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

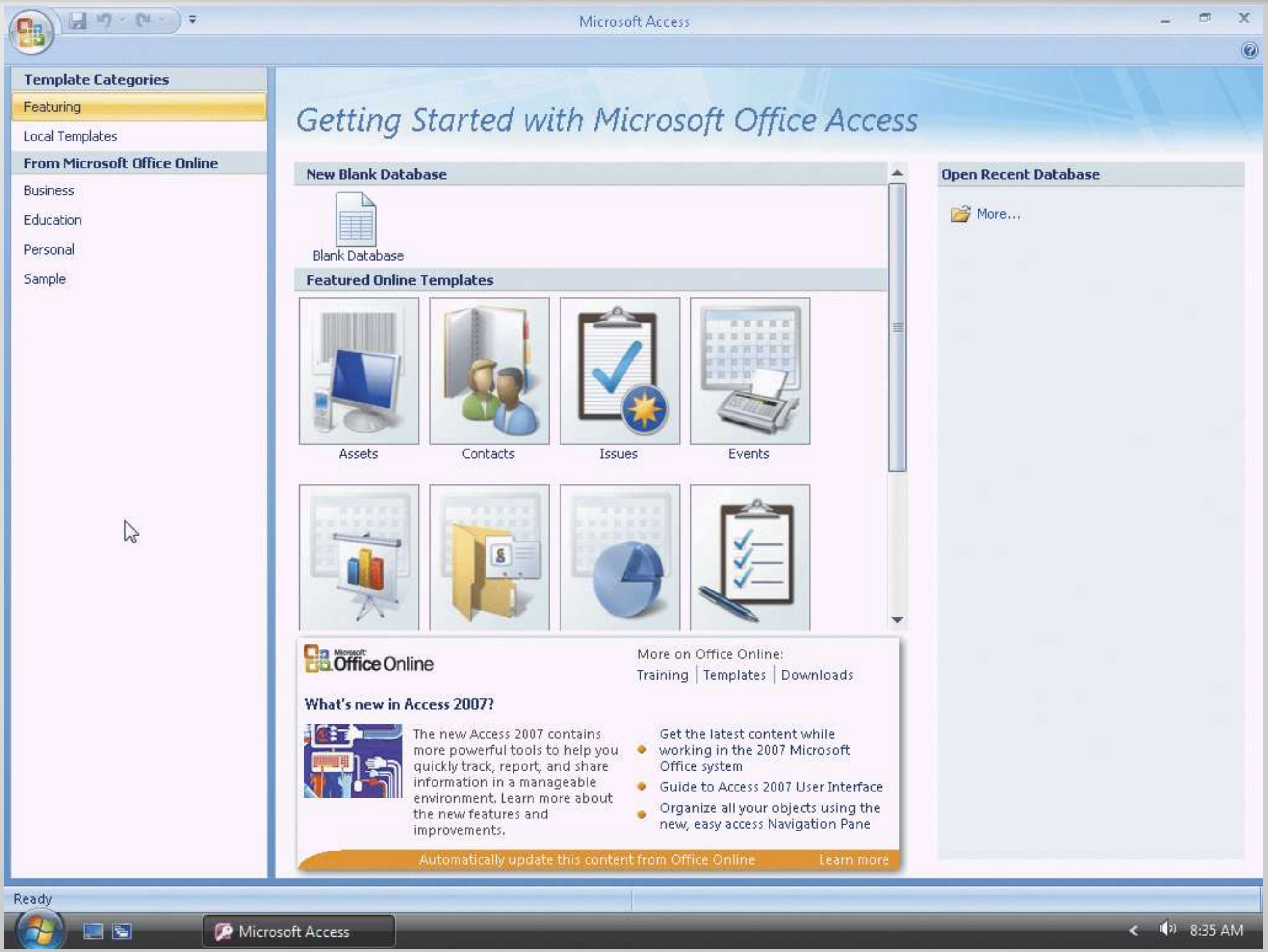
Plan Ahead

- 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

Starting Access



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

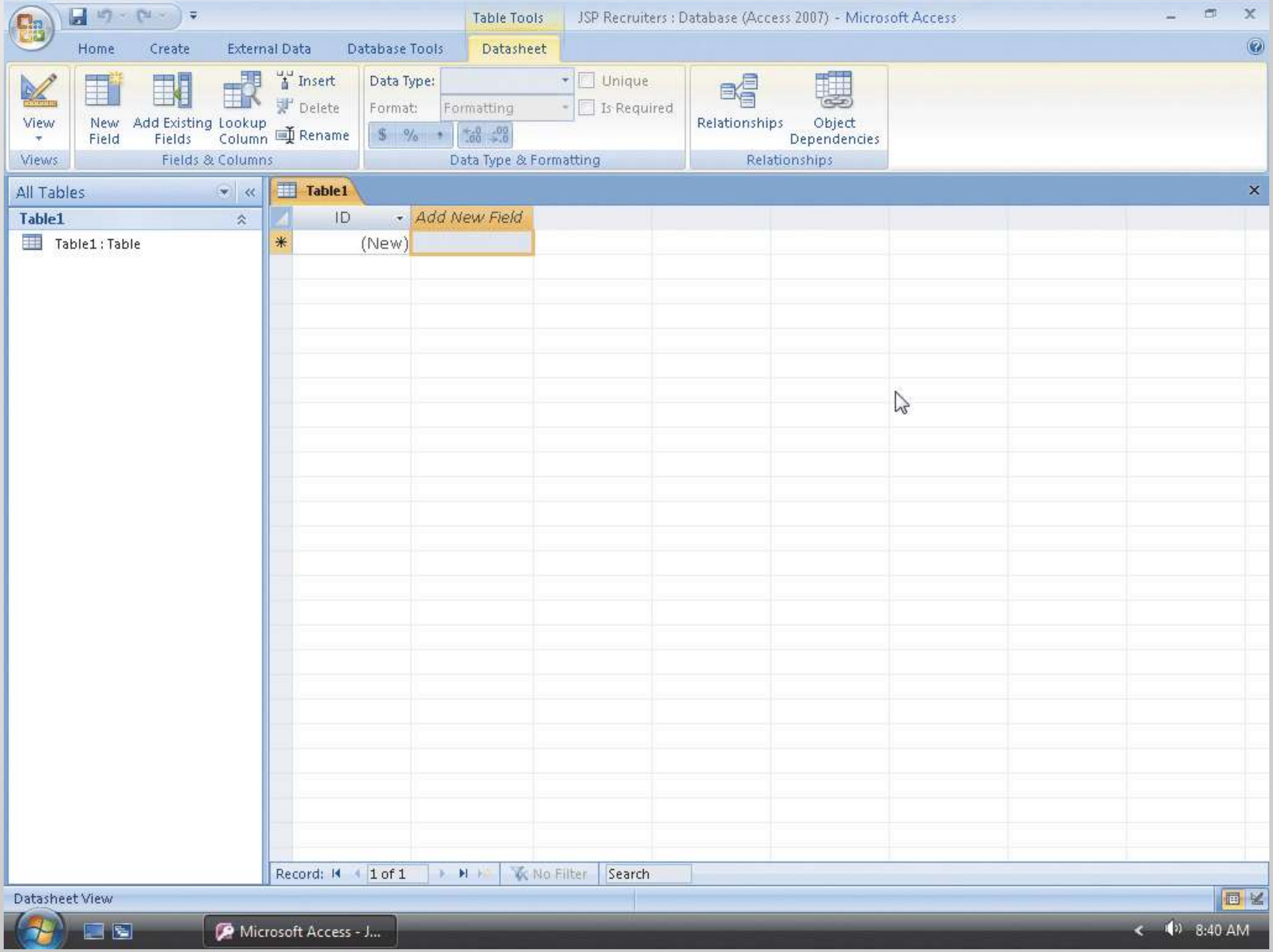
Creating a Database

- 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 fl ash 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



