

Microsoft Access 2003

Manual - Foundation Level



SAMPLE

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COURSEWARE

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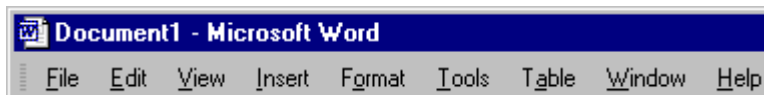
SAMPLE

Course Basics

Toolbars

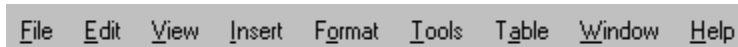
The Title Bar

- The title bar is displayed along the top of almost all program, folder and dialog box windows. It is used to display information such as the name of the application (or folder) and the document you are working on. Information which is displayed here may vary. The example shown illustrates the title bar for a program called **Microsoft Word**, in which a document called **Document1** has been opened or saved:



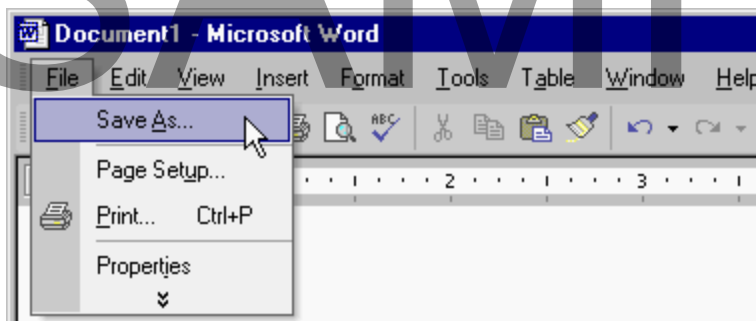
The Menu Bar

- The menu bar is located under the title bar, and contains a series of drop down menus. The example shown illustrates the Microsoft Word Menu Bar:



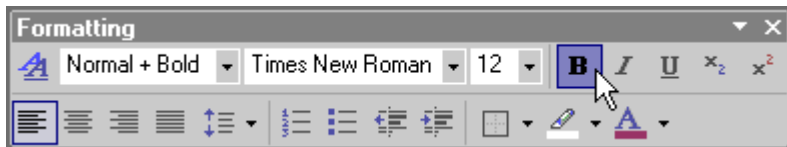
To execute Menu commands

- In most cases, you are asked to use the mouse to execute a series of menu commands (e.g., **File > Save As**). What this means is that you select **File** from the main menu, followed by **Save As**:



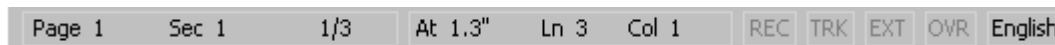
The Tool Bar

- The tool bar contains a series of icons, which allow you to achieve a desired effect as quickly as possible. In the example shown, taken from the Microsoft Word Formatting toolbar, to make the selected text bold, you would click on the **Bold** icon:



The Status Bar

- Most application windows have a status bar displayed along the bottom of the window. In the example illustrated, taken from Microsoft Word, the status bar conveys information about the page within the document which you are working on, along with other relevant information:





The Scroll Bar

- When a program or folder needs to display information within a window, two sets of scroll bars may be displayed along the bottom and right side of the window. By using the scroll bars it is possible to move to any position within a document and also work on a document many times bigger than your physical screen size.

To move up and down within a window (using the scroll bar)

- To scroll upwards in a window, click on the upwards-pointing arrow at the top of the vertical scroll bar: 
- To move downwards in a window, click on the downwards-pointing arrow at the bottom of the vertical scroll bar: 

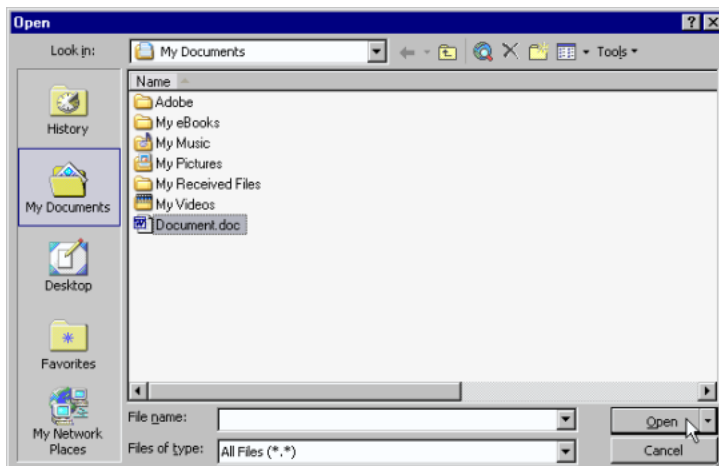
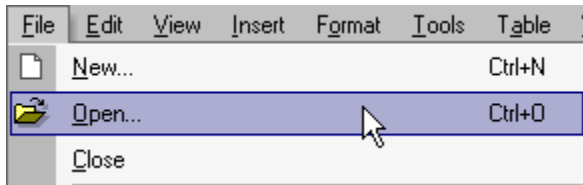
To move right to left within a window

- To move to the right-hand side of a window, click on the right-hand arrow on the horizontal scroll bar: 
- To move to the left-hand side of a window, click on the left-hand arrow on the horizontal scroll bar: 

File Management

Opening Files

- From the main menu, select **File > Open** command or click on the **Open** icon and select the required file from the dialog box displayed:

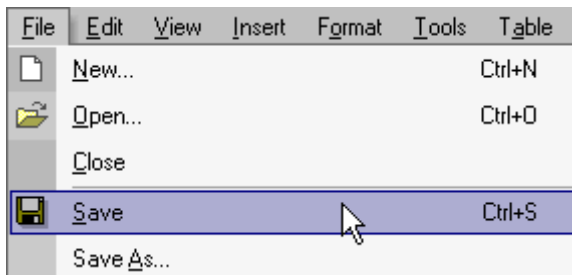


- Use the **Look in** drop-down menu to select the drive or folder which contains the file you want.
- To open the file you require either double-click on the file name or select the file name by clicking on it, and then click on the **Open** button.

Saving Files

To save a new document

- From the main menu, select **File > Save** command or click on the **Save** icon and from the dialog box displayed select the required folder. Enter a file name and then click on the **Save** button:



- After you have saved the file for the first time, clicking on the **Save** icon will automatically save your document with the filename you gave it. It does not give you the option to rename.

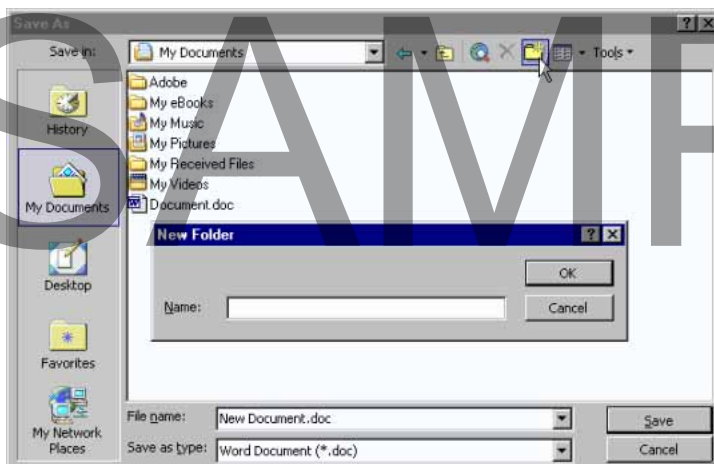
To save a document under another name and/or location

- The **Save As** command can be used to save a file under a different name, to save a file in a different word processor format, or to save a file to a different drive and/or folder. From the main menu, choose **File > Save As** command.

Note: The **File > Save As** command will rename the document on the screen so that you can keep the earlier version, as well as saving any changes you have made.

To create a new folder in which to save your document

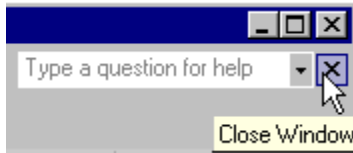
- Click on the **Create New Folder** icon, displayed within the **Save As** dialog box.
- This will display the **New Folder** dialog box. Enter the name of the new folder, and then click on the **OK** button:



Note: The folder will be created under the current folder.

Closing Files

- Click on the **Close Window** icon displayed at the top-right of the document window. Be sure to click on the **Close Window** icon, (as opposed to the **Close** icon):



Installing the Sample Files

- Use Windows Explorer to create a folder called **Access 2003 Foundation Samples**, in the **My Documents** folder.
- If you are installing the sample files from the CD-ROM, place the CD-ROM in the CD drive and copy the files from the **access_2003_foundation_usa\exercise_files** to the **My Documents\Access 2003 Foundation 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.

- **Notes for tutors:**

The above instructions are for Windows that has not been set-up for a multi-user environment (with individual profiles). The instructions above may require modification within a Windows multiuser environment. Where possible pre-install the relevant work files prior to use by students/delegates.

SAMPLE

Introduction to Microsoft Access 2003

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

- Distinguish the two main types of Access 2003 files
- Create a new database file from scratch
- Open an existing database file
- Understand new Access 2003 security features
- Understand Access 2003 security levels
- Close a database file

What is Access?

Access 2003

- This courseware teaches the fundamentals of **Microsoft Access 2003**. **Access 2003** is a relational database management program; it allows you to create and manage desktop and client/server database applications.

Content

- With **Microsoft Access 2003**, you can create **tables** to contain your information, **queries** to retrieve information from the tables, and **forms and reports** to make the information available to users in various ways.

Delivery

- Typically, the database files you create in **Access 2003** have an **.mdb** extension. You can, however, use **Access 2003** to export data to a wide variety of other formats.

Creating Files

About Access 2003 Files

- Microsoft Access 2003 lets you create two main types of files: database files (with an **.mdb** extension) and project files (with an **.adp** extension).

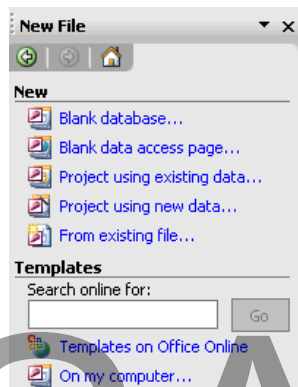
A **database file** is the actual information repository - it is a collection of related data that has to do with a particular subject. For example, if you owned a retail chain, you might want to place all sales and store information in a database. You could organize this data into tables; you could group employee information in one table, customer information in another, and store information in yet another.

