



Access 2 Class Guide

Instructor: Susan Jerger

Part 1: Rehash of Access 1

1.1 Object Types

Table (saved with tbl prefix) – the backbone of your database. By creating multiple tables that have relationships, you can fully utilize Access’s functionality.

Query (qry) – a way to pull specific data from a table or tables; can combine tables and calculate fields on the fly

Form (frm) – a quick and easy way to enter data

Report (rpt) – can be used to summarize data culled from tables using queries; they are nicely formatted to print out like a Word document.

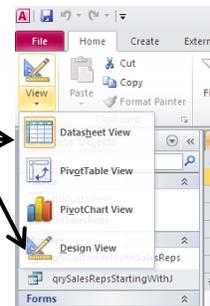
1.2 Views

You can view the objects in different ways. And the views will vary depending on the type of object you are currently using. Two of the most common views are...

Datasheet View – shows records and fields in a spreadsheet-like format

Design View – delves more deeply into the make-up of the object (varies by object type)

You can change the view off of the **Home tab** of the Ribbon or on the right side of the Status Bar.

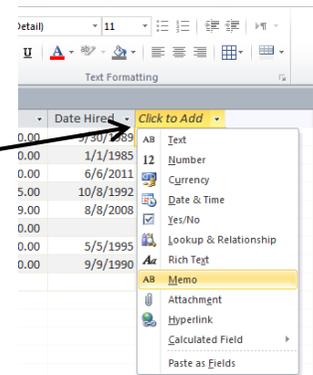


Part 2: Changing Your Table after the Fact

2.1 Adding (& Deleting) fields in Datasheet View

While Datasheet View is generally used just for data entry and record maintenance, you can easily add fields as needed.

1. Click on the **Click to Add** button at the end of your field columns.
2. Choose the field type and name the field.
3. If needed, switch to Design View to change Field Properties.



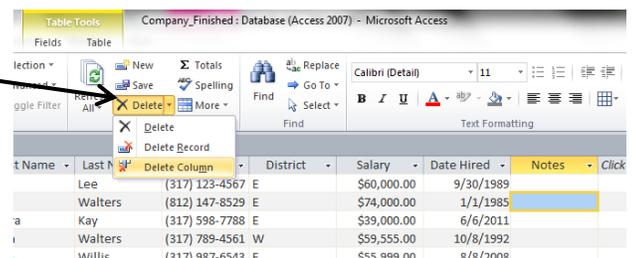
Exercise 1: Add a Memo field to tblSalesReps

It is even easier to delete a field (assuming it is not a Primary Key or linked field, of course!)

1. Click somewhere in the column.
2. Click on **Delete** → **Delete Column** on the Home tab of the Ribbon.
3. Click **Yes** on the dialog box that pops up.

NOTE #1: An alternative would be to *right click* on the column and select **Delete Field** and then **Yes**.

NOTE #2: You can delete Records either way as well.



Exercise 2: Delete the Memo field from tblSalesReps

Part 3: Save Time with Lookup Lists

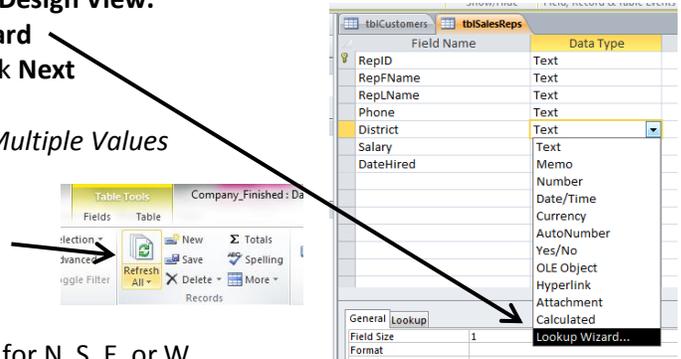
A lookup field (AKA drop-down list) can be helpful in preventing user entry errors by letting users select from a list of values. An example would be a list of states’ abbreviations for an address field.

3.1 Using the Lookup Wizard

The Lookup Wizard will let you specify what you want to appear in the drop-down list. It is a great option if your values will rarely change.

1. Open the table you want to have a lookup field in **Design View**.
2. Change the Data Type for the field to **Lookup Wizard**
3. Choose "I will type the values that I want" and click **Next**
4. Put the values in one column and click **Next**
5. Choose whether or not to *Limit to List* and *Allow Multiple Values*
6. Click **Finish**

NOTE: If you've entered a new record into a form, you can use the Refresh All button on the Ribbon to make sure the underlying table or query is also updated.



Exercise 3: Change tblSalesReps' District to a Lookup Field for N, S, E, or W.

3.2 Lookup List from another Table

If your lookup list will often vary or will be used more than once, use a separate table for the list.

