Microsoft Office Training Series

Access

Advanced

Post-Course

- Courses never Cancelled
- 12+ Months Schedule
- 24 Months Online Support
- UK Wide Delivery

STL MicrosoftTraining.net

Learning & Performance Institute
Accredited Learning Provider

ilm Recognised Provider

Microsoft Partner
Certified Silver Partner

CONTENTS

Module One: Getting Started

Welcome to the Advanced Post Course manual. You can use advanced forms and tasks to do even more in Access than you have previously learned. For example, you can use Access to create mailing labels, work with SQL and publish a Web database—among other things. By the time you finish this course, you will be able to navigate Access and create reports like a pro. Sit back, relax and have fun. You are in for a thrilling ride!

Objectives

Research has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly.

With this manual, students should have learned how to:

- Use the Quick Start group, Property Sheet, table macros, report sections, conditional formatting, Expression Builder and logical functions.
- Add, move, remove and format both regular and calculated controls
- Set the Primary Key
- Create a subform, Web form, split form, modal dialog, PivotChart, PivotTable and mailing labels
- Group and sort data
- Understand, view and edit relationships
- Understand and establish referential integrity
- Sort and filter a query
- Add calculated fields
- Understand what SQL is, what SQL statements are, basic SQL syntax and the uses for SQL within Access
- Link to, import and export an Excel spreadsheet, Access database, SharePoint list, text or XML file and other types of links, imports and exports
- Use the Database Documenter, analyze table and database performance and repair and compact a database

Module Two: Advanced Table Tasks

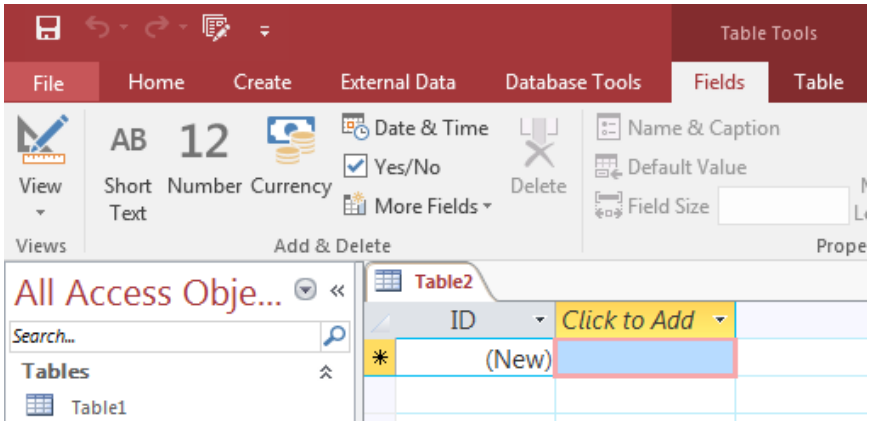
In this module you will acquaint students with six different advanced table tasks: using the quick start group, using the property sheet, adding, moving, and removing controls, formatting controls, setting the primary key and using table macros.

Using the Quick Start Group

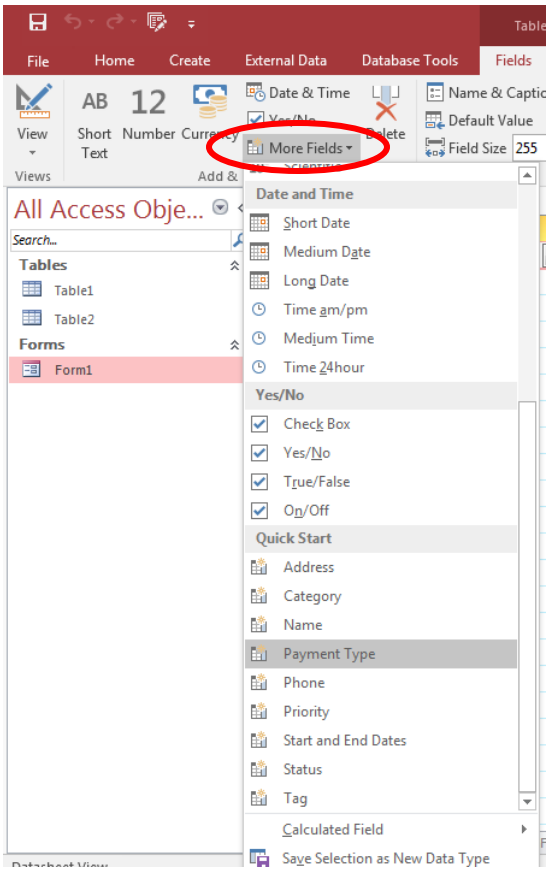
Quick Start groups are an easy way to input information without entering it over and over again. There are various groups that you can create, including address, category, name, payment type, phone, priority, start and end dates, status and tag.

Some Quick Start groups will have predefined list items, which you can also add on to. For example, let's say you want to add payment types to your table. The predefined payment type list items are cash, credit card, check, debit and in kind. You can use these predefined list items, remove the ones you don't need and even add your own. For this example, we will delete the in kind and check list items and add Paypal as a payment type selection.

1. Open your table
2. Highlight the field that is to the right of where you want your new Quick Start group to appear. In this example, we are going to put our payment type Quick Start group to the left of the ID column.

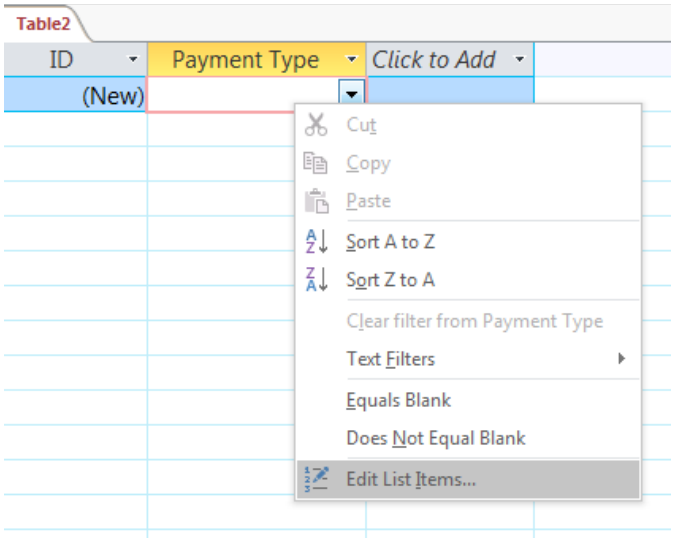


3. Click the "More Fields" option from your menu.
4. Scroll down to the Quick Start section and choose "Payment Type."



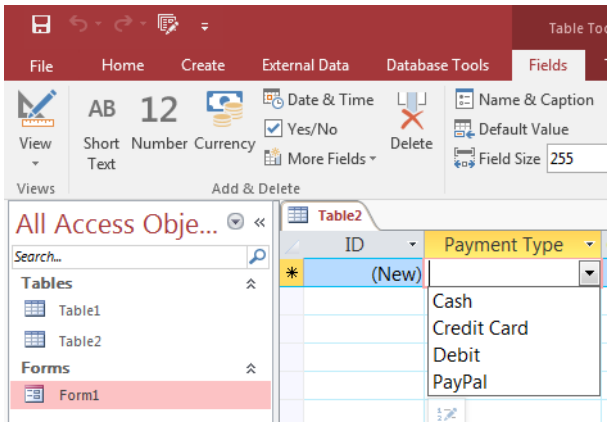
5. Once your Payment Type Quick Start Group is on your table, right click anywhere on the column.

   A menu will pop up. From that menu, select “Edit List Items” at the bottom.



6. A menu box will pop up that contains the predefined list items. If you want to delete a list item, highlight it and hit your backspace key. If you want to add a list item, just type it in. For this example, we are going to delete Check and in kind, and add Debit and Paypal.

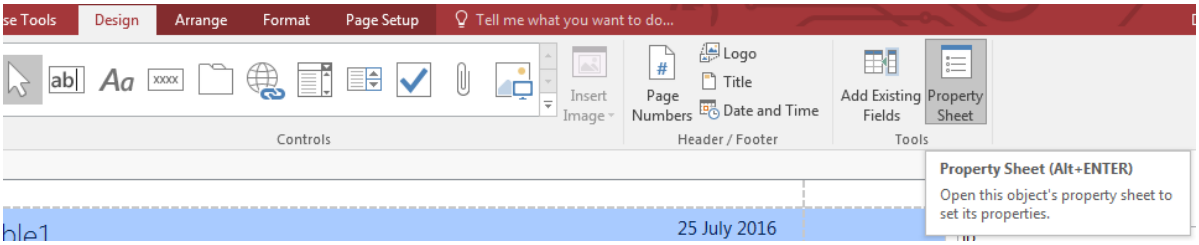
7. Press the "OK" button and your new Payment Type Quick Start group will contain the new list items.



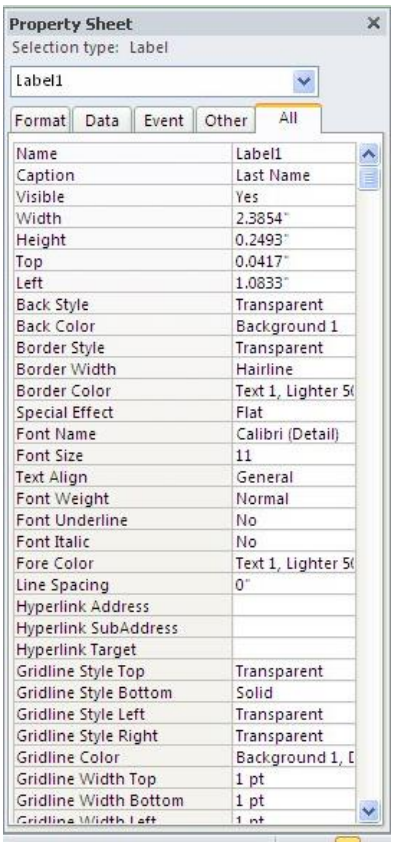
Using the Property Sheet

The property sheet gives you an easy way to edit the design of your report. By displaying the property sheet and then clicking on a selection within your report, you can change or add features within your report.

To access the Property Sheet, click on the "Create" tab within Access and selecting the "Report" icon from the menu. The "Design" menu should open up immediately and the Property Sheet icon is all the way at the end.



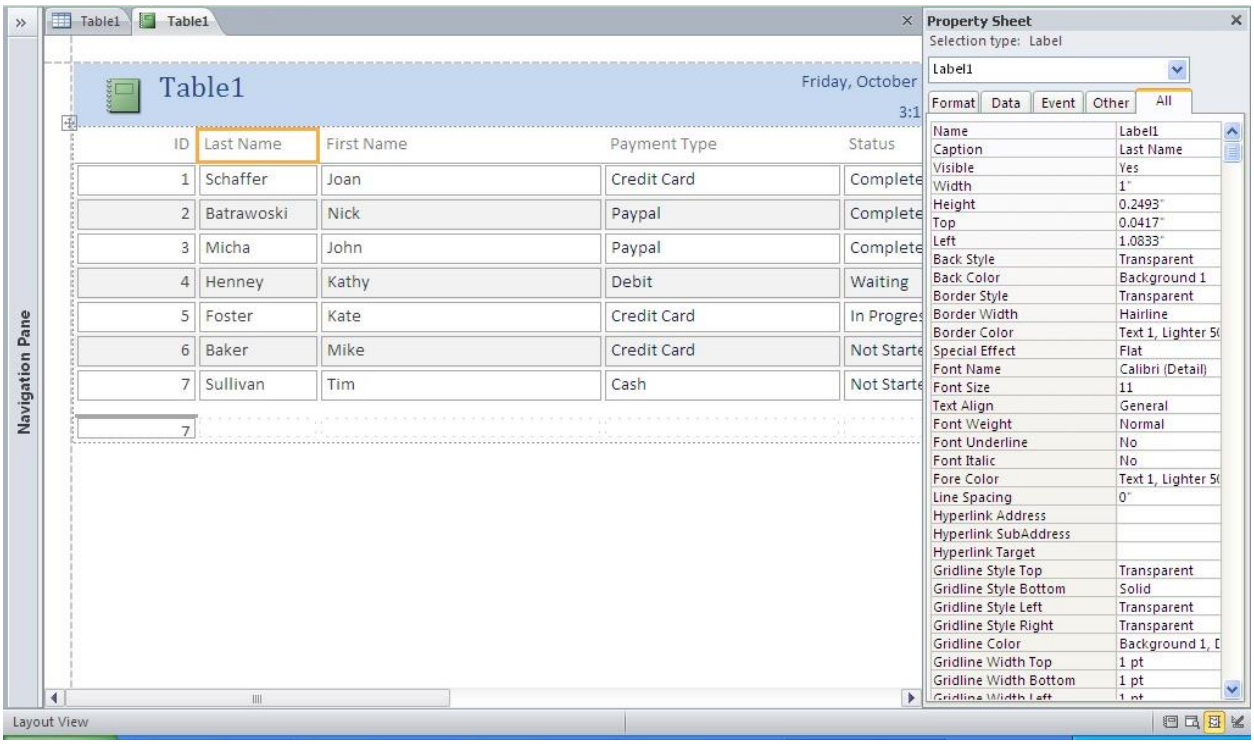
Clicking this icon will bring up the Property Sheet.



Click on one of the fields to change its value or to add a value if one does not exist. For example, the Last Name column is to wide in the table above, so we are going to shorten it.

1. Start by clicking on the column header, which is last name.
2. Go over to the property sheet and find the "Width" selection.
3. In the box next to that selection, delete "2.3854," replace it with "1."
4. Hit the enter key.

Our new report looks like this:



Adding, Moving and Removing Controls

Report controls are located under the design tab, in a rectangular box with the label "controls" under it.

To add controls:

1. Click on the control you want to use from the design menu.

2. Click on the spot on our report where you want the control to go.

To move controls after they are on your report:

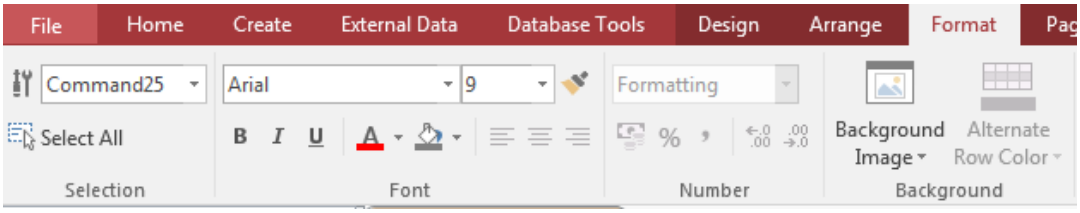
1. Scroll over the control until your pointer looks like two double-sided arrows intersecting each other.
2. Click on the control.
3. Slide it to a new spot on your report.

To delete a control that was placed on your report:

1. Scroll over the control until your pointer looks like two double-sided arrows intersecting each other.
2. Right click on your mouse.
3. Select “delete” from the list menu.

Formatting Controls

You can format controls to make them look how you want them to.



To format a control:

1. Select the “format” tab.
2. Scroll over the control until your pointer looks like two double-sided arrows intersecting each other.

3. Click on it.

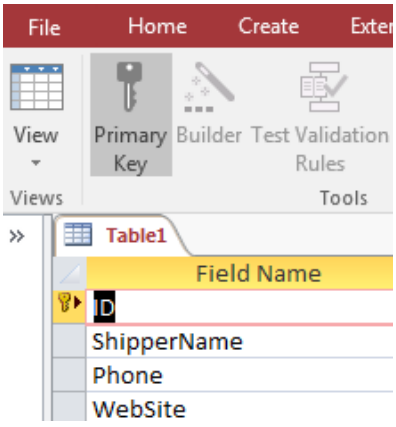
4. Choose an option from the formatting tab. You can change the font size, type, color and many other features of your control.

Setting the Primary Key

The Primary Key is a unique identifier that distinguishes one entry in your table for another. For example, account numbers are a good Primary Key because they are unique to each customer and will set one customer apart from the other customers—now and in the future. You will never take one customer's account number and assign it to another customer. An example if a bad Primary Key is a first or last name. You may not have two customers with the same first or last name now, but you might in the future.

To set the Primary Key:

1. Click the "View" icon from the Home tab, which is the first one from the left.
2. Select "Deign View" from the dropdown menu.
3. Under "Field Name" select the field that you want to set as the Primary Key.
4. Click the "Primary Key" icon from the design menu. It will light up.



5. You will see a key icon next to the field that you have set as the Primary Key.

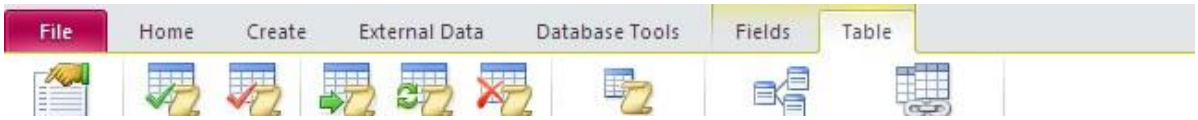
You have now set a Primary Key for the table.

Using Table Macros

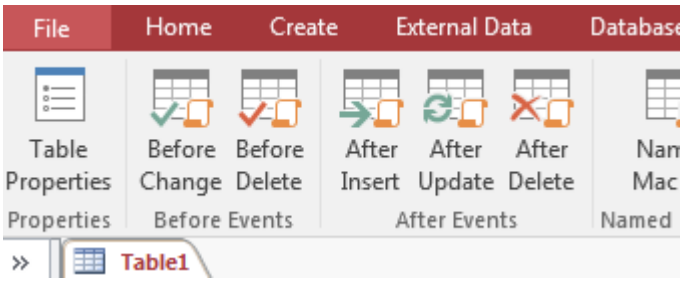
There are two types of table macros, event driven macros and named macros. Event driven macros are activated by a certain event happening within the table. Named macros are activated when summoned by their name.

To create an event driven macro:

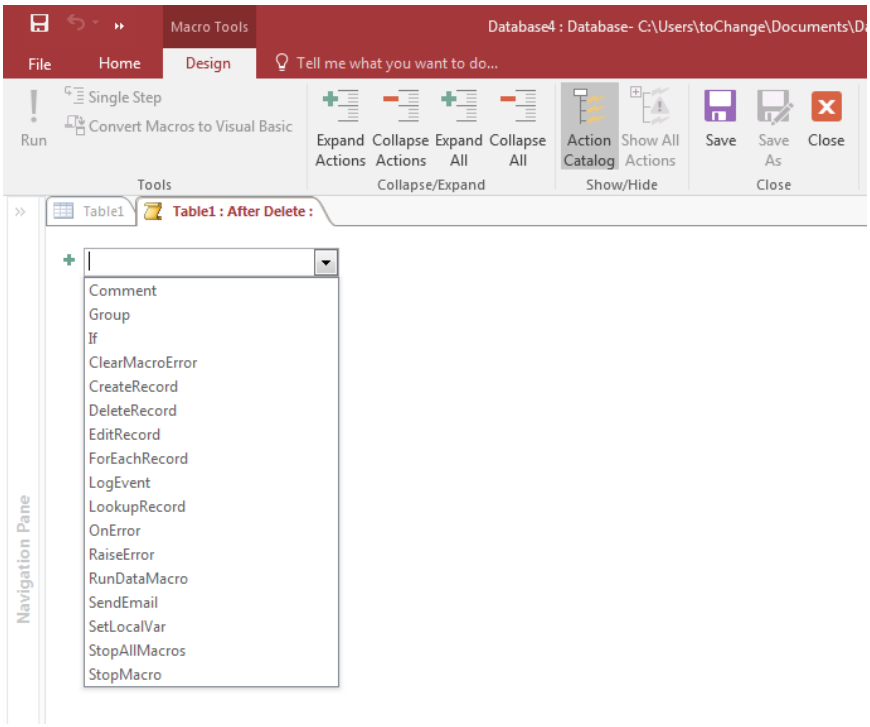
1. Click on the "Table" tab.