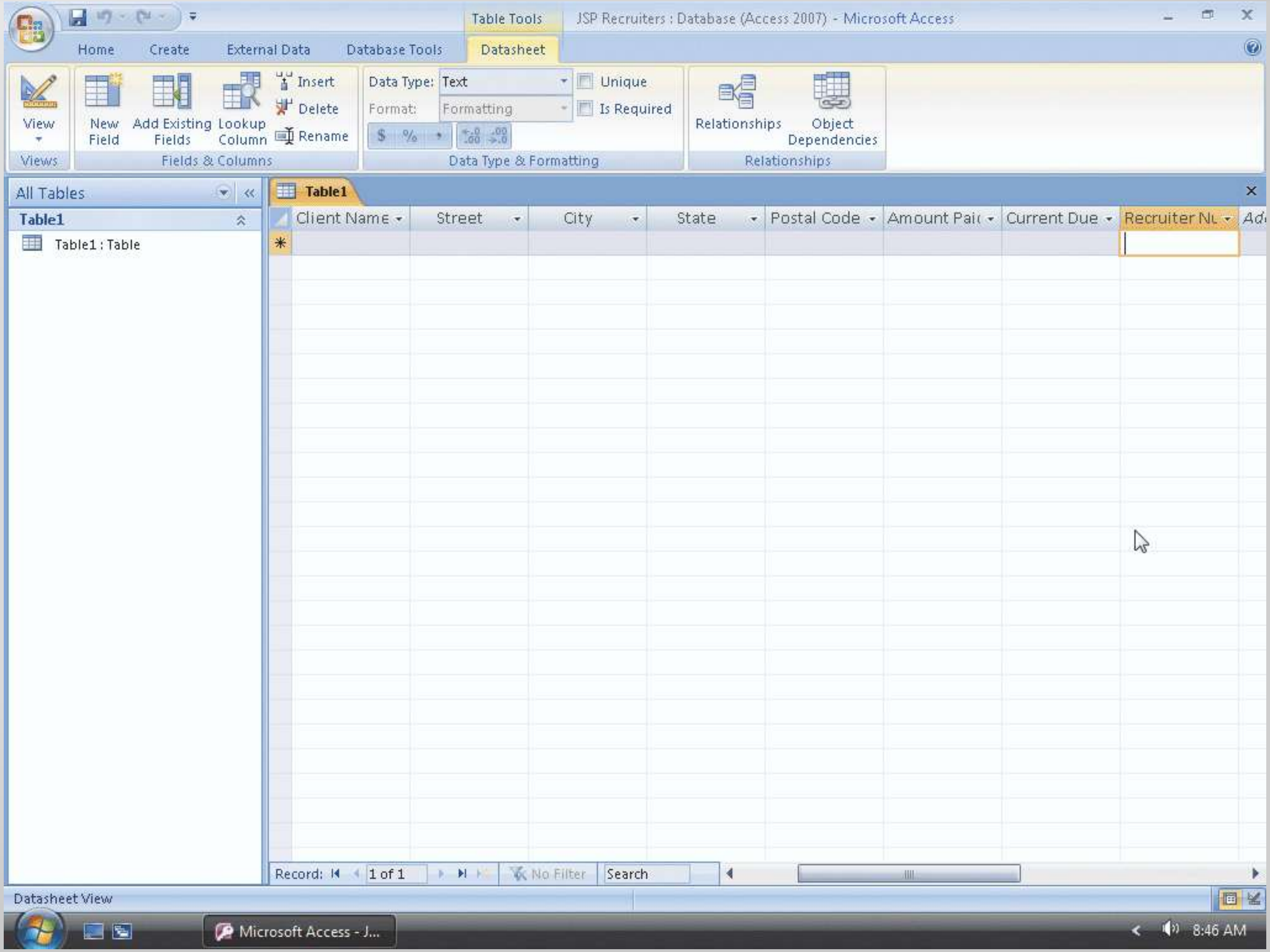
Defining the Fields in a Table

- 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

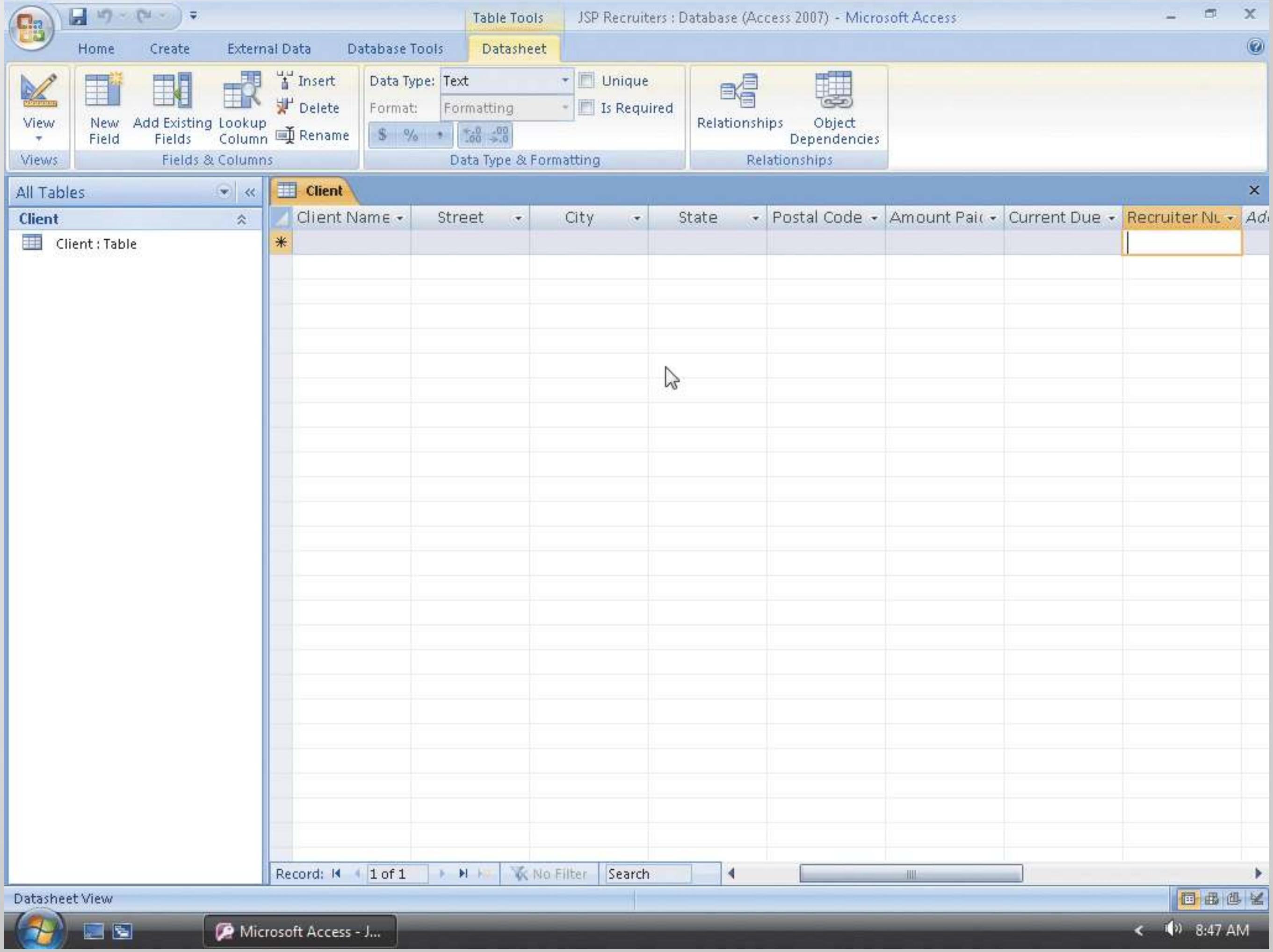
Defining the Fields in a Table



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



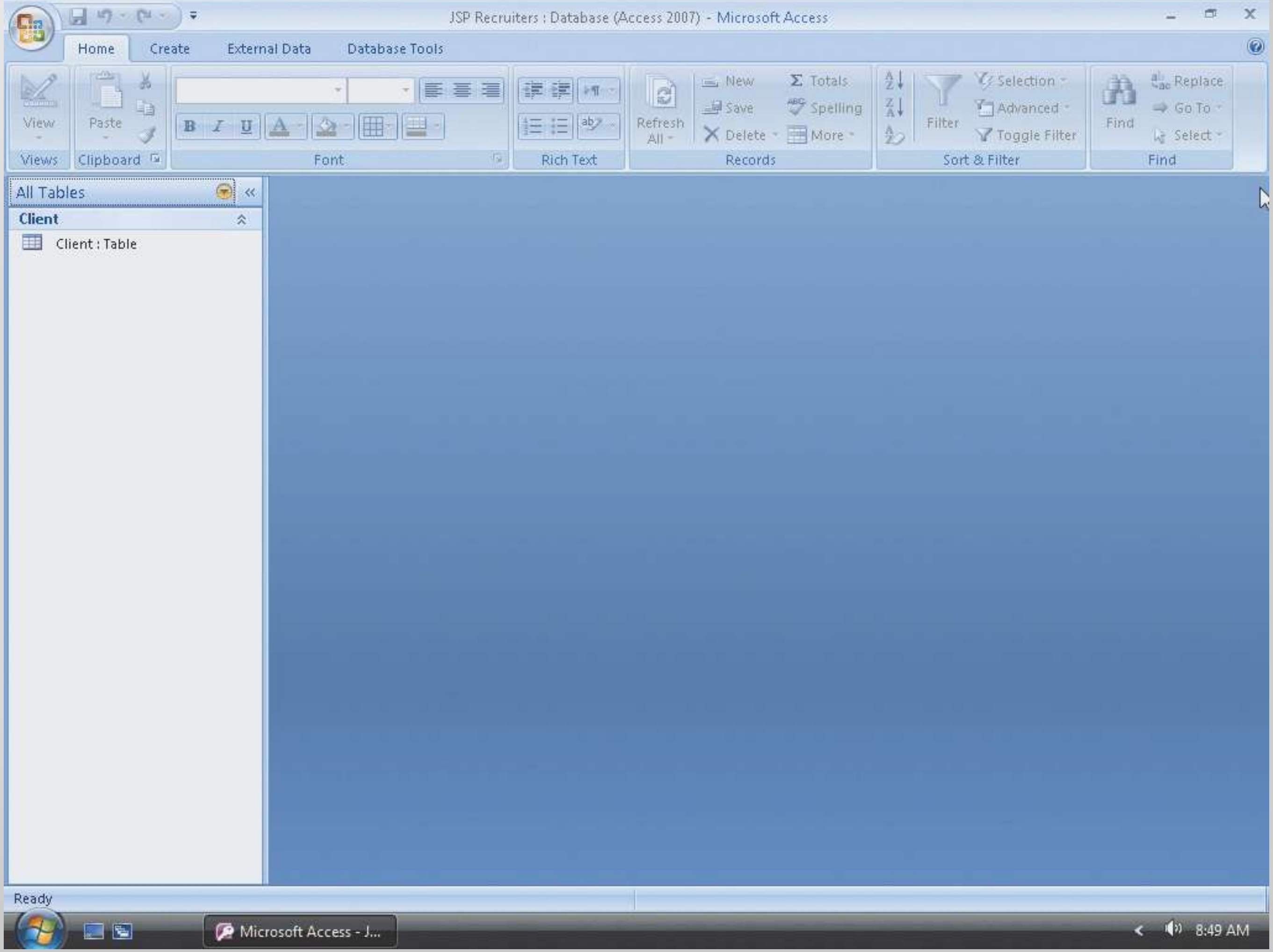
Changing the Primary Key

- 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

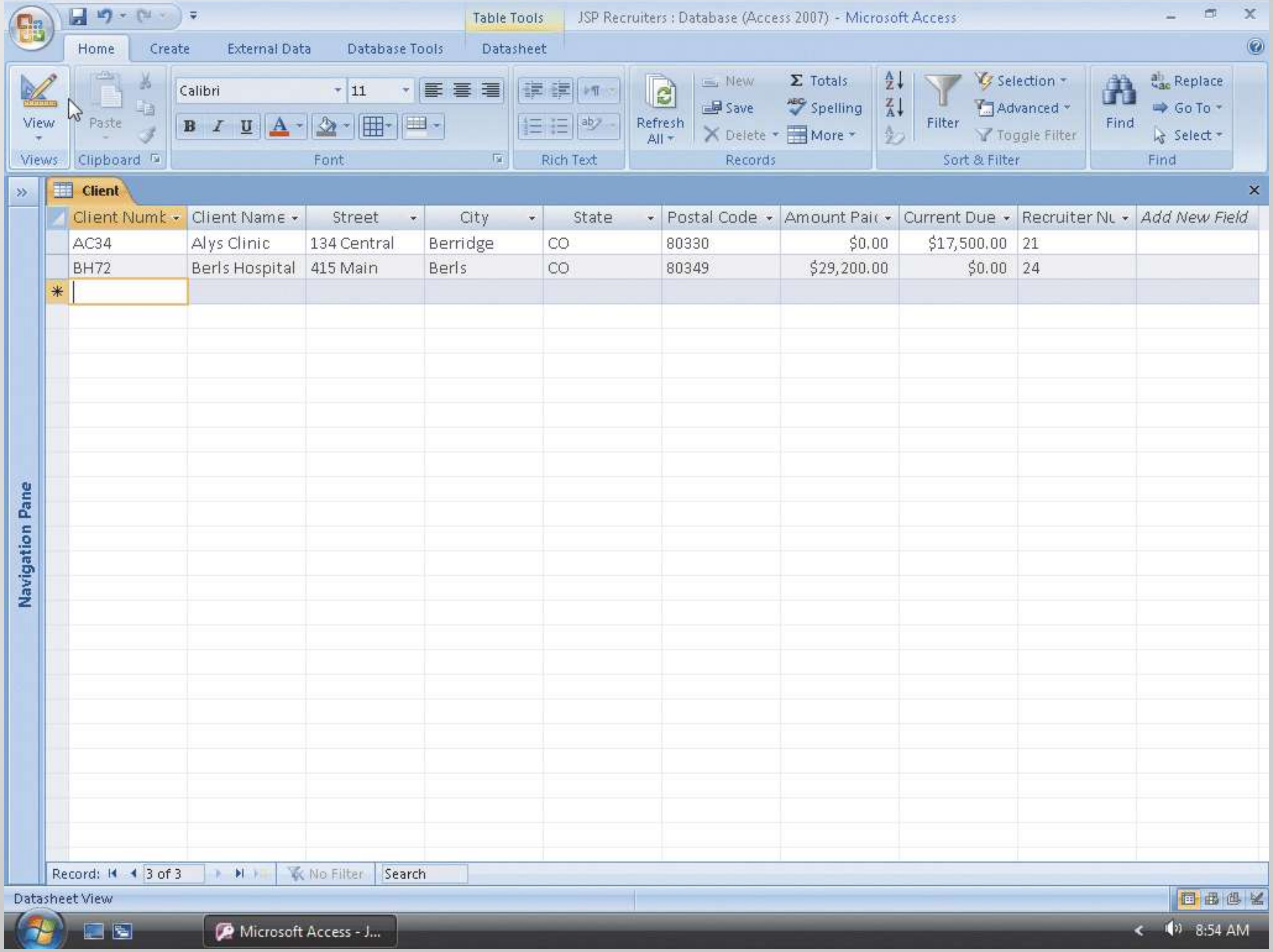
Adding Records to a Table

