

Access I 2007 Workshop

Tables and Forms

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I. Getting Started


Your older Access databases can be opened with 2007.

Open a 2003 database then save in 2007:

1. Click on the "Office Button" located in the top left corner
2. Click on Open
3. Navigate to your file and double click on it to open
4. Take a look at your tables, forms, queries and reports
5. Click on the Office Button then click on **Save As**
6. Select Access 2007 database to convert file to the new format



Notes:

- Depending on your default security setting in Access, a security warning may appear toward the top of your screen when you open your database.
To display all objects:
 - Click on Options box
 - Click enable this content and click OK
- Notice the Navigation Pane on the left side. The pane will list all objects such as Tables, Forms, Queries and Reports.
- Click on "All Access Objects" label on the pane to shown specific objects.
- Use the Shutter Bar open/close button to collapse and expand the pane. 
- Users of Access version 2003 cannot open a 2007. Using Access 2007, you would need to use File/Save As and select Access 2002 - 2003 database.

II. Create a new database

Your new database will contain related information and objects. For example, the Projects Database will include a table containing data elements that describe the project and will also have a "related" table that contains all the detail about the project activities. Also included will be a form for data entry, queries to retrieve project data and a report to present the data.

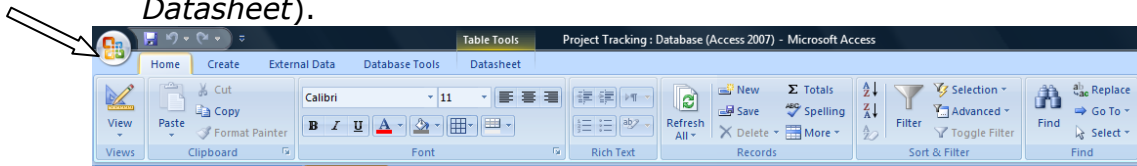
Create new database:

1. Run Access
2. Click on Blank Database from the main Access menu
3. Type a file name (*Project Tracking*) in the File Name box on the right
4. Click on the folder icon to navigate and select the location to put your database
5. Click Create

Notes:

- The file extension of Access 2007 is **accdb** (i.e.: Project Tracking.accdb).
- All your objects that you create: Tables, forms, queries & reports will reside in Project Tracking.accdb.

- New xml format: More secure, more compact, better recovery
- Notice the “Ribbon” at the top of your screen that replaces the old toolbars. The ribbon contains tabs (*Home, Create, External Data, Database Tools & Datasheet*).



III. Create Tables

Your table is used to define, format and enter your data. The table will include descriptive field names, define the type of data allowed in the field and specify formatting such as currency or decimal places. When you add a field name you want to clearly describe that field. The field should contain the smallest unit of data. For example, when you add the name field, you want to have separate fields for title, first name, middle initial and last name. This will give you the flexibility to easily include, exclude, query or sort by that field.

Tables can be created using different methods:

- A: When you first create a new database, the system will automatically place you in a new table.
- B: Click on the Create tab on the ribbon and select from:
 - Table
 - Table Template
 - Table Design
- C: Click on External Data tab and Import from Excel, XML, ODBC, dBase, etc.

Notes:

- Click on the tab “Datasheet” to insert fields, delete fields, define field formatting

A.) Add new fields using the column headings:

1. Double click on “Add New Field” listed in the column heading
2. Type Project_Name for your field name
3. Press Enter
4. Continue to type the following additional fields followed by enter:

Project_Description
 Requestor_FirstName
 Requestor_LastName
 Person_ Assigned

Add new fields using the Field Templates:

1. Click on the New Field button (located in Fields and Columns group on ribbon)

2. Locate desired field(s) from the Field Template list and double click to select

Scroll to the Projects group and select the following fields:

Priority
Status
Begin Date
End Date
Notes

3. Click on the x to close the field templates box

Data type and formatting:

The data type defined for your fields can be one of the following:

Text, Memo, Number, Currency, Yes/No, OLE object, Hyperlink or Attachment Attachment is new with Access 2007. Attachment allows you to attach files to records.

1. Click on the field name to select
2. In the data type and formatting group on the ribbon, enter data type, format, check if data is unique or required

Update the following fields:

Field Name	Date Type	Format
Project_Name	Text	Check: Is required
Project_Description	Text	Check: Is required

To add a "Lookup Column":

Lookup allows you to simply check off values instead of typing them. You can now select multiple values with this version.


