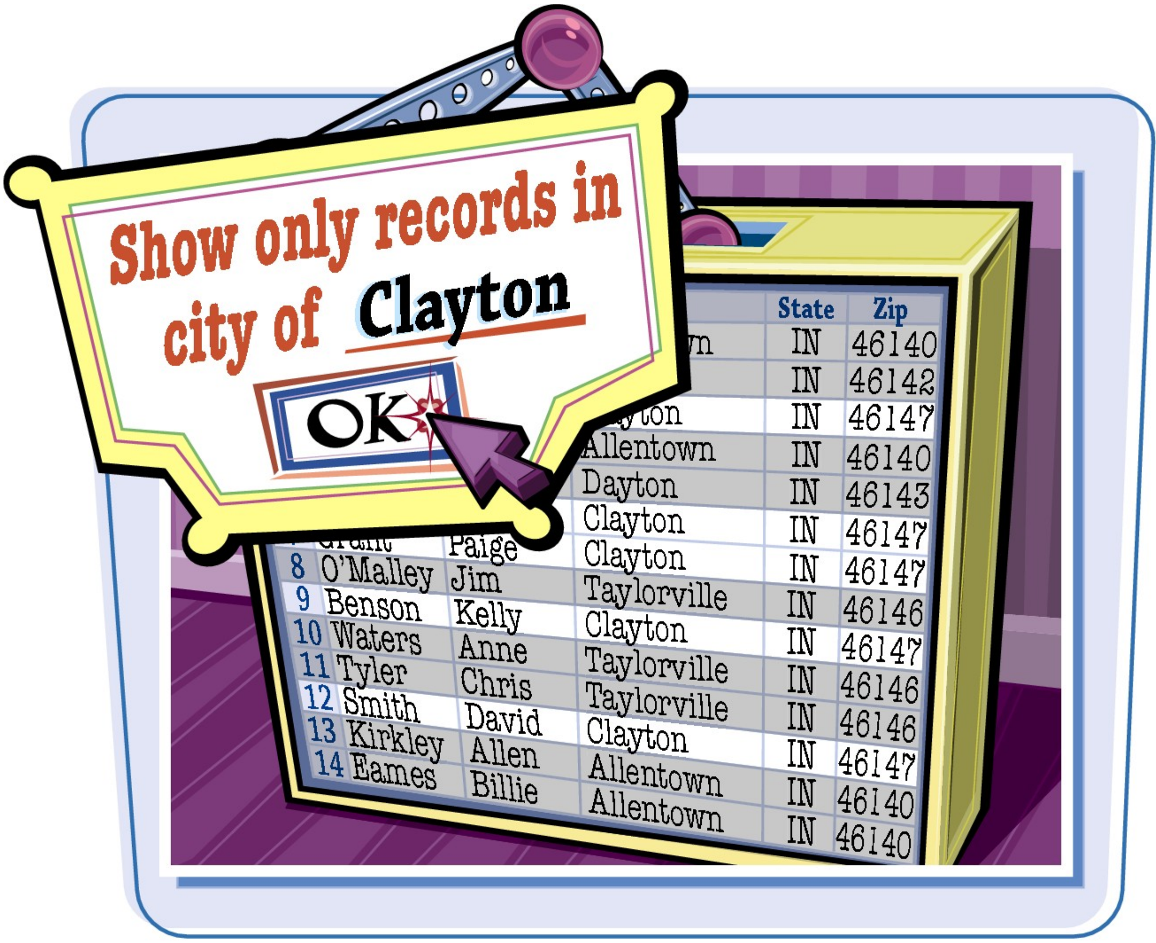
Datasheets and Forms

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 on-screen *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.