- 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

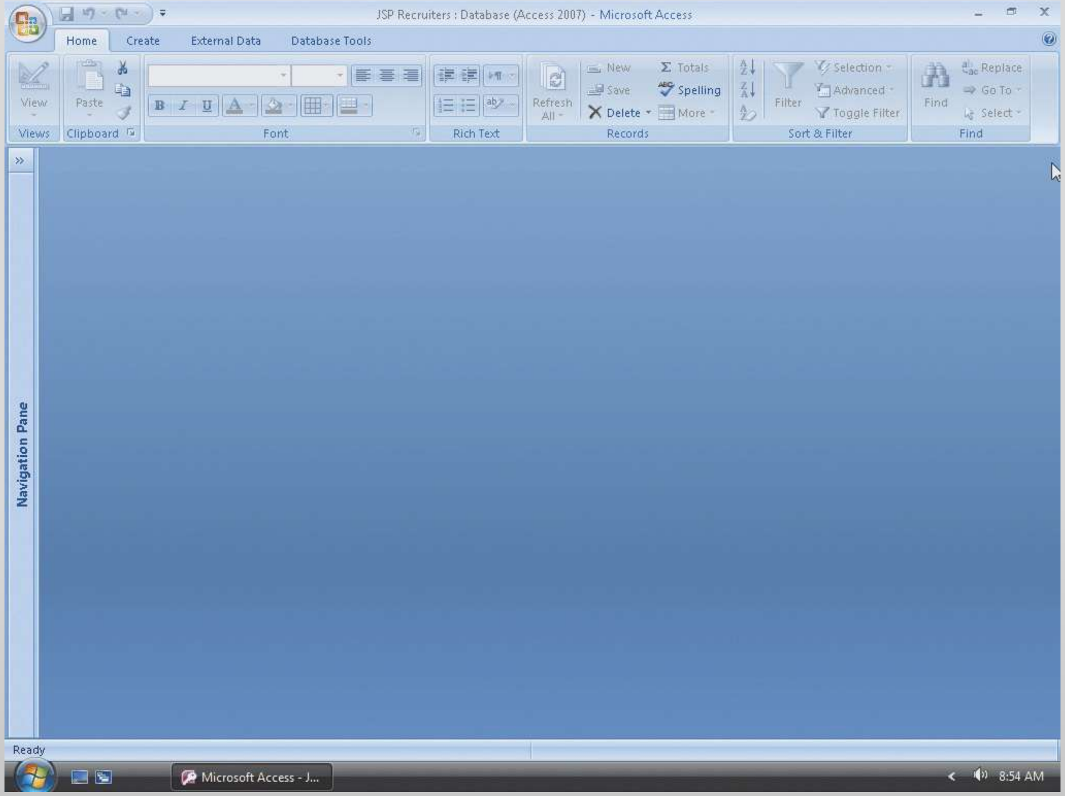
- Type `17500` to enter the current due amount and then press the TAB key to move to the next field
- Type `21` as the Recruiter number to complete data entry for the record
- Press the TAB key to complete the entry of the first record
- Use the techniques shown previously to enter the data for the second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

