Microsoft Office 2007

Access Chapter 1

Creating and Using a Database
Objectives

- Describe databases and database management systems
- Design a database to satisfy a collection of requirements
- Start Access
- Describe the features of the Access window
- Create a database
Objectives

• Create a table and add records
• Close a table
• Close a database and quit Access
• Open a database
Objectives

• Print the contents of a table
• Create and print custom reports
• Create and use a split form
• Use the Access Help system
Plan Ahead

- Identify the tables
- Determine the primary keys
- Determine the additional fields
- Determine relationships among the tables
- Determine data types for the fields
- Identify and remove any unwanted redundancy
- Determine a location for your database
Starting Access

• Click the Start button on the Windows Vista taskbar to display the Start menu
• Click All Programs at the bottom of the left pane on the Start menu to display the All Programs list
• Click Microsoft Office in the All Programs list to display the Microsoft Office list
• Click Microsoft Office Access 2007 to start Access and display the Getting Started with Microsoft Office Access screen
• If the Access window is not maximized, click the Maximize button next to the Close button on its title bar to maximize the window
Creating a Database

• With a USB flash drive connected to one of the computer’s USB ports, click Blank Database to create a new blank database.
• Repeatedly press the DELETE key to delete the default name of Database1.
• Type JSP Recruiters in the File Name text box to replace the default file name of Database1 (your screen may show Database1.accdb). Do not press the ENTER key after typing the file name.
• Click the ‘Browse for a location to put your database’ button to display the File New Database dialog box.
• If the Navigation Pane is not displayed in the Save As dialog box, click the Browse Folders button to expand the dialog box.
Creating a Database

• If a Folders list is displayed below the Folders button, click the Folders button to remove the Folders list

• If Computer is not displayed in the Favorite Links section, drag the top or bottom edge of the Save As dialog box until Computer is displayed

• Click Computer in the Favorite Links section to display a list of available drives

• If necessary, scroll until UDISK 2.0 (E:) appears in the list of available drives
Creating a Database

• Double-click UDISK 2.0 (E:) in the Computer list to select the USB flash drive, Drive E in this case, as the new save location.

• Click the OK button to select the USB flash drive as the location for the database and to return to the Getting Started with Microsoft Office Access screen.

• Click the Create button to create the database on the USB flash drive with the file name, JSP Recruiters.

• If a Field List appears, click its Close button to remove the Field List from the screen.
Creating a Database
Defining the Fields in a Table

- Right-click Add New Field to display a shortcut menu
- Click Rename Column on the shortcut menu to display an insertion point
- Type Client Number to assign a name to the new field
- Press the DOWN ARROW key to complete the addition of the field
- Right-click Add New Field to display a shortcut menu, click Rename Column on the shortcut menu to display an insertion point, type Client Name to assign a name to the new field, and then press the DOWN ARROW key to complete the addition of the field
Defining the Fields in a Table

- Using the same technique add the fields in the Client table up through and including the Amount Paid field.
- Click the Data Type box arrow to display the Data Type box menu.
- Click Currency to select Currency as the data type for the Amount Paid.
- Click the right scroll arrow to shift the fields to the left and display the Add New Field column.
- Make the remaining entries from the Client table structure shown in the figure on the following slide to complete the structure. Be sure to select Currency as the data type for the Current Due field.
Defining the Fields in a Table
Saving a Table

- Click the Save button on the Quick Access Toolbar to save the structure of the table
- Type **Client** to change the name to be assigned to the table
- Click the OK button to save the structure with the name, Client
- If you have an additional record between the field names and the asterisk, click the record selector (the box at the beginning of the record), press the DELETE key, and then click the Yes button when Access asks you if you want to delete the record.
Saving a Table
Changing the Primary Key

• Click the Design View button on the status bar to move to Design view
• Confirm that your data types match those shown in figure 1-35 on page AC 28. Make any necessary corrections to the data types
• Click the row selector for the ID field to select the field
• Press the DELETE key to delete the field
Changing the Primary Key

• Click the Yes button to complete the deletion of the field
• With the Client Number field selected, click the Primary Key button to designate the Client Number field as the primary key
• Click the Save button to save the changes
• Close the Client table by clicking the Close ‘Client’ button
Changing the Primary Key
Adding Records to a Table