1. Click where you want the field to be added (click on Project_Description)
2. Click on the Datasheet tab from the Ribbon
3. Click on Lookup Column from the Fields and Columns group
4. Click the selection: I will type in values that I want and press next
5. Click in the cell under Col 1
6. Type a department name and press tab (type IA, IT, Reslife & Financial Aid)
7. Press Next when you are done
8. Type "Dept" as the column label
9. Check Allow multiple values
10. Click Finish
11. Save tables as tbl_projects and press ok
12. Click on the black x on the right to close tbl_projects

Note:


- To easily identify the different types of objects in your Access database, you can use the following naming convention:

<i>Object</i>	<i>Name</i>
Table	tbl_tablename
Form	frm_formname
Query	qry_queryname
Report	rpt_reportname

Table Views:

 **Datasheet View** – allows you to view your table and enter data (looks like a spreadsheet with columns & rows).

- Click on View / Datasheet View to enter your data

 **Design View** – allows you to create tables and add or change the table design (add fields, set data properties)

- Click on View / Design View to edit existing field properties or add additional field names. Check out the various field properties.

Add data to your table:

1. Double click on the table name from the left navigation pane or
If you are in the Design View, click on View / Datasheet View
2. Type your data and press tab or enter to go to the next field

B.) Create a table using templates:

This second table will contain detail tasks associated with each project.

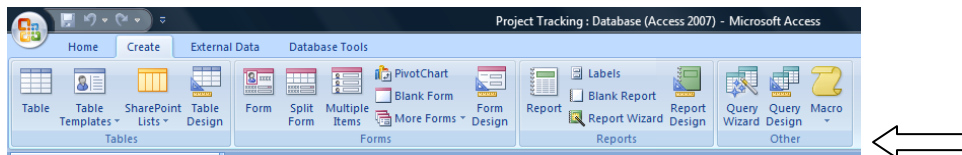
1. Click on the Create tab on the ribbon
2. Click on Table Templates & select Tasks
3. All the fields for tasks will be automatically placed in your table
4. Click on the Datasheet tab
5. Click on the first button on the toolbar: View / Design View
6. To save your table, enter table name: tbl_tasks and click ok
7. You will see the same design view from 2003 –
8. Add the field: projectID (click in cell below attachments) and make it a number field
9. Close and save changes to table

Add records to your table called tbl_tasks:

1. Double click on tbl_tasks to open
2. Add the Title: Design Access I workshop press tab
3. Fill in other fields for the Access I workshop and enter a 1 for Project ID
4. Add a second record with the Title: Design Access II workshop
5. Enter a 1 for Project ID

Note:

- Notice how the ribbon is grouped when you click on the Create tab: Tables, Forms, Reports, Other

**Create a “relationship” between the project table and task tables:**

1. Click on the Database Tools tab
2. Click on the Relationships button
3. Double click on tbl_projects and tbl_tasks to add
4. Click on Close to close the Show Table dialog box
5. Click on ID from tbl_projects and drag to ProjectID in tbl_tasks
6. Click on Create to create a one-to-many relationship
(You will see a black line from ID to ProjectID.
For each project, you will have many tasks associated with that project.)
7. Click Close and Yes to save

Notes:

- Double click on your projects table to open. Notice the + sign in front of each project record. When you click on the + sign, you will see the related task records.
- If you don't see the + sign, close and reopen your table.

C.) Create a table from an Excel file:

1. Click on the External Data tab
2. Click Excel from the IMPORT group
3. Click Browse to locate the Excel file name
4. Select the drive/folder/file – double click to select
5. Select Import the source data into a new table in the current database / click ok
6. Click next on the Import Sheet Wizard (most often data is on sheet1)
7. Check – First row contain column headings / click next
8. Click next
9. Select Let Access add primary key or choose your own primary key / next
10. Click Finish
11. Click Close

To locate a record:

1. Click in the field you want to search
2. Click the Home tab, click on Find
3. Enter your text to search
4. You may want to change the “Look In” or “Match” fields

5. Click on Find Next to locate your record

Or

1. Enter text in the search box at the bottom of the screen.

Filters:

Use filters to quickly select and view designated records quickly. Filters may be applied from within tables, forms, or the datasheet of a query.