A **project file** is a file that connects to the database - it is the basis for client/server applications. For example, a project file might contain forms, reports, or modules; it would not contain any data or data-definition-based objects (like tables). Think of a project as an "in-between" file: it serves as the interface for an actual database file. Since a project is a more advanced feature, this Foundation-level training course does not discuss them in any great detail.

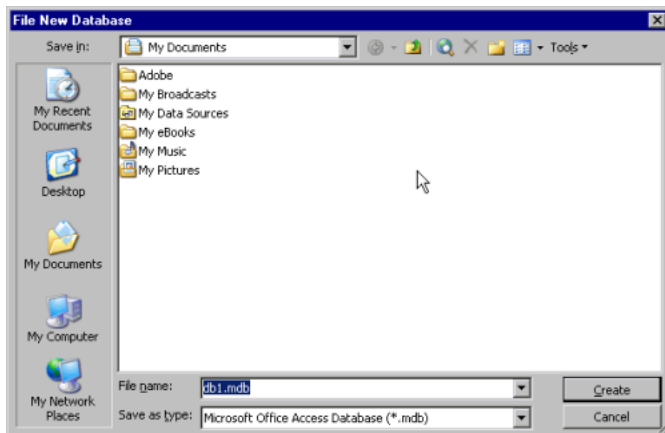
Creating a new database file

- From the main menu, choose **File > New**

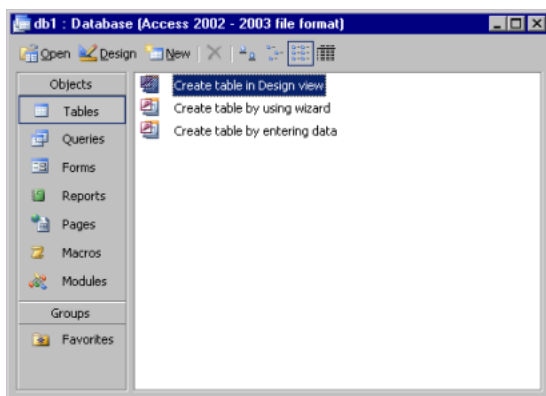
OR press the **Ctrl + N** key combination to open the **New File** task pane which appears on the right of your screen:



- Click **Blank Database**. In the **File New Database** dialog box, specify a location and a name for your new database file. Then click **Create**:



- The **Database** dialog box appears, to let you start adding objects and information to your database. We will deal with these features in a future section of this course:



Note: The default file format is for Access 2003 is "Access 2000." To change the default file format to "2002-2003", select **Tools > Options**, and click on the **Advanced** tab in the displayed dialog box. Choose **Access 2002-2003** from the **Default File Format** drop down menu, and click **Apply**. Click **OK** to close the dialog box.

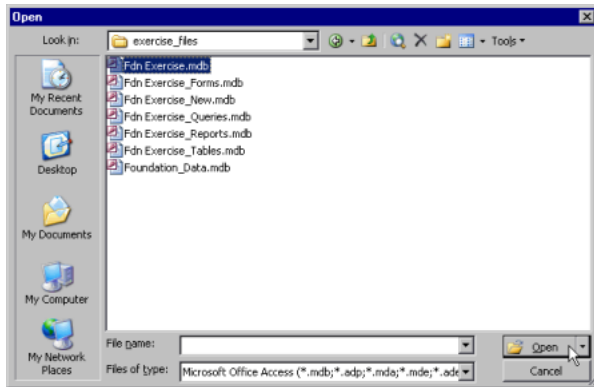
Opening and Closing a Database File

Opening a database file

- From the main menu, choose **File > Open**

OR press the **Ctrl + O** key combination to display the **Open** dialog box. Browse to the location of the database file you want to open. When you find it, highlight

it and click **Open**:



Note: You can also double-click the file to open it.

Understanding new Access 2003 security features

- If this is your very first time opening a file in Access 2003, you may see an Access warning dialog box stating that unsafe expressions are not blocked. In order to stop the display of this warning every time you open a file, you will need to download **Jet 4.0 Service Pack 8**, which is available at <http://www.microsoft.com>.

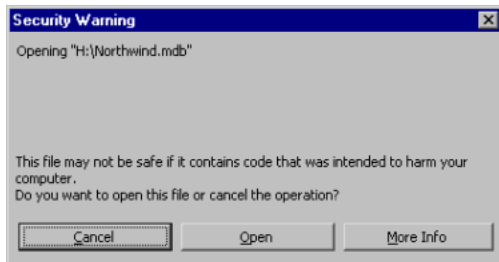
Note: If you do not see any warning dialog boxes when you open a database, please disregard these instructions.

To download Jet 4.0 SP8

- Download **Jet 4.0 SP8** from the Microsoft website.
- Exit Access.
- Start Access again, and open a file.
- You will now see a different message dialog box that asks you if you wish to block unsafe expressions. Click **Yes**.
- You will once again be prompted to quit Access 2003. Click **OK**.
- Re-start Access 2003, and open a database.

Understanding Access 2003 Security Levels

- In addition to the security dialog boxes mentioned in the previous section, when opening a database you may also see *another* warning dialog box that informs you that the file may not be safe if it contains harmful codes. This warning is displayed because security levels have been increased in Access 2003:



- If you know the origin of the file, and are absolutely certain that it is trustworthy, click **Open**. If you are unsure, click **Cancel**.
- Under default security settings in Access 2003, this warning will be displayed every time you open a file in Access.

Note: It is possible - although not recommended - to avoid the display of this warning dialog box by lowering the Access 2003 security level from **Medium** to **Low**. Be careful - such an action may expose your computer to potentially destructive macro viruses. Consult the various Access Help tools for details on how to change security levels.

Closing a database file

- From the main menu, choose **File > Close**.

Review Questions

How would you:

- Explain the two main types of files you can create in Access 2003?
- Create a new database file?
- Open an existing database file?
- Understand new Access 2003 security features?
- Understand Access 2003 security levels?
- Close a database file?

Access 2003 Interface

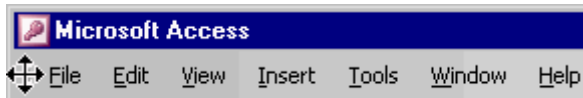
When you have completed this learning module you will have seen how to:

- Use the menu bar
- Use the Database toolbar
- Use the task pane
- Use the status bar
- Use the Office Assistant
- Customize the toolbars

Access 2003 Workspace

Using the Menu bar

- The **menu bar** contains all of the **Access 2003** menu options. With these menu options, you can access most of the **Access 2003** features. The options available in each menu often depend on the object you are working with and the mode of **Access 2003**.
- By default, the **Menu bar** appears under the title bar, at the top of the screen. However, you can place this bar wherever you want on the screen.
- To move the **Menu bar**, find the dotted gray line at the far left of the menu bar. Place your mouse on this line. The mouse indicator changes to a four-arrow symbol. This means you can drag the bar to your desired location:



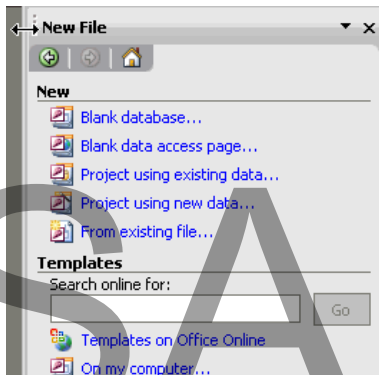
Using the Database toolbar

- The **Database toolbar** is a bar of buttons that act as shortcuts to many of the Access 2003 features that are most often used. This toolbar is very similar to the **Standard toolbar** in other Office 2003 applications, such as Word and Excel.
- By default, the **Database toolbar** appears at the top of the screen, just below the **Menu bar**. Like the **Menu bar**, though, you can place this bar wherever you want it on the screen.
- To move the **Database toolbar**, find the dotted gray line at the far left of the Database toolbar. Place your mouse on this line; the mouse indicator changes to a four-arrow symbol. This means you can drag the bar to your desired location:



Using the task pane

- The **task pane** is a window that acts like a dialog box, except you can keep it on the screen as you work. Depending on the task it relates to, it provides access to different features.
- Access 2003 has five new task panes. In total, there are eight task panes: Getting Started, Help, Search Results, File Search, Clipboard, New File, Template Help, and Object Dependencies.
- You can change the type of task pane by clicking the **Other Task Panes** down arrow in the top right corner of the **task pane**. The eight task pane types are then available on a drop-down menu.
- One example of a **task pane** is when you create a new database file (by choosing **File > New**). The various options for creating a new database file are then provided in the pane.
- As with toolbars, you can move the **task pane** around the screen. You can do this by dragging its title bar.
- If the **task pane** is too small for you, you can resize it. You can achieve this by positioning the mouse indicator over a side edge or corner of the **task pane**. The mouse indicator changes to a two-sided arrow, which means you can drag it to make the pane bigger or smaller:



Note: Task panes - including the five new Access 2003 panes - will be discussed in greater detail later in this training manual.

Using the Status bar

- The **Status bar** appears at the bottom of the screen. It provides status information. For example, if you are inputting information into a table, the

status bar might tell you what mode you are in or what column you are currently applying changes to.

- The following image shows the **Status bar** when you have the Database window open:



- The following image shows the **Status bar** when you have a Design view open:

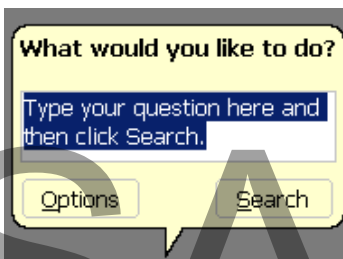


- Unlike the other toolbars, you cannot move the **Status bar** around the screen.