- Right-click the Client table in the Navigation Pane to display the shortcut menu
- Click Open on the shortcut menu to open the Client table in Datasheet view
- Click the Shutter Bar Open/Close Button to hide the Navigation pane
- Click in the Client Number field and type AC34 to enter the first client number. Be sure you type the letters in uppercase so they are entered in the database correctly
Adding Records to a Table

• Press the TAB key to complete the entry for the Client Number field

• Enter the client name, street, city, state, and postal code by typing the following entries, pressing the TAB key after each one: *Alys Clinic* as the client name, *134 Central* as the street, *Berridge* as the city, *CO* as the state, and *80330* as the postal code

• Type 0 to enter the amount paid

• Press the TAB key to complete the entry for the Amount Paid field
Adding Records to a Table

- Type 17500 to enter the current due amount and then press the TAB key to move to the next field.
- Type 21 as the Recruiter number to complete data entry for the record.
- Press the TAB key to complete the entry of the first record.
- Use the techniques shown previously to enter the data for the second record in the Client table.
Adding Records to a Table

<table>
<thead>
<tr>
<th>Client Num</th>
<th>Client Name</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>Postal Code</th>
<th>Amount Paid</th>
<th>Current Due</th>
<th>Recruiter N</th>
<th>Add New Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC14</td>
<td>Aly's Clinic</td>
<td>134 Central</td>
<td>Bernde</td>
<td>CO</td>
<td>80330</td>
<td>$0.00</td>
<td>$13,500.00</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>BH72</td>
<td>Berks Hospital</td>
<td>415 Main</td>
<td>Berks</td>
<td>CO</td>
<td>83349</td>
<td>$29,200.00</td>
<td>$0.00</td>
<td>24</td>
<td></td>
</tr>
</tbody>
</table>
Closing a Table

- Click the Close ‘Client’ button, shown in Figure 1–46 on page AC 33, to close the table.
Quitting Access

- Click the Close button on the right side of the Access title bar, shown in Figure 1–47 on page AC 35 to quit Access
Starting Access

• Click the Start button on the Windows Vista taskbar to display the Start menu
• Click All Programs at the bottom of the left pane on the Start menu to display the All Programs list and then click Microsoft Office in the All Programs list to display the Microsoft Office list
• Click Microsoft Office Access 2007 on the Microsoft Office submenu to start Access and display the Getting Started with Microsoft Office Access window
• If the Access window is not maximized, click the Maximize button on its title bar to maximize the window
Starting Access
Opening a Database from Access

• With your USB flash drive connected to one of the computer’s USB ports, click the More button to display the Open dialog box

• If the Folders list is displayed below the Folders button, click the Folders button to remove the Folders list

• If necessary, click Computer in the Favorite Links section

• Double-click UDISK 2.0 (E:) to select the USB flash drive, Drive E in this case, as the new open location

• Click JSP Recruiters to select the file name
Opening a Database from Access

• Click the Open button to open the database
• If a Security Warning appears, as shown in Figure 1–50 on page AC 37, click the Options button to display the Microsoft Office Security Options dialog box
• Click the ‘Enable this content’ option button
• Click the OK button to enable the content
Opening a Database from Access
Adding Additional Records to a Table

• If the Navigation pane is hidden, click the Shutter Bar Open/Close Button, shown in Figure 1–51, to show the Navigation pane
• Right-click the Client table in the Navigation pane to display a shortcut menu
• Click Open on the shortcut menu to open the Client table in Datasheet view
• Hide the Navigation pane by clicking the Shutter Bar Open/Close button
Adding Additional Records to a Table

- Click the New (blank) record button to move to a position to enter a new record
- Add the records shown in Figure 1–52, using the same techniques you used to add the first two records
- Click the Close ‘Client’ button to close the table
Adding Additional Records to a Table

The image shows a screenshot of Microsoft Access 2007, a database management tool. The screenshot displays a table with multiple columns including Client Number, Client Name, Street, City, State, Postal Code, Amount Paid, Current Due, and Recruiter. The table contains several rows of data, each representing a different client with their respective information. The table is open in Datasheet view, allowing for easy data manipulation and management.