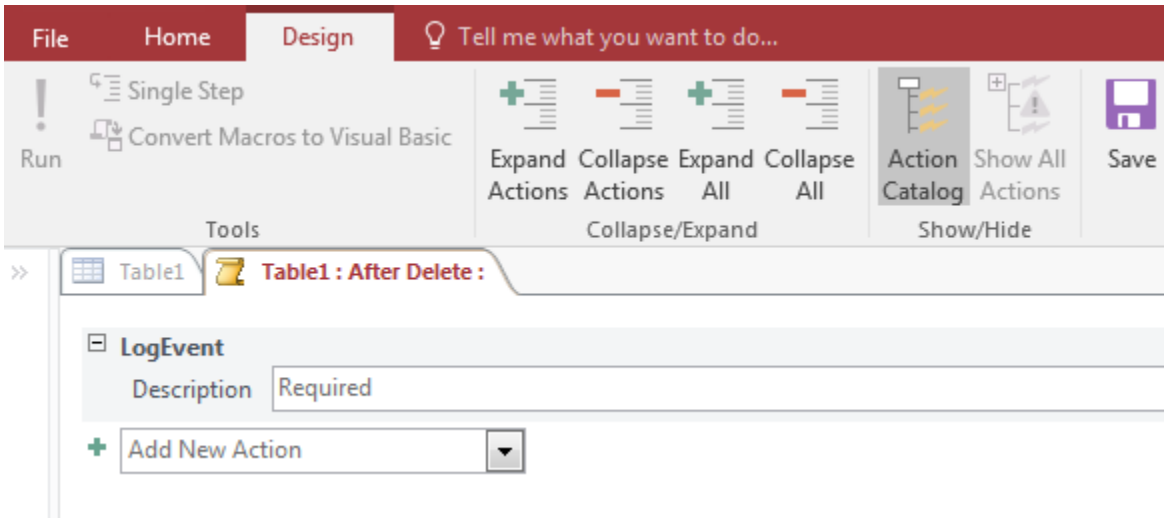
2. Choose an event from one of the event options, which are "Before Change," Before Delete," "After Insert," "After Update" and "After Delete."



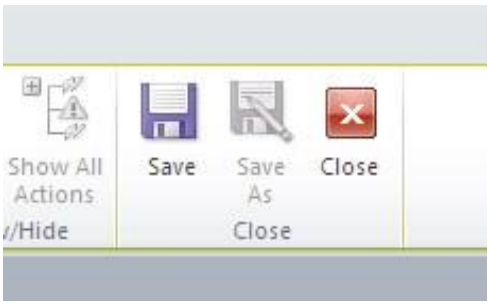
3. The macro menu will open up with a dropdown box for you to choose the action you want it to perform. Make a selection from the dropdown menu and then enter a description for the action.



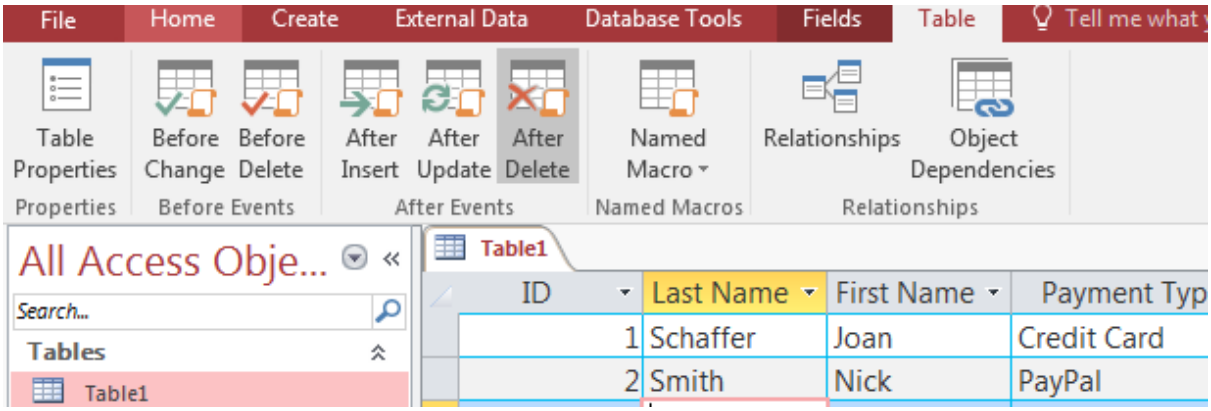
4. Click the "Save" button from the Table menu.



5. Click the "Close" button from the Table menu.



You have created a new event driven macro. You will know what events already have a macro linked to them because the event will be lit up in the Table menu.



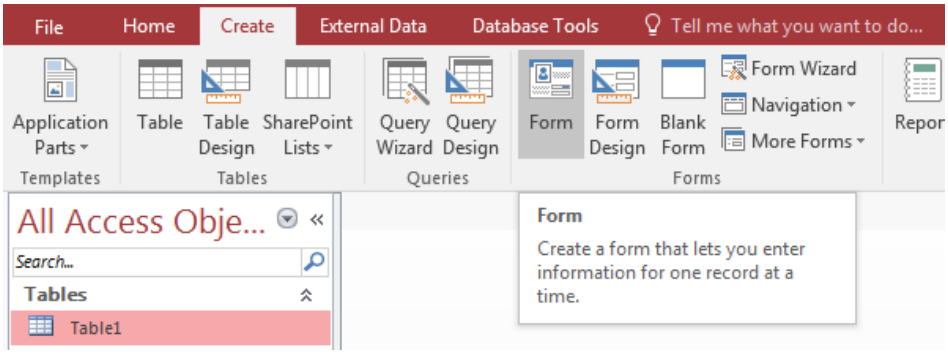
Module Three: Advanced Form Tasks

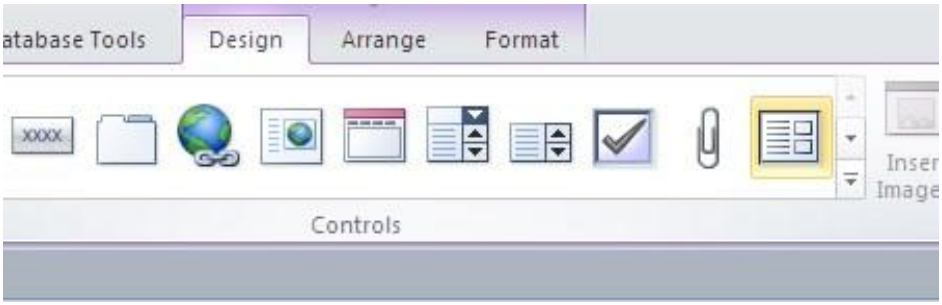
In this module, students will learn how to create three different advanced forms: a subform, Web form and split form. They will also learn how to create three advanced tasks: a Modal Dialog, PivotTable and PivotChart.

Creating a Sub Form

1. Click the “Create” tab.

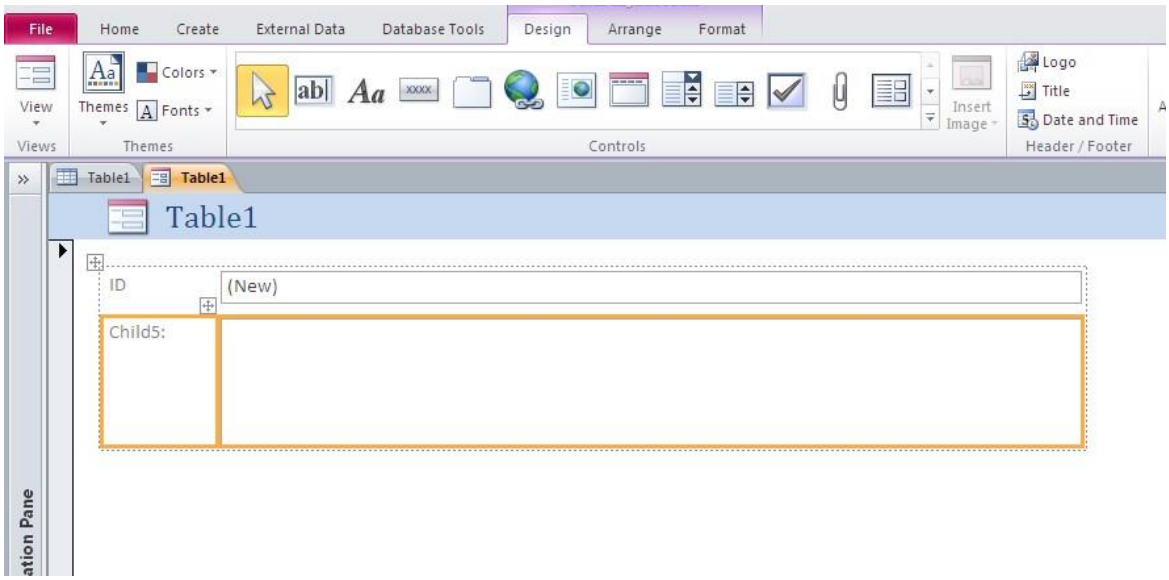
2. Click on the form icon. A new form will open.





3. Click on the sub form icon, which is highlighted in yellow.

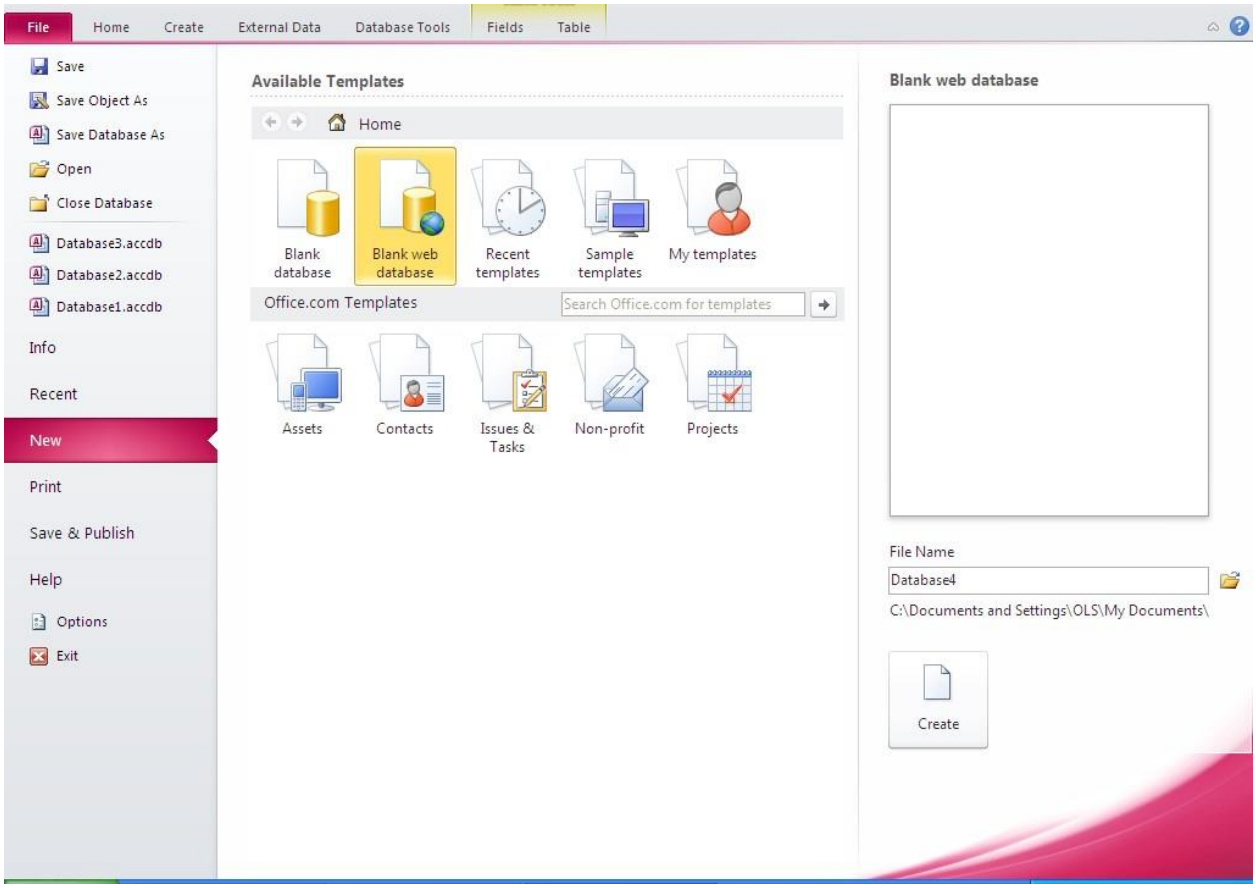
4. Click on the area of the form, where you want place the sub form.


File
Home
Create
External Data
Database Tools
Design
Arrange
Format
View
Views
Themes
Colors
Fonts
Themes
Controls
Insert Image
Logo
Title
Date and Time
Header / Footer
Table1
Table1
Table1
ID
(New)
Child5:

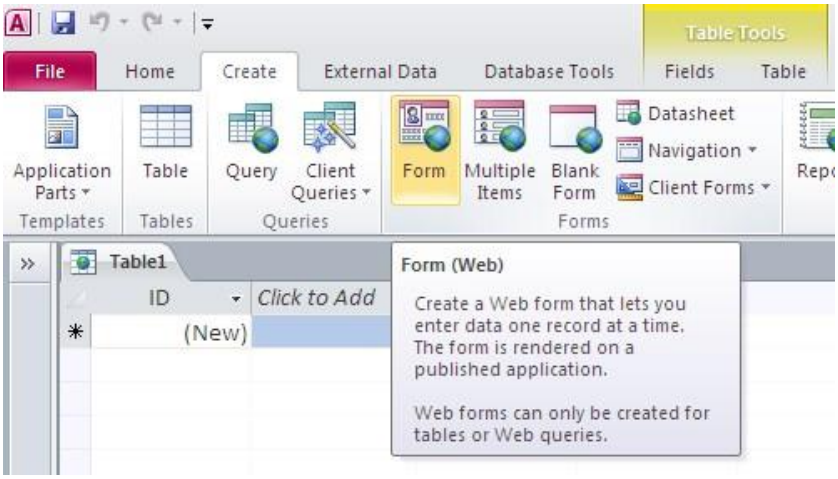
Creating a Web Form

Open access and click on the pink file tab.

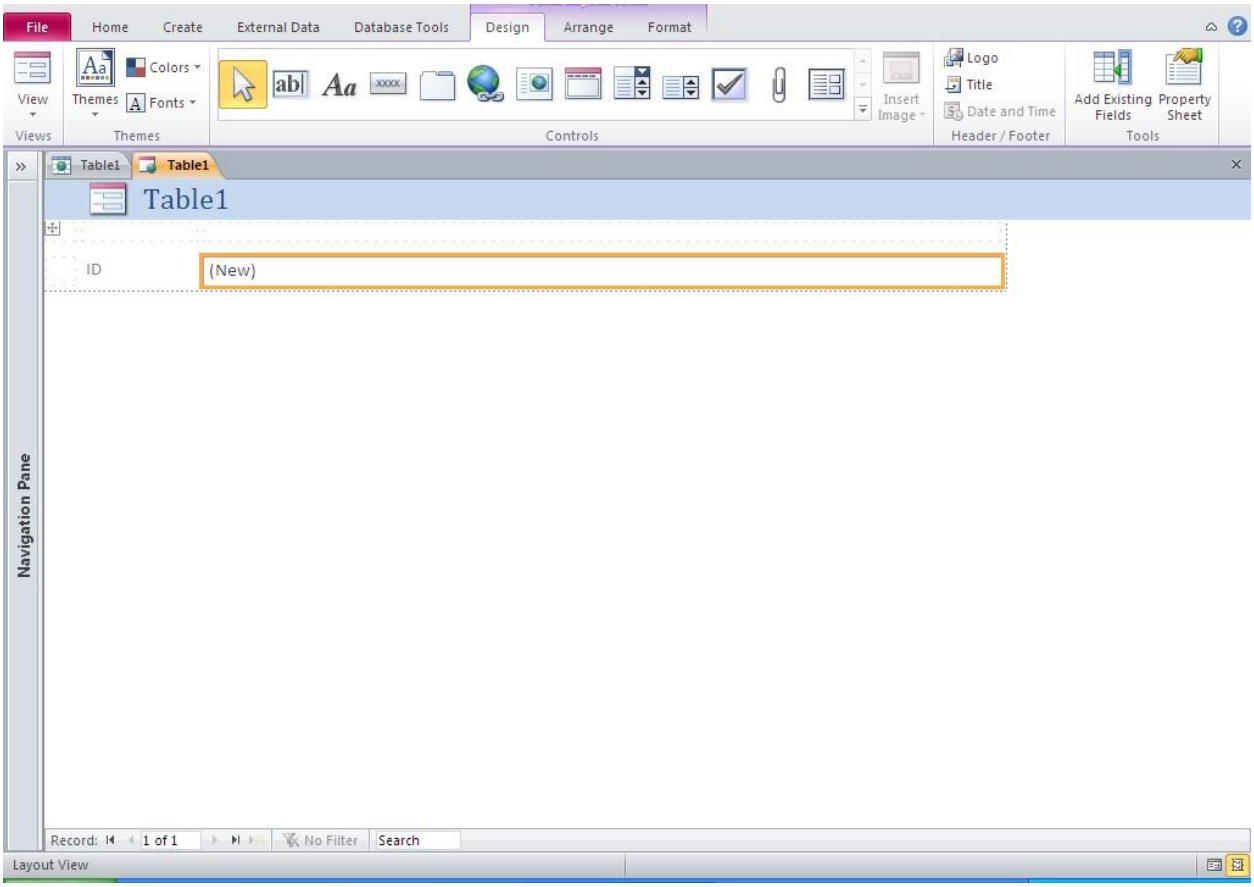
Scroll down to “New” and then choose “Blank web database.” Click on “Create.”



Once your new database is open, click the “Create” tab and then select the “Form” icon.

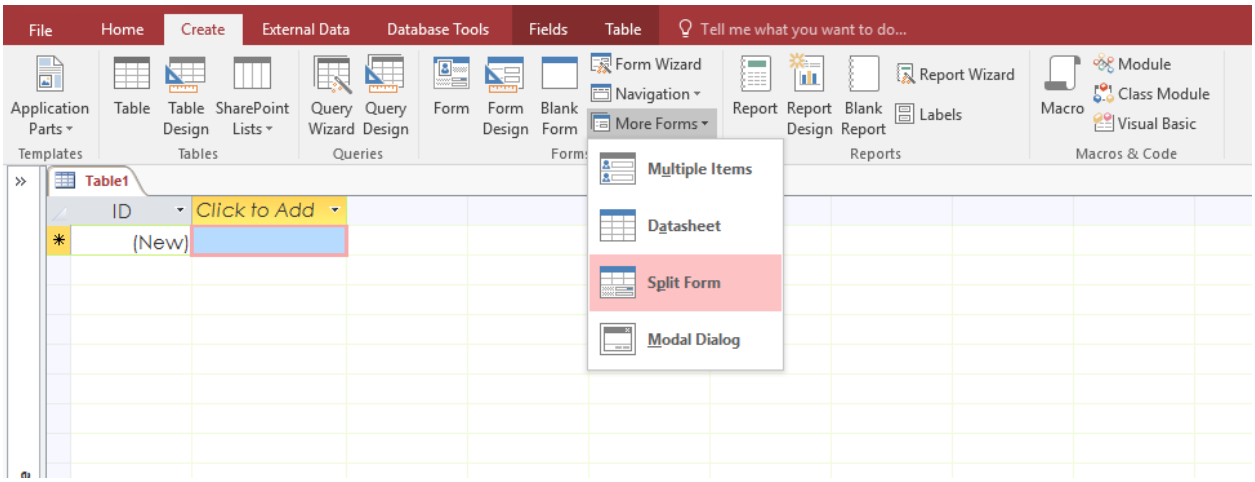


Your new page with your web form should look like this:

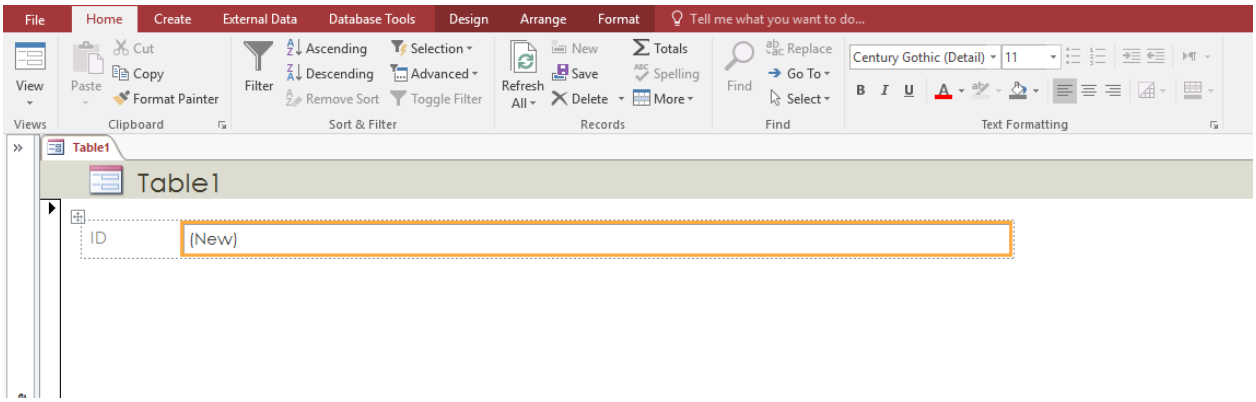


Creating a Split Form

Click on the "Create" tab and select the "More forms" option. Scroll down to the "Split form" option.