1. Before creating the lookup, create the additional table if it does not already exist. Enter the necessary records.
2. Open the table that will have the look up in **Design View**
3. Change the Data Type for the field to **Lookup Wizard**
NOTE: if you are using a field that has an established relationship, you will need to delete that relationship in order to create the Lookup List. To delete a relationship: (1) Click on **Database Tools tab** and then **Relationships**. (2) Click on the relationship line and press **Delete**. (3) click **Yes**. (4) Then change the Data Type to **Lookup Wizard**.
4. Choose "I want the lookup field to get the values from another table or query" and click **Next**
5. Choose the table or query and click **Next**
6. Select the field(s) and click **Next**
7. Choose field(s) to sort and click **Next**
8. Choose whether or not to hide the column key and click **Next**
9. Enable data integrity and then save.
10. Use the Lookup Field Properties in Design View to tailor your lookup field. Example: Add column headers by putting Yes next to Column Heads.
11. Delete the table copy from the Navigation Pane.

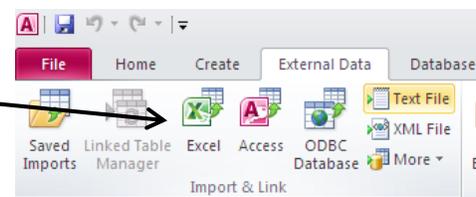
Exercise 4: Transform the RepID field in tblCustomers into a Lookup Field using tblSalesReps' RepID field (be sure to delete their relationship first!)

Part 4: Importing into Access

4.1 Import Data from Excel Spreadsheets

Data from an Excel spreadsheet can easily be imported into an Access database using the Import Spreadsheet Wizard.

1. Go to the **External Data tab** of the Ribbon.
2. In the Import & Link group, click on **Excel**.
3. When the Get External Data box pops up, browse for the spreadsheet file and choose whether to add a new table, append to an existing table, or create a linked table.



4. Choose the sheet(s) or range(s) you want added.
5. Indicate if there are first row column headings.
6. Check if you would like a wizard to analyze your table for errors after importing.
7. Click **Finish**.
8. You can then save your import steps if this is a procedure you do often.

Exercise 5: Import NewSalesReps.xlsx into tblSalesReps.

4.2 Import Data from Text Files

Text files will have file extensions such as .csv (comma-separated values) or .txt. This type of file may not appear structured, but as long as the data is separated in a consistent format (by commas, spaces, tabs, etc.), Access can place the data in the correct locations.

1. Go to the **External Data** tab of the Ribbon.
2. In the Import & Link group, click on **Text File**.
3. When the Get External Data box pops up, browse for the spreadsheet file and choose whether to add a new table, append to an existing table, or create a linked table.
4. Next, choose Delimited or Fixed Width
5. If delimited, choose the delimiter and mark if the first row contains field names
6. Follow steps #6-9 above.

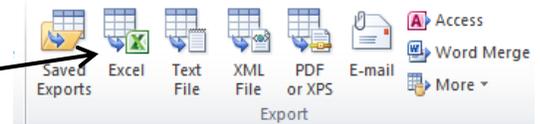
Exercise 6: Import CustomersTextImport.txt into tblCustomers.

Part 5: Do the Opposite: Export!

5.1 Exporting into Excel

You can easily export Access objects (tables, queries, forms, reports, etc.) into another Access database or into other formats such as Excel.

1. Open the Object in Datasheet View
2. Click the **External Data** tab on the Ribbon
3. Select **Excel** in the Export section
4. In the window that pops up, select the file name, format, and options.
5. Click **OK**
6. Save the export steps if you'd like, then click **Close**.



Exercise 7: Export Customers as an Excel file.

Part 6: Sorting & Filtering Your Records

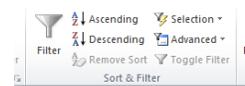
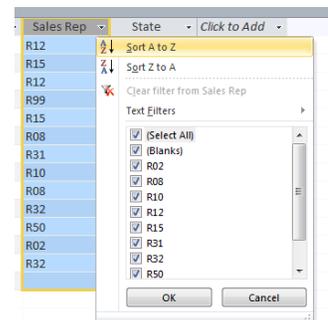
6.1 Sorting is Easy

You can sort records in tables, queries, and forms.

1. In Datasheet View, click on the arrow to the right of the Field Name you want sorted.
2. Choose to sort Ascending (A to Z) or Descending (Z to A).

NOTE #1: You can right click on fields in a form to get a similar choice.

NOTE #2: Sorting options are usually available off of the Home tab of the Ribbon.



Exercise 8: In tblSalesReps, sort by RepID

6.2 Filtering the Easy Way

Filtering can be done quick and easily. It can be helpful for analyzing data.

- Filter options can be found where the sorting options are as well.
- You can toggle the Filter off/on from the Ribbon or from the Record bar at the bottom.

Exercise 9: In tblSalesReps, filter to reps with \$50,000 or greater salaries. Then sort by Last Name.

Part 7: The Power of the Query

7.1 Filtering with Queries

You can use filtering queries to drill down to relevant data. Comparison operators (such as >, <, >=, <=, =, and < >) and logical operators (AND, OR, NOT, etc.) can be used to filter the data. Here is an example:

1. Start a new Query by going to **Create tab** and clicking on **Query Wizard**
2. Choose a query type such as *Find Unmatched Query Wizard*.
3. Follow the Wizard's steps to completion.