This visual representation helps in understanding how to add additional records to a table within Microsoft Access. The interface includes options for selecting, sorting, and editing data, which are essential features for managing databases efficiently.
Previewing and Printing the Contents of a Table

• If the Navigation pane is hidden, show the Navigation pane by clicking the Shutter Bar Open/Close Button
• Be sure the Client table is selected
• Click the Office Button to display the Office Button menu
• Point to the Print command arrow to display the Print submenu
• Click Print Preview on the Print submenu to display a preview of the report
Previewing and Printing the Contents of a Table

- Click the mouse pointer in the position shown in Figure 1–60 on page AC 42 to magnify the upper-right section of the report
- Click the Landscape button to change to landscape orientation
- Click the Print button on the Print Preview tab to print the report
- When the printer stops, retrieve the hard copy of the Client table
- Click the Close ‘Client’ button to close the Print Preview window
Previewing and Printing the Contents of a Table
Creating an Additional Table

• Click Create on the Ribbon to display the Create tab
• Click the Table button on the Create tab to create a new table
• Right-click Add New Field to display a shortcut menu
• Click Rename Column on the shortcut menu to display an insertion point
• Type **Recruiter Number** to assign a name to the new field
Creating an Additional Table

- Press the DOWN ARROW key to complete the addition of the field
- Using the same technique, add the Last Name, First Name, Street, City, State, Postal Code, and Rate fields
- Click the Data Type box arrow to display the Data Type box menu
- Click Number on the Data Type box menu to select the Number data type and assign the Number data type to the Rate field
Creating an Additional Table

• Add the Commission field and assign it the Currency data type
• Click the Save button to display the Save As dialog box
• **Type** Recruiter **to assign a name to the table**
• Click the OK button
Creating an Additional Table
Modifying the Primary Key and Field Properties

- Click the Design View button on the status bar to move to Design view
- Click the row selector for the ID field to select the field
- Press the DELETE key to delete the field
- Click the Yes button to complete the deletion of the field
- With the Recruiter Number field selected, click the Primary Key button to designate the Recruiter Number field as the primary key
Modifying the Primary Key and Field Properties

• Click the row selector for the Rate field to select the field
• Click the Field Size box to display the Field Size box arrow
• Click the Field Size box arrow to display the Field Size box menu
• Click Single to select single precision as the field size
Modifying the Primary Key and Field Properties

- Click the Format box to display the Format box arrow
- Click the Format box arrow to open the Format box menu
- Click Fixed to select fixed as the format
- Click the Decimal Places box to display the Decimal Places box arrow
Modifying the Primary Key and Field Properties

• Click the Decimal Places box arrow to enter the number of decimal places
• Click 2 to select 2 as the number of decimal places
• Click the Save button to save your changes
• Close the Recruiter table by clicking the Close ‘Recruiter’ button
Modifying the Primary Key and Field Properties
Adding Records to an Additional Table

- Open the Recruiter table in Datasheet view by right-clicking the Recruiter table in the Navigation pane and then clicking Open on the shortcut menu.
- Enter the Recruiter data from Figure 1–74 on page AC 49.
- Click the Close ‘Recruiter’ button to close the table and remove the datasheet from the screen.
Adding Records to an Additional Table

![Microsoft Access window](image)

### Table: Recruiters

<table>
<thead>
<tr>
<th>Recruiter No.</th>
<th>Last Name</th>
<th>First Name</th>
<th>Street</th>
<th>City</th>
<th>State</th>
<th>Postal Code</th>
<th>Rate</th>
<th>Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Kerry</td>
<td>Alyssa</td>
<td>261 Pointer</td>
<td>Tawnn</td>
<td>CO</td>
<td>80416</td>
<td>0.10</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>24</td>
<td>Reeves</td>
<td>Camileen</td>
<td>5135 Brill</td>
<td>Denton</td>
<td>CO</td>
<td>80412</td>
<td>0.10</td>
<td>$15,000.00</td>
</tr>
<tr>
<td>27</td>
<td>Fernandez</td>
<td>Jaime</td>
<td>265 Maxwell</td>
<td>Charleston</td>
<td>CO</td>
<td>80360</td>
<td>0.09</td>
<td>$5,450.00</td>
</tr>
<tr>
<td>54</td>
<td>Lee</td>
<td>Jan</td>
<td>1327 Oak</td>
<td>Denton</td>
<td>CO</td>
<td>80413</td>
<td>0.08</td>
<td>$3.00</td>
</tr>
</tbody>
</table>
Creating a Report

• Be sure the Client table is selected in the Navigation pane
• Click Create on the Ribbon to display the Create tab
• Click the Report Wizard button to display the Report Wizard dialog box
• Click the Add Field button to add the Client Number field
• Click the Add Field button to add the Client Name field
Creating a Report