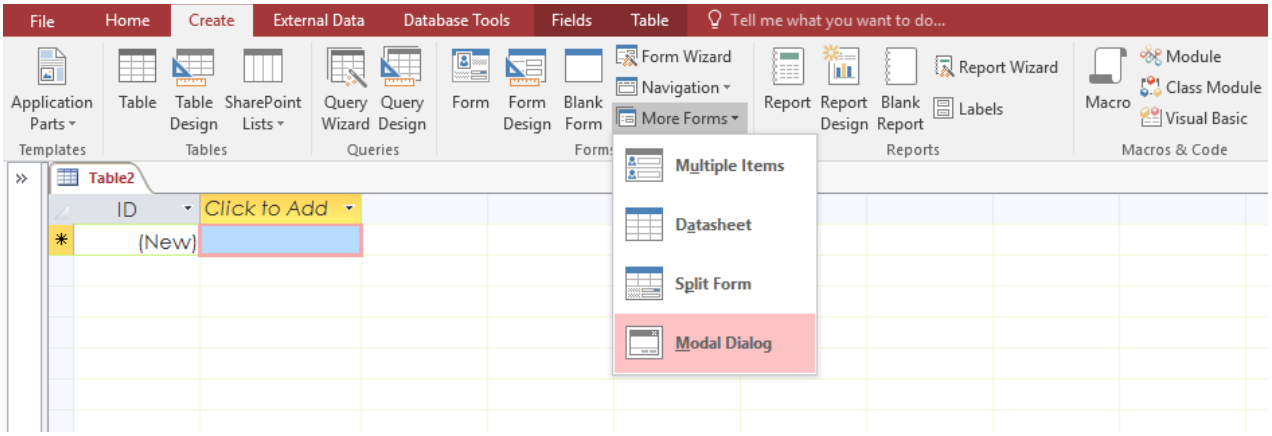


Your new split form should look like this:

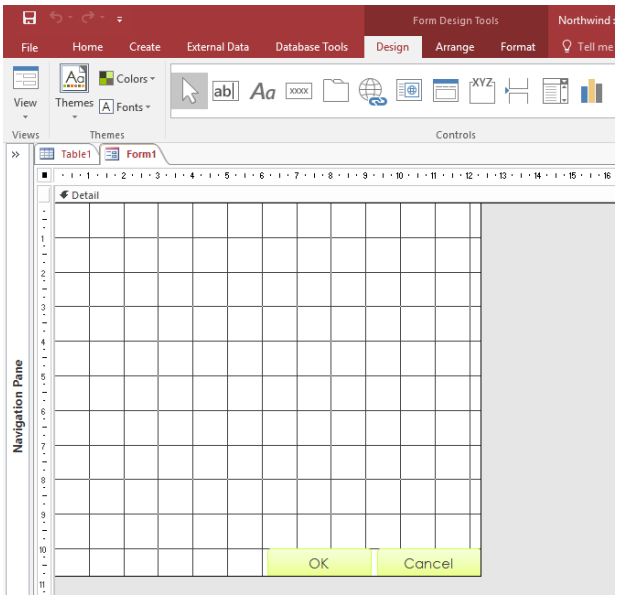


Creating a Modal Dialog

Click on the "Create" tab and select the "More forms" option. Scroll down to the "Modal Dialog" option.



Your new Modal Dialog should look like this:

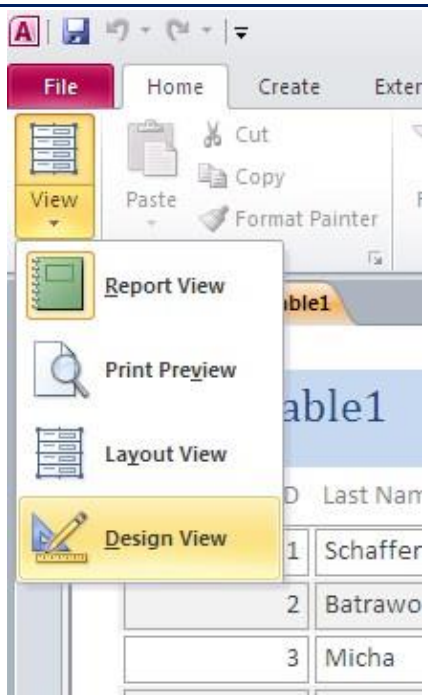


Module Four: Advanced Reporting Tasks

In this module, students will learn how to perform certain advanced reporting tasks, including using the report sections, using conditional formatting, grouping and sorting data, adding calculated controls and creating labels.

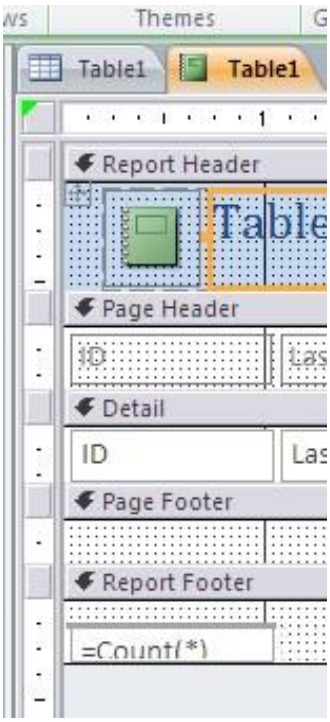
Using Report Sections

Report sections consist of Report Header, Page Header, Group Header, Detail, Group Footer, Page Footer and Report Footer. These sections make up the design of the report, so it is essential that you know how to use them.



To see these sections, you need to open your report in "Design View," which is done by selecting the "View" icon under the Home tab and then selecting "Design View" from the menu that opens up.

This is what you will see. Notice the report sections we talked about (the groups header and footer are not shown):



Use the **report header** when you want to insert items on in the header of your report cover page. Items that you might want to include on a cover page header include the title of the report or a related image.

Use the **page header** for items that you want to insert into the header of every single page of your report. For example, you may want to have the title of the report on each page.

Use the **group header** to signal the beginning of a new group. The group header will be placed at the beginning on each group. A good example of something to put as the group header is the name of the group.

Use the **details** section for the controls that make up the body of your report.

Use the **group footer** to signal the end of a group. The group footer will be placed at the end of each group. You may want to use this space to summarize the details of the group.

Use the **page footer** for items that you want to show at the bottom of each page. A common use of page footers is to display page numbers or the section/group name that the page is found under.

Use the **report footer** to summarize the details of the entire report or to report a total if your report pertains to expenses, profit/loss, etc.

Here is a sample of a report in Design View:

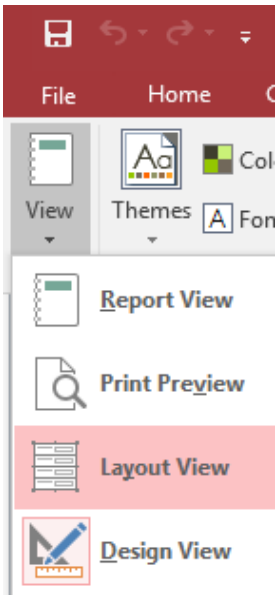
And the same report in Report View:

Using Conditional Formatting

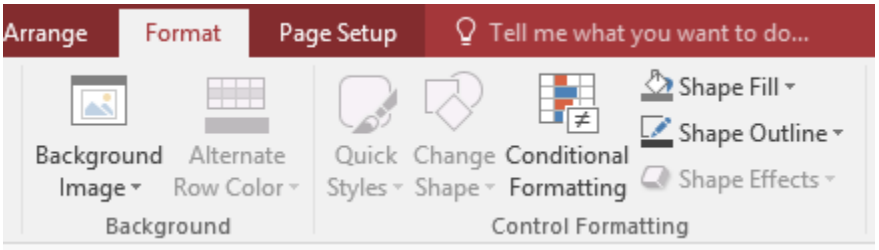
Conditional formatting allows you to insert automatic formatting when certain conditions are met. These conditions are specified by you. Access will allow you to create up to 50 conditional formatting rules per control or control set.

Create conditional formatting rules:

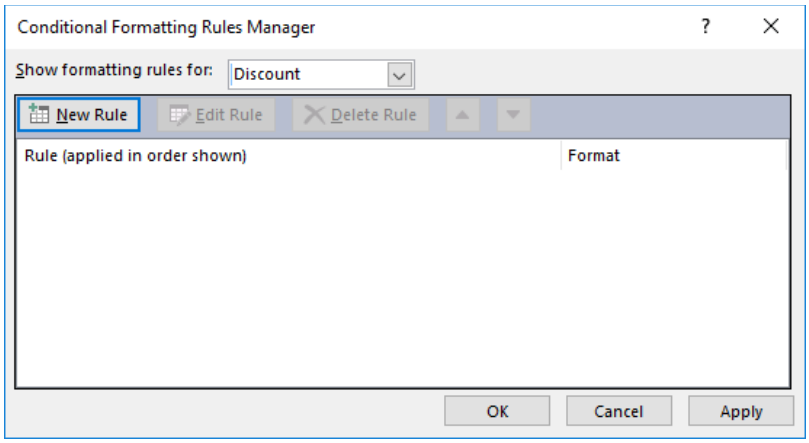
1. First you will need to open the report in the "Layout View" located by clicking the "View" icon on the Home menu.



2. Select the Format tab and choose "Conditional Formatting" icon from the Format menu.

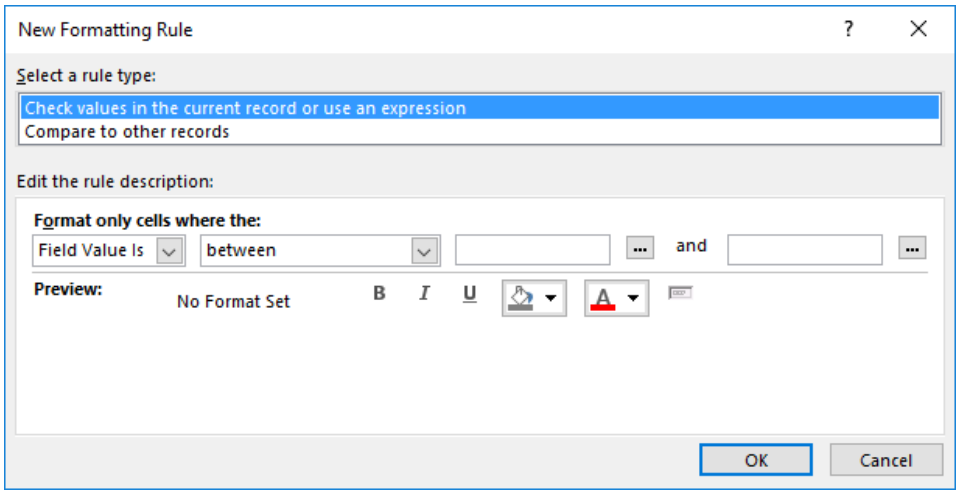


3. The Conditional Formatting Rules Manager box will open up.



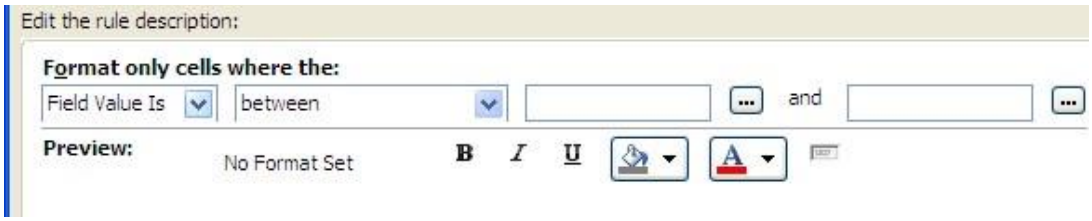
4. Click on "New Rule" to define a new rule.

5. The New Formatting Rule box will open up.

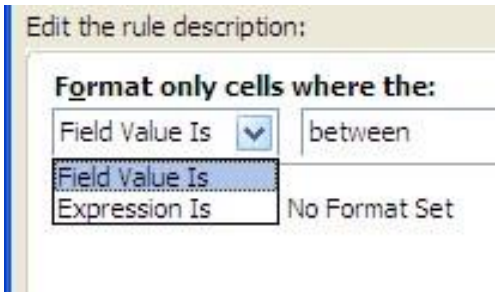


6. The first thing you need to do in this box is to choose whether you want to "Check value in the current record or use an expression" or "Compare other records."

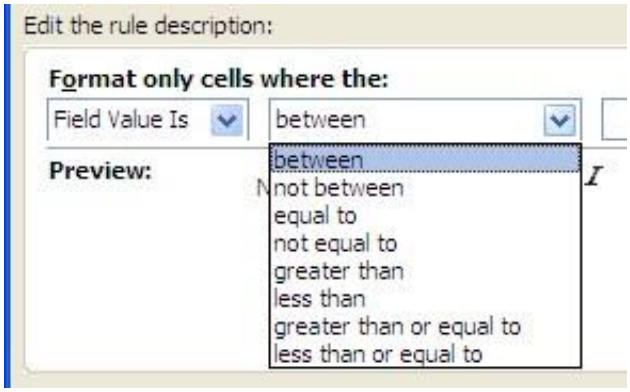
7. Underneath the rule type section, you will find the section to edit the rule description.



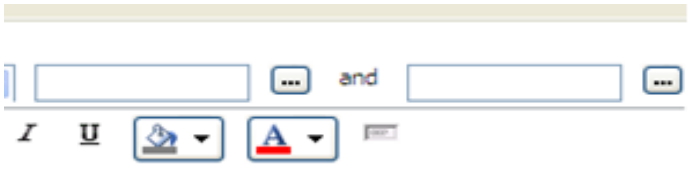
8. In the first box, choose whether you want the formatting to occur where there is a field value or an expression.



9. For the next box you will need to choose where the field value or expression must or must not be, in order for the formatting to occur. You have several options, including "between," "not between," "equal to," "not equal to," "greater than," "less than," "greater than or equal to" and "less than or equal to."



10. Set your new rule by placing a value in both of the boxes below.

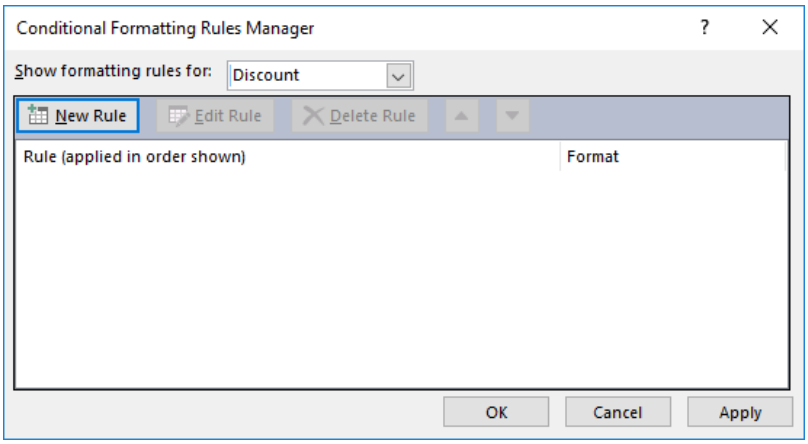


11. Click "OK" on the New Rule Formatting box.

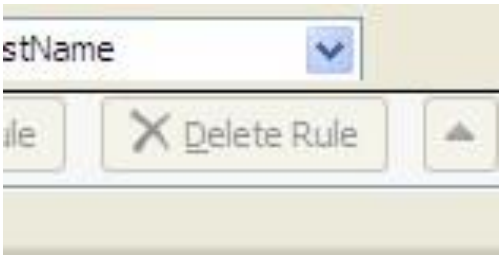
12. To create another rule click “New Rule” again or click “OK” on the Conditional Formatting Rules Manager box if you are finished creating rules for the control or group of controls.

You can change the priority of or delete your conditional formatting rules by:

Go back to your Conditional Formatting Rules Manager box.



Highlight the rule you want to delete by clicking on it and then clicking the “Delete Rule” button.



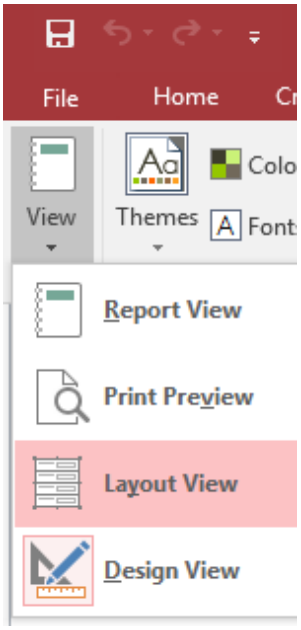
Highlight the rule you want to move by clicking on it and click the up or down arrow next to the “Delete Rule” button.

Grouping & Sorting Data

1. Put your report into “Layout View.”
2. Right click on the column that you want to group or sort.
3. Choose “Group on (column name,)” “Sort A to Z” or “Sort Z to A.”

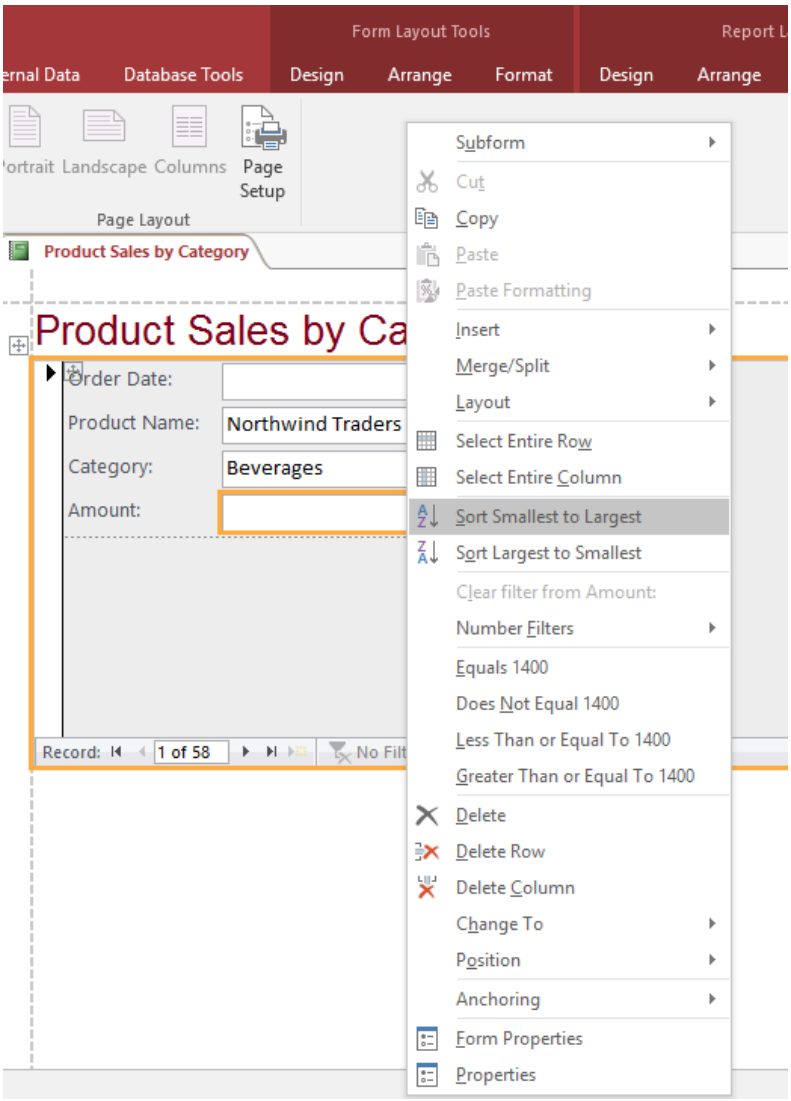
In this example, sort a report by last name.

First, put the report in “Layout View.”