Using the Office Assistant

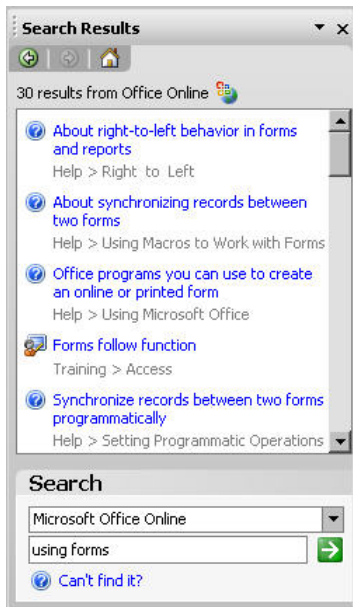
To open the Office Assistant

- From the main menu, choose **Help > Show the Office Assistant**. The **Office Assistant** is a **Microsoft Office Help** feature. It works by asking you questions. If you need help with a certain task, or if you need an explanation on a particular feature or concept, you can simply click on the **Office Assistant** and then type your request in the **Office Assistant** dialog box:



To ask the Office Assistant a question

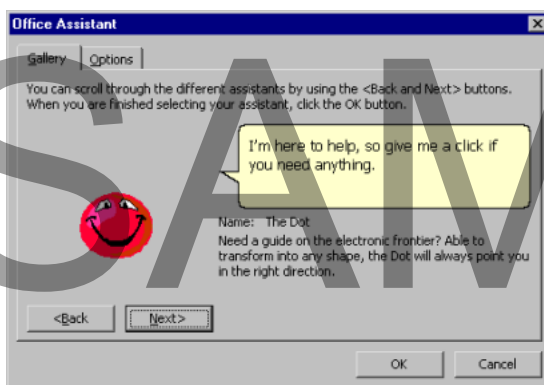
- In the text box of the **Office Assistant**, type a phrase.
- Click **Search**. Access 2003 will then perform an online search on the Microsoft Office web site.
- If the **Office Assistant** finds information related to that phrase, it will display the appropriate matches in the **Search Results** task pane. If it finds no matches, it tells you, and you can type a different phrase:



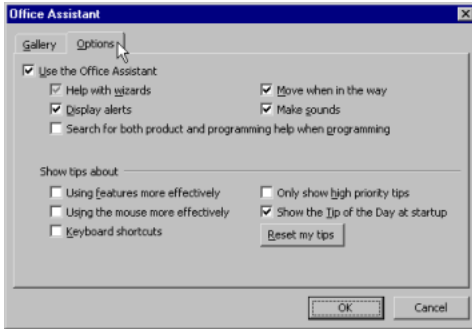
Note: If you do not have an internet connection, you can perform an Offline Help search by selecting **Offline Help** from the drop-down menu located in the **Search** section of the **Search Results** task pane. Simply click on the green arrow button to perform the query, and the results will be displayed in the **Search Results** pane.

To change Office Assistant options

- In the **Office Assistant** dialog box, click **Options**.
- In the displayed dialog box, use the **Gallery** tab to change the image for the Office Assistant:



- Use the **Options** tab to configure the behavior settings for the **Office Assistant**:



- Click **OK** to apply the changes and close the dialog box.

To hide the Office Assistant

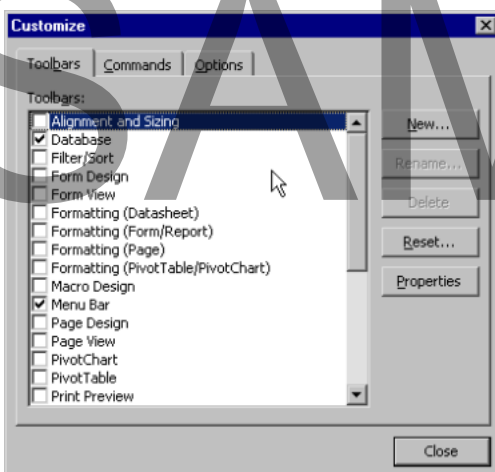
- From the **Help** menu, choose **Hide the Office Assistant**. You can also right-click the **Office Assistant** image and choose **Hide** on the context menu.

Customizing the toolbars

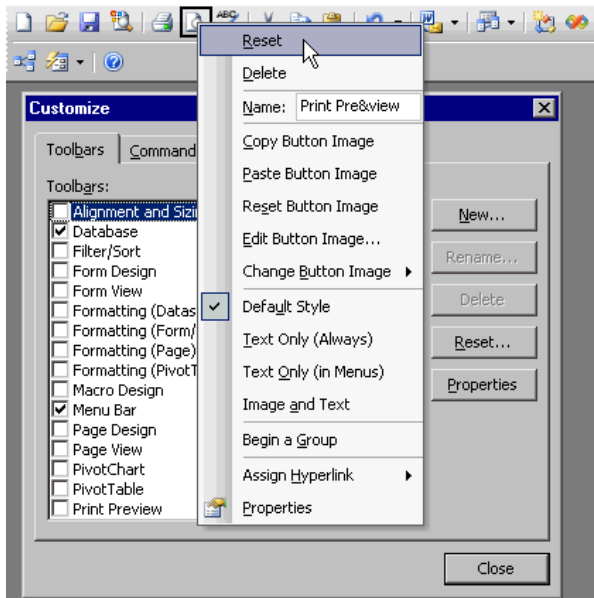
- You can right-click any toolbar and choose **Customize** on the context menu to customize the appearance and behavior of Access 2003's toolbars:



- In the **Customize** dialog box, use the three tabs to specify which toolbars should appear and how you want the commands to work:



- When the **Customize** dialog box is showing, you can right-click any button or menu option to customize names, button images, properties, and so on:



Review Questions

How would you:

- Use the menu bar?
- Use the Database toolbar?
- Use the task pane?
- Use the status bar?
- Use the Office Assistant?
- Customize the toolbars?

SAMPLE

The Database Toolbar

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

- Use the New button
- Use the Open button
- Use the Save button
- Use the Search button
- Use the Print button
- Use the Print Preview button
- Use the Spelling button
- Use the Cut button
- Use the Copy button
- Use the Paste button
- Use the Undo button
- Use the OfficeLinks button
- Use the Analyze button
- Use the Code button
- Use the Microsoft Script Editor button
- Use the Relationships button
- Use the New Object: <Object Type> button
- Use the Microsoft Access Help button

Using the Database Toolbar

Using the Database Toolbar

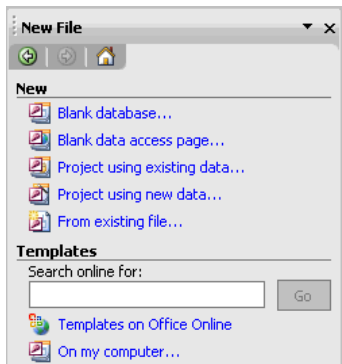
- The Database toolbar provides shortcuts to commonly used features.
- Some buttons are disabled until you have certain windows or features open.

Using the New button

- The **New** button lets you create a new database file or project file. It also lets you open a recently used file:



- When you click the **New** button, the **New File** task pane appears with links to various options:

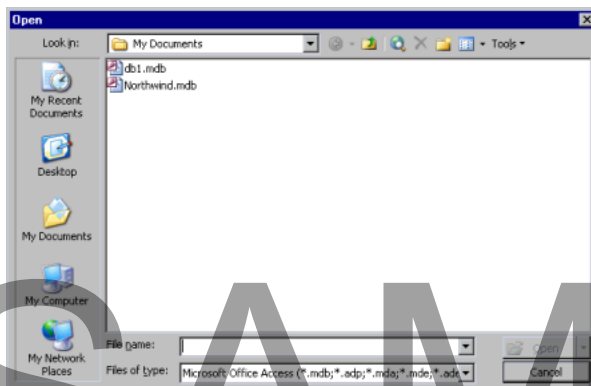


Using the Open button

- The **Open** button lets you open an existing database file or project file:



- When you click the **Open** button, the **Open** dialog box appears. This dialog box lets you browse to the location of the file you want to open and specify the file type of this file:



Using the Save button

- The **Save** button lets you save your current file:



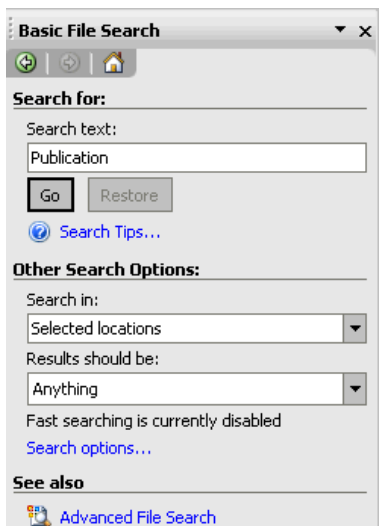
- If you have not previously saved the file when you click this button, the **Save As** dialog box appears. This dialog box lets you choose a location, name, and type for the file.

Using the File Search button

- The **File Search** button lets you search for specific files on your computer, as well as files that contain particular text:



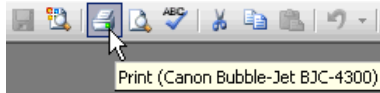
- When you click the **File Search** button, the **Basic File Search** task pane appears with various search options:



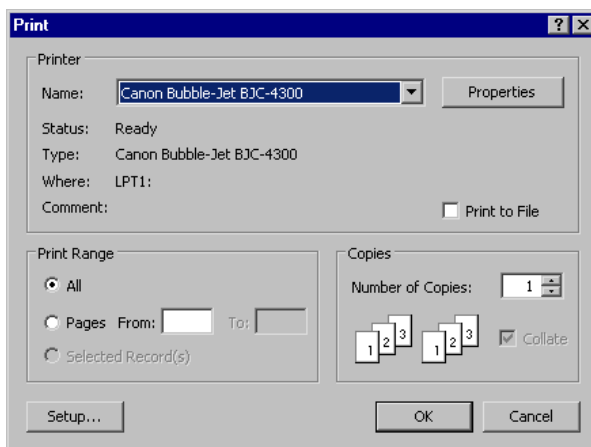
- To conduct a search, type the text you want to search for in the **Search text** box at the top of the task pane. Under **Other Search Options**, click the arrow beside each drop-down list and click inside the boxes that appear to select/deselect different options. If a **Plus (+)** symbol appears beside an option, you can click it to expand that selection and view nested options within. After you have specified all the options, click **Go**.
- It's helpful to restrict the search as much as possible before you click **Go** in the task pane. For example, if you know that the text will likely only occur in an Access file, make sure that only **Access Files** is selected in the **Results Should Be** drop-down list.