Adding Records to a Table



Closing a Table

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



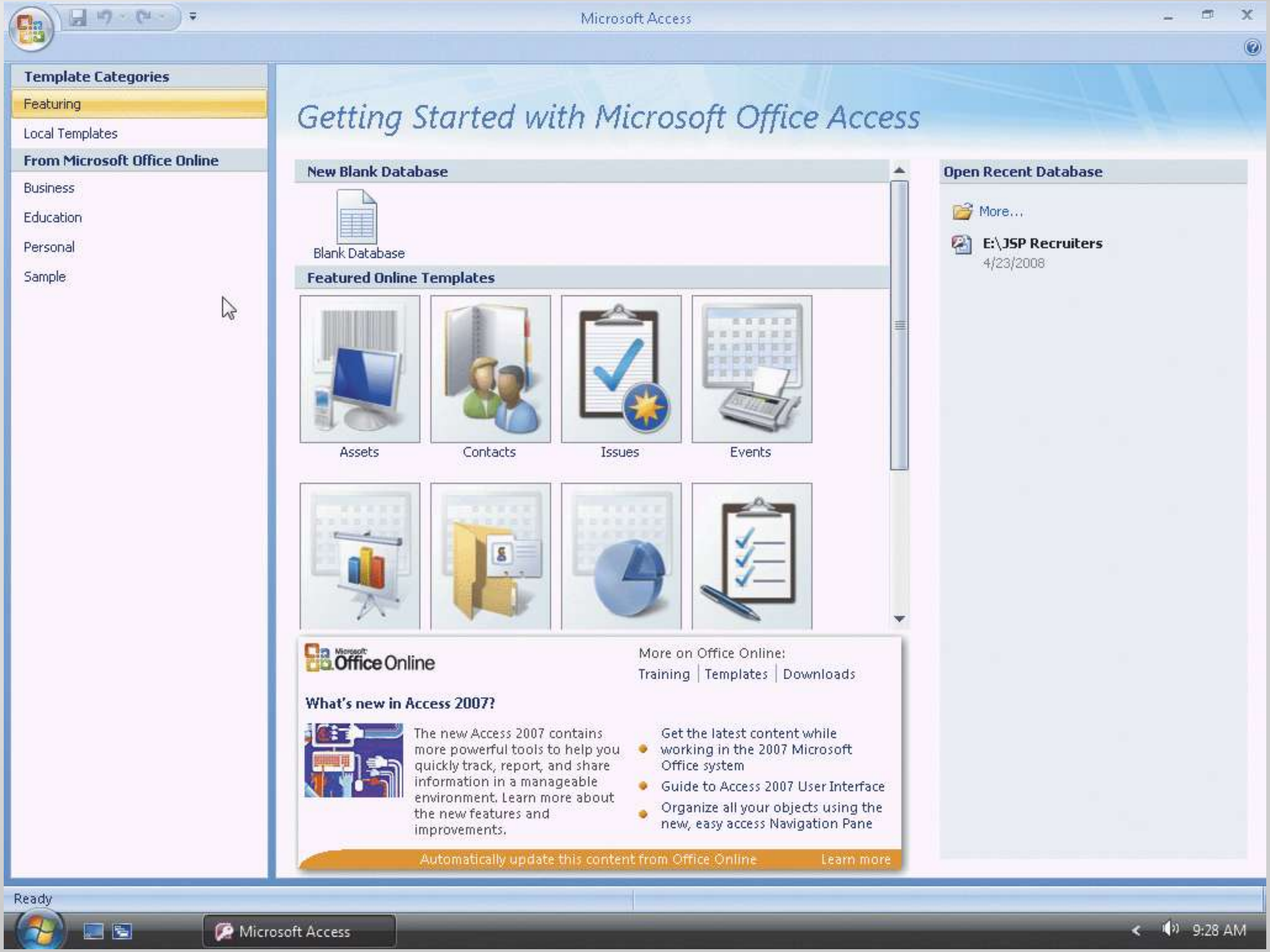
Quitting Access

- 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



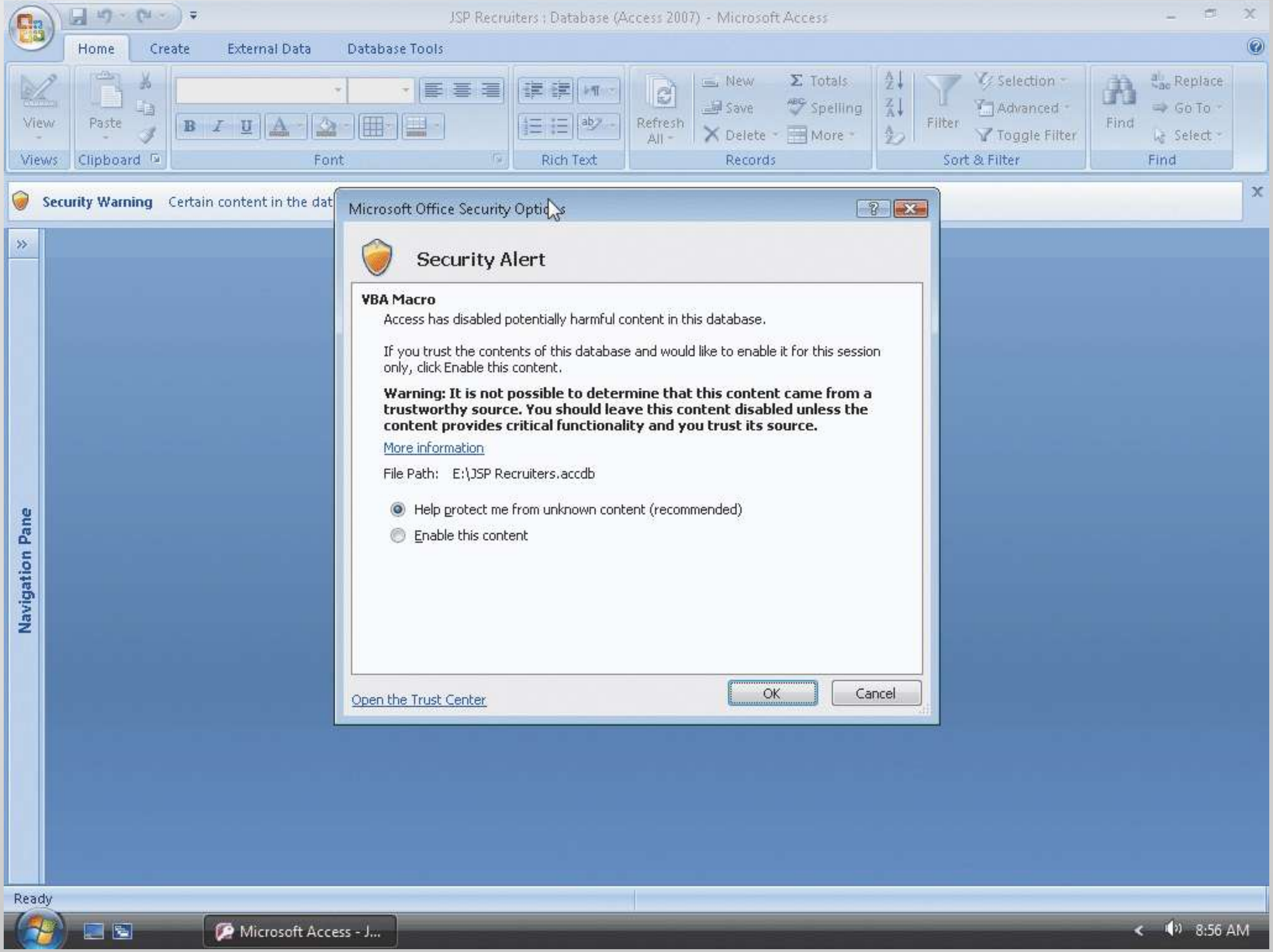
Opening a Database from Access