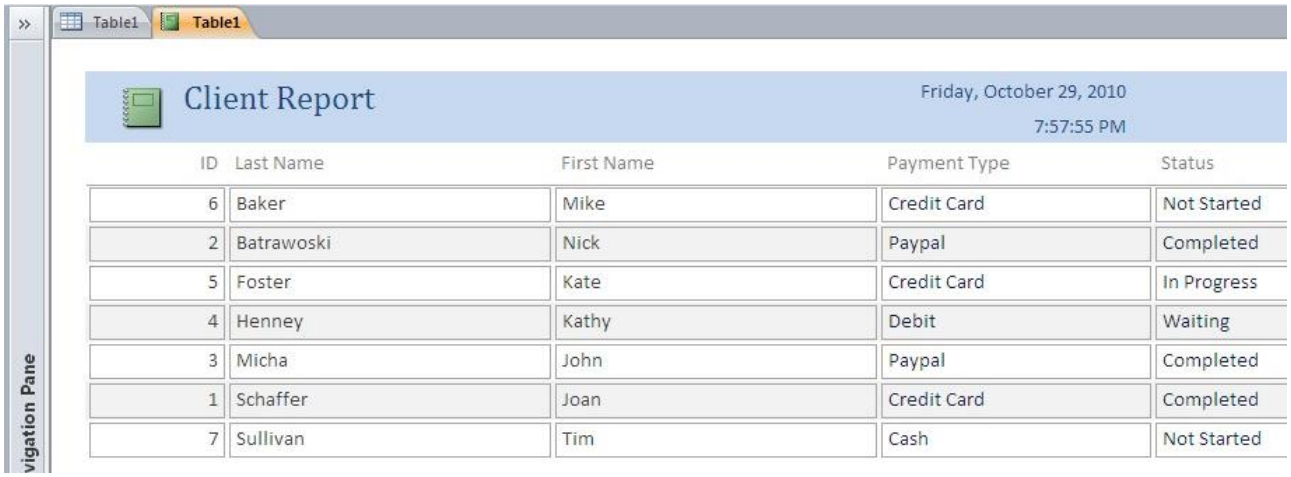


Then right-click on my “Last Name” column and a menu pops up.

Select “Sort A to Z” to put my last names into alphabetical order.



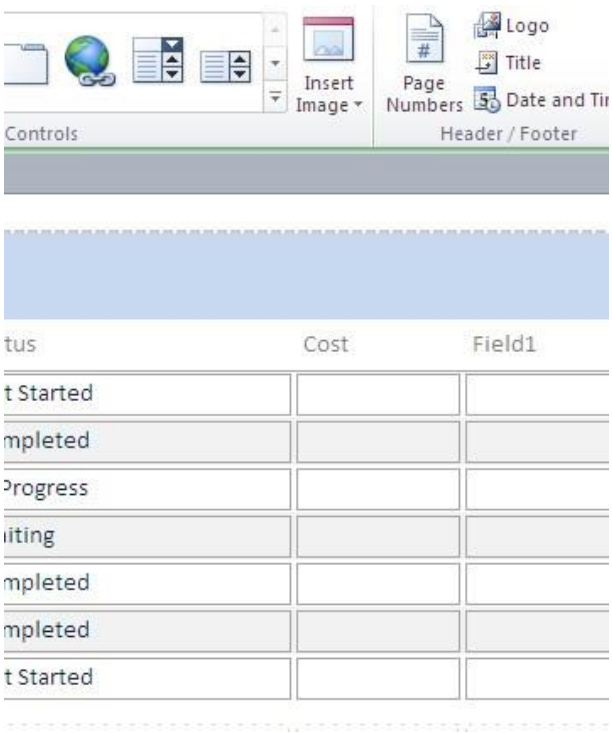
The new report looks like this:



Adding Calculated Controls

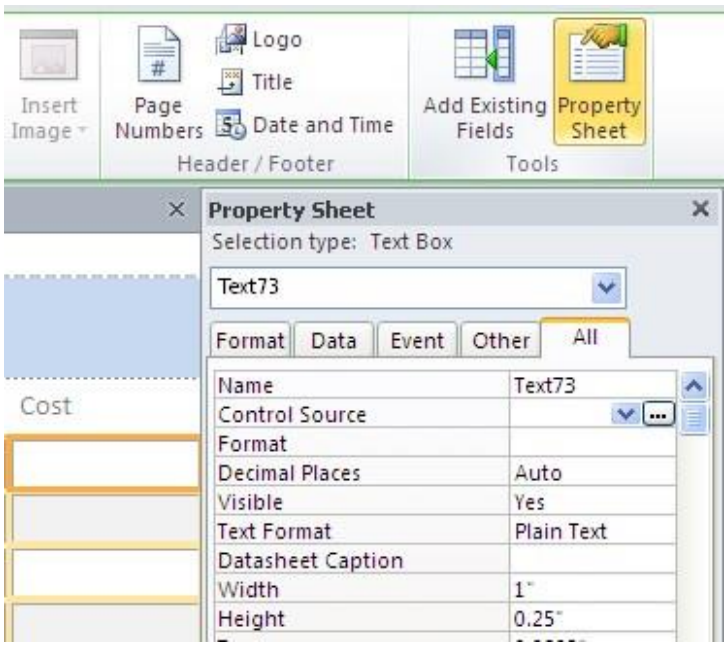
1. Choose a control to from the “Controls” box on the Design menu tab.

2. Click on the spot on your report where you want the control to go. The report below had a text box control added called “Cost.”

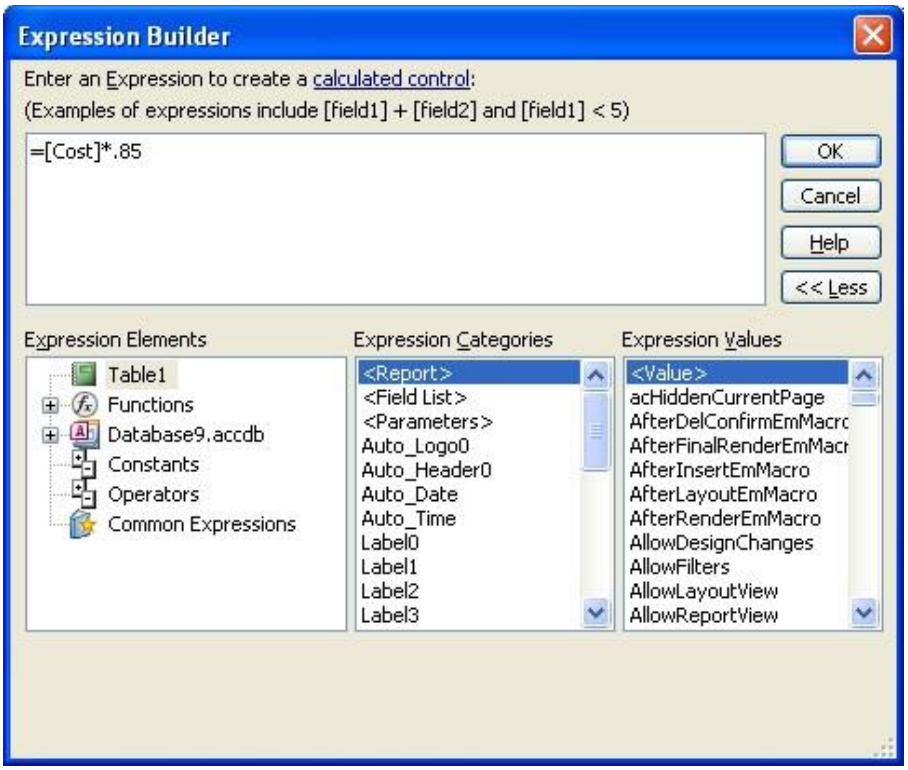


1. Click on the “Property Sheet” icon from the “Tools” box on the Design menu tab.

2. Under “Name” will be an options called “Control Source,” which will have an empty box with a drop down menu next to it. This down box will also have a button with an ellipsis on it. Click on the ellipsis button.



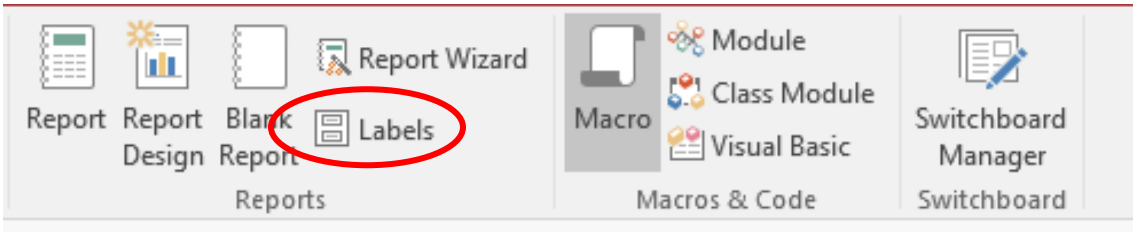
3. The Expression Builder box will pop up. You can input your calculated control expressions into this box. The report below had "=[Cost]*.85" to discount the cost by 15% during an special discount period.



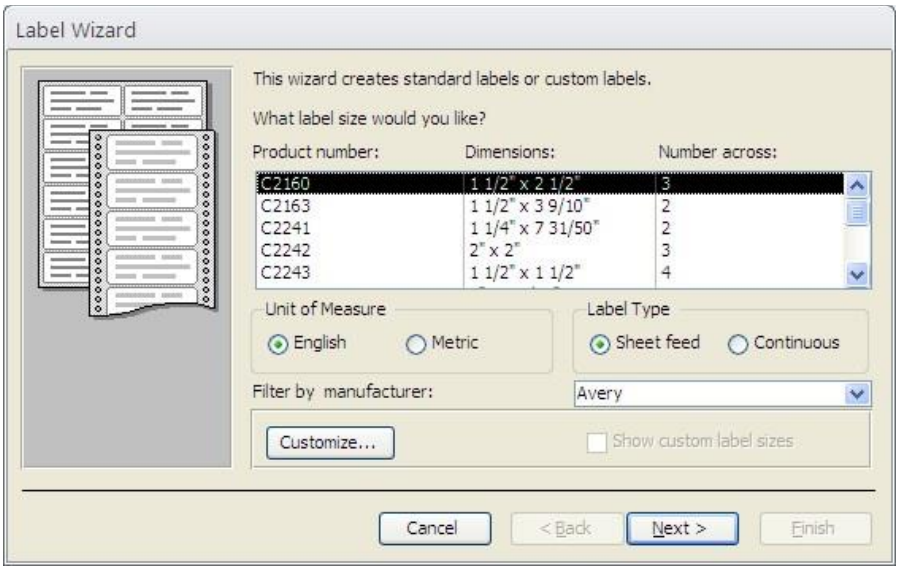
4. Click "OK." An Enter Parameter Value box may pop up to have you set a value for part of your new expression.

Creating Labels

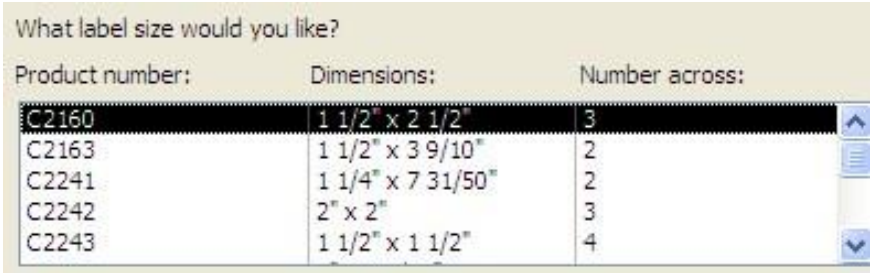
Click on the "Label" icon, which is under the Create tab in the "Reports" box.



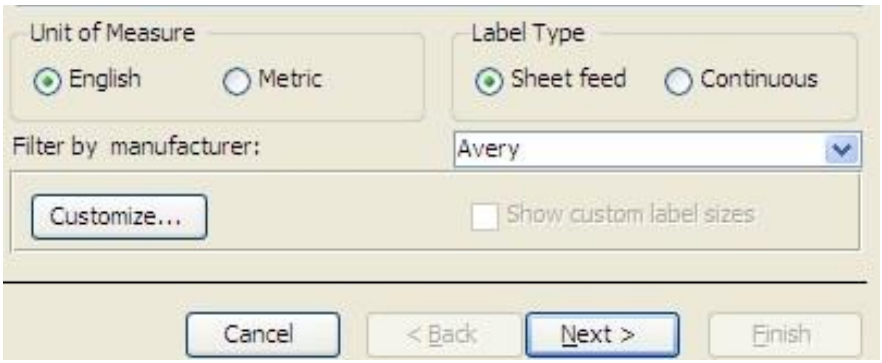
The Label Wizard box will pop up.



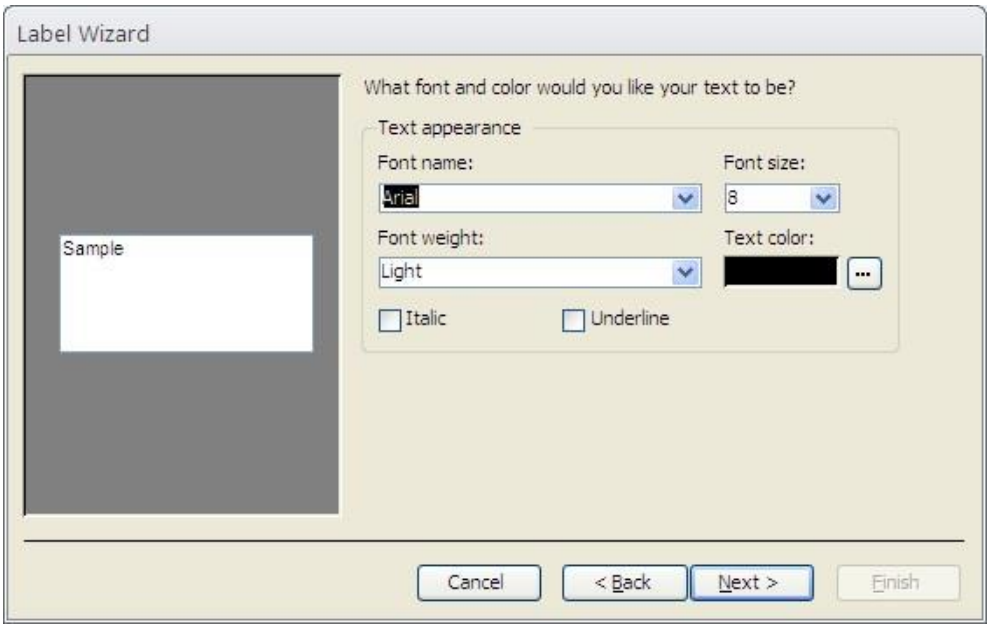
Choose the label size that you need, if you size is listed. If not, you can create a customized label to fit your specifications by clicking on the "Customize" button.



You can filter the label list be manufacturer to make it easier to find your label. You will also need to choose between an English or metric unit of measure and a sheet feed or continuous label type. Click the "Next" button.



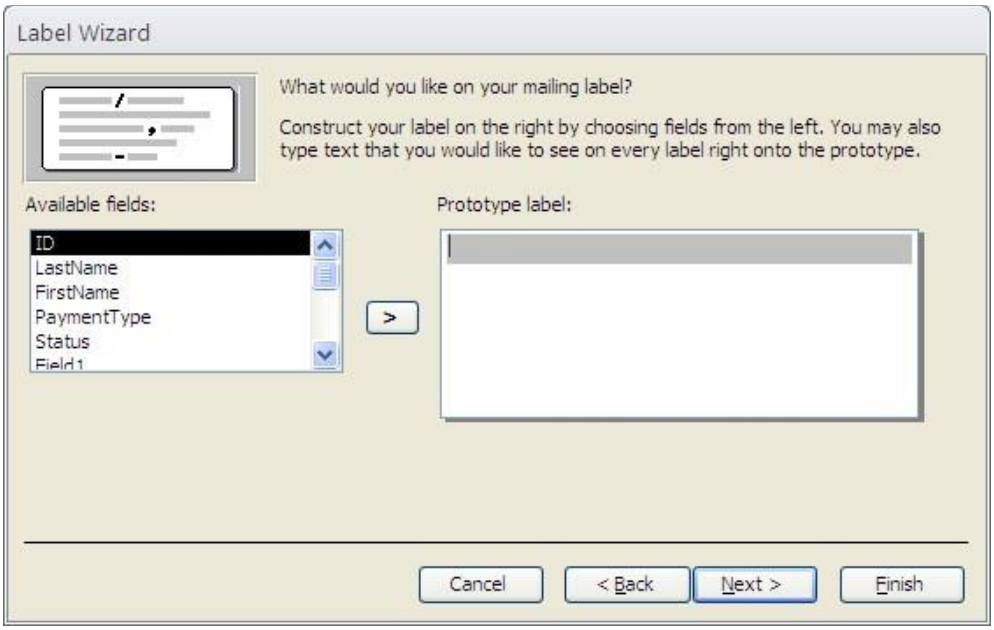
You can select your font type, size, weight and color on the next page. You can also place a check mark in the italic and/or underline boxes, if you want either of those options. Click the "Next" button.



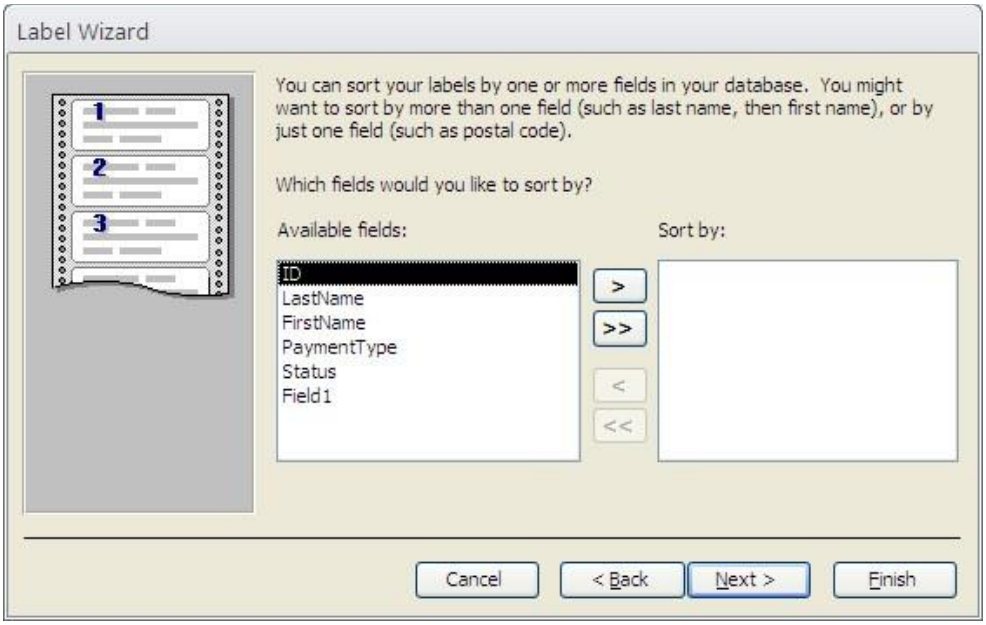
On the next page you will choose which fields from your report that you want included on your labels.

To select a field, click on it and then click on the > button. The field should show up in the Prototype

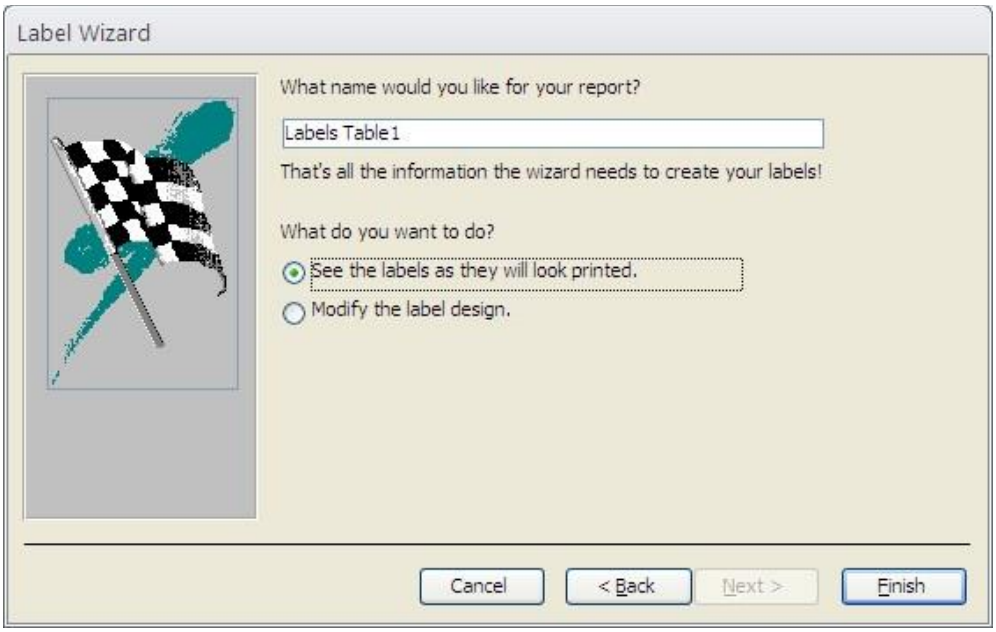
Label box. Click "Next."