Using the Print button

- The **Print** button lets you print the currently selected database object. For example, if you have a table selected in the **Database** window and you click **Print**, only that table will print:

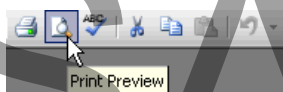


- The **Print** button is a shortcut to printing; it does not let you configure different printing options. If you want to configure printing options, choose **File > Print** from the main menu, and use the options in the **Print** dialog box to set up the print job:

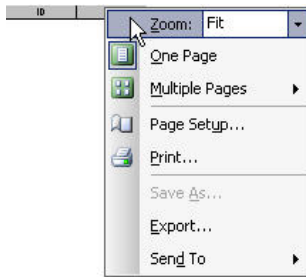


Using the Print Preview button

- The **Print Preview** button lets you preview the print job before you actually print it:



- When you click the **Print Preview** button, a preview window opens, showing you what the print job would look like if you clicked the **Print** button.
- In this preview window, when you hold the mouse indicator over the document, a magnifying glass icon appears. Click the window once to magnify the view, and click again to restore it to its original size.
- In the preview window, you can right-click the document to view a context menu. This menu lets you change the zoom level and other viewing options:

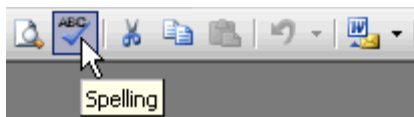


- At the bottom left corner of the preview window, you can tell the viewer what page you want to look at (if your form or report spans multiple pages). You can type the desired page number into the box and press the **Enter** key to go to a view of that page

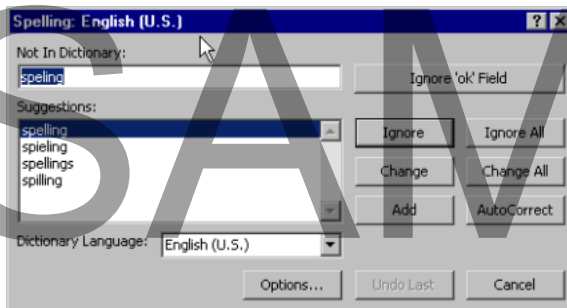
OR you can use the arrow buttons to navigate to the desired page.

Using the Spelling button

- The **Spelling** button lets you perform a spell check on the currently selected database object:



- When you click the **Spelling** button, Access 2003's spell check feature automatically launches. If it does not find any errors, it tells you that the spell check is complete. If it does find errors, a dialog box appears that lets you correct the word in question or tells the spell check feature to ignore that word:



Using the Cut button

- The **Cut** button lets you cut the currently selected text. Doing this removes the text from the screen and places a copy of it on the computer's Clipboard:



Using the Copy button

- The **Copy** button lets you copy the currently selected text (so that the text is not removed from the screen, but a copy of it is placed on the computer's Clipboard):



Using the Paste button

- The **Paste** button lets you paste the contents of the Office Clipboard into the document at the location of the cursor:



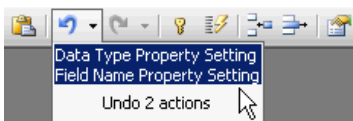
- Usually, to be able to paste, you need to have used the **Cut** or **Copy** feature first (to place information on the Clipboard).

Using the Undo button

- The **Undo** button lets you undo your most recent operation:

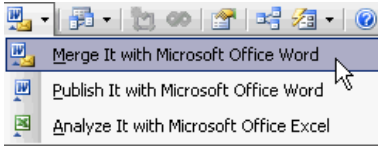


- You can click the arrow beside the **Undo** button to view a list of the twenty most recent actions you can undo:



Using the OfficeLinks button

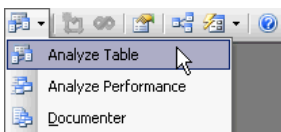
- The **OfficeLinks** button lets you work with the data in another Office application (like Word or Excel). When you click the arrow beside the **OfficeLinks** button, you can choose which application you want to use:



- Choose the **Merge It with Microsoft Word** option to open the **Microsoft Word Mail Merge** dialog box. This dialog box lets you merge your data into a Microsoft Word file via a link.
- Choose the **Publish It with Microsoft Word** option to place a copy of the data in a Microsoft Word **.rtf** file. (An **.rtf** extension stands for Rich Text Format.)
- Choose the **Analyze It with Microsoft Excel** to place a copy of the data in a Microsoft Excel worksheet.

Using the Analyze button

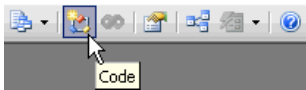
- The **Analyze** button lets you analyze your data or data object in various ways. When you click the arrow beside the **Analyze** button, you can choose which form of analysis to use:



- Choose the **Analyze Table** option to open the **Table Analyzer Wizard**. This wizard teaches you about effective table design, and it lets you make the structure of your tables more efficient.
- Choose the **Analyze Performance** option to open the **Performance Analyzer** dialog box. This dialog box lets you choose various objects in your database and have Access 2003 scan that object for any possible problems.
- Choose the **Documenter** option to open the **Documenter** dialog box. This dialog box lets you choose various objects in your database and have Access 2003 create a report that details the objects and property values. This feature is useful for gaining an overall understanding of your database's structure and content.

Using the Code button

- Use the **Code** button to open a **Microsoft Visual Basic** code editor window. You need to select a form in **Form View** for this button to be active:



Using the Microsoft Script Editor button

- The **Microsoft Script Editor** button lets you edit the code in a data access page. You can use the Microsoft Script Editor to add text, edit HTML tags, and add any VBScript code on the page:



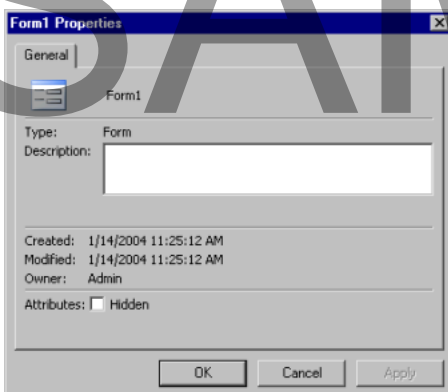
- You need to be working with a data access page before this option is available. You can create a data access page by choosing **File > New** and clicking **blank database access page**.

Using the Properties button

- The **Properties** button lets you view the properties of the currently selected object:

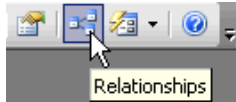


- When you click the **Properties** button, a properties dialog box opens for the currently selected object:



Using the Relationships button

- The **Relationships** button lets you view, edit, and create relationships between the tables in your database:



- When you click the **Relationships** button, the **Relationships** window opens. If you have no tables showing in this window yet, the **Show Table** dialog box also opens, which lets you select the tables you want to appear in the window:



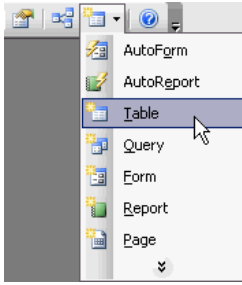
- In the **Relationships** window, you can create relationships by dragging one attribute to another. Relationships are represented with a black line connecting the linked attributes. You can edit a relationship by double-clicking the black line.

Using the New Object: <Object Type> button

- The **New Object: <Object Type>** button lets you insert new objects. The name listed beside "New Object:" depends on the type of object you have selected:



- When you click the arrow beside the button, a drop-down list provides different object types. To insert an object, click on the type of object you wish to add:



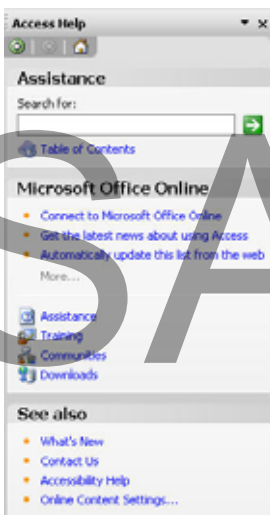
- For example, to insert a new table, click the arrow beside the **New Object** button and choose **Table**. The **New Table** dialog box then opens, which allows you to create a new table. After creating a table in this way, when you hold the mouse indicator over the **New Object** button, you can see that the name has changed to **New Object: Table**, because that is the most recent object you have created with this button.

Using the Microsoft Office Access Help button

- The **Microsoft Office Access Help** button lets you obtain help on a certain task or get more information on a particular concept:



- When you click the **Microsoft Office Access Help** button, the **Access Help** task pane appears, offering you online help:



- To find specific information on the Microsoft Office Help website, type a query into the **Search for** field, and click the green arrow button.

- Click on the appropriate link in the displayed **Search Results** pane to find the information you need. Do not hesitate to use the Access 2003 Help features - they exist to assist you!

Review Questions

How would you:

- Use the New button?
- Use the Open button?
- Use the Save button?
- Use the File Search button?
- Use the Print button?
- Use the Print Preview button?
- Use the Spelling button?
- Use the Cut button?
- Use the Copy button?
- Use the Paste button?
- Use the Undo button?
- Use the OfficeLinks button?
- Use the Analyze button?
- Use the Code button?
- Use the Microsoft Script Editor button?
- Use the Relationships button?
- Use the New Object: <Object Type> button?
- Use the Microsoft Office Access Help button?

SAMPLE

The Task Pane

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

- Open the Getting Started task pane
- View and open recent files
- Open the New File task pane
- Use the Blank database option of the New File task pane
- Use the Blank data access page option of the New File task pane
- Use the Project using existing data option of the New File task pane
- Use the Project using new data option of the New File task pane
- Use the From existing file option of the New File task pane
- Use the Templates option of the New File task pane
- Use the Templates on Office Online option of the New File task pane
- Open the Clipboard task pane
- Use the options on the Clipboard task pane
- Open the File Search task pane
- Use the Basic File Search and Advanced File Search features of the File Search task pane

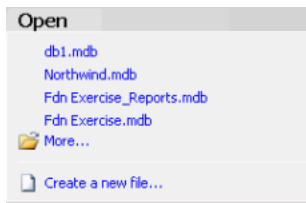
Using the Open area of the Getting Started Task Pane

Opening the Getting Started task pane

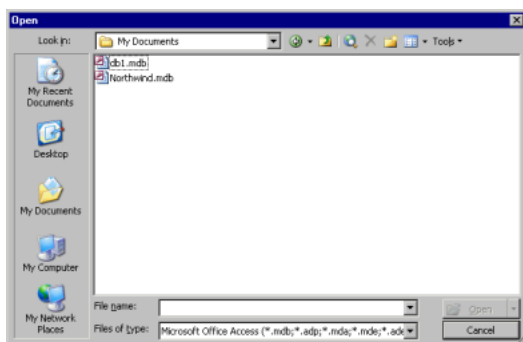
- By default, the new **Getting Started** task pane will automatically launch each time you start Access 2003.
- If the task pane is not already visible on the right side of the Access environment, from the main menu, choose **View > Task Pane**.
- Click on the **Other Task Pane** down arrow and select **Getting Started** from the list. You will notice that the top half of the task pane contains useful links to the Microsoft Office website. Experiment!

Viewing and Opening Recent Files

- The **Open** area of the **Getting Started** task pane shows recently opened Access files:



- If the list does not include the file that you want to open, click **More**.
- The **Open** dialog box opens, which lets you browse to the location of a file, specify its name and type, and open it:



- To open a file in the list, simply double-click its name.