Two types of basic filters: *Filter by Form* and *Filter by Selection*.

Filter by Form:

1. Open tbl_projects and click in the person_assigned column
2. Click on the filter button (located on the Home tab / filter & sort group)
3. Notice all items are checked. Click on the select all to remove the check.
4. Click on the desired name(s) so only those records will be displayed
5. Click ok
6. To remove the filter and show all records: click on Toggle Filter
(You can filter on multiple fields)

Filter by Selection:

1. Open tbl_projects and click on a cell that contains the desired value: click on Mailroom in the Dept column
2. Click on the filter by selection button (located on the Home tab / filter & sort group)
3. Click on the desired options (equals, does not equal, contains or does not contain)
4. To remove the filter and show all records: click on Toggle Filter

Add a totals line to get a sum, average or other function:

1. Open your table
2. Click Home and select Totals from the Records Group on the ribbon
3. A new line labeled "Totals" is added to the end list. Click in the column where you want the total and select the function
 - a. *Note:* The Totals option can be used with filtered records.

IV. Forms

Forms allow you to define where the fields are placed on the screen for data entry. You need to create a form if you don't want to use the table datasheet view for data entry. For example, if you are tracking your survey results, you may want to set up a form that looks identical to the survey. If

you have more than one table, you may want to use a form to display all the information on one screen.

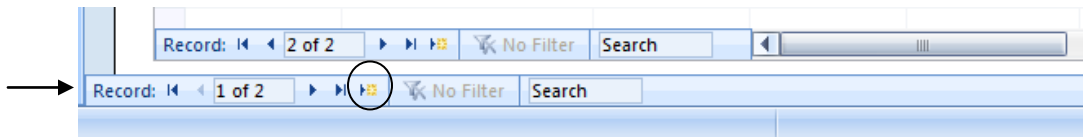
Create a form using the Form tools:

1. Click on Create tab
2. Click once on the table: tbl_project
3. Click on Form
4. You are placed in a Layout view
5. Click on View / Form View
6. Enter a record: tab or return to get from field to field
7. Close the form and save form as frm_project detail

Note: Your main table (tbl_projects) is displayed on the top half of the screen and your detail task records from (tbl_tasks) that relate to the project table are listed on the bottom part of the screen.

To enter a new record in your projects tables:

1. Double click on your form to open
2. Click on the last line and click on the icon to add a blank record
3. Enter your data and press tab to go to the next field



To enter a new record in your task tables:

1. Locate your desired project
2. Click in the task box to add a new task for that project
3. The correct Project_ID number will be automatically added to the tasks table

Title	Priority	Status	% Complete	Description	Start Date	Due Date
Design Access I worksho (1)	High	Completed	100%		7/21/2008	
Design Access II workshc (2)	Normal	In Progress	75%		10/1/2008	
*	(2) Normal	Not Started	0%		10/14/2008	

Create a Split Form using the form tools:

A split form displays your detail record in the top half of the screen (as a form) and then lists the record again on the bottom half of the screen along with other records in a datasheet view.

1. Click on Create tab
2. Click once on the table: tbl_project
3. Click on Split Form
4. You are placed in a Layout view
5. Click on View / Form View
6. Enter a record: tab or return to get from field to field
7. Close the form and save form as frm_projects

Modify the form:

1. Click on View / **Design View**
2. Change the form heading: Click on the heading field and highlight the existing name then type a new form heading or click on Design / Title to update
3. Select a background color for the Project Name field: Click on Project Name then go to the Font group and click the expand arrow on Fill/Back Color button (picture of paint bucket)
4. Click on View / Form View to view your changes
5. Click on View / Design view to make additional modifications
6. To change the width of the fields:
 - a. Click to select the field
 - b. Click and drag the outside border to resize (the whole table changes)
7. To change the width of one field:
 - a. Click on any field to select
 - b. Click on the small table box on the top left
 - c. Click on Arrange (under Form Layout Tools)
 - d. Click on Remove
 - e. Click outside the table to deselect the fields
 - f. Click on the field you want to change and point to the border. With the double headed arrow displayed, click and drag the border to change the width of the box
8. To change the position of the field: Click on field and drag to new position
9. Click on View / Form View to view your changes
10. Click on View / **Layout View**
11. Click on Format and select one of the auto formats
12. Click on View / Form View to view your changes
13. Close and save form