On the next page, you can decide how you want your labels sorted. Send selections from the Available Fields box to the Sort By box by clicking the > and >> buttons. Once finished, click "Next."



On the last page, name your report and choose "See the labels as they will look printed" or "Modify the label design." Click "Finished."



Your labels will open up in Print Preview automatically.

Module Five: Understanding Relationships

This module will teach students about the different types of relationships, how to view relationships, how to edit relationship, what referential integrity is and how to establish it.

Types of Relationships

Relationships area means to join data to different tables, while avoiding redundancy in the tables. Therefore, you can divide your data into different tables—using it only once—and then add it into other tables by establishing relationships.

There are three types of relationships:

- A One-to-one relationship is where each entry on table 1 can only have a relationship with one entry on table 2 and each entry on table 2 can only have a relationship with one entry on table
  1. These types of relationships are rare.

- A One-to-Many relationship is where each entry on table 1 can have a relationship with multiple entries on table 2, but not vice versa.

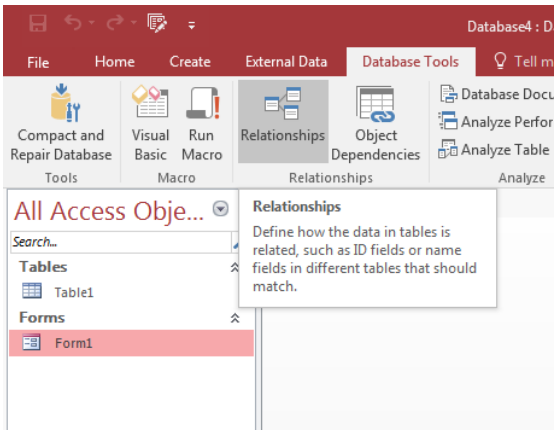
- A Many-to-Many relationship is where each entry on table 1 can have a relationship with multiple entries on table 2 and each entry on table 2 can have a relationship with multiple entries on table 1.

One big reason for creating table relationships: creating relationships provides a foundation for establishing referential integrity, which will be discussed in a later section.

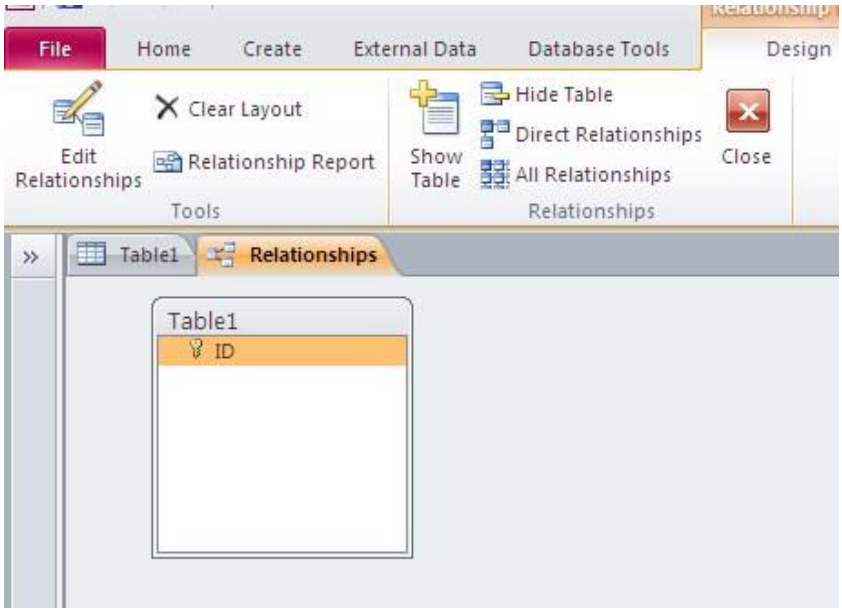
Viewing Relationships

To view your relationships:

1. Click on the Relationships icon, which is located under the Database Tools tab.



2. If you have Relationships that are already defined, then a relationship tab will open up and display your relationships.

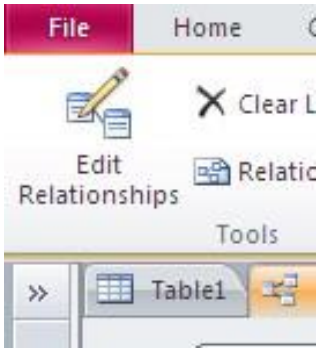


3. You will have the option to show all of your relationships or just the direct relationships. You can also hide the table or close the relationship tab completely.

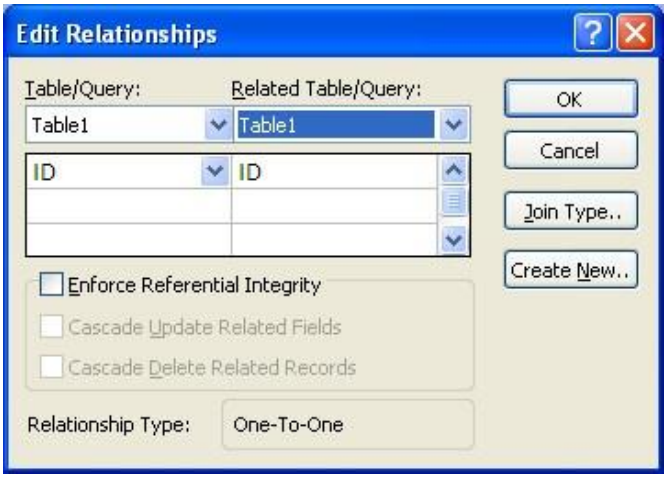
Editing Relationships

To edit your relationships:

1. Open your relationship tab.
2. Select the relationship that you want to edit.
3. Click "Edit Relationships" in the Tools box.



4. An edit box will open.



5. Make your changes in the Edit Relationships box and then click "OK."

About Referential Integrity

The goal of referential integrity is to avoid having "orphaned" data. "Orphaned" data can happen when you are deleting or updating the data in your tables.

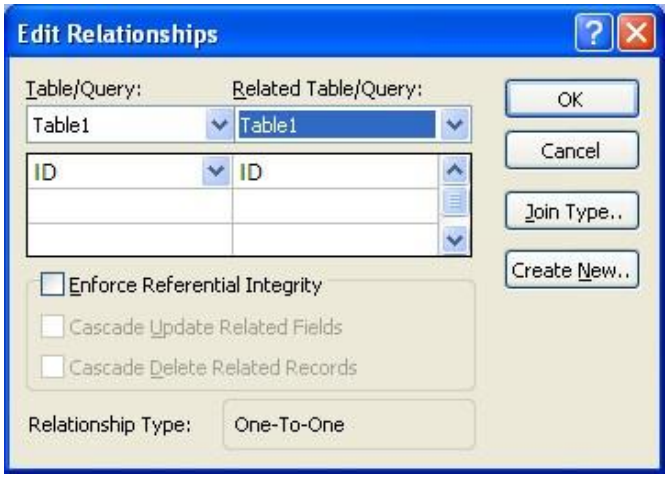
For example, if you have a customer on table 1 that is linked to payments on table 2 and then you delete that customer, then the payments linked to that customer on table 2 will become "orphaned" data.

Referential integrity prevents this by denying changes that will result in "orphaned" data.

Since you may have a valid need to delete or update data in your tables, you can choose to allow Access to update or delete data that have a relationship with the data you are updating or deleting.

Establishing Referential Integrity

1. In the Edit Relationships box, place a check mark in the box that says "Enforce Referential Integrity."



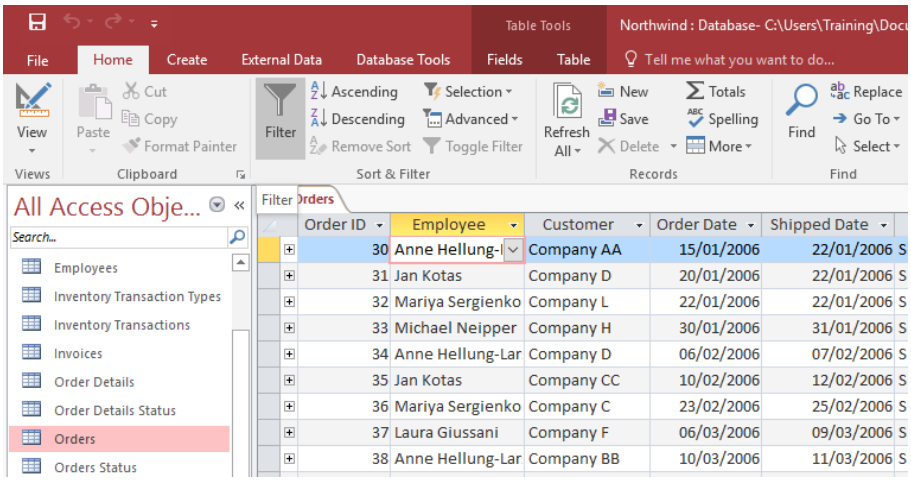
2. The choices to "Cascade update related fields" or "Cascade delete related records" will open up. Put a check mark in one or both of these boxes if you want to allow Access to update or delete data that have a relationship with the data you are updating or deleting. 3. Then select "OK."

Module Six: Advanced Query Tasks

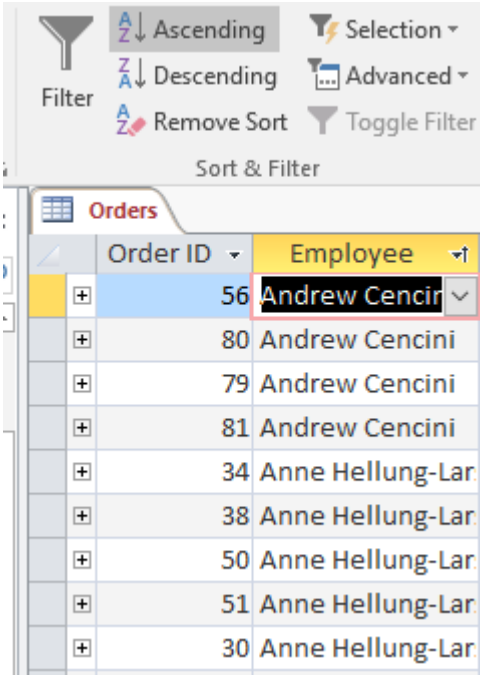
In this module, students will learn about advanced query tasks, such as sorting and filtering a query, adding calculated fields, using the Expression Builder and using logical functions.

Sorting and Filtering a Query

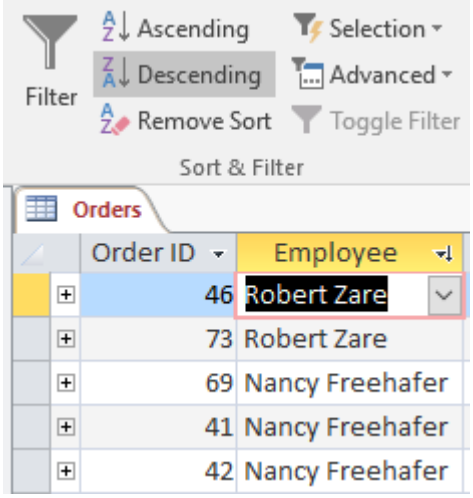
1. Go to the Home tab and select the "Filter" icon from the Sort & Filter box.



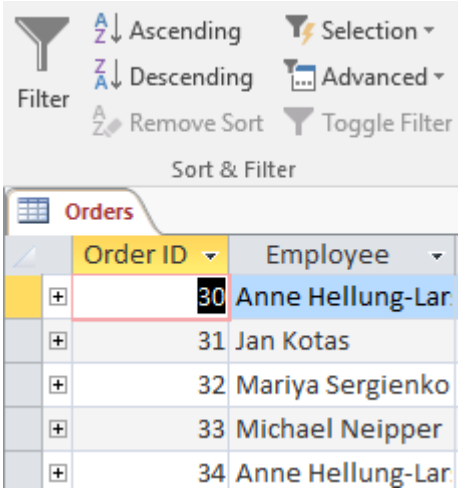
2. If you want to sort the query, select "Ascending" or "Descending" instead of "Filter." Choose "Ascending" to put your field in alphabetical order.



3. Choose "Descending" to put it in reverse alphabetical order.

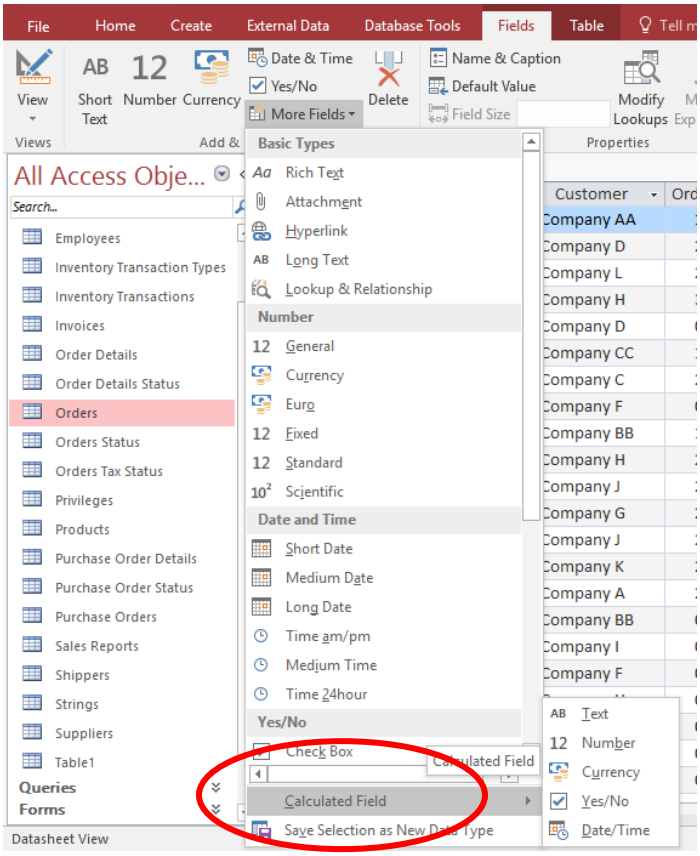


4. Choose “Remove Sort” if you want to undo the sorting that you have already performed on your query.



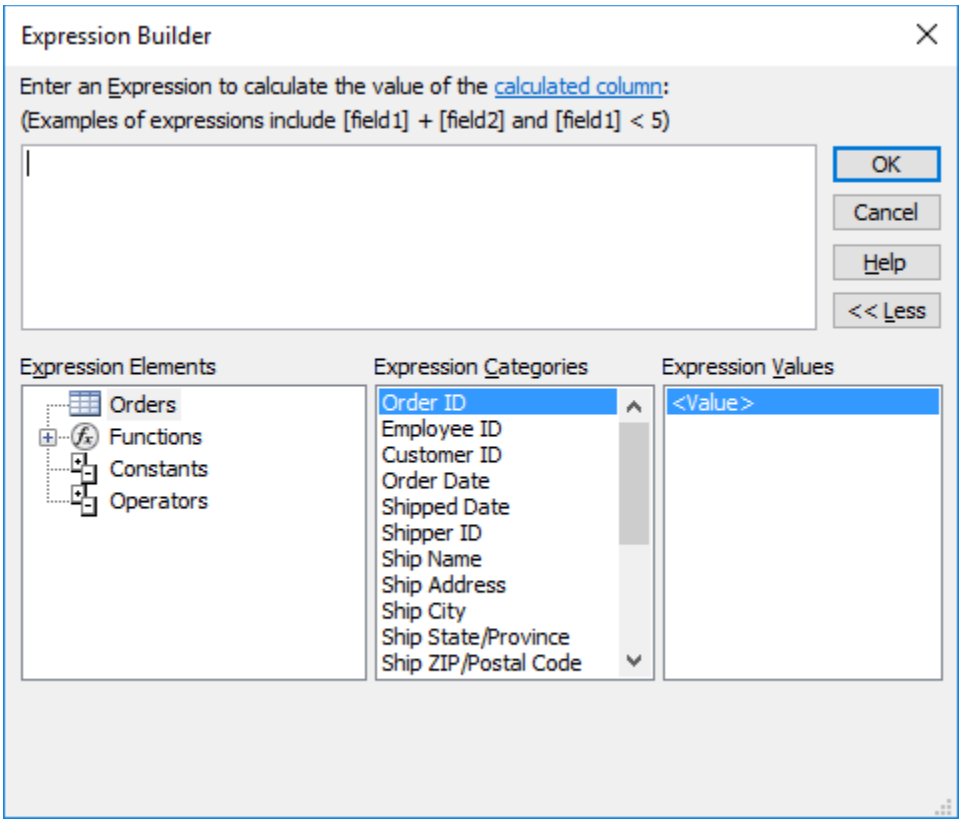
Adding Calculated Fields

1. Click on the “More Fields” button, which is under the Fields tab in the Add & Delete box.



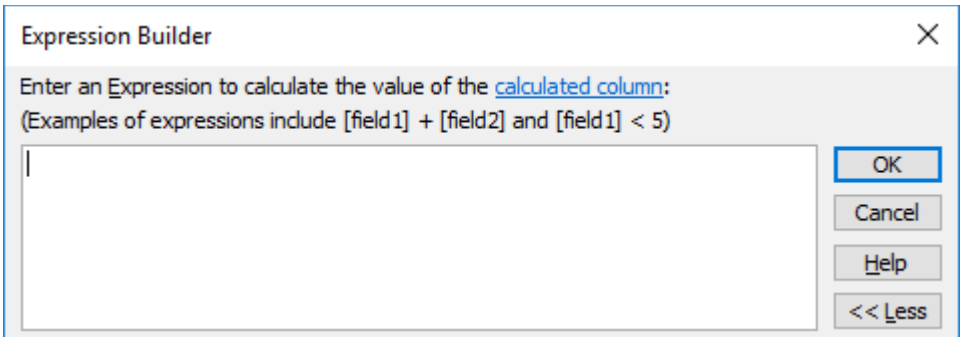
2. Click on the type of calculated field you want to create. Your options are text, number, currency, yes/no and time/date.

3. This will open the Expression Builder. You will use it to create calculated fields.


Expression Builder
Enter an Expression to calculate the value of the calculated column:
(Examples of expressions include [field1] + [field2] and [field1] < 5)
OK
Cancel
Help
<< Less
Expression Elements
Orders
Functions
Constants
Operators
Expression Categories
Order ID
Employee ID
Customer ID
Order Date
Shipped Date
Shipper ID
Ship Name
Ship Address
Ship City
Ship State/Province
Ship ZIP/Postal Code
Expression Values
<Value>

Using the Expression Builder

1. The Expression Builder helps you create a calculated field.



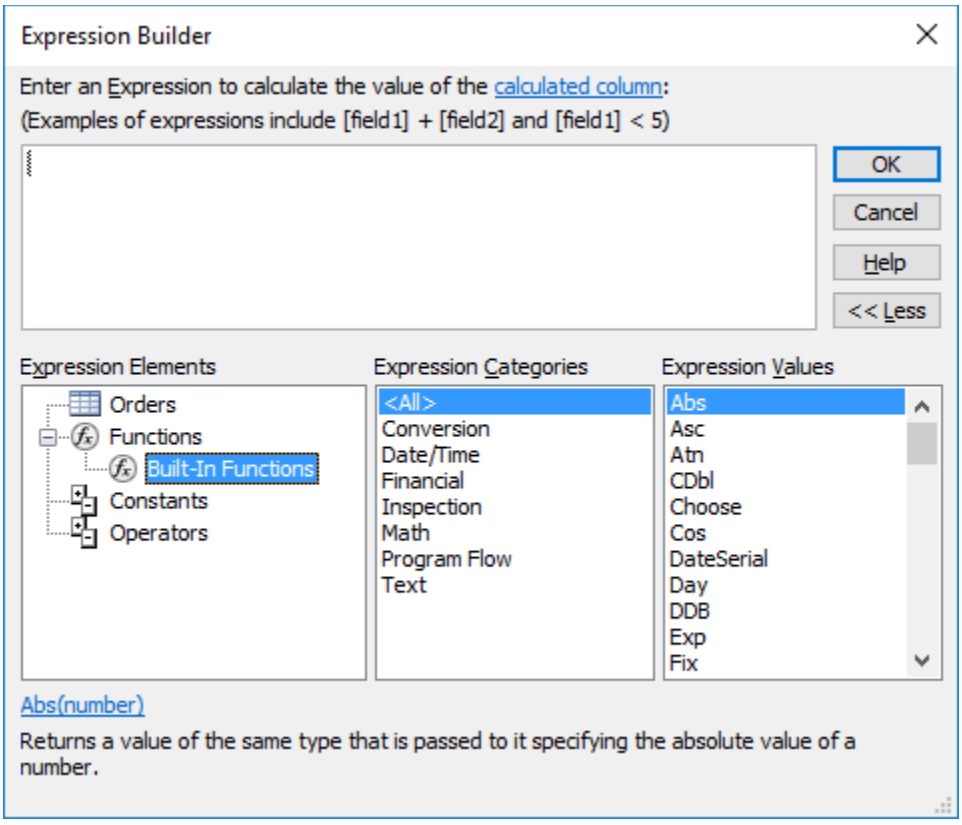
2. You will put your expression into the big white box.