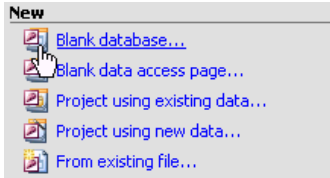
Using the New area of the New File Task Pane

Opening the New File task pane

- From the main menu, choose **File > New**.
- The **New File** task pane opens as a window on the right side of the screen.

Using the Blank Database option

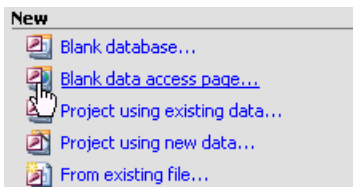
- The **Blank Database** option lets you create a new database file from scratch. You'll then be able to add new tables and other database objects, also from scratch:



- To use this option, click **Blank database**. The **File New Database** dialog box opens.
- In the **File Name** box, type a name for the new database, and from the **Save As Type** list, choose a file format (usually **.mdb** for a Microsoft Access database).
- Use the **Save In** list to browse to the location in which you want to place the new database file. You can double-click folders in the large pane to open them.
- Click **Create** when you have entered all the required information.

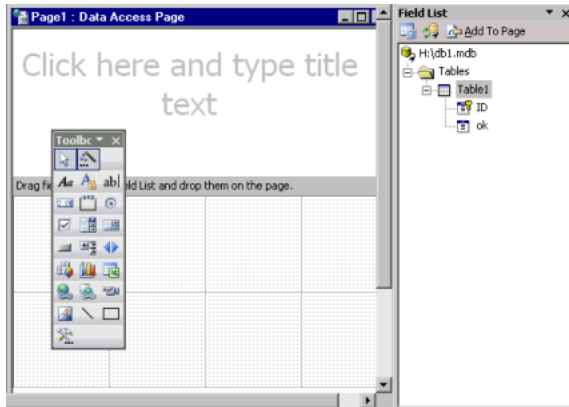
Data Access Page option

- The **Blank data access page** option lets you create a new data access page from scratch. A data access page is a Web page that is connected directly to the data in your database. You can use a data access page to view, edit, update, delete, filter, group, and sort information in the database:



- A data access page can contain components such as a spreadsheet, a PivotTable list, or a chart.
- Data access pages only work in **Microsoft Internet Explorer 5** or later.
- To use this option, click **Blank data access page**. A view of the blank page appears:

SAMPLE



- Create the page as desired. Use the toolbox that appears along with the view to add text and other objects to the page.

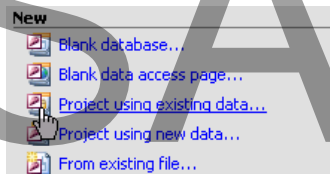
Note: If the toolbox doesn't appear, you can view it by choosing **View > Toolbox**.

To make a page available to other users over the World Wide Web

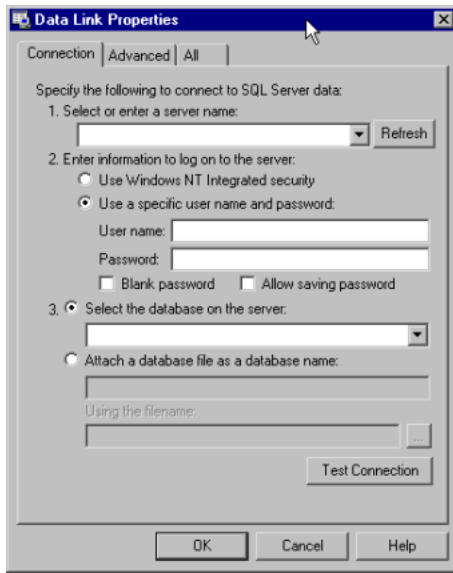
- You need to save the page to a Web folder or Web server.
- You also need to make the database (the one connected to the data access page) available to the users.

Using the Project using existing data option

- The **Project using existing data** option lets you create a new project file based on an existing database file. A project file is a file that connects to the database; it is the basis for client/server applications. For example, a project file might contain forms, reports, or modules; it would not contain any data or data-definition-based objects (like tables):

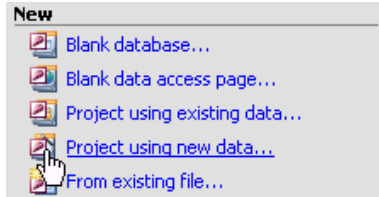


- When you choose this option, the **File New Database** dialog box opens. This dialog box lets you specify a name and location for the new project file.
- When you click **Create** in the **File New Database** dialog box, the **Data Link Properties** dialog box opens. This dialog box lets you provide the necessary information for Access to connect the new project file with an existing database:

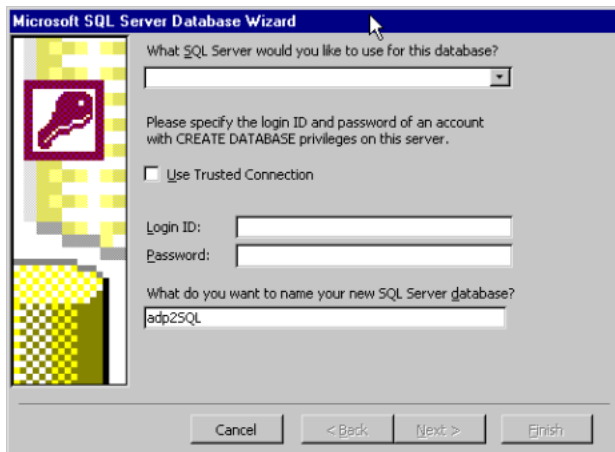


Using the Project using new data option

- The **Project using new data** option lets you create a new project file that is not yet based on any database file:

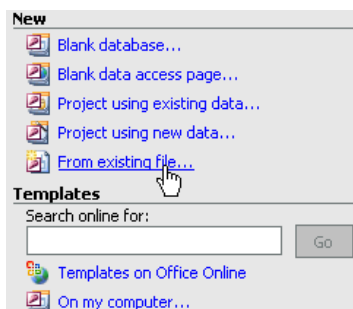


- When you choose this option, the **File New Database** dialog box opens. This dialog box lets you specify a name and location for the new project file.
- When you click **Create** in the **File New Database** dialog box, the **Microsoft SQL Server Database Wizard** opens. This wizard lets you provide Access with information about the database you will attach to the project. You can provide a name for this database as well as connection information:



Using the From existing file option

- The **From existing file** option lets you create a new database file based on the data in an existing file:

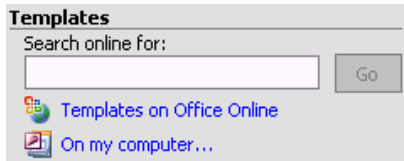


- When you select **From existing file**, the **New From Existing File** dialog box appears. This dialog box lets you specify the name and location of the file you want to base the new database file on.
- You can base a new database file on any of the following file types: another **Access database** file (*.mdb), an **Access project** file (*.adp), or an **HTML** file (*.htm or *.html).

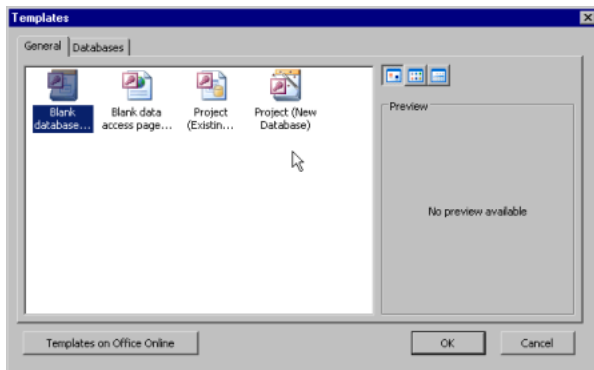
Using the Template area of the New File Task Pane

Using the Templates option

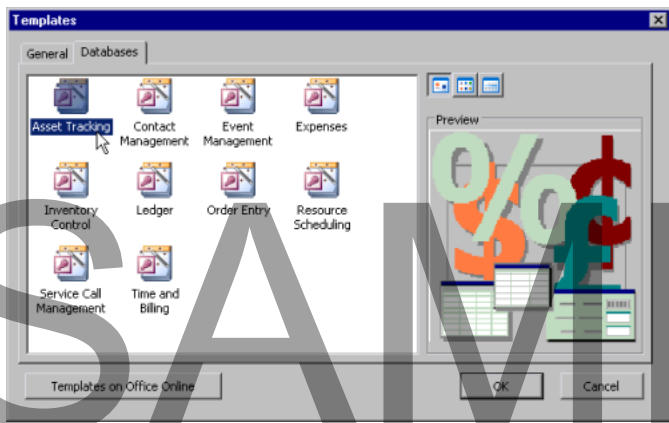
- The **Templates** option lets you create a new file (either a database file or a project file) based on one of Access's predefined templates:



- When you choose **On my computer**, the **Templates** dialog box opens with two tabs: the **General** tab and the **Databases** tab.
- Use the **General** tab to create a new blank database, blank data access page, project (based on an existing file), or project (not based on an existing file). These are the same options as the ones listed in the **New** area of the **New File** task pane:



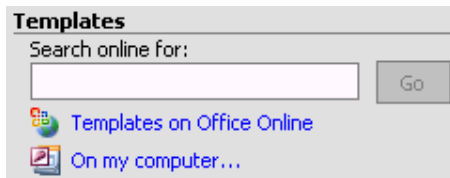
- Use the **Databases** tab to view a list of predefined Access databases. To model your new database file on one of these, select it and click **OK**:



- The right half of the **Templates** dialog box (for both options) lets you change the manner in which the files are listed in the left half. For example, if you want to view the contents of the left half in list format instead of icon format, you can select the appropriate button on the right half.

⚠ Using the Templates On Office Online option

- The **Templates on Office Online** option lets you create a new file based on a Microsoft predefined template located on Microsoft web site:

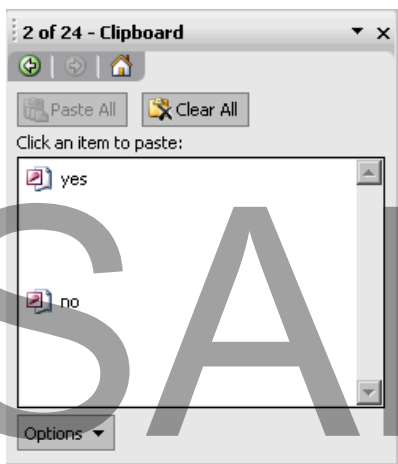


- This option is a link that launches your Internet browser and brings you to a Microsoft Office web page. Follow the instructions on this page to view the available templates.