- 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



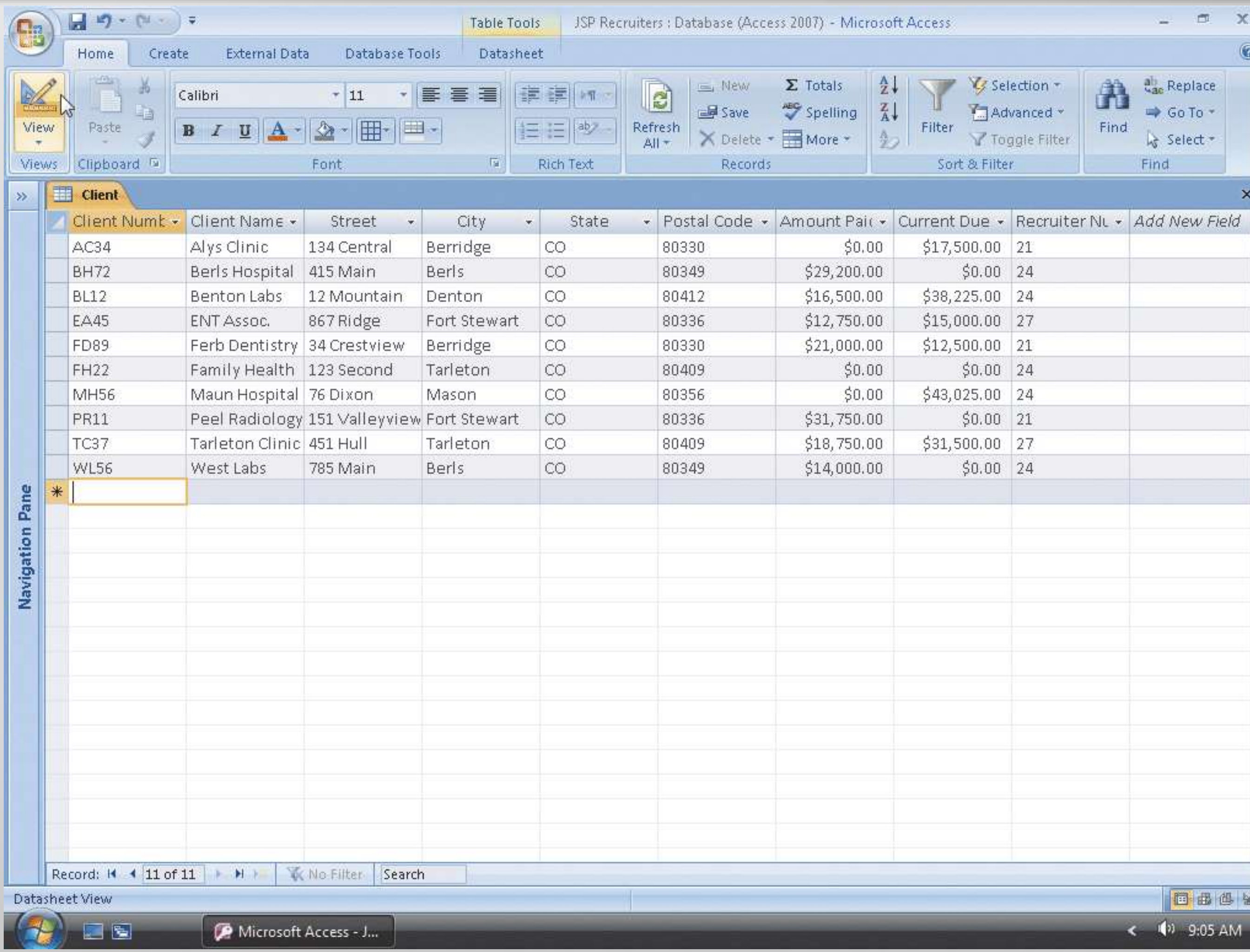
Adding Additional Records to a Table

- 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



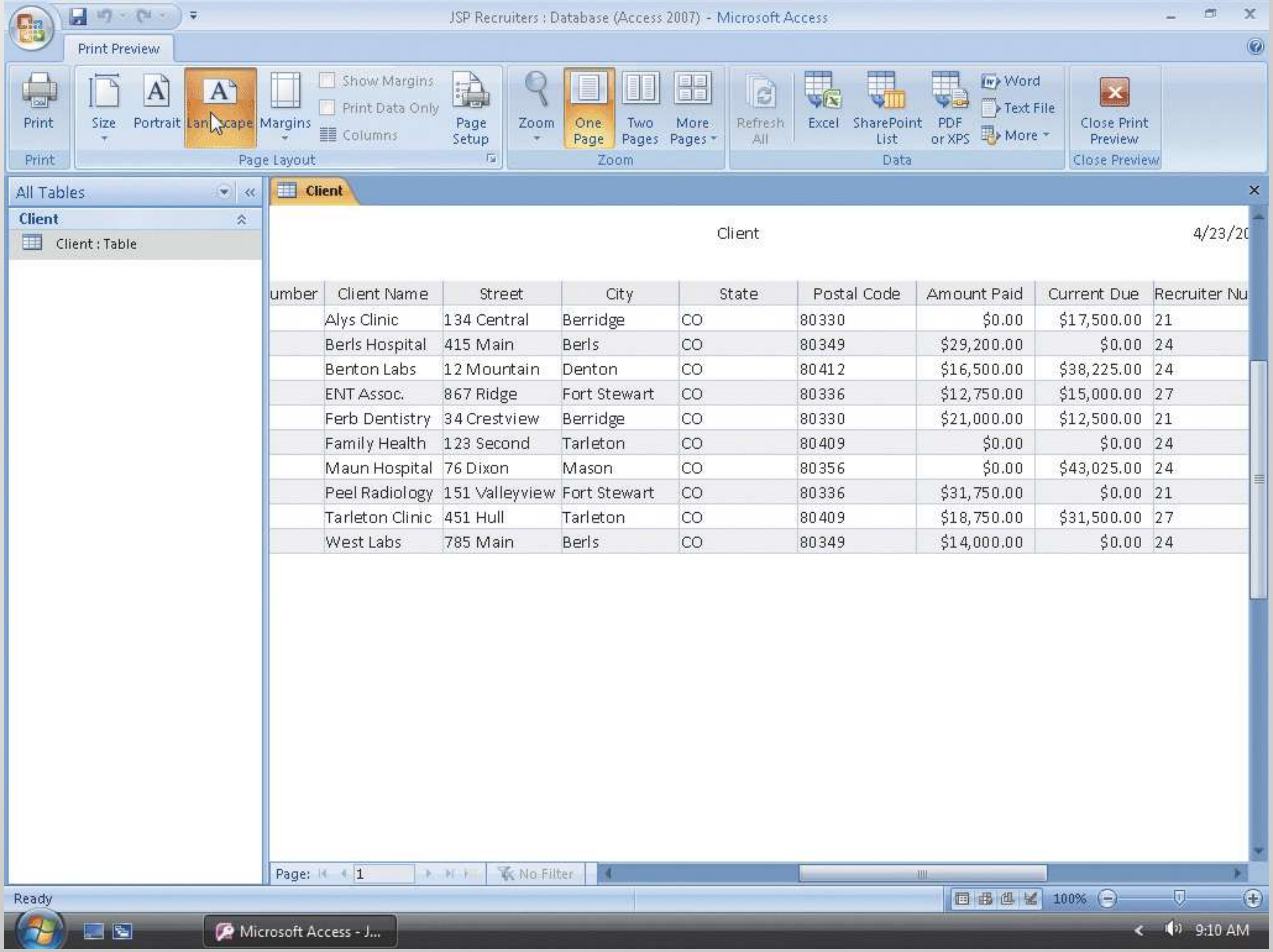
Previewing and Printing the Contents of a Table