3. Click "More >>" if you want to choose your expression elements, expression categories and expression values.

4. Click "<< Less" if you want to revert back to the simplier version of the Expression Builder.

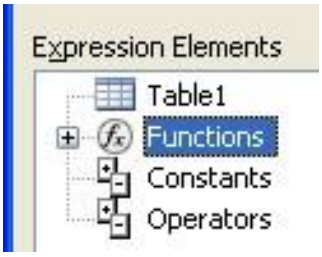
Using Logical Functions

Logical functions are built-in functions that help make building an expression easier. Expression categories include conversion, date/time, financial, inspections, math, program flow and text. Each expression category has a list of expression values that you can use in your expression.

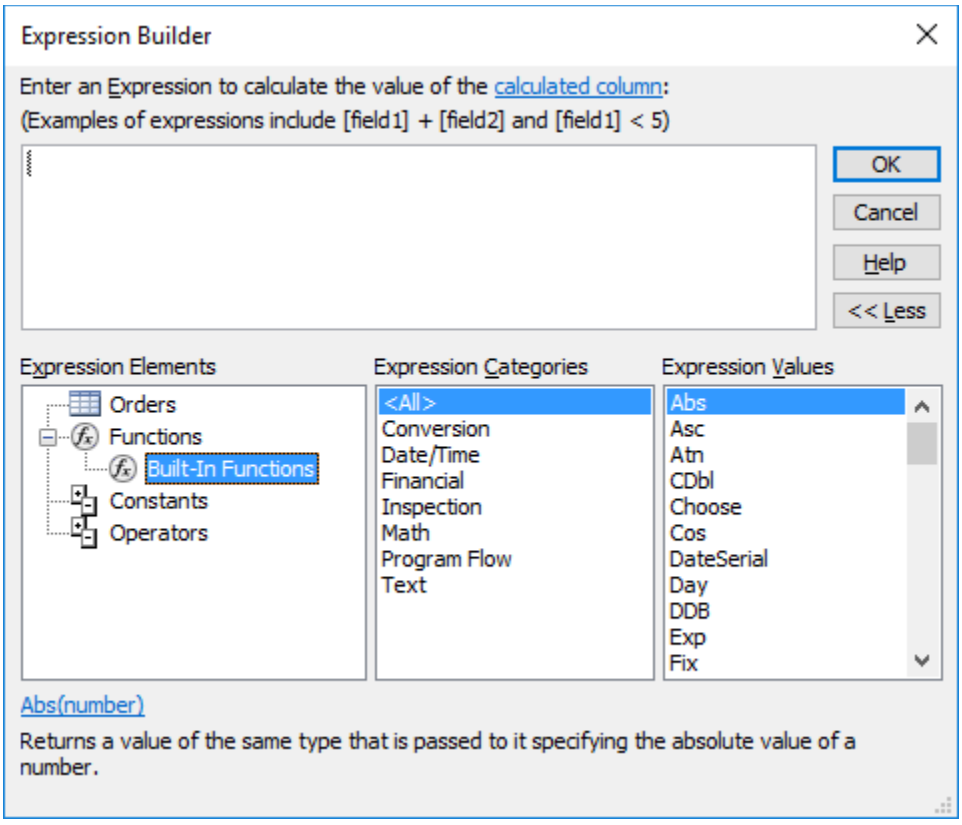


1. To use a logical functions, click on "More >>" on the right hand side of the Expression Builder.

2. Click the + sign next to "Functions" in the Expression Elements box.



3. Select "Built-in-Functions," choose a selection from the Expression Categories box and then the needed function from the Expression Values box.


Expression Builder
Enter an Expression to calculate the value of the calculated column:
(Examples of expressions include [field1] + [field2] and [field1] < 5)
OK
Cancel
Help
<< Less
Expression Elements
Expression Categories
Expression Values
Orders
Functions
Built-In Functions
Constants
Operators
<All>
Conversion
Date/Time
Financial
Inspection
Math
Program Flow
Text
Abs
Asc
Atn
CDbl
Choose
Cos
DateSerial
Day
DDB
Exp
Fix
Abs(number)
Returns a value of the same type that is passed to it specifying the absolute value of a number.

Module Seven: Working with SQL

In this module, students will learn about the relationship between Access 2010 and SQL. They will discover what SQL is, what an SQL statement is, they will learn about basic SQL syntax and they will learn about the various uses of SQL in Access 2010.

What is SQL?

SQL is an acronym for **Sequence Query Language**. Access is the database; SQL is the language that is used to retrieve information from an Access database. In other words, you use SQL to retrieve data from an Access database.

An Access database can—and often does—hold a lot of information. It can be time consuming to search a large database for the exact information that you need. In a situation like this, using SQL to search for and find the information that you need can save you time and effort.

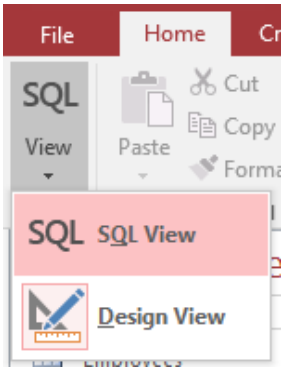
SQL can also work as a retrieval system for in-users. For example, if you have a personnel database, employees within the personnel office can use SQL statements to retrieve data, but most cannot modify the data within the database.

You can keep all or most users are in a read-only mode, which will disallow them permission to modify the data. Different permissions can be set for different users.

Understanding SQL Statements

An SQL statement is created from a series of clauses that detail the data you want to search for. For example, the statement below is made up of three clauses: select, from and where. It says that we want to search the "Payment Type" field from Table 1 for customers who paid with Paypal.

In order to see or edit SQL statements, you must be in "SQL View," which you get to by going to the View option under the Home tab and then choosing "SQL View."



There are six common clauses for SQL statements, although they are not the only ones. These six common clauses are:

- select
- from
- where
- order by
- group by
- having

Most clauses are optional, but two of them are required for every single SQL statement. These two required clauses are **select** and **from**, because you must have a database and field from which to search for the data.

Basic SQL Syntax

SQL statements are created by a group of SQL clauses and SQL clauses are created by SQL syntax. Basic SQL syntax includes the following terms:

- identifier
- operator
- constant
- expression

An SQL clause can be compared to a sentence and each term can be compared to a part of a sentence.

An **identifier** is comparable to a **noun** in a sentence. It describes the database object that you want to search for. "Customers.[Payment Type]" is an example of an identifier.

An **operator** is comparable to a **verb or adverb** in a sentence. It describes an action that you want to perform or modifies an action. "as," "and" and "or" are all operators.

A **constant** is comparable to a **noun** in a sentence. It describes an unchanging value. "100" and "NULL" are examples of a constant.

An **expression** is comparable to an **adjective** in a sentence. It combines all of the above plus functions to create a single value. ">= Customer.[Payment Type]" is an example of an expression.

Uses for SQL in Access

As we have already learned, the main use of SQL in Access is to retrieve data from a database, based on statements given by the user.

We have also briefly touched on a second use for SQL in Access, which is to give in-users the ability to search for and retrieve data from a database, without allowing them access to the entire database.

We looked at an example of personnel employees being able to quickly find employee information in a database, without the need to access the entire database.

A third use of SQL in Access is to use it as a way to update a database remotely, so that no one else is actually going into the database and modifying the raw data.

This last uses has two important benefits" it leaves less room for error and lessens the possibility of modifying the wrong data, which can be detrimental to the entire database.

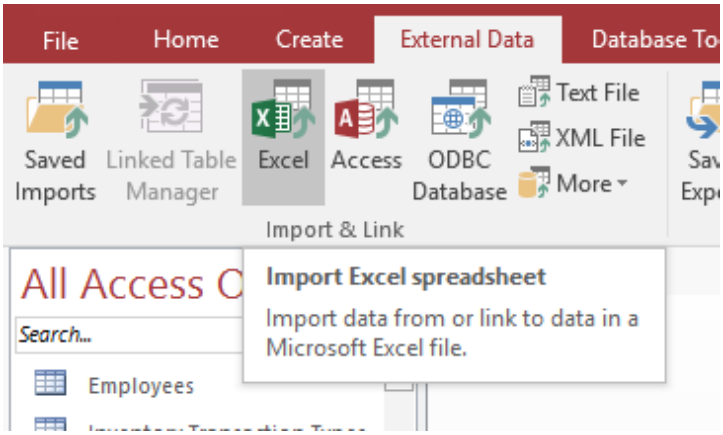
Module Eight: Linking Data

In this module, students will learn how to link data. Topics will include linking to an Excel spreadsheet, linking to an Access database, linking to a SharePoint list and linking to a text or XML file. We will also look at other types of links.

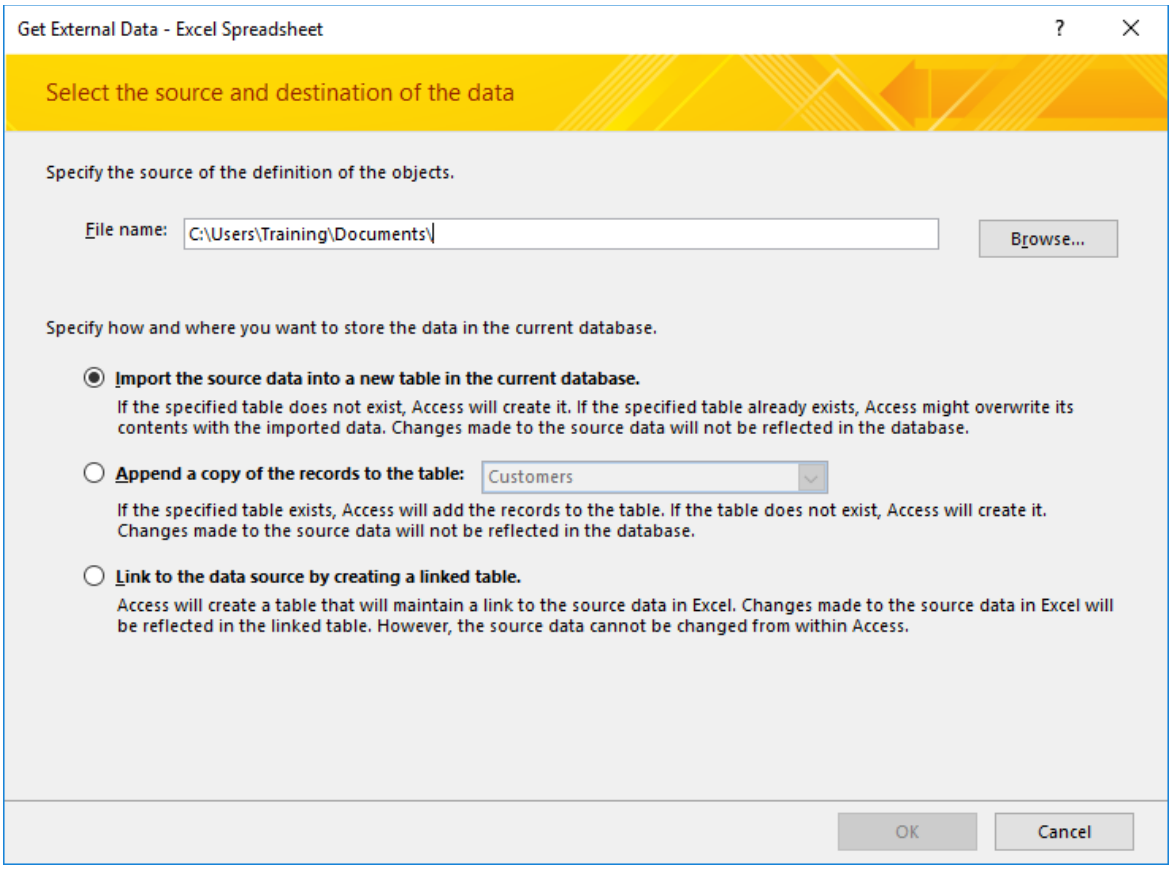
Linking to an Excel Spreadsheet

To link to an Excel spreadsheet:

1. Go to the "External Data" tab and choose the Excel icon from the Import & Link box.



2. The "Get External Data – Excel Spreadsheet" box will pop-up.

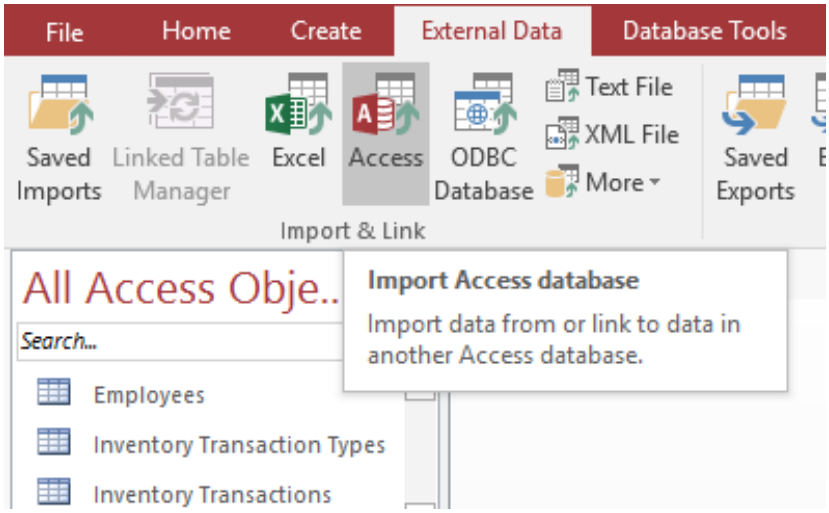


3. Browse for the source of the data.
4. Choose "Link to the data source by creating a linking table."
5. Hit "OK."

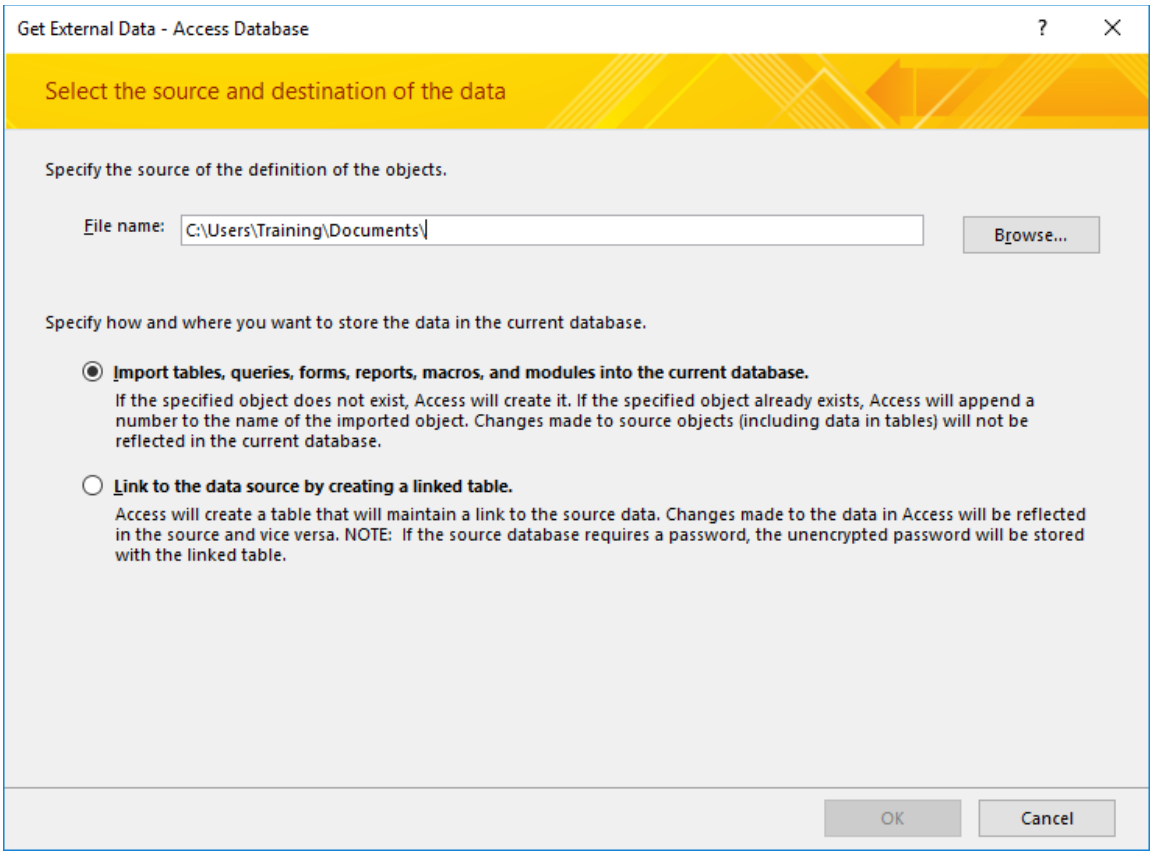
Linking to an Access Database

To link to an Access database:

1. Go to the "External Data" tab and choose the Access icon from the Import & Link box.



2. The "Get External Data – Access Database" will open up.



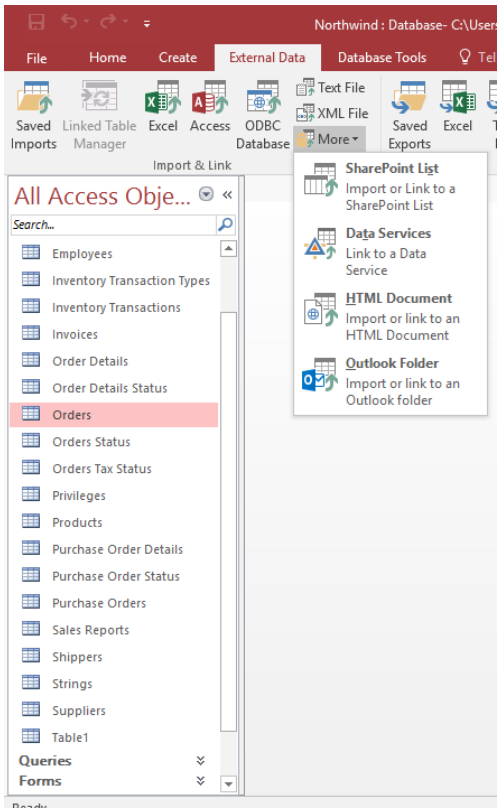
3. Browse for the source of the data.
4. Choose "Link to the data source by creating a linked table."
5. Hit "OK."