Using the Clipboard Task Pane

About the Office Clipboard feature

- Microsoft Office comes with an **Office Clipboard** feature that can be used by all of the Office applications. This Office Clipboard stores up to 24 items; when you cut or copy something from any Office application, the item appears in Access's **Clipboard** task pane:

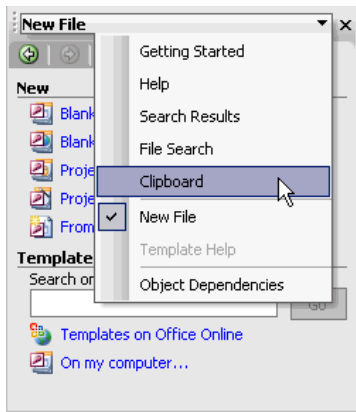


- The item is represented as a graphic in the task pane. The graphic tells you which application the item is from; for example, if you cut text from Microsoft Word, a Microsoft Word icon appears with that text in the **Office Clipboard**. The most recently cut or copied item is always added to the top of the gallery.
- The **Office Clipboard** is related to the system Clipboard, but they are not the same thing. The system Clipboard can only hold one thing at a time, while the **Office Clipboard** can hold up to 24. When you copy multiple items to the

Office Clipboard, the last item is always copied to the system Clipboard. When you clear all items from the **Office Clipboard**, you also clear the system Clipboard. When you use the **Paste** shortcut keys (**Ctrl + V**), you paste the contents of the system Clipboard, not the **Office Clipboard**.

Opening the Clipboard task pane

- If the **New File** task pane is showing, click the down arrow in the top right of the task pane and choose **Clipboard** from the drop-down list:

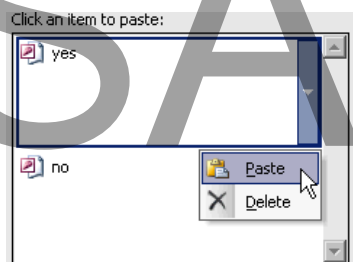


- If the **New File** task pane is not showing, choose **Edit > Office Clipboard** from the main menu.

Using the Office Clipboard feature

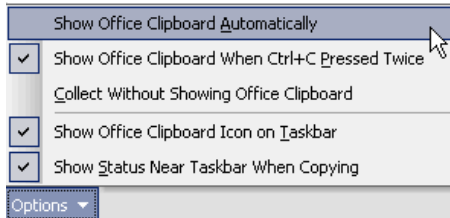
- With the cursor at the location where you want to paste an item, simply click the graphic that represents that item in the **Office Clipboard**

OR right-click the item and choose **Paste**:



- To remove a single item from the **Clipboard** task pane, right-click on it and choose **Delete**.
- To remove all items from the **Clipboard** task pane, click **Clear All**.

- If the **Clipboard** task pane is docked to the side of the main Access window and you want to float it over your work area, drag the task pane's title bar toward the middle of the screen. If the task pane is floating and you want to dock it, double-click its title bar.
- To configure options for the **Clipboard** task pane, click **Options** in the lower left corner of the task pane and choose the desired option:



Using the File Search Task Pane

⚠ About the File Search feature

- Microsoft Office comes with a **File Search** feature that can be used by all of the Office applications. This **File Search** feature allows you to search your computer for any files or objects containing the text that you specify:

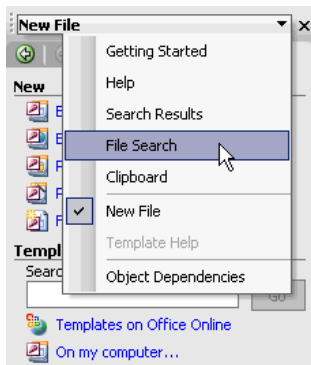


- The **File Search** feature has two parts to it: a **Basic File Search** component and an **Advanced File Search** component. The **Basic File Search** allows you to search for text. The **Advanced File Search** allows you to search for any number of data types (including file names, types of files, or categories of information).
- In Access, the **File Search** feature is available on the **File Search** task pane.

Note: Don't confuse the **File Search** feature with filters or queries. Filters and queries are also "search" functions, but they are intended to help you find very specific information and analyze this information. The **File Search** feature is for higher-level searches, where you are just looking for instances of a word or name. Filters and queries are described later in this training manual.

Opening the File Search task pane

- If the **New File** or **Clipboard** task pane is showing, click the down arrow in the top right of the task pane and choose **File Search** from the drop-down list:



Note: If a task pane is not showing, choose **File > File Search** from the main menu.

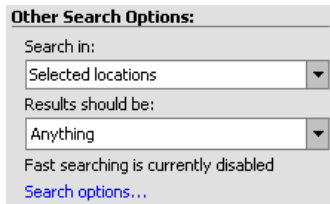
Using the Search feature

- To perform a basic search (for text that occurs in a file on your system), make sure that the title bar states **Basic File Search**. You can toggle back and forth between **Basic Search** mode and **Advanced File Search** mode by clicking the blue link at the bottom left of the task pane:

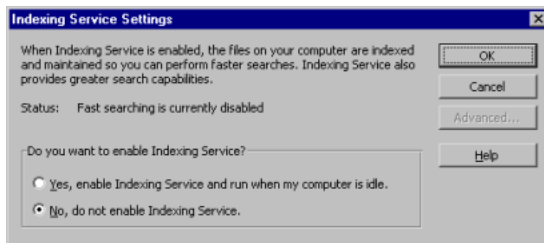
See also

[Advanced File Search](#)

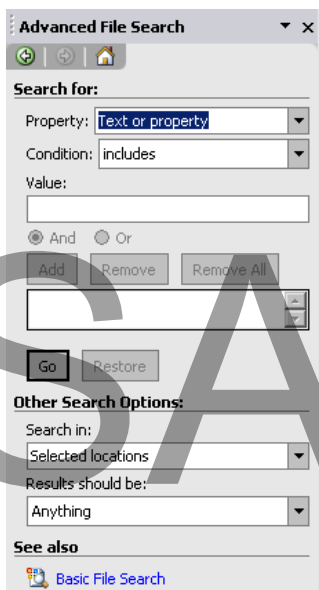
- Restrict the search parameters as much as possible. For example, if you are performing a **Basic** search for a text string, use the **Search in** and **Results should be** drop-down lists to make the search apply to only those specifications:



- To make searching more efficient, Windows provides an indexing feature. You can enable/disable this feature by clicking **Search Options** in **Basic Search** mode:



- To perform an advanced search in **Advanced Search** mode, use the **Property** drop-down list to specify the type of information you are searching for. You can further limit the search by using the **Condition** drop-down list and text box.
- If you are using this **Condition** feature, you need to click **Add** to add the typed **Value** to the box. This lets you combine multiple conditions in one search if you want:



Review Questions

How would you:

- Open the Getting Started task pane?
- View and open recent files?
- Open the New File task pane?
- Use the Blank database option of the New File task pane?
- Use the Blank data access page option of the New File task pane?
- Use the Project using existing data option of the New File task pane?
- Use the Project using new data option of the New File task pane?
- Use the From existing file option of the New File task pane?
- Use the Templates option of the New File task pane?
- Use the Templates on Office Online option of the New File task pane?
- Open the Clipboard task pane?
- Use the options on the Clipboard task pane?
- Open the File Search task pane?
- Use the Basic File Search and Advanced File Search features of the File Search task pane?

SAMPLE

The Database Window

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

- Use the Open button on the Database window menu bar
- Use the Design button on the Database window menu bar
- Use the New button on the Database window menu bar
- Use the Delete button on the Database window menu bar
- Use the Icon buttons on the Database window menu bar
- Use the List button on the Database window menu bar
- Use the Details button on the Database window menu bar
- Use groups
- Use the Favorites button on the Database window toolbar
- Use the Tables button on the Database window toolbar
- Use the Queries button on the Database window toolbar
- Use the Forms button on the Database window toolbar
- Use the Reports button on the Database window toolbar
- Use the Pages button on the Database window toolbar
- Use the Macros button on the Database window toolbar
- Use the Modules button on the Database window toolbar

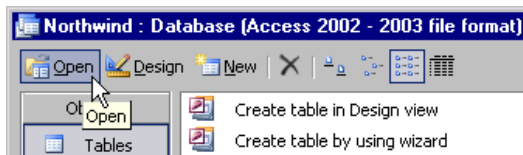
The Database Menu Bar

Using the Database Menu Bar

- The Database Window Menu bar allows you to open an object, access the Design view for the selected object, create a new object, delete an object, and arrange the objects in the Database window.

Using the Open button

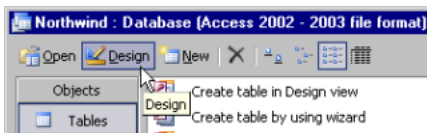
- The **Open** button of the Database window menu bar allows you to view an object in your database:



- The **Open** button works in conjunction with the object you have currently selected in the window. For example, if you have a particular table selected and click the **Open** button, a window containing that table will open.

Using the Design button

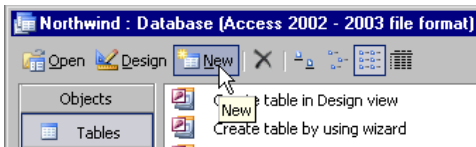
- The **Design** button allows you to view an object in Design view. Design view is a mode of Access that lets you create or modify the structure of tables and queries, create forms or pages through which you can display data, and format reports:



- Like the **Open** button, the **Design** button works in conjunction with the object that is currently selected in the window.
- The options within the Design view depend on the object you are modifying. For example, Design view for tables differs from that of forms.

Using the New button

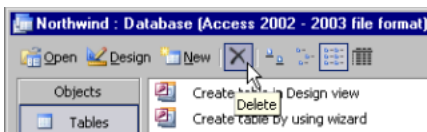
- The **New** button allows you to create a new object using a wizard:



- The **New** button works in conjunction with the type of object button selected in the toolbar along the left side of the Database window. For example, to create a new table, select the **Tables** button and click **New**.