Name
Address
City
State
Zip
Jon Grey
9a W.8th
Clayton
Indiana

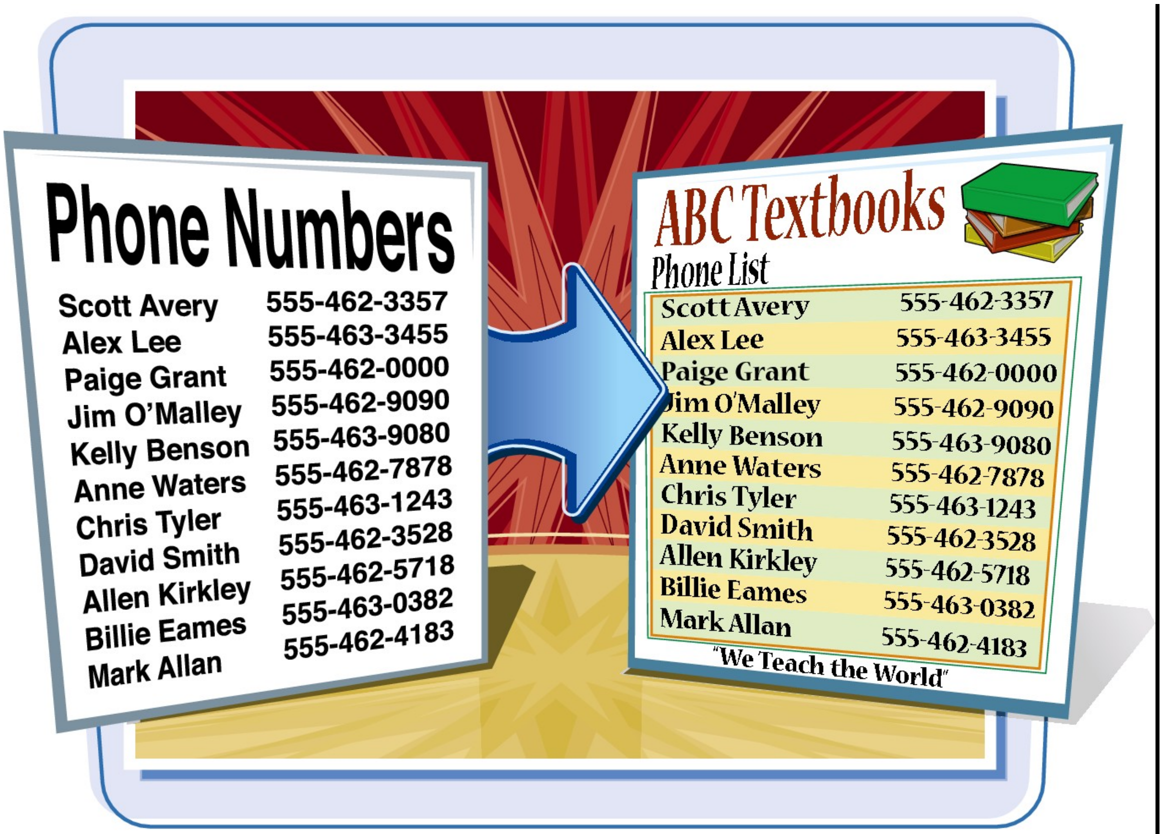
Filters and Queries

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.


Show only records in city of Clayton
OK
State Zip
IN 46140
IN 46142
IN 46147
Allentown IN 46140
Dayton IN 46143
Clayton IN 46147
Paige Clayton IN 46147
8 O'Malley Jim Taylorville IN 46146
9 Benson Kelly Clayton IN 46147
10 Waters Anne Taylorville IN 46146
11 Tyler Chris Taylorville IN 46146
12 Smith David Clayton IN 46147
13 Kirkley Allen Allentown IN 46140
14 Eames Billie Allentown IN 46140

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.



Phone Numbers

Scott Avery	555-462-3357
Alex Lee	555-463-3455
Paige Grant	555-462-0000
Jim O'Malley	555-462-9090
Kelly Benson	555-463-9080
Anne Waters	555-462-7878
Chris Tyler	555-463-1243
David Smith	555-462-3528
Allen Kirkley	555-462-5718
Billie Eames	555-463-0382
Mark Allan	555-462-4183