- Click the Amount Paid field, and then click the Add Field button to add the Amount Paid field
- Click the Add Field button to add the Current Due field
- Click the Add Field button to add the Recruiter Number field
- Click the Next button to display the next Report Wizard screen
- Because you will not specify any grouping, click the Next button in the Report Wizard dialog box to display the next Report Wizard screen
Creating a Report

- Click the box arrow in the text box labeled 1 to display a list of available fields for sorting.
- Click the Client Number field to select the field as the sort key.
- Click the Next button to display the next Report Wizard screen.
- Make sure that Tabular is selected as the Layout. (If it is not, click the Tabular option button to select Tabular layout.)
- Make sure Portrait is selected as the Orientation. (If it is not, click the Portrait option button to select Portrait orientation.)
Creating a Report

- Click the Next button to display the next Report Wizard screen
- Be sure the Module style is selected. (If it is not, click Module to select the Module style.)
- Click the Next button to display the next Report Wizard screen
- Erase the current title, and then type Client Financial Report as the new title
- Click the Finish button to produce the report
- Click the Close ‘Client Financial Report’ button to remove the report from the screen
Creating a Report

![Microsoft Access window showing a Client Financial Report]

<table>
<thead>
<tr>
<th>Client Number</th>
<th>Client Name</th>
<th>Amount Paid</th>
<th>Current Due</th>
<th>Recruiter Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC36</td>
<td>Alyx Clinic</td>
<td>$0.00</td>
<td>$17,500.00</td>
<td>22</td>
</tr>
<tr>
<td>BH72</td>
<td>Belts Hospital</td>
<td>$25,200.00</td>
<td>$0.00</td>
<td>24</td>
</tr>
<tr>
<td>BL12</td>
<td>Benton Labs</td>
<td>$16,500.00</td>
<td>$38,225.00</td>
<td>24</td>
</tr>
<tr>
<td>EA45</td>
<td>ENT Assoc.</td>
<td>$13,750.00</td>
<td>$55,000.00</td>
<td>27</td>
</tr>
<tr>
<td>FD69</td>
<td>Free Dentistry</td>
<td>$23,000.00</td>
<td>$12,300.00</td>
<td>21</td>
</tr>
<tr>
<td>FH23</td>
<td>Family Health</td>
<td>$0.00</td>
<td>$950.00</td>
<td>24</td>
</tr>
<tr>
<td>MM12</td>
<td>Main Hospital</td>
<td>$0.00</td>
<td>$463,005.00</td>
<td>24</td>
</tr>
<tr>
<td>PE24</td>
<td>Peer Radiology</td>
<td>$32,750.00</td>
<td>$0.00</td>
<td>21</td>
</tr>
<tr>
<td>TG37</td>
<td>Tarleton Clinic</td>
<td>$68,750.00</td>
<td>$31,500.00</td>
<td>27</td>
</tr>
<tr>
<td>WL36</td>
<td>West Labs</td>
<td>$14,000.00</td>
<td>$0.00</td>
<td>24</td>
</tr>
</tbody>
</table>
Printing a Report

- With the Client Financial Report selected in the Navigation pane, click the Office Button.
- Point to the arrow next to Print on the Office Button menu and then click Quick Print on the Print submenu to print the report.
Creating Additional Reports

• If necessary, click Create on the Ribbon to display the Create tab, and then click the Report Wizard button to display the Report Wizard dialog box.

• Add the Client Number, Client Name, Street, City, State, and Postal Code fields by clicking each field and then clicking the Add Field button.

• Click the Next button to move to the screen asking about grouping, and then click the Next button a second time to move to the screen asking about sort order.

• Click the box arrow in the text box labeled 1, click the Client Number field to select the field as the sort key, and then click the Next button.
Creating Additional Reports

• Make sure that Tabular is selected as the Layout and that Portrait is selected as the Orientation, and then click the Next button

• Make sure the Module style is selected, and then click the Next button

• Enter Client Address Report as the title and click the Finish button to produce the report

• Click the Close ‘Client Address Report’ button to close the Print Preview window
Creating Additional Reports

• Click the Recruiter table in the Navigation pane, and then use the techniques shown in Steps 1 through 8 to produce the Recruiter Financial Report. The report is to contain the Recruiter Number, Last Name, First Name, Rate, and Commission fields. It is to be sorted by Recruiter Number. It is to have tabular layout, portrait orientation, and the Module Style. The title is to be Recruiter Financial Report.