Using the Delete button

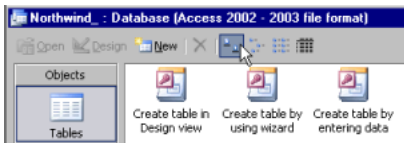
- The **Delete** button allows you to delete an object:



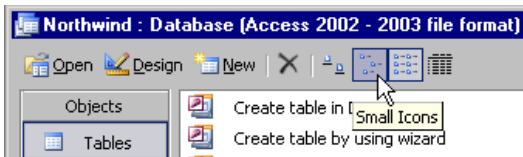
- To use this feature, select the object you want to delete, and click this button. As a safeguard, Access will always prompt you to continue before it actually deletes the object.

Using the Icon buttons

- The **Large Icons** and **Small Icons** buttons allow you to change the size of the graphics in the Database window.
- Click **Large Icons** to make the graphics bigger:

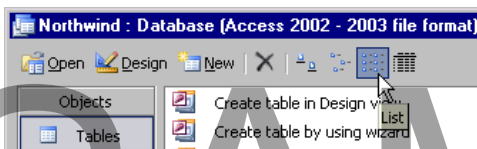


- Click **Small Icons** to make the graphics smaller:



Using the List button

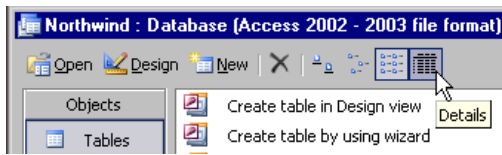
- The **List** button allows you to view the database objects in the Database window in a list format:



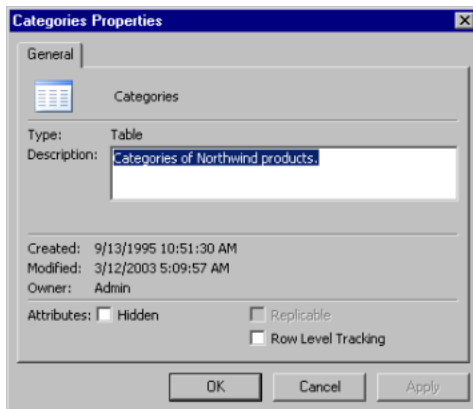
- In this list, only the names of the objects are listed.

Using the Details button

- The **Details** button is similar to the **List** button (it also lets you view the database objects in list format), but it provides more information than just the name, such as a description of the object, the date it was last modified, and its type:



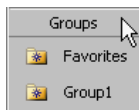
- To add a description to an object (so that it appears under the **Description** column when you click the **Details** button), right-click an object in the Database window and choose **Properties**. In the **Properties** dialog box, you can type the description in the box provided. After you close this dialog box, the description will appear when you have the list details showing:



The Database Window Toolbar

About the Groups feature

- Groups** is an **Access** feature that lets you combine commonly used or similar objects in one grouping. The objects listed in a group are actually shortcuts to the objects; they are not the objects themselves. So, if you delete a group shortcut, you are not actually deleting the object.
- On the toolbar along the left side of the **Database** window, any groups you have created appear under the **Groups** button:

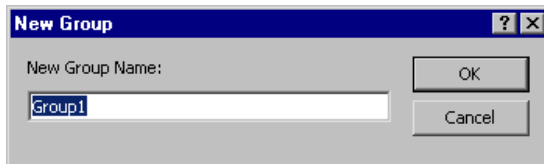


- Groups** can be useful as organizational tools; if your database has dozens of objects, a group can help you to access a particular object efficiently.

Using Groups in the Toolbar

To create a new group

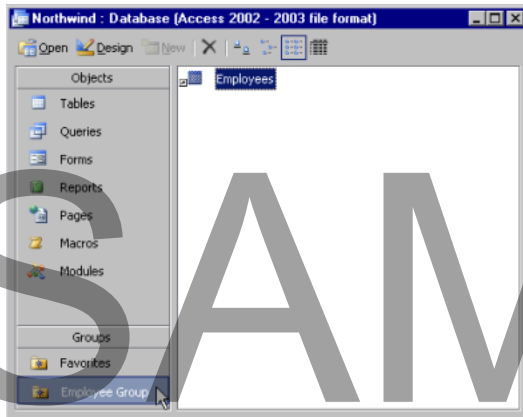
- From the main menu, choose **Edit > Groups > New Group**.
- In the **New Group** dialog box, type a name for the group and click **OK**:



- If the group does not appear in the **Database** window, click the **Groups** button along the side of the window; the Groups section of the toolbar will then expand to show the new group.

To add an object to the group

- Click the appropriate button along the left side of the window to show the object in the right pane.
- From the right pane, drag the object to the group name.
- Click the group name to make sure a shortcut to the object was created successfully:



To remove an object from the group

- Click the group name along the left side of the window.
- In the right pane, select the object shortcut and click the **Delete** button at the top of the Database window

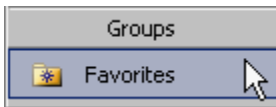
OR right-click the object shortcut and choose **Delete**.

To delete a group

- Click the group name along the left side of the window.
- Right-click the name and choose **Delete Group**.

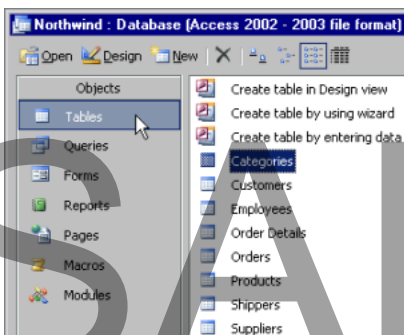
Using the Favorites button

- The **Favorites** button represents a default group Access creates for you, called **Favorites**. You can add objects to this group or remove them from this group in the same way as you would with other groups. It's up to you whether you want to use this group or create your own, but you cannot delete the Favorites group:



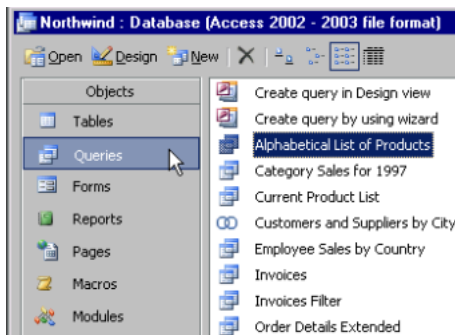
Using the Tables button

- The **Tables** button allows you to view all tables in the database, as well as different table-creating options. In this view, you can double-click a table to work with it:



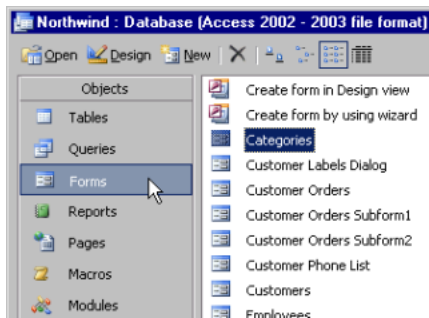
Using the Queries button

- The **Queries** button allows you to view all queries in the database, as well as different query-creating options. In this view, you can double-click a query to work with it:



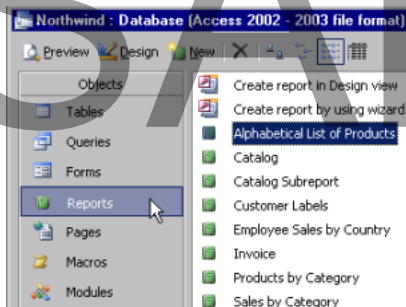
Using the Forms button

- The **Forms** button allows you to view all forms in the database, as well as different form-creating options. In this view, you can double-click a form to work with it:



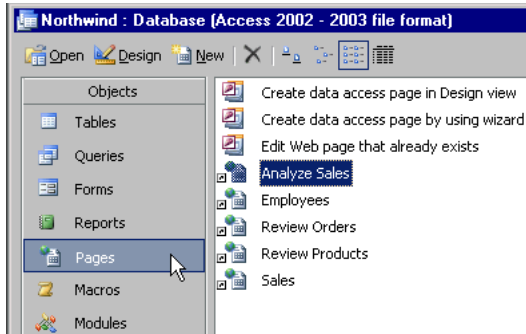
Using the Reports button

- The **Reports** button allows you to view all reports in the database, as well as different report-creating options. In this view, you can double-click a report to work with it:



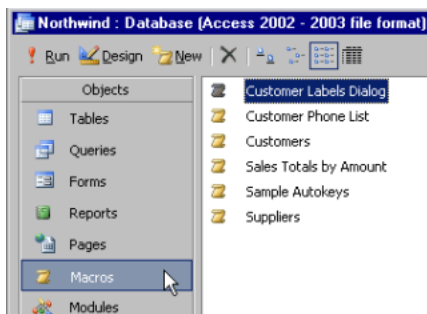
Using the Pages button

- The **Pages** button allows you to view all pages in the database, as well as different page-creating options. In this view, you can double-click a page to work with it:



Using the Macros button

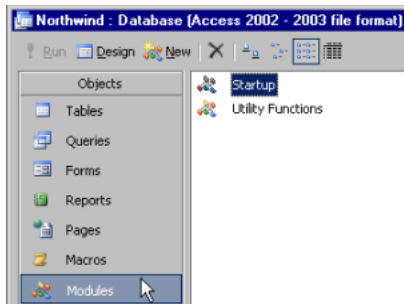
- The **Macros** button allows you to view all macros in the database, as well as different macro-creating options. In this view, you can double-click a macro to work with it:



Using the Modules button

- The **Modules** button allows you to view all modules in the database, as well as different module-creating options. In this view, you can double-click a module to be able to work with it:

SAMPLE



Review Questions

How would you:

- Use the Open button on the Database window menu bar?
- Use the Design button on the Database window menu bar?
- Use the New button on the Database window menu bar?
- Use the Delete button on the Database window menu bar?
- Use the Icon buttons on the Database window menu bar?
- Use the List button on the Database window menu bar?
- Use the Details button on the Database window menu bar?
- Use groups?
- Use the Favorites button on the Database window toolbar?
- Use the Tables button on the Database window toolbar?
- Use the Queries button on the Database window toolbar?
- Use the Forms button on the Database window toolbar?
- Use the Reports button on the Database window toolbar?
- Use the Pages button on the Database window toolbar?
- Use the Macros button on the Database window toolbar?
- Use the Modules button on the Database window toolbar?