ABC Textbooks

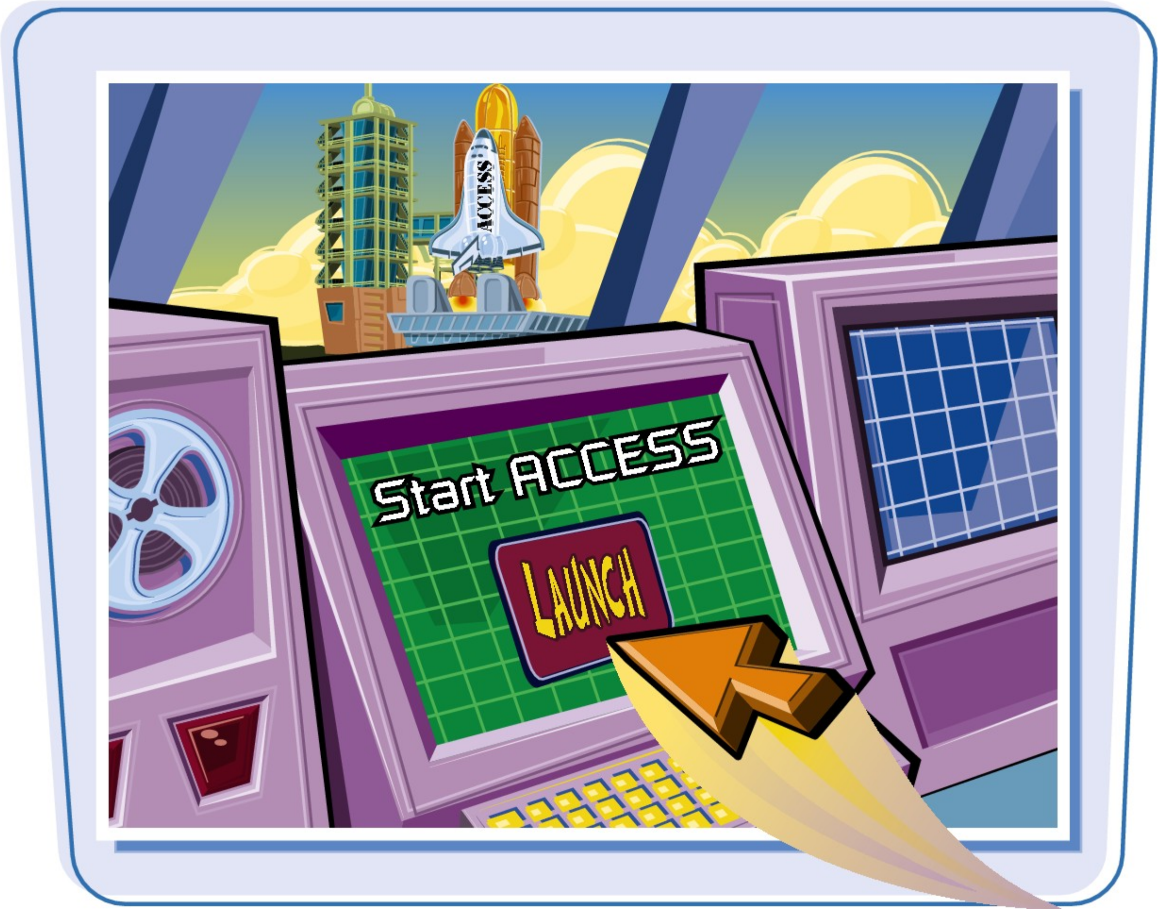
Phone List

Scott Avery	555-462-3357
Alex Lee	555-463-3455
Paige Grant	555-462-0000
Jim O'Malley	555-462-9090
Kelly Benson	555-463-9080
Anne Waters	555-462-7878
Chris Tyler	555-463-1243
David Smith	555-462-3528
Allen Kirkley	555-462-5718
Billie Eames	555-463-0382
Mark Allan	555-462-4183

"We Teach the World"