Exercise 10: Using tblCustomers, use the *Find Unmatched Query Wizard* to find sales reps without customers. Then add in the Date Hired.

7.2 User Parameters in Queries

You can have a query prompt the user for a certain value for a field. This can be done in Design View for a query. In the Criteria row for a field, type in [Which *fill-in-the-blank?*] for the user to be prompted for an entry each time the query is run.

Exercise 11: Create a parameter query that asks for a customer's state.

Part 8: Printing Labels

8.1 Labels are a snap

Access handily has a labels report set up and ready to go for you. Forget about Word's Mail Merge...Access has it beat hands down.

1. Select the table or query that has your source data.
2. Click on **Create** on the Ribbon
3. Click on **Labels** in the Reports section
4. In the Label Wizard, choose: the label size, the text appearance, fields and spacing for the label, how you would like the labels sorted, and the name of your labels report.

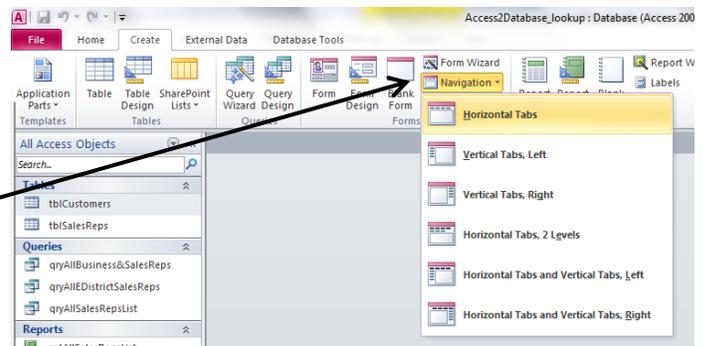
Exercise 12: Print labels from tblCustomers.

Part 9: Navigation Form-The new "Switchboard"

A Navigation form (formerly known as a "switchboard" in previous versions of Access) can be a great tool when your database will be used by others. A user could click a button to perform actions without having to tinker with your tables.

9.1 An Easy Navigation Form

1. Click on the **Create tab** of the Ribbon.
2. In the Forms section, click on **Navigation** and choose the layout you would like to use.
3. Click and drag forms and reports to the buttons of the navigation form.

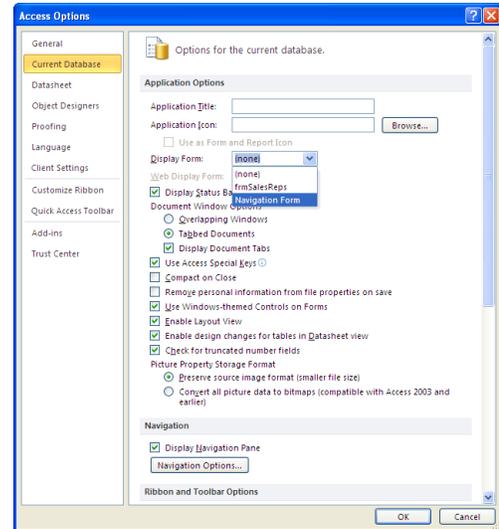


4. You can also have a button represent an action to be performed.
 - a. Make sure the button is selected and in Layout View.
 - b. Click on the **Property Sheet** button on the right in the Ribbon.
 - c. The Property Sheet will open on the right.
 - d. Use the **Builder button**  off the Event tab.
 - e. Choose your Builder (Macro builder in this instance)
 - f. Open the Action Catalog to find an action you need.
 - g. Click Save in the Ribbon and then Close when finished.
5. Use the Form Layout Tools tabs to format the form the way you need it.

9.2 Make Your Navigation Form Front and Center

Force Access to display your Navigation Form when the database is first opened.

1. Click on **File** and then **Options** on the bottom left.
2. In the Access Options window, click on Current Database.
3. Next to Display Forms, chose the Navigation Form.
4. Click OK.
5. Exit out of Access and reopen the database to see if the change has worked.



Part 10: The Last Bits

10.1 Further Study

UITS IT Training & Education – University Information Technology Services at IUPUI and IU-Bloomington

<http://ittraining.iu.edu/>

Offers a wide range of computer classes for free to students, faculty, and staff and for a fee to outside people.

Monroe County Public Library – Bloomington, IN

www.monroe.lib.in.us

Offers a free 6-session course on Access. Call 812-349-3050 to verify dates and eligibility.

Microsoft Office Online Training

<http://office.microsoft.com/en-us/training/>

Find free online training for Access as well as the other Office programs.

Testing & Education Reference Center

www.in.gov/inspire/ (click on the Testing & Education button on the bottom left → then click on Career Tools and Basic Computer Skills)

Use free tutorials for Access and the other Microsoft Office Tools. You may need to create a free account.

Library Materials include...

Office 2010 Simplified by Kate Shoup – 004 SHO

Microsoft Access Step By Step by Joyce Cox – 005.7565 COX

Microsoft Office Access 2010 Quicksteps by John Cronan – 005.7565 CRO

Picture Yourself Learning Microsoft Access 2007 by Faithe Wempen – 005.7565 WEM

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