SAMPLE

Tables

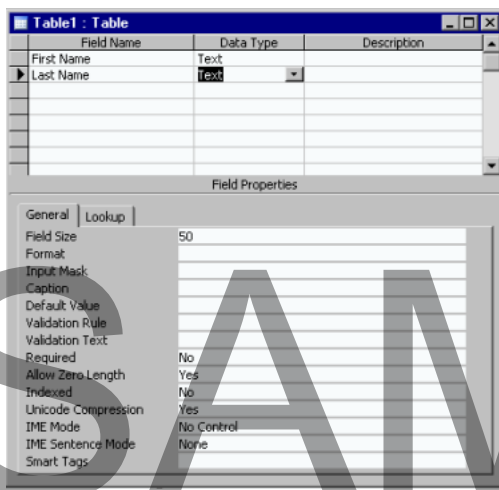
When you have completed this learning module you will have seen how to:

- Create a table in Design view
- Use the Table Wizard to create a table
- Change a table design
- Add records
- Find records
- Filter records (using one of three methods)
- Sort records

Create a Table

About creating a table in Design view

- You can create a table in **Design view** or with a wizard.
- **Design view** is a window that lets you configure the table columns (also called fields). Think of this view as a blueprint for the table: it doesn't show you actual data in each row, but it does define how the rows need to look:



- The concept of “row” has a slightly different meaning in Design view: a “row” in Design view actually represents one column in the table (as opposed to one record). For example, if in Design view you name a row “First Name”, the table will have a column called “First Name” and each record in the database will need to have a “First Name” field entry.
- All fields have two main characteristics: **Field Name** and **Data Type**. **Field Name** refers to the name of the column. **Data Type** refers to the type of information a field can contain (e.g., text instead of numbers).

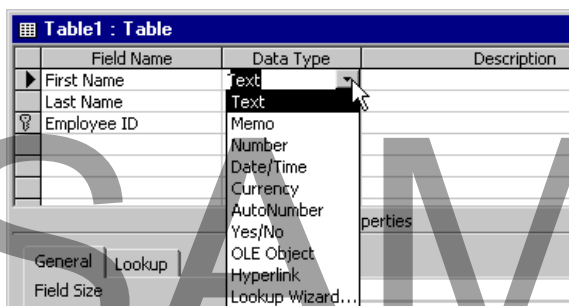
- For each field, you can also define other properties, such as how many characters they can hold, or how they should be presented to users (e.g., as a drop-down list instead of a text box).
- It's usually a good idea to define one field in the table as a **primary key**. A primary key is a field whose value uniquely identifies each record in the table. Access provides an **AutoNumber** feature that can assign a unique number to each record for this purpose. For example, if you are creating an Employees table, you can create an Employee ID field, define it as the primary key, and use the AutoNumber feature to give each employee record a unique ID. Primary keys are used as the basis for relationships to foreign keys of other tables. A primary key cannot allow Null values:

	Field Name	Data Type	Description
	First Name	Text	
	Last Name	Text	
	Employee ID	AutoNumber	

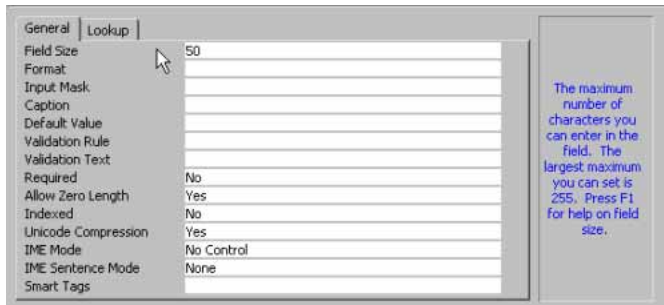
- You can use the **Tab** key to move from field to field.

Creating a Table in Design View

- Click the **Tables** button along the left side of the Database window.
- In the right pane, double-click **Create table in Design view**. A blank design view window opens.
- Begin creating fields: input a name and type for each. When you place the cursor in the **Data Type** field, a drop-down arrow lets you choose a type:



- For each field, use the tabs at the bottom of the window to further define field properties. If you need more information about these properties, place your cursor in each; the lower right corner of the window tells you how that property works:



- Use the **Insert Rows** or **Delete Rows** buttons on the toolbar at the top of the Access window to add new rows above your current row or delete your current row:



- Use the **Primary Key** button on the toolbar at the top of the Access window to make the current row the primary key. If you want to remove primary key status from that row, select it and click the **Primary Key** button again.

Note: You can also right-click a row and choose **Primary Key** from the context menu:



- When you are finished creating fields and setting up the table as desired, choose **File > Save** and type a name for your table. Click **OK**.

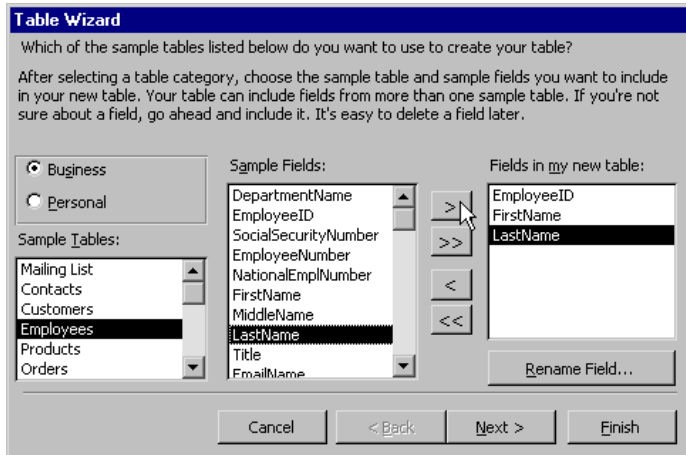
About using the Table Wizard to create a table

- The other method for creating a table is by using a wizard. This wizard provides samples of common fields in different types of personal or business database tables. Note that there is no actual data attached to these fields; they are merely models that you can choose to incorporate. You can always rename the fields if you want a different name.

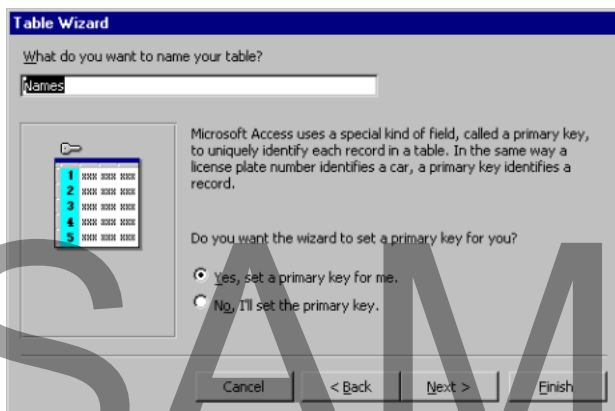
Using the Table Wizard to create a table

- Click the **Tables** button along the left side of the Database window.
- In the right pane, double-click **Create table by using wizard**. The wizard opens.
- On the first page, use the **Business** or **Personal** options to filter the list of sample tables and fields to the desired type. Clicking different tables in the **Sample Tables** list makes the contents of the **Sample Fields** list change

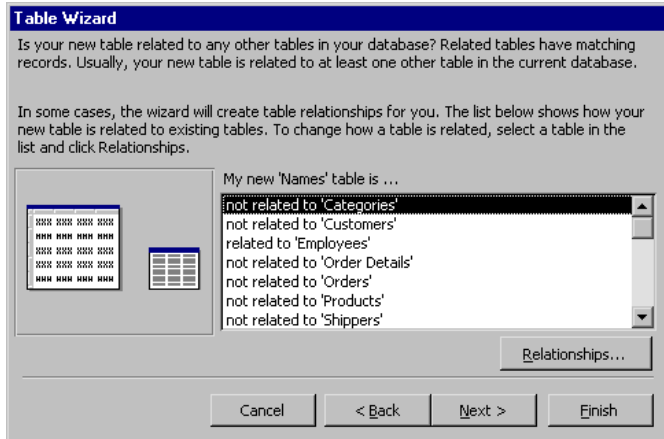
accordingly. When you see a field name that matches a field you want in your new table, select it and click the > arrow button:



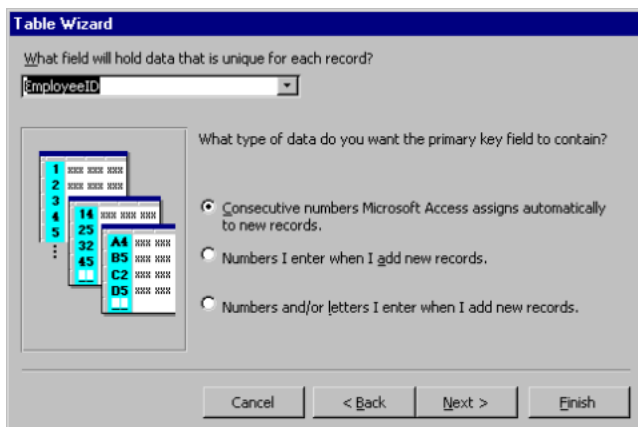
- Fields you have added stay in the list on the right even if you change the options in the left half of the dialog box. If you want to remove a field from the list, select it from the list on the right, and click the < arrow button. If you would like to rename a field, select it and click **Rename Field**.
- Click **Next**. Type a name for your table and choose whether you want the wizard to set a primary key. If you choose **No**, you'll need to do it in Design view after the table is created. If you choose **Yes**, you can always change the primary key after the table is created:



- Click **Next**. If you chose to let the wizard set a primary key for you on the previous page, you can now create relationships between this table and other existing tables if there is common information between the tables. The wizard lists all other existing tables; if you select one and click **Relationships**, the wizard asks you the type of relationship (and gives an explanation of each):

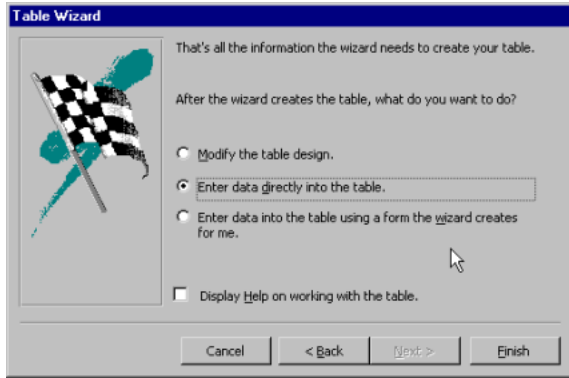


- If you chose to set your own primary key on the previous page, the wizard asks you for information that might be suitable for a primary key:



- Click **Next**. If you chose to manually set your primary key, you are now prompted to specify relationships (described above). Otherwise, the final wizard screen appears.
- Choose an option for when the wizard finishes: you can have the wizard open Design view for you to modify the table design, start entering data directly into the table

OR have the wizard open a form for data entry:



- Click **Finish**.

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.

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