- 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

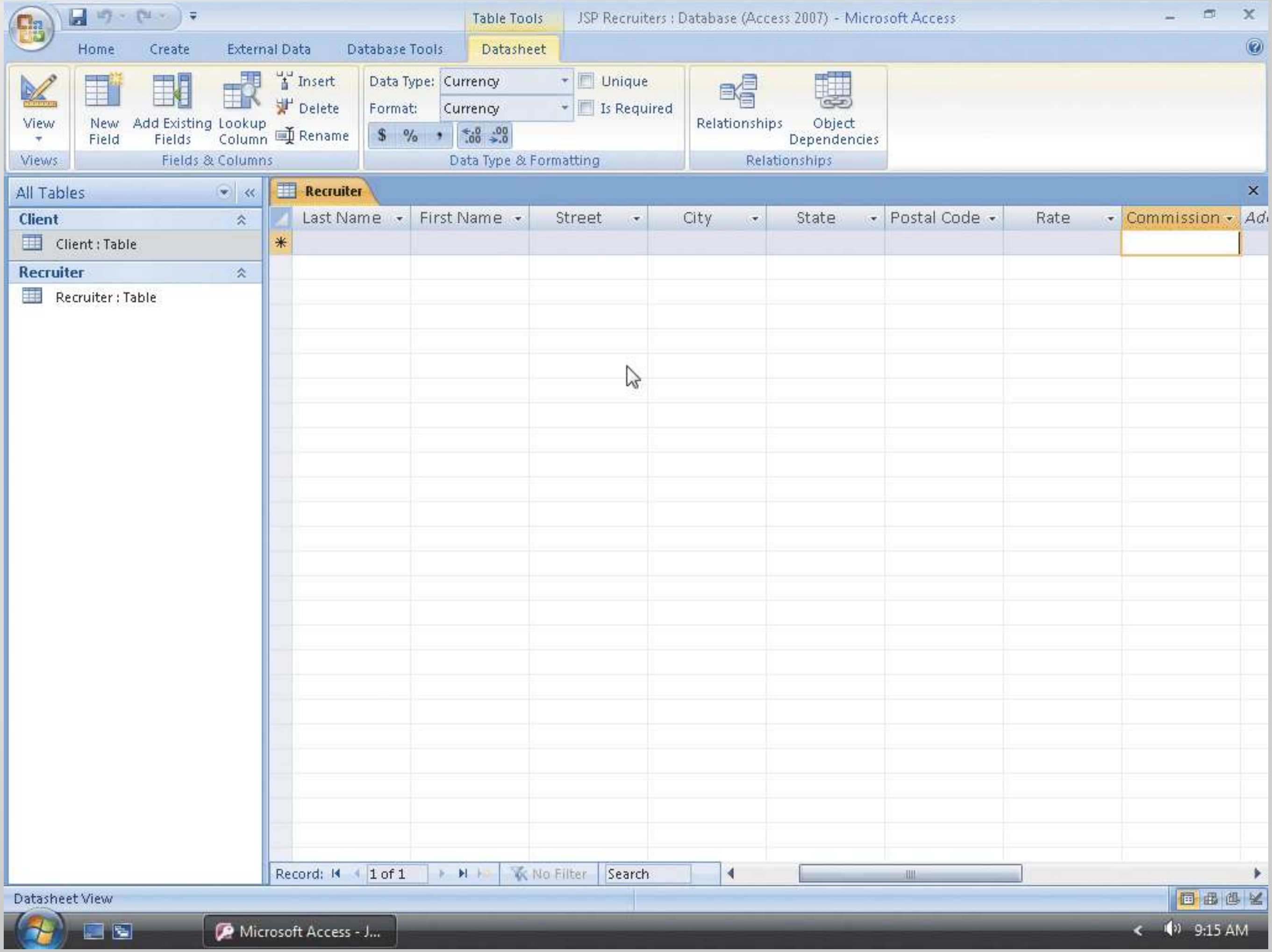
Creating an Additional Table

- 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

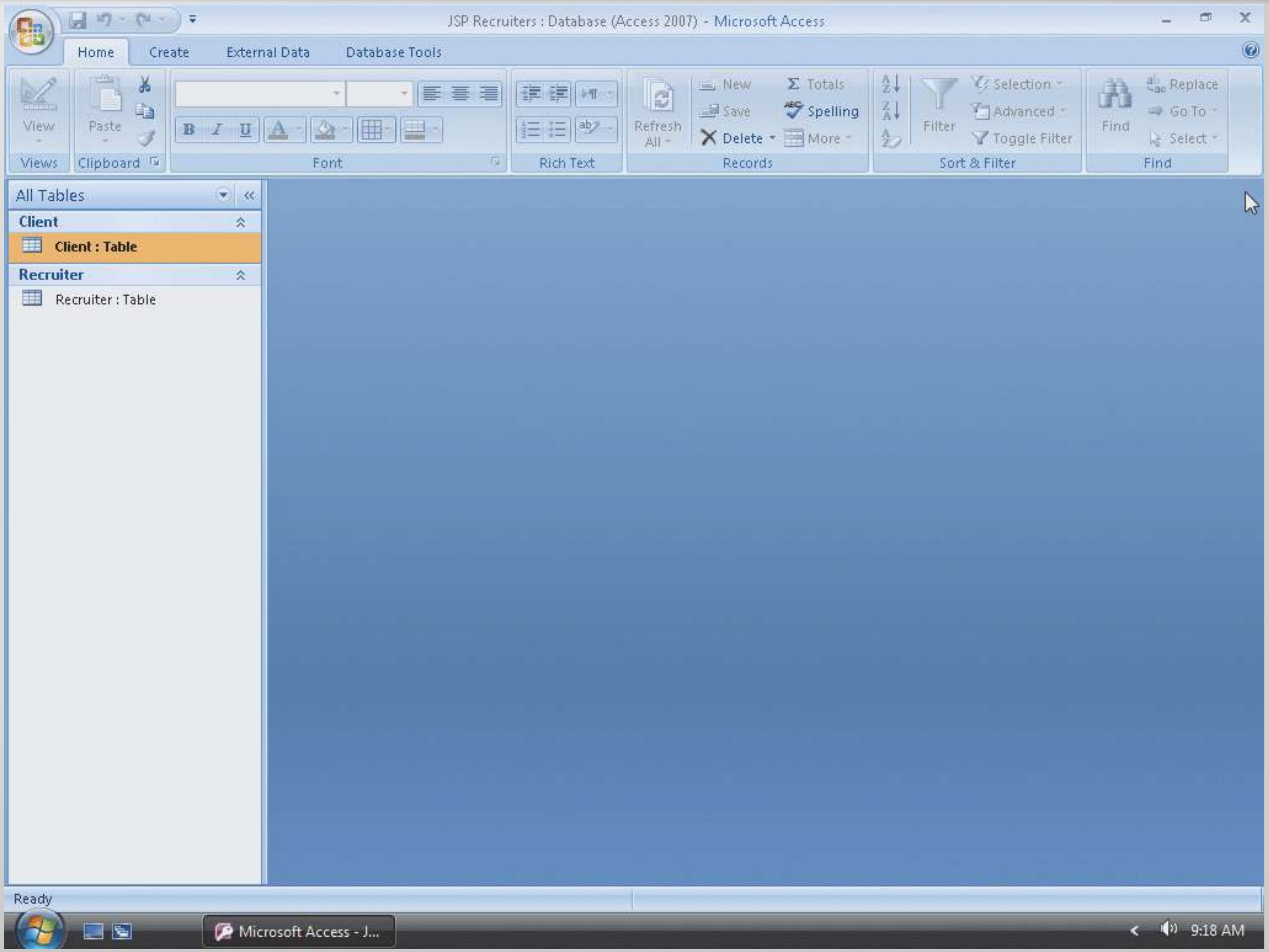
Modifying the Primary Key and Field Properties

- 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

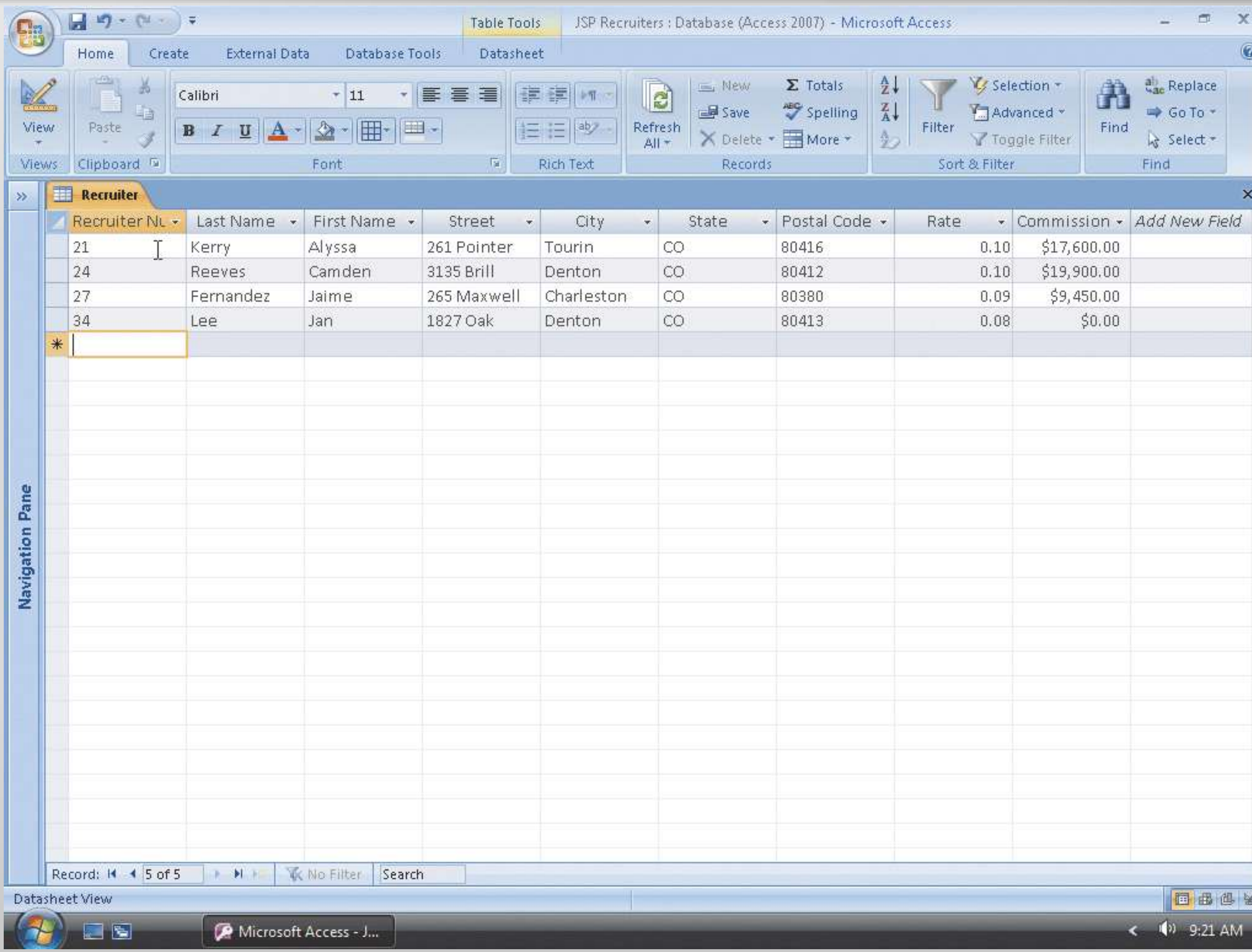
Modifying the Primary Key and Field Properties