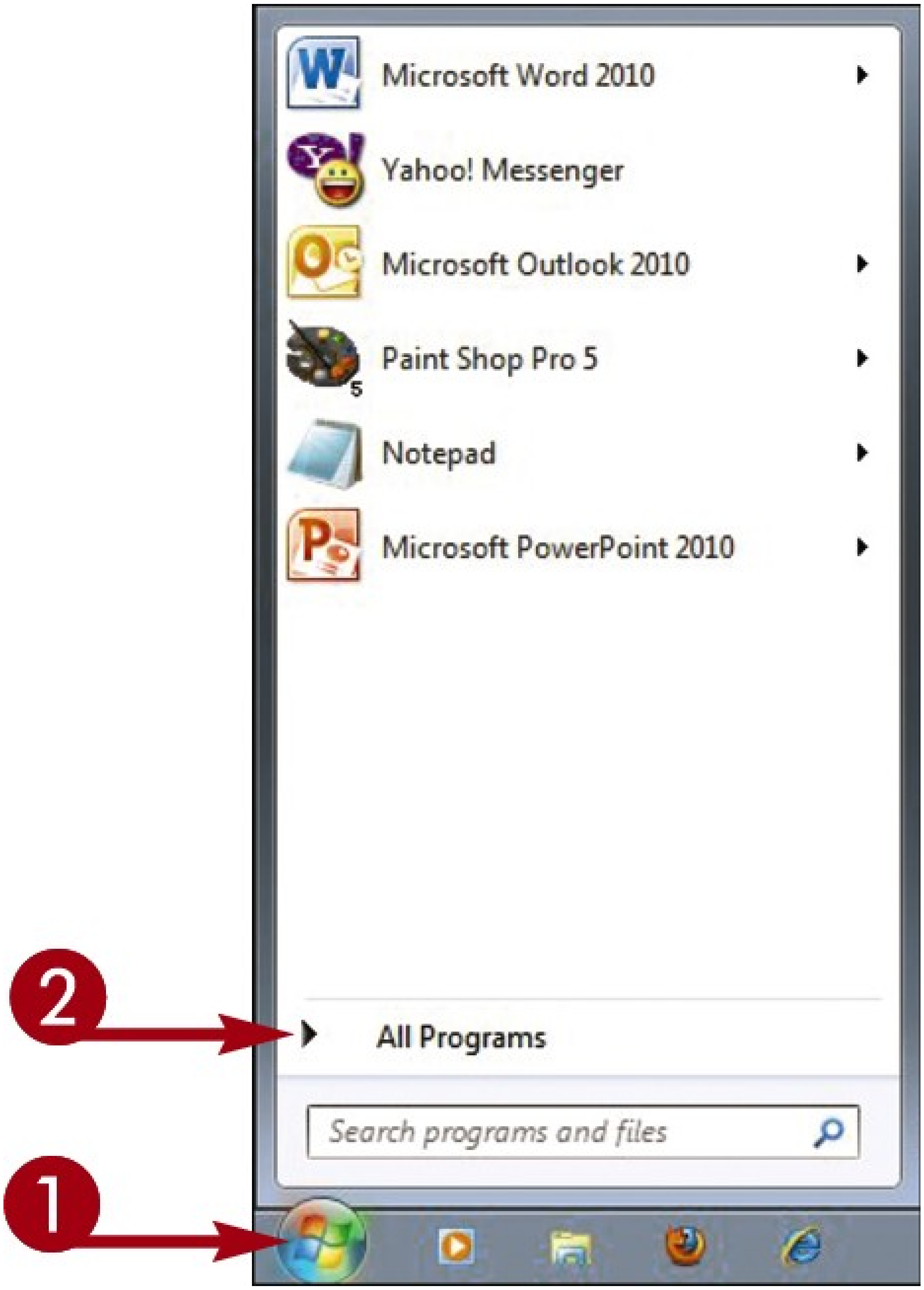
Start and Exit Access

Before you can create or open a database file, you must first start Access. Access starts with the File menu open and the New command selected. From here, you can create a new database or open an existing one. When you are finished working with Access, you should exit the program.


ACCESS
Start ACCESS
LAUNCH

Start and Exit Access

Start Access


Microsoft Word 2010
Yahoo! Messenger
Microsoft Outlook 2010
Paint Shop Pro 5
Notepad
Microsoft PowerPoint 2010
All Programs
Search programs and files
2
1

① Click **Start**.

② Click **All Programs**.