Linking to a SharePoint List

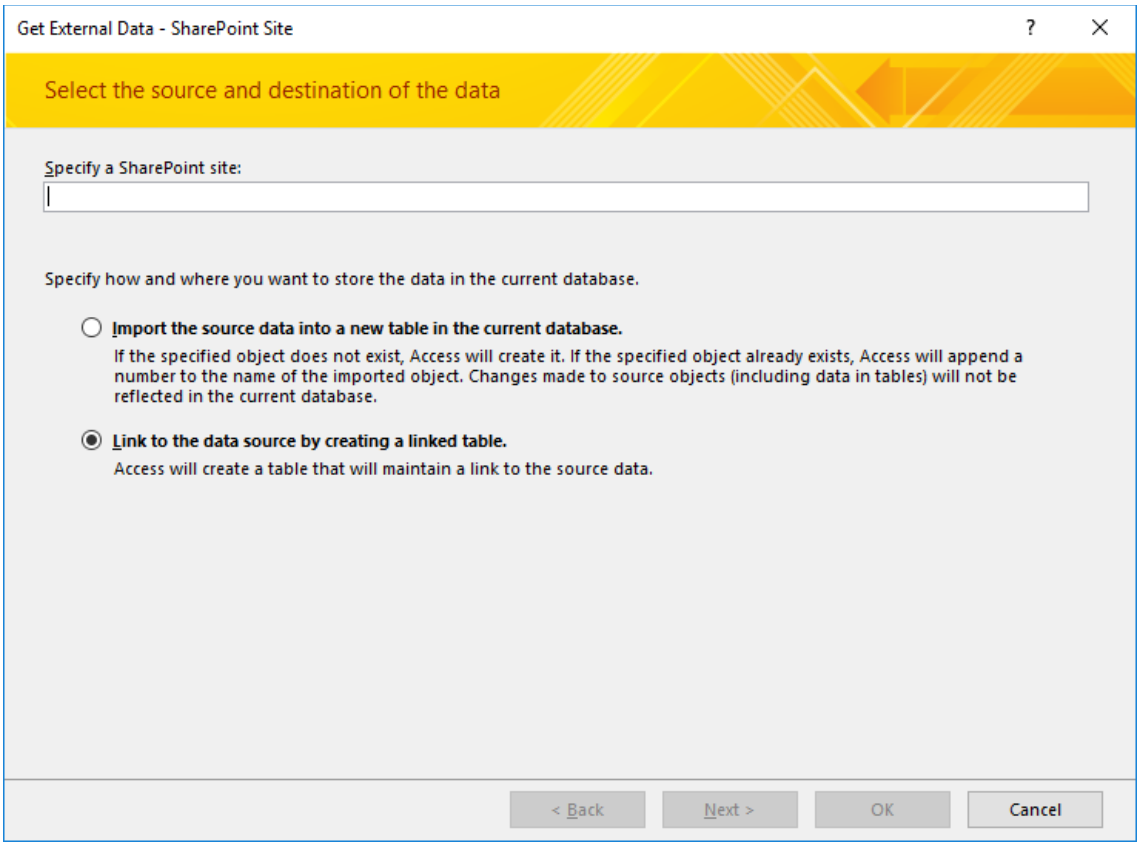
To link to a SharePoint list:

1. Go to the "External Data" tab and choose the "More" icon from the Import & Link box.

2. Select "SharePoint List" from the dropdown menu.



3. The "Get External Data – SharePoint Site" will open up.

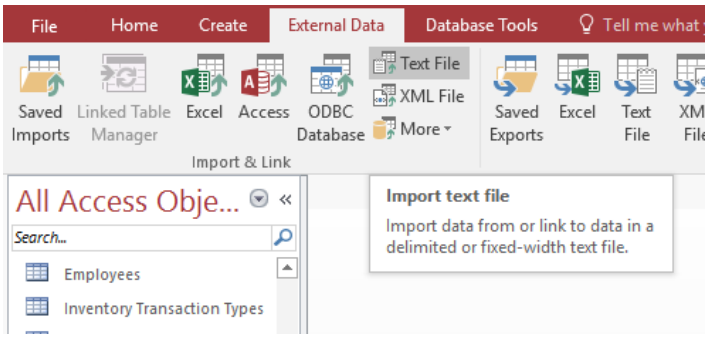


1. Specify a SharePoint site.
2. Choose "Link to the data source by creating a linked table."
3. Hit "OK," or "Next" if applicable.

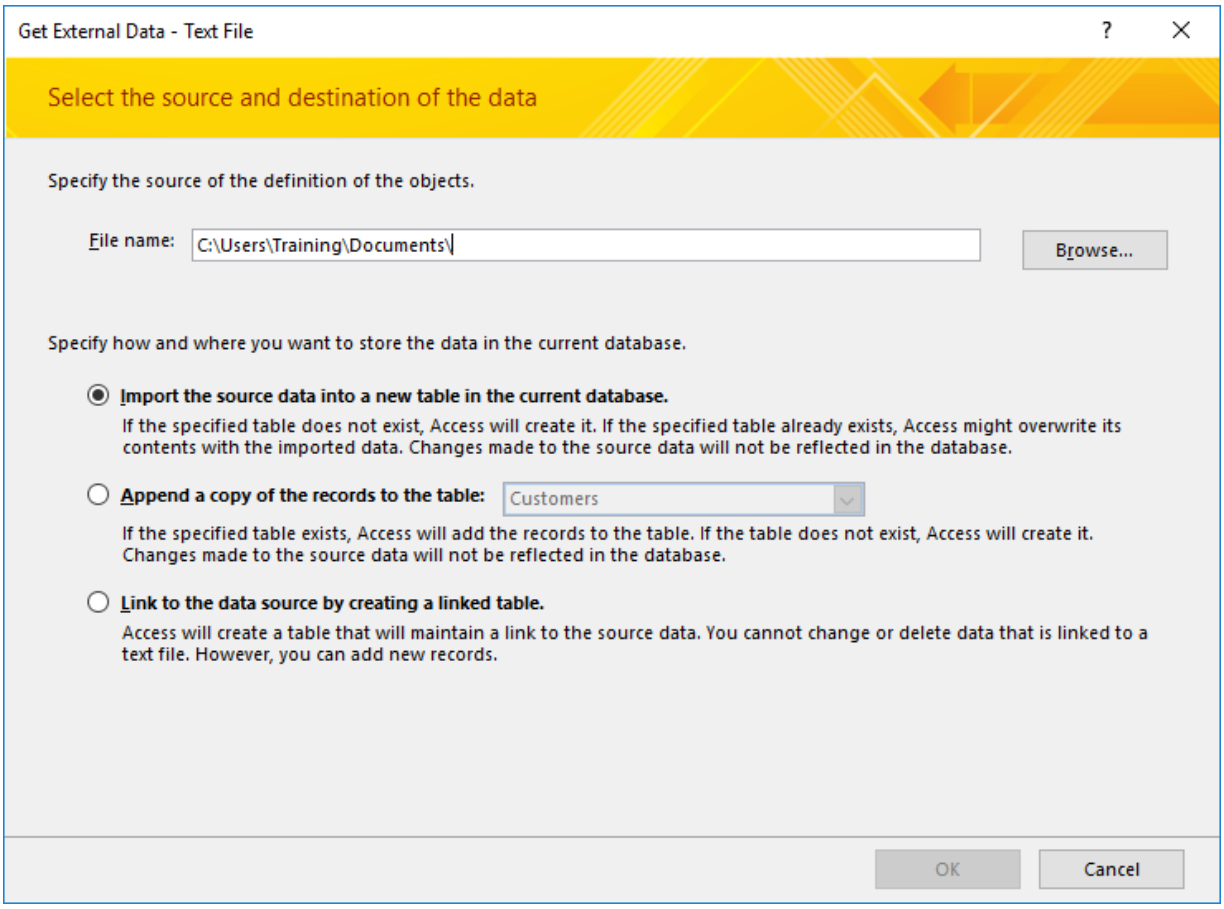
Linking to a Text or XML File

To link to a text file:

1. Go to the "External Data" tab and choose the Text File icon from the Import & Link box.



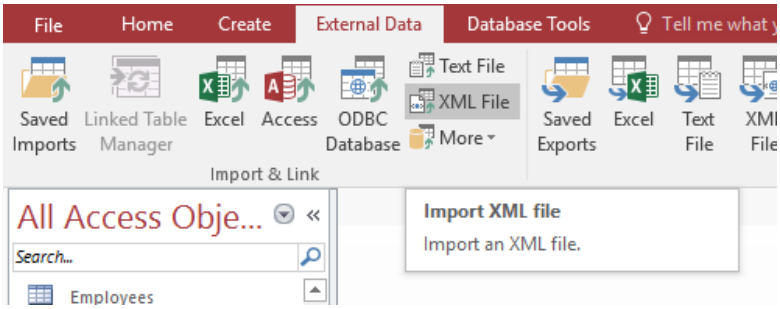
2. The "Get External Data – Text File" will open up.



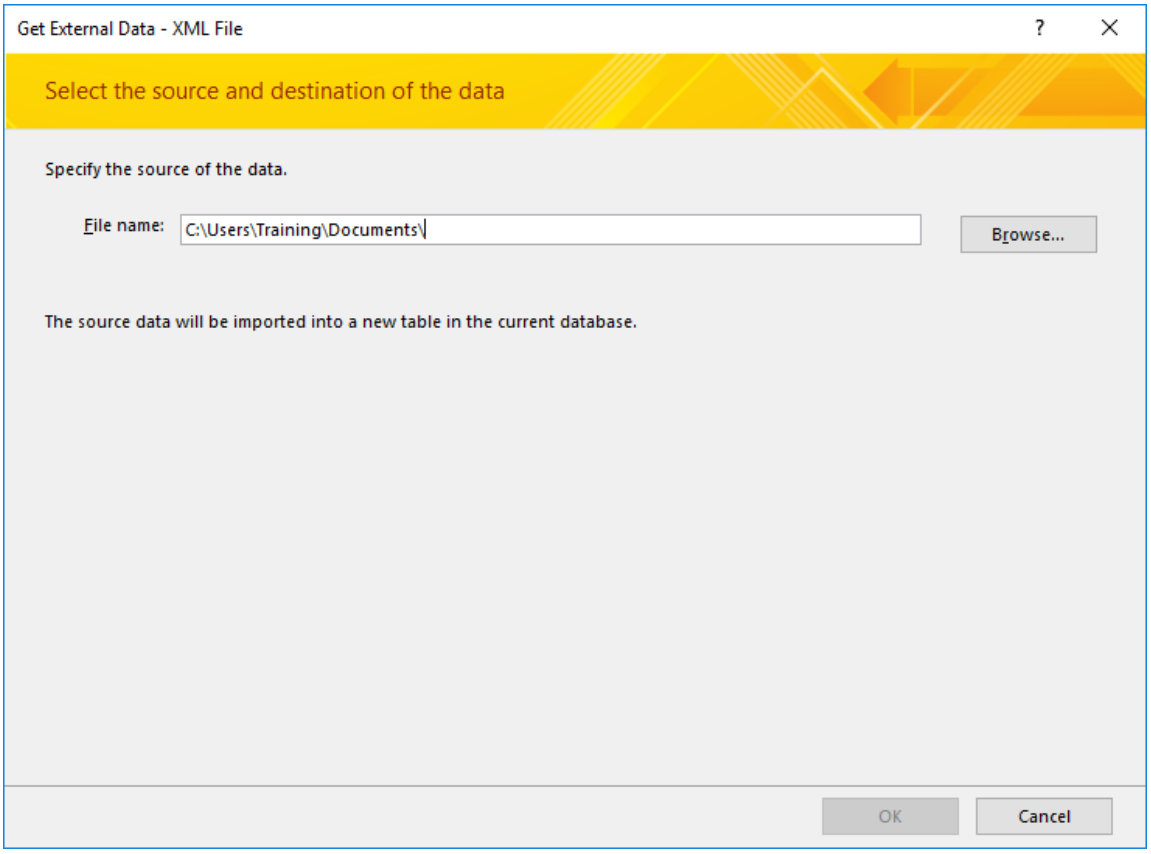
3. Browse for the source of the data.
4. Choose "Link to the data source by creating a linked table."
5. Hit "OK."

To link to an XML file:

1. Go to the "External Data" tab and choose the XML File icon from the Import & Link box.



2. The "Get External Data – XML File" will open up.



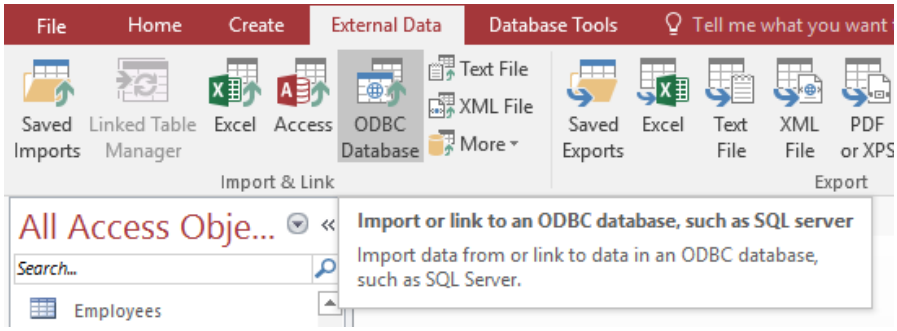
3. Browse for the source of the data.

4. Hit "OK."

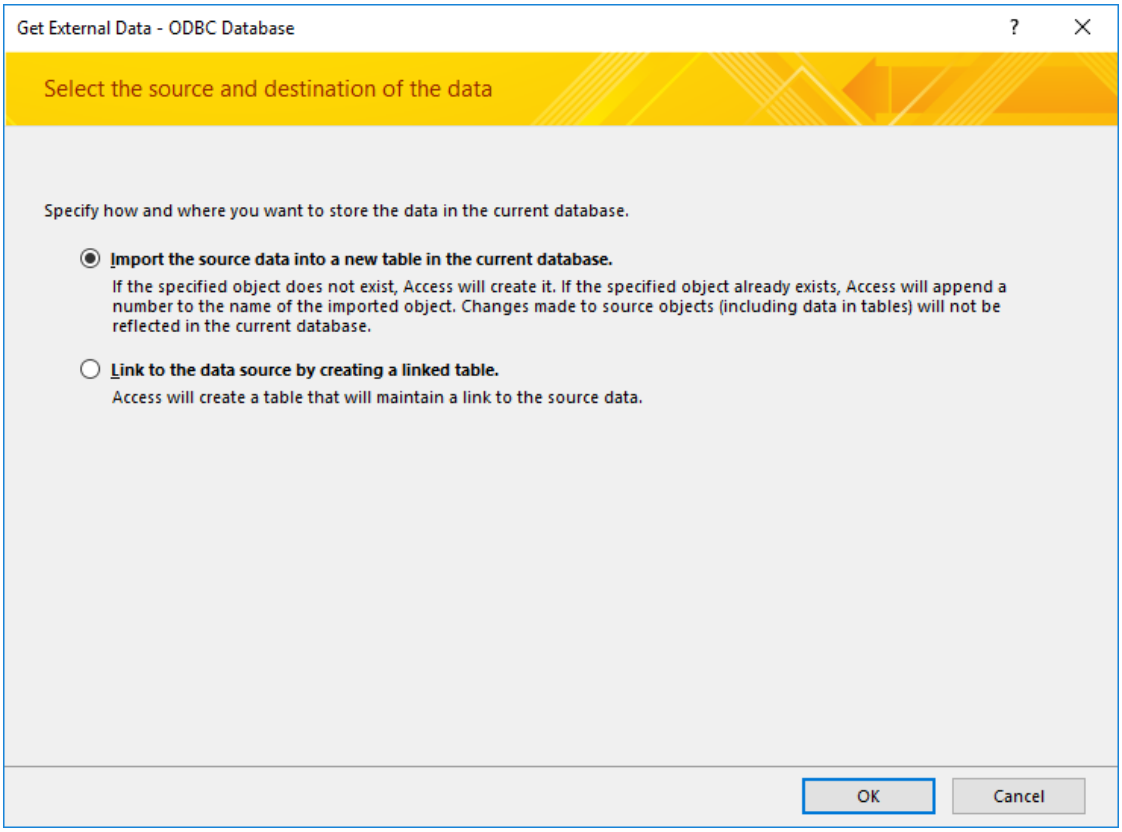
Other Types of Links

To link to an ODBC database:

1. Go to the "External Data" tab and choose the ODBC Database icon from the Import & Link box.



2. The "Get External Data – ODBC Database" box will open up.

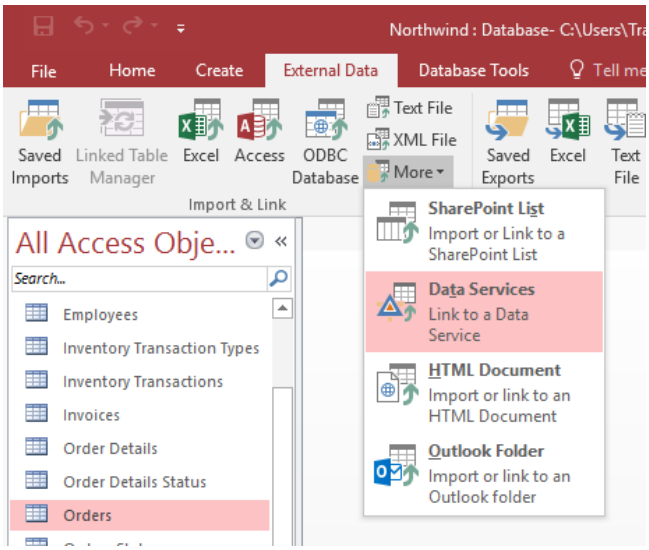


3. Choose "Link to the data source by creating a linked table."
4. Hit "OK."

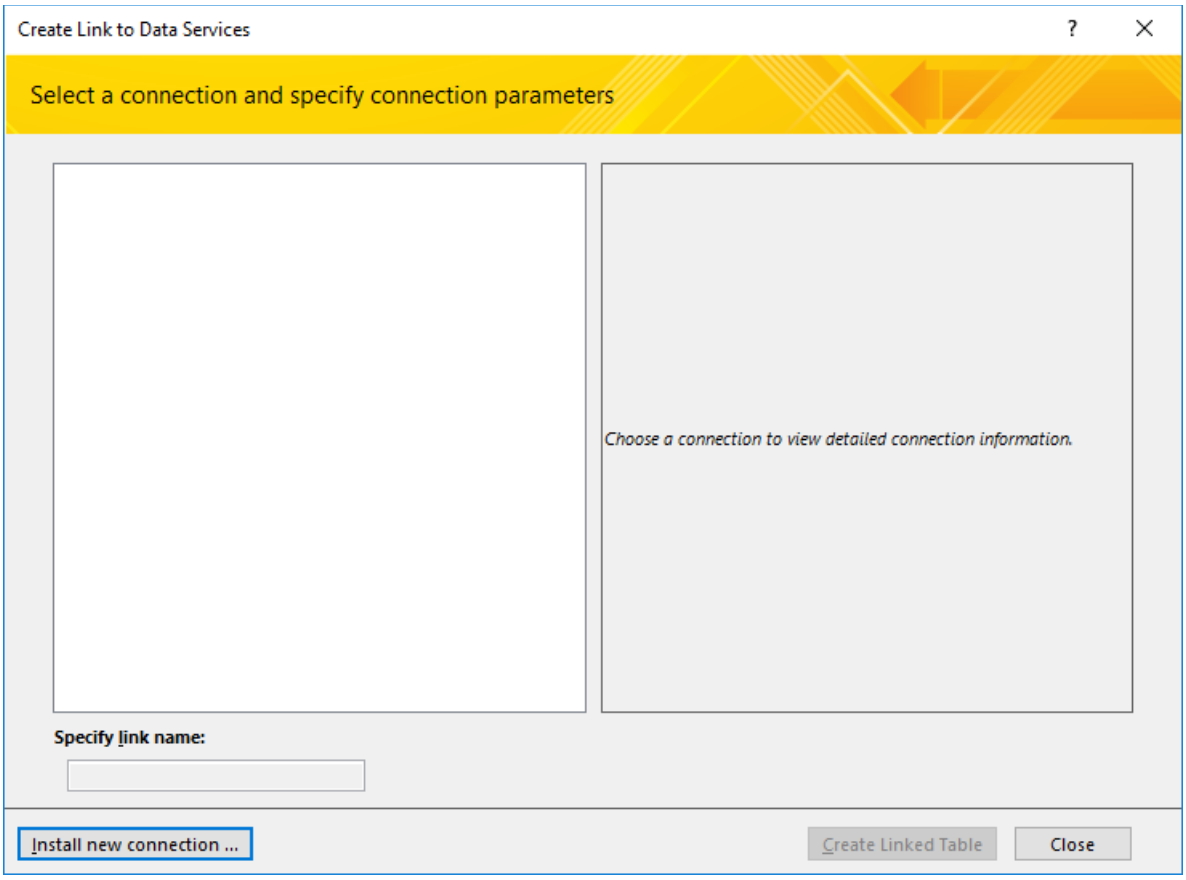
To link to a data service:

1. Go to the “External Data” tab and choose the “More” icon from the Import & Link box.

2. Select “Data Services” from the dropdown menu.



3. The “Create Link to Data Services” box will open up.



4. Choose the “Install new connection” button on the bottom left hand side, and follow the prompts to set up a connection.

5. Select a connection from the left hand side of the box. Details for that connection will pop up on the right side of the box.