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



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

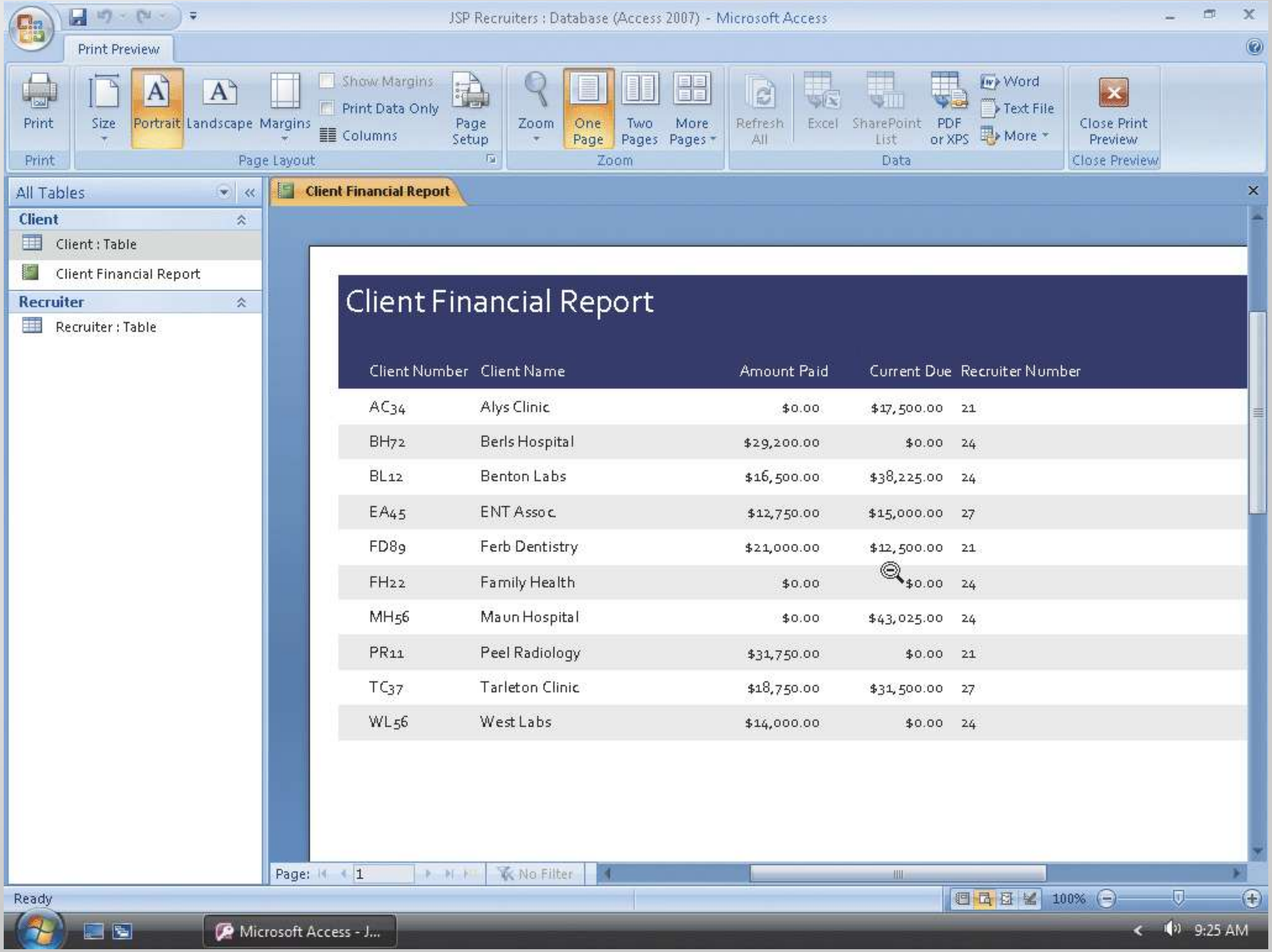
Creating a Report

- 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



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

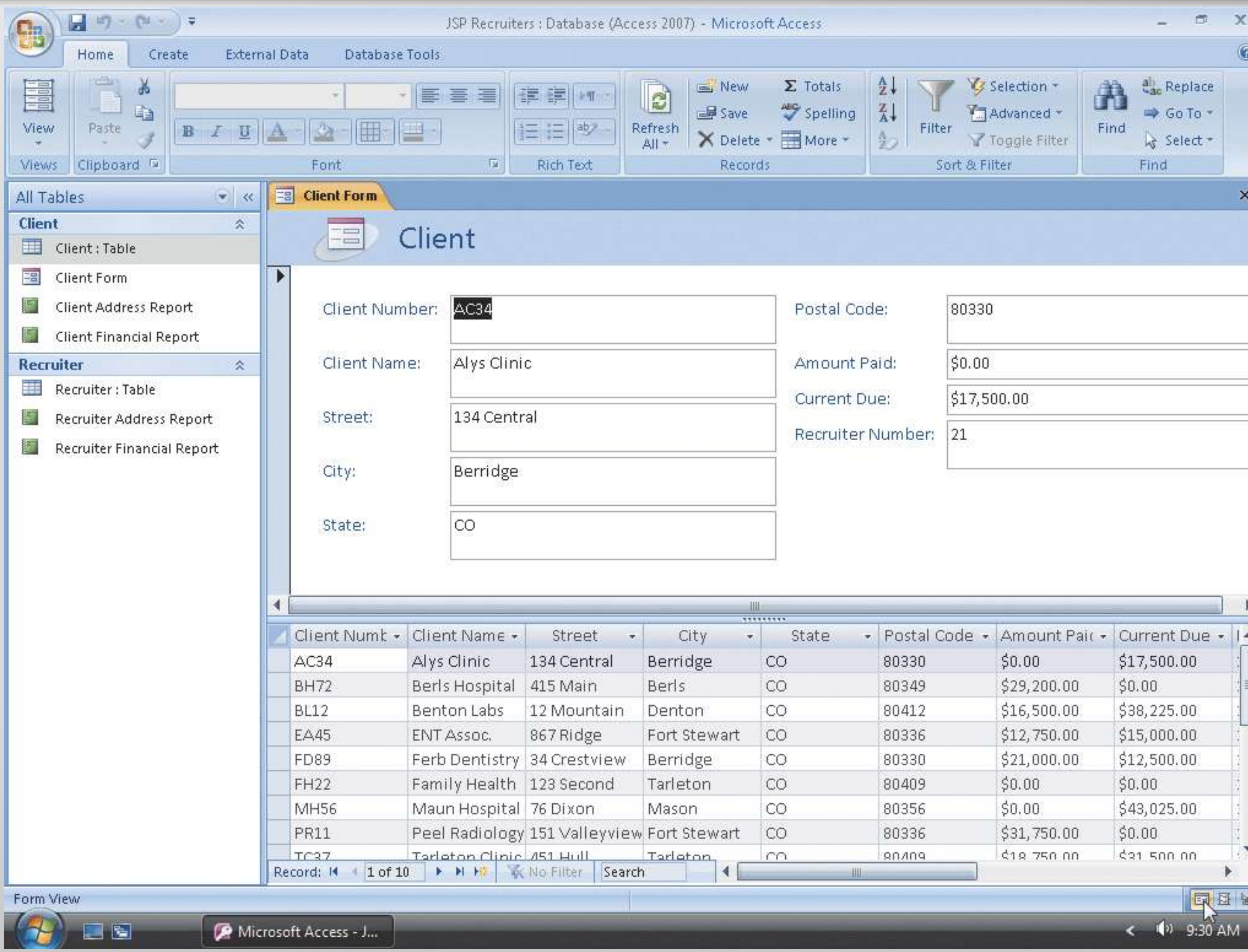
Creating Additional Reports

- 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