• With the Recruiter table selected in the Navigation pane, use the techniques shown in Steps 1 through 8 to produce the Recruiter Address Report. The report is to contain the Recruiter Number, Last Name, First Name, Street, City, State, and Postal Code fields. It is to be sorted by Recruiter Number. It is to have tabular layout, landscape orientation, and the Module Style. The title is to be Recruiter Address Report.

• Click the Close ‘Recruiter Address Report’ button to close the Print Preview window.
Creating a Split Form

- Select the Client table in the Navigation pane
- If necessary, click Create on the Ribbon to display the Create tab
- Click the Split Form button to create a split form. If a Field List appears, click its Close button to remove the Field List from the screen
- Click the Save button to display the Save As dialog box
- Type Client Form as the form name, and then click the OK button to save the form
- If the form appears in Layout view, click the Form View button on the Access status bar to display the form in Form view
Creating a Split Form

Using a Split Form

- Click the Next Record button four times to move to record 5
- Click the Postal Code field on the second record in the datasheet to select the second record in both the datasheet and the form
- Click the Close ‘Client Form’ button to remove the form from the screen
Using a Split Form

[Image of a split form in Microsoft Access]

- Client Number: BH72
- Client Name: Berks Hospital
- Street: 415 Main
- City: Berks
- State: PA
- Postal Code: 80349
- Amount Paid: $29,200.00
- Current Due: $0.00
- Recruiter Number: 24

The split form allows for easy viewing of client information and other details.
Changing Database Properties

- Click the Office Button to display the Office Button menu
- Point to Manage on the Office Button menu to display the Manage submenu
- Click Database Properties on the Manage submenu to display the JSP Recruiters.accdb Properties dialog box
- If necessary, click the Summary tab
Changing Database Properties

- Click the Author text box and then type your name as the Author property. If a name already is displayed in the Author text box, delete it before typing your name.
- Click the Subject text box, if necessary delete any existing text, and then type your course and section as the Subject property.
- Click the Keywords text box, if necessary delete any existing text, and then type Healthcare, Recruiter as the Keywords property.
- Click the OK button to save your changes and remove the JSP Recruiters.accdb Properties dialog box from the screen.
Changing Database Properties
Searching Access Help

- Click the Microsoft Office Access Help button near the upper-right corner of the Access window to open the Access Help window
- **Type** create a form in the ‘Type words to search for’ text box at the top of the Access Help window
- Press the ENTER key to display the search results
- Click the Maximize button on the Access Help window title bar to maximize the Help window unless it is already maximized
- Click the Create a split form link to display information regarding creating a split form
- Click the Close button on the Access Help window title bar to close the Access Help window and make the database active
Searching Access Help

Create a split form

A split form is a new feature in Microsoft Office Access 2007 that gives you two views of your data at the same time — a Form view and a Datasheet view. The two views are connected to the same data source and are synchronized with each other at all times. Selecting a field in one part of the form selects the same field in the other part of the form. You can add, edit, or delete data from either part (provided the record source is updatable and you have not configured the form to prevent these actions).

Working with split forms gives you the benefits of both types of forms in a single form. For example, you can use the datasheet portion of the form to quickly locate a record, and then use the form portion to view or edit the record. The form portion can serve as an attractive and functional header for the datasheet portion. This technique is used in many of the template databases that are available for Office Access 2007.

What do you want to do?

+ Create a new split form by using the Split Form tool
+ Turn your existing form into a split form
+ Fine-tune your split form

Create a new split form by using the Split Form tool

This procedure creates a new split form from scratch. The form is based on a table or query that you select from the Navigation Pane or have open in Datasheet view.

1. In the Navigation Pane, click the table or query that contains the data that you want on your form. Or open the table or query in Datasheet View.
2. On the Create tab, in the Forms group, click Split Form.

Access creates the form and displays it in Layout view. In Layout View, you can make design changes to the form while it is displaying data. For example, you can adjust the size of the text boxes to fit the data, if necessary.
Quitting Access

• Click the Close button on the right side of the Access title bar to quit Access
Summary

• Describe databases and database management systems
• Design a database to satisfy a collection of requirements
• Start Access
• Describe the features of the Access window
• Create a database
Summary

- Create a table and add records
- Close a table
- Close a database and quit Access
- Open a database
Summary

• Print the contents of a table
• Create and print custom reports
• Create and use a split form
• Use the Access Help system
Microsoft Office 2007

Access Chapter 1 Complete