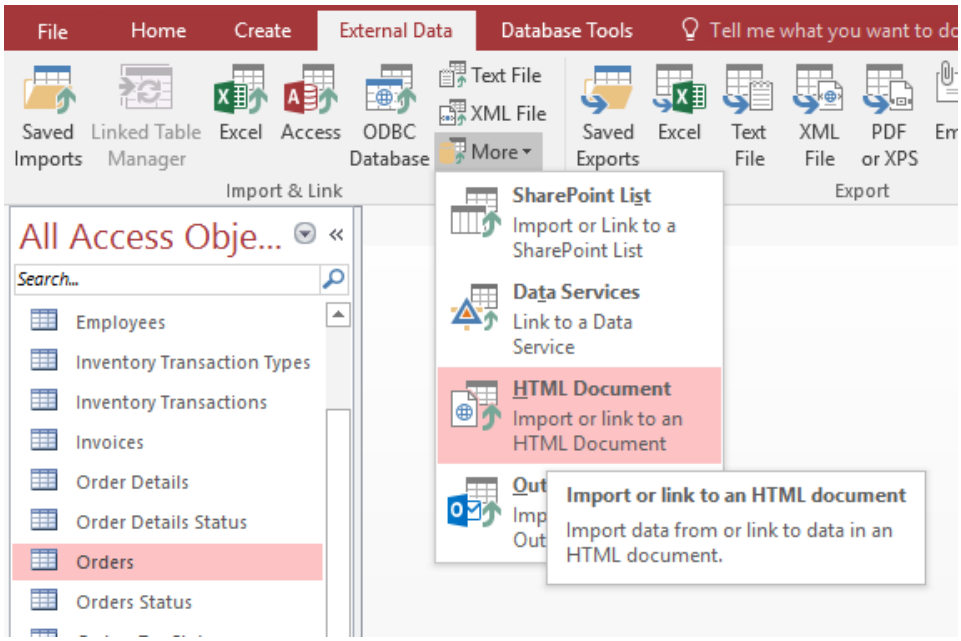
6. Specify link name in the box near the bottom left hand corner of the box (right above the “Install new connection” button.

7. Hit the “Create Linked Table” button in the bottom right hand side, right next to the “Close” button.

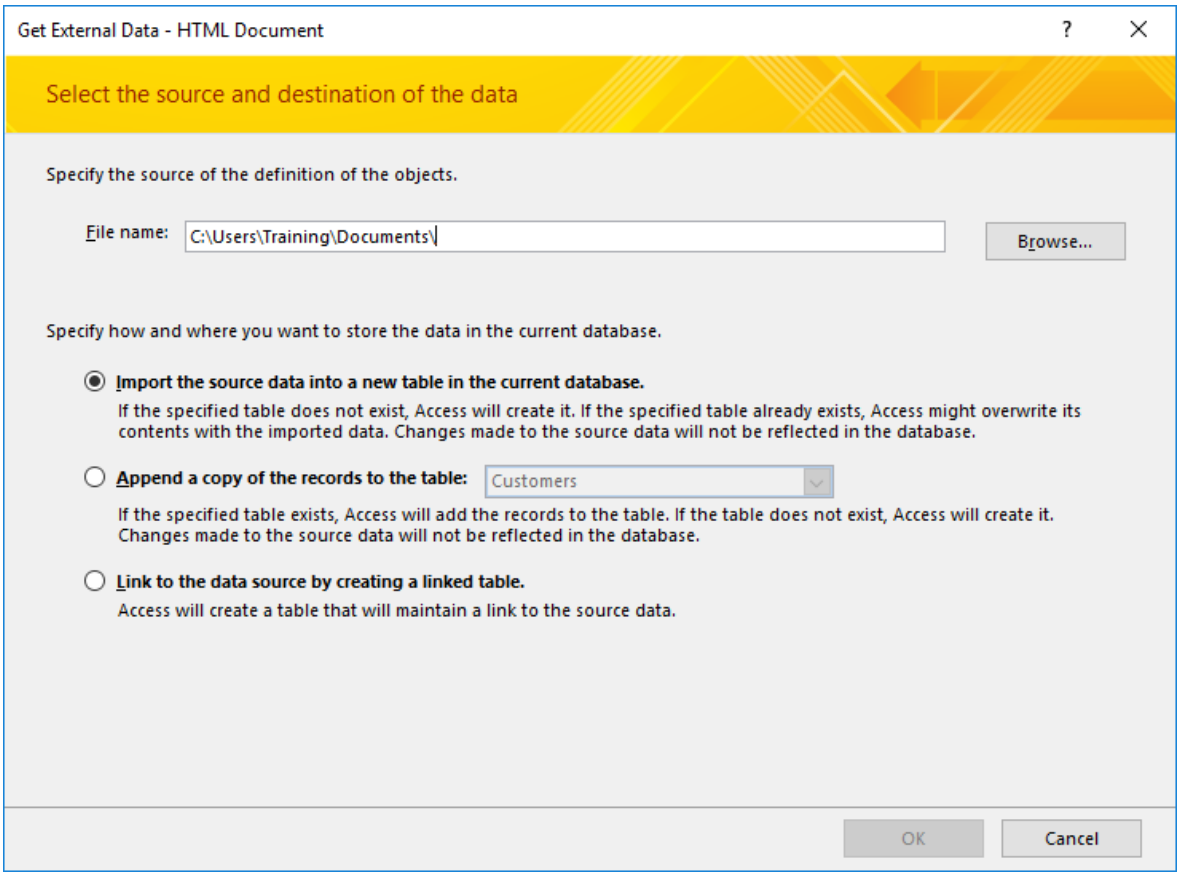
To link to an HTML document:

1. Go to the “External Data” tab and choose the “More” icon from the Import & Link box.

2. Select “HTML Document” from the dropdown menu.



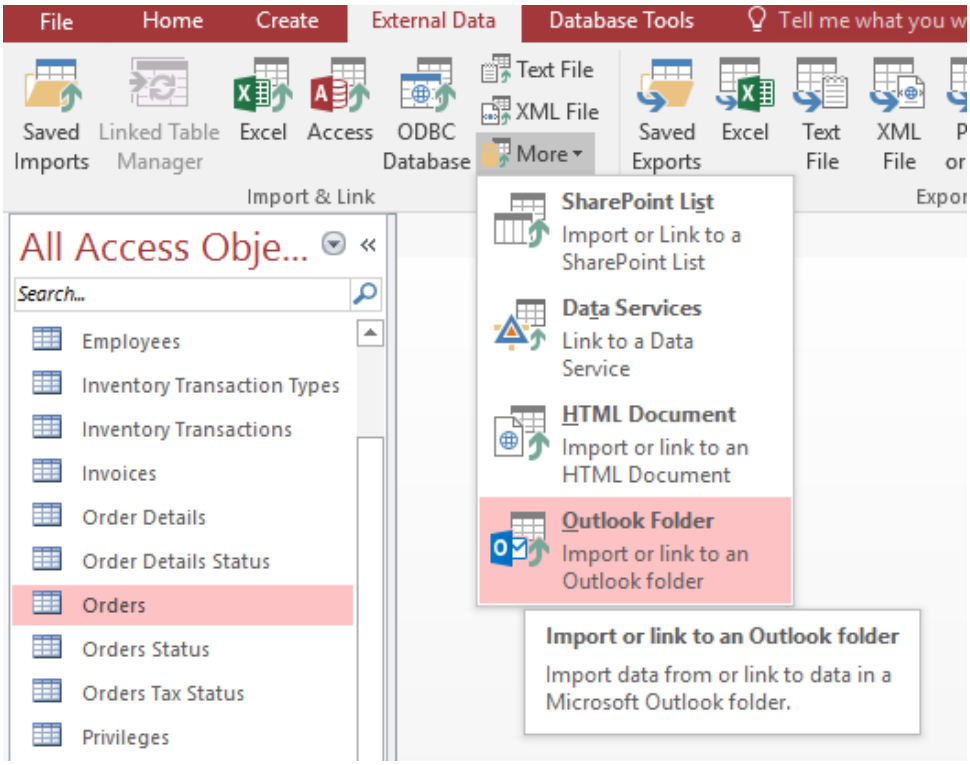
3. The "Get External Data – HTML Document" will open up.



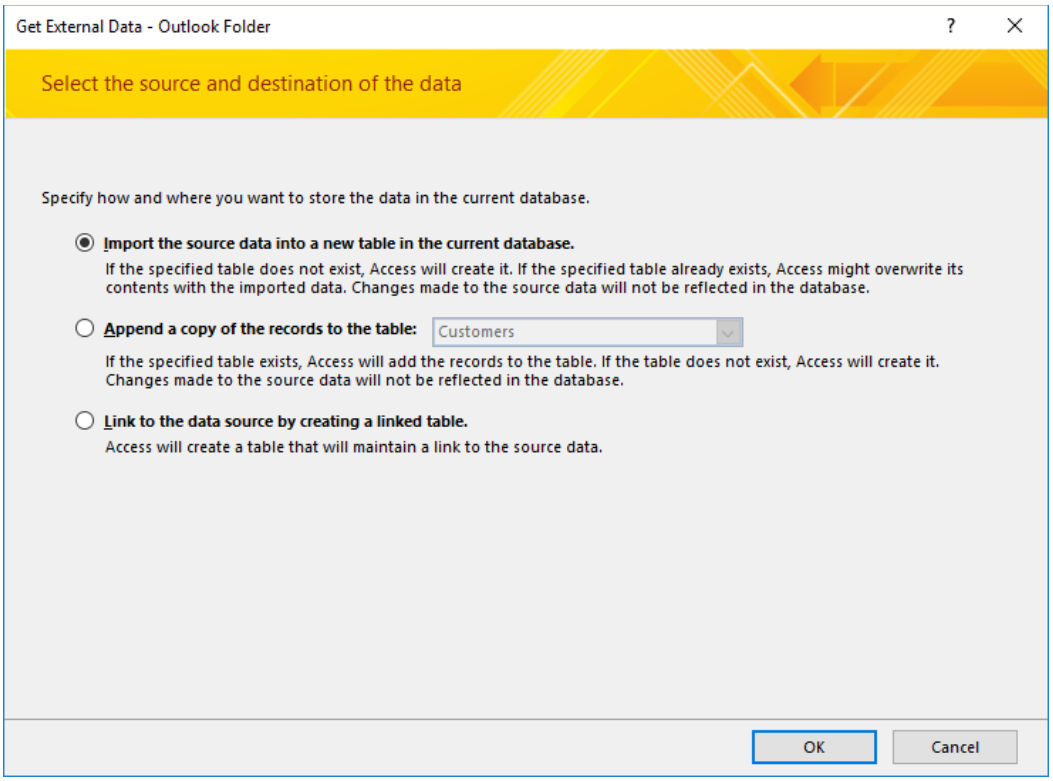
1. Browse for the source of the data.
2. Choose “Link to the data source by creating a linked table.”
3. Hit “OK.”

To link to an Outlook folder:

1. Go to the “External Data” tab and choose the “More” icon from the Import & Link box.
2. Select “Outlook Folder” from the dropdown menu.



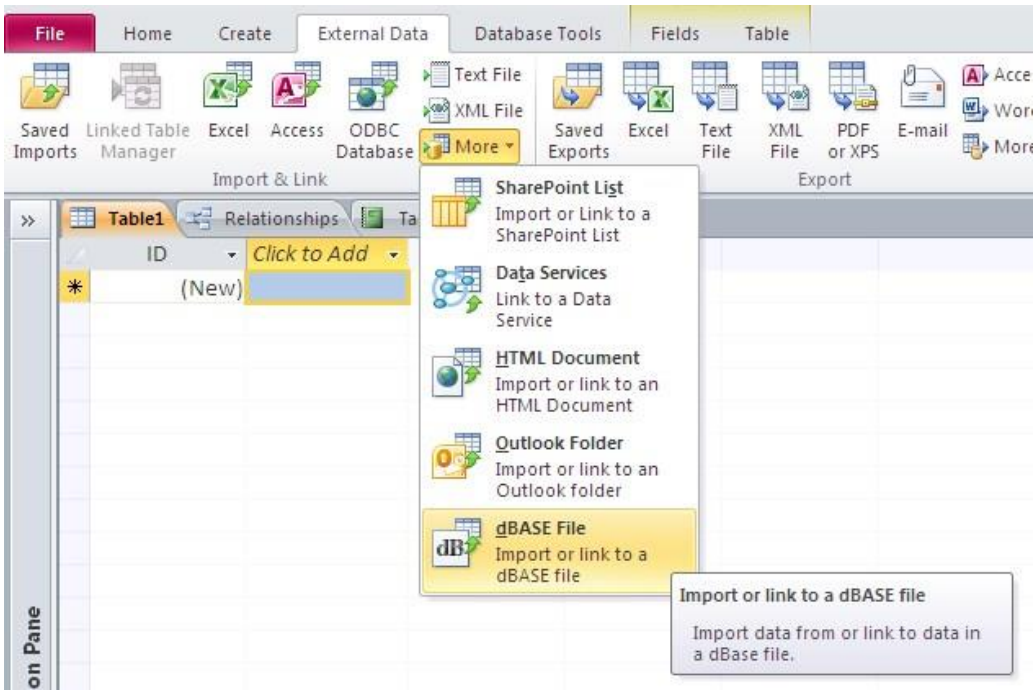
3. The “Get External Data – Outlook Folder” box will open up.



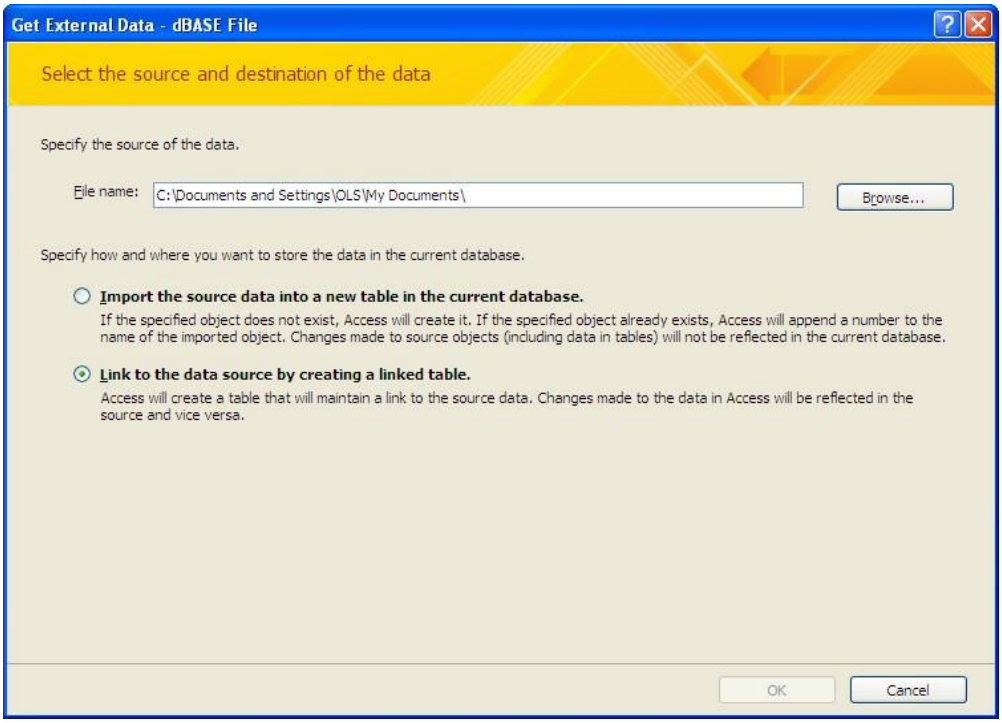
4. Choose "Link to the data source by creating a linked table."
5. Hit "OK."

To link to a dBASE file:

1. Go to the "External Data" tab and choose the "More" icon from the Import & Link box.
2. Select "dBASE File" from the dropdown menu.



3. The "Get External Data – dBASE File" box will open up.



4. Choose "Link to the data source by creating a linked table."

5. Hit "OK."

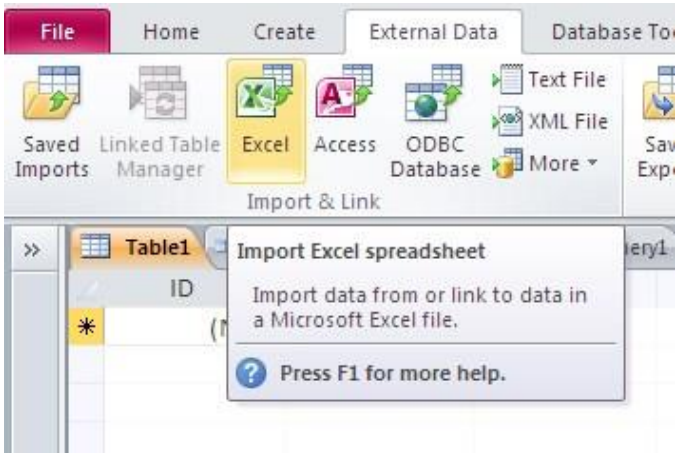
Module Nine: Importing Data

In this module, students will learn how to import data. Topics will include importing from an Excel spreadsheet, importing from an Access database, importing from a SharePoint list and importing from a text or XML file. We will also look at other types of imports.

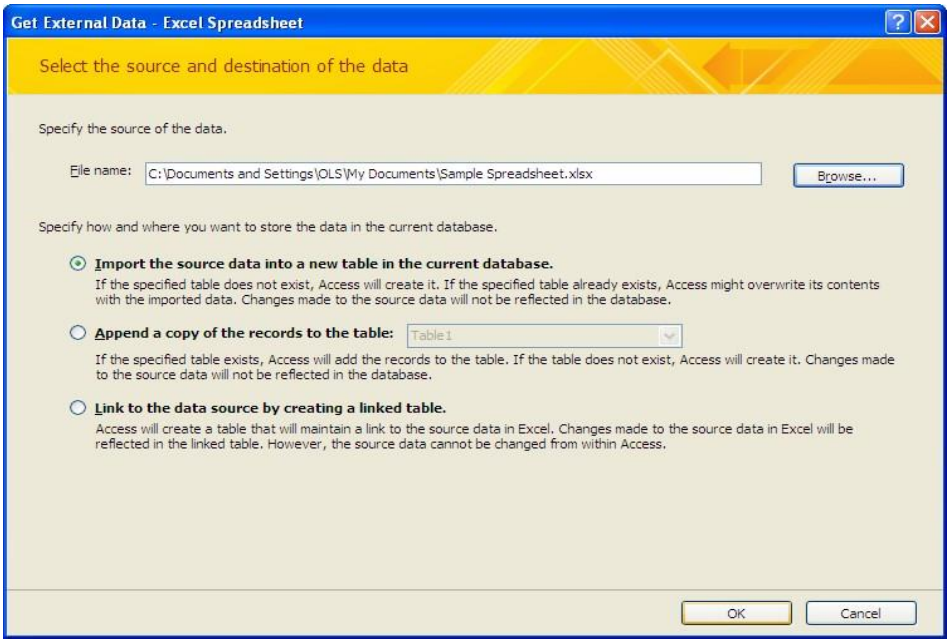
Importing From an Excel Spreadsheet

To import from an Excel spreadsheet:

1. Go to the "External Data" tab and choose the Excel icon from the Import & Link box.



2. The "Get External Data – Excel Spreadsheet" box will pop-up.



3. Browse for the source of the data.

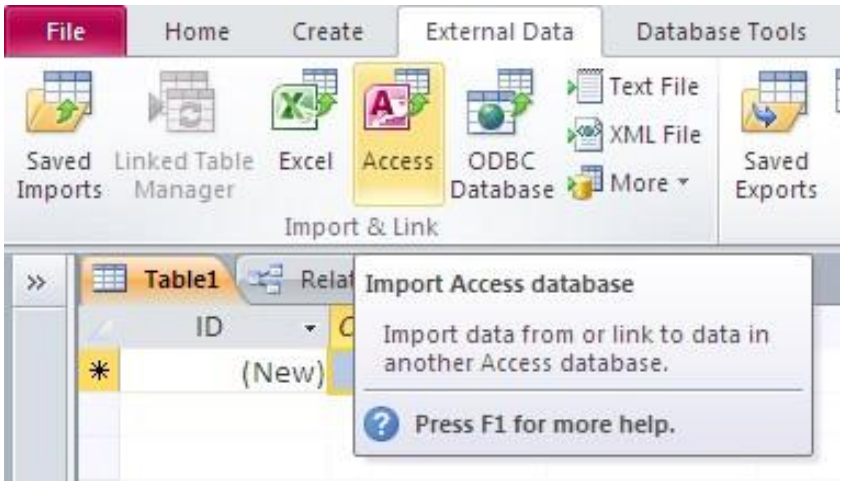
4. Choose "Import the source data into a new table in the current database."

5. Hit "OK."