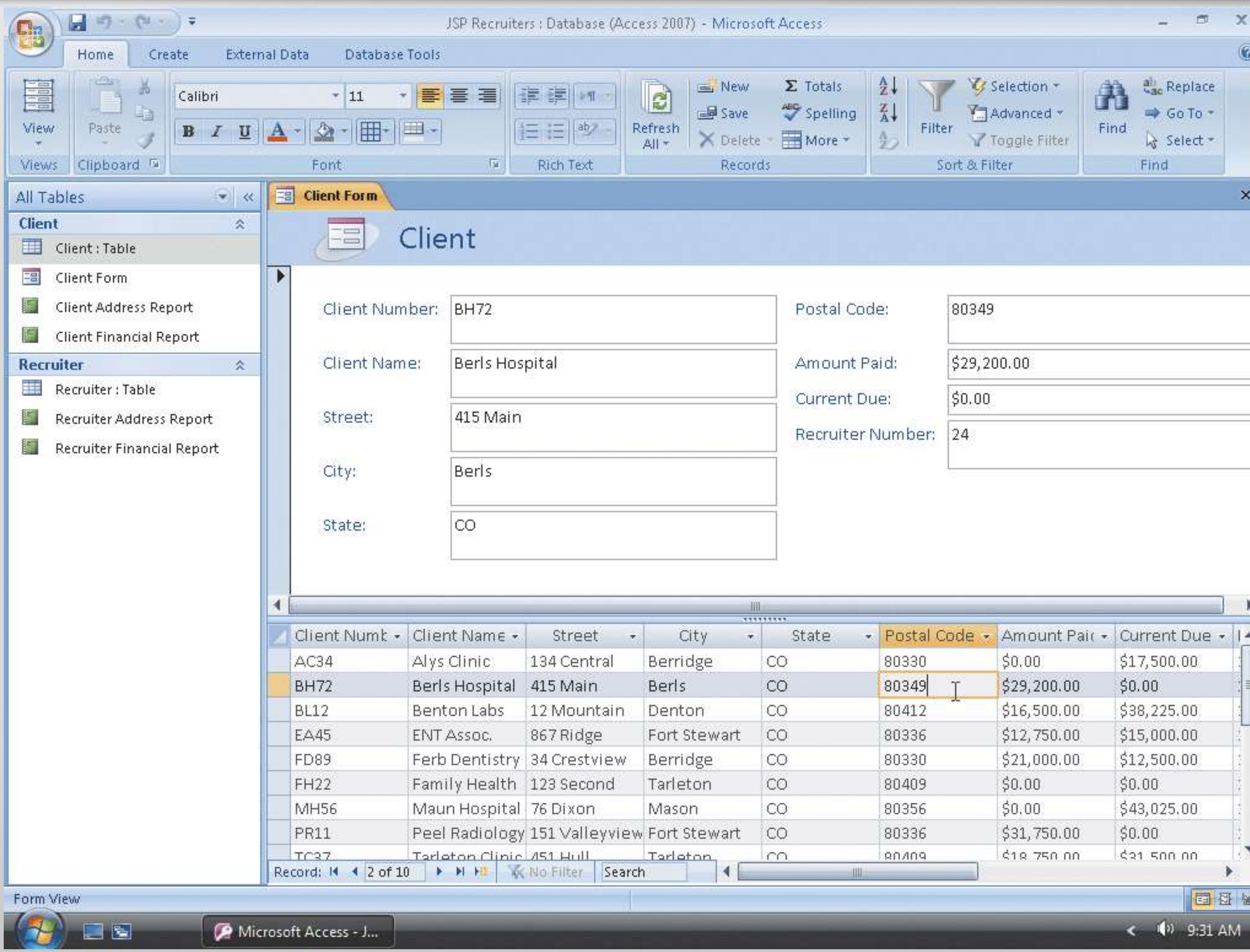
Creating a Split Form



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



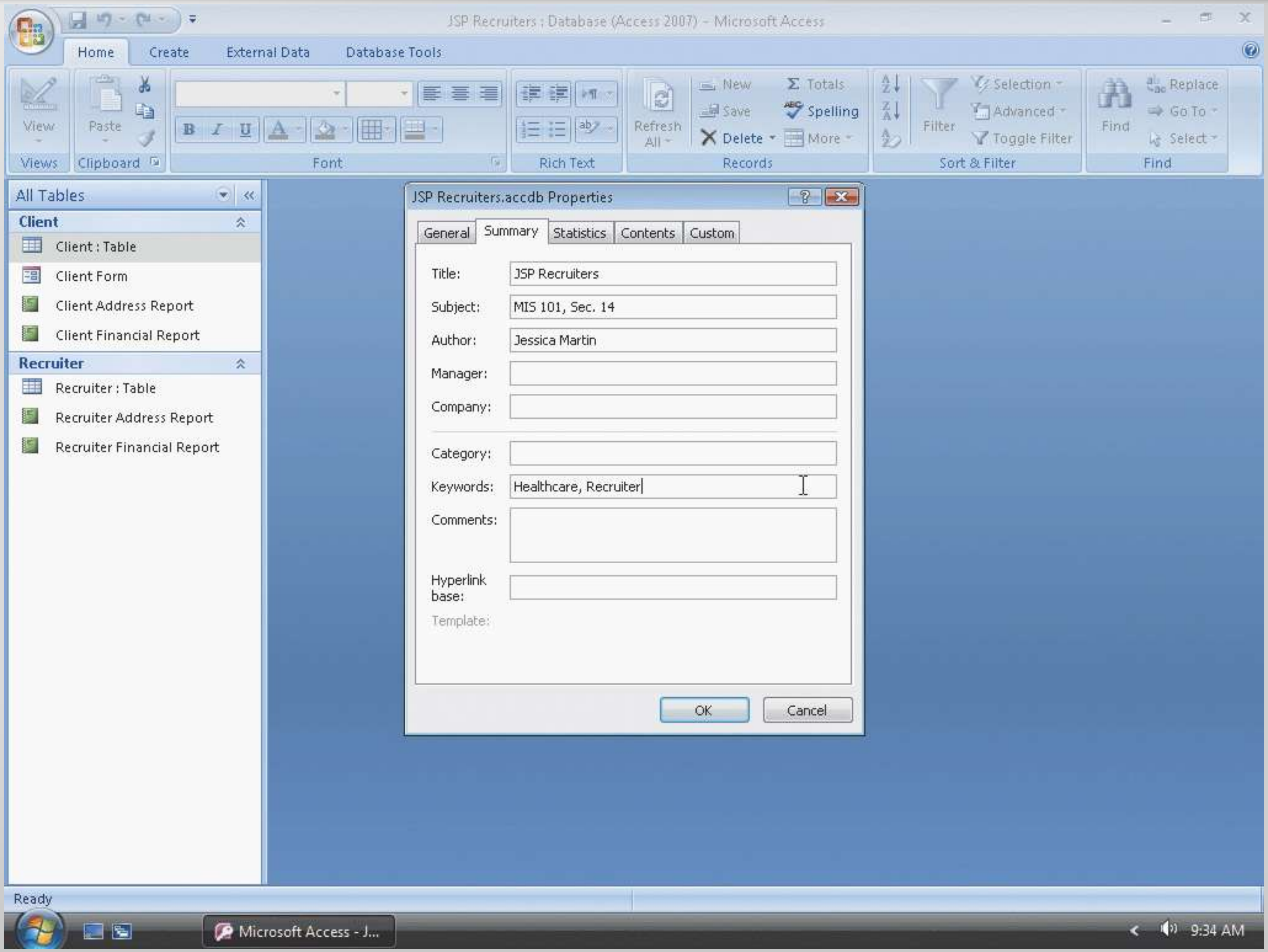
Changing Database Properties

- 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

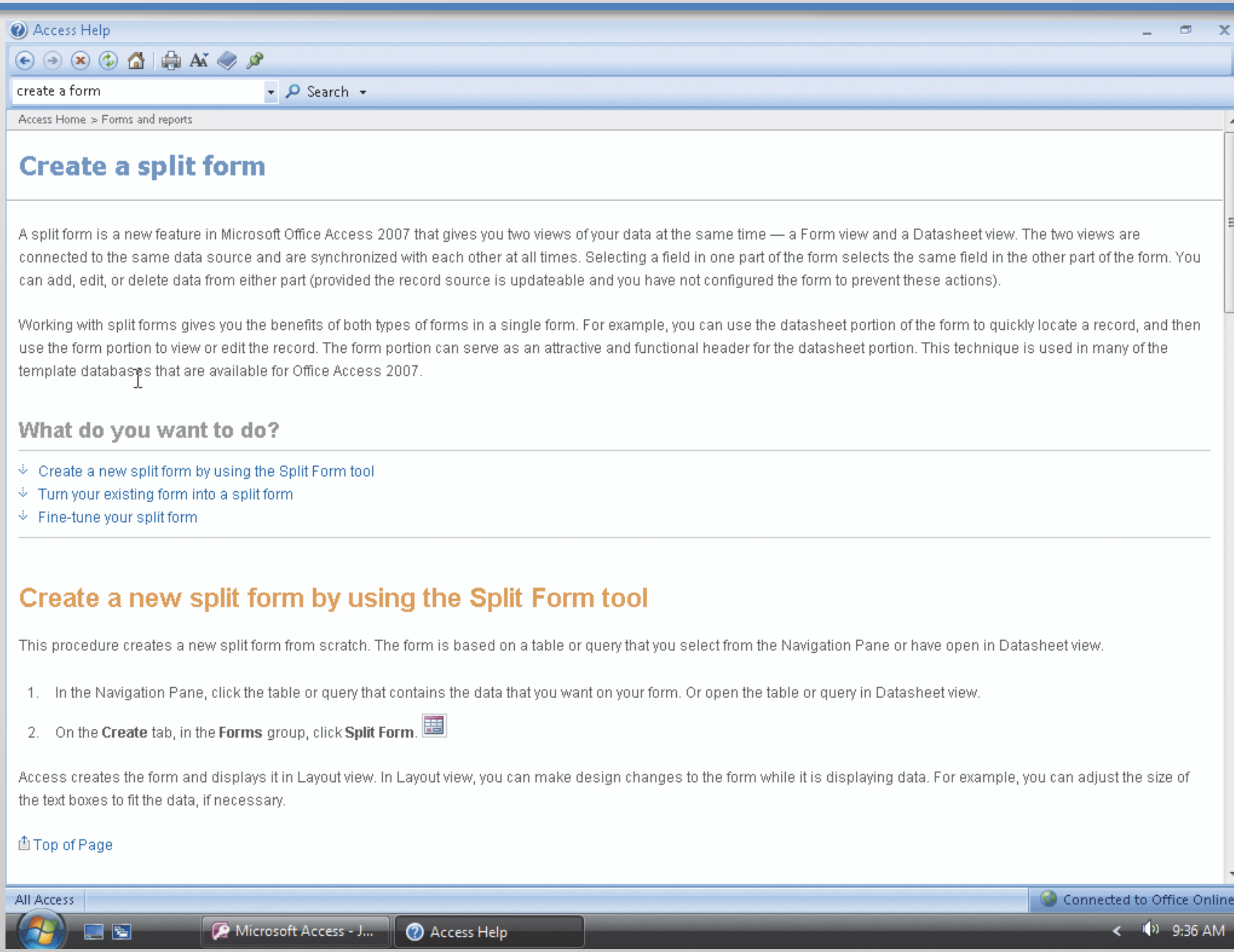
Changing Database Properties



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



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