

## Apply Your Knowledge


Reinforce the skills and apply the concepts you learned in this module.

### Adding a Caption, Changing a Data Type, and Creating a Query, Form, and Report

**Note:** To complete this assignment, you will be required to use the Data Files. Please contact your instructor for information about accessing the Data Files.

**Instructions:** Financial Services provides financial planning advice to the community. The company employs a number of trained and certified financial advisors to help their clients navigate the complex world of financial investing. Financial Services has a database that keeps track of its advisors and its clients. Each client is assigned to a single advisor; each advisor may be assigned many clients. The database has two tables. The Client table contains data on the clients who use Financial Services. The Advisor table contains data on the advisors. You will add a caption, change a data type, and create a query, a form, and a report, as shown in Figure 1-56.

*Perform the following tasks:*

1. Start Access, open the Support\_AC\_Financial Services database from the Data Files, and enable the content.
2. Open the Advisor table in Datasheet view, add AU # as the caption for the Advisor Number field, and resize all columns to best fit the data. Save the changes to the layout of the table and close the table.
3. Open the Client table in Design view and change the data type for the Advisor Number field to Short Text. Change the field size for the field to 4 and add AU # as the caption for the Advisor Number field. Save the changes to the table and close the table.
4. Use the Simple Query Wizard to create a query for the Client table that contains the Client Number, Client Name, and Advisor Number. Use the name Client Query for the query and close the query.
5. Create a simple form for the Advisor table. Save the form and use the name Advisor for the form. Close the form.
6. Create the report shown in Figure 1-56 for the Client table. **If necessary** Move the page number so that it is within the margins. Save the report as Client Advisor Report.
7. add your last name to the title of the report, that is, change the title to Client Advisor Report LastName where LastName is your actual last name.
8. Compact and repair the database.
9. Submit the revised database in the format specified by your instructor.
10.  How would you change the field name of the Street field in the Client table to Address?

Continued >



Apply Your Knowledge *continued*

Client Advisor Report			
Advisor Number	Client Name	Street	City
103	Kirk D'Elia	378 Stout Ave.	Carlton
	Heidi Croft	245 Beard St.	Kady
	Cindy Platt	178 Fletcher Rd.	Conradt
	Alton Repart	220 Beard St.	Kady
	Patricia Singer	234 Hartwell Dr.	Carlton
120	Moss Manni	109 Fletcher Dr.	Carlton
	Carly Cohen	87 Fletcher Rd.	Conradt
	Timothy Edwards	876 Redfern Rd.	Kady
	Katy Cline	255 Main St.	Kady
	Bob Schwartz	443 Cheddar St.	Kady

Figure 1-56

## Extend Your Knowledge

Extend the skills you learned in this module and experiment with new skills. You may need to use Help to complete the assignment.

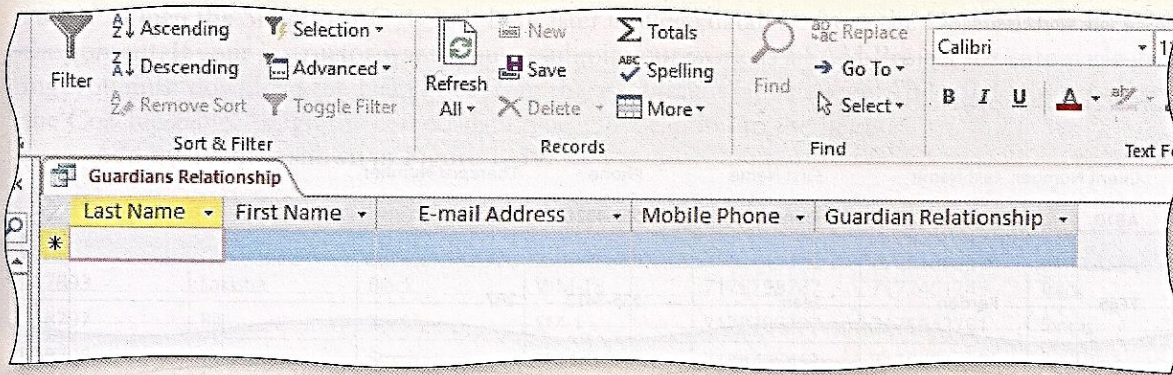
### Using a Database Template to Create a Student Database

**Instructions:** Access includes both desktop database templates and web-based templates. You can use a template to create a beginning database that can be modified to meet your specific needs. You will use a template to create a Students database. The database template includes sample tables, queries, forms, and reports. You will modify the database and create the Guardians Relationship Query shown in Figure 1-57.

*Perform the following tasks:*

1. Run Access.
2. Select the Desktop Students template in the template gallery and create a new database with the file name Students.
3. Close the welcome dialog box, and then close the Student List form.
4. Open the Navigation Pane and change the organization to Object Type.
5. Open the Guardians table in Datasheet view and delete the Attachments field in the table. The Attachments field has a paperclip as the column heading.
6. Add the Guardian Relationship field to the end of the table. Assign the Short Text data type with a field size of 15.
7. Save the changes to the Guardians table and close the table.
8. Use the Simple Query Wizard to create the Guardian Relationship Query shown in Figure 1-57. Close the query.



**Figure 1-57**

9. Open the Emergency Contact report in Layout view. Delete the controls containing the current date and current time in the upper-left corner of the report. Change the title of the report to Student Emergency Contact List.
10. Save the changes to the report.
11. If requested to do so by your instructor, add your first and last names to the end of the title and save the changes to the report.
12. Submit the revised database in the format specified by your instructor.
13. a. Why would you use a template instead of creating a database from scratch with just the fields you need?
- b. The Attachment data type allows you to attach files to a database record. If you were using this database to keep track of students, what specific documents might you attach to a Guardian record?

## Expand Your World

Create a solution, which uses cloud and web technologies, by learning and investigating on your own from general guidance.

**Problem:** As a volunteer project, you and a few friends are creating a database for a local physical therapy clinic that provides therapy to the elderly in their homes. You want to be able to share query results and reports, so you have decided to store the items in the cloud. You are still learning Access, so you are going to create a sample query and the report shown in Figure 1-58, export the results, and save them to a cloud storage location, such as Microsoft OneDrive, Dropbox, or Google Drive.

**Note:** To complete this assignment, you will be required to use the Data Files. Please contact your instructor for information about accessing the Data Files.

### Instructions:

1. Open the Support\_AC\_Physical Therapy database from the Data Files and enable the content.  
If your instructor wants you to submit your work as a SAM Project for automatic grading, you must download the Data Files from the assignment launch page.
2. Use the Simple Query Wizard to create a query that includes the Client Number, First Name, Last Name, and Therapist Number. Save the query as Client Query.
3. Export the Client Query as an XPS document to a cloud-based storage location of your choice.
4. Create the report shown in Figure 1-58. Save the report as Client Therapist Report.

*Continued >*



## AC 1-44 Access Module 1 Databases and Database Objects: An Introduction

Expand Your World *continued*

Client Therapist Report				
Client Number	Last Name	First Name	Phone	Therapist Number
AB10	Autley	Francis	555-4321	203
BR16	Behrens	Alexa	555-6987	205
FE45	Ferdon	Jean	555-3412	207
KL12	Klingman	Cynthia	555-4576	203
MA34	Marston	Libby	555-8787	207
PR80	Priestly	Martin	555-4454	205
SA23	Sanders	Marya	555-9780	207
TR35	Teeter	Rich	555-2222	205

Figure 1-58

- Export the Client Status Report as a PDF document to a cloud-based storage location of your choice. You do not need to change any optimization or export settings. Do not save the export steps.
- If requested to do so by your instructor, open the Therapist table and change the last name and first name for Therapist 203 to your last name and your first name.
- Submit the assignment in the format specified by your instructor.
- ☼ Which cloud-based storage location did you use for this assignment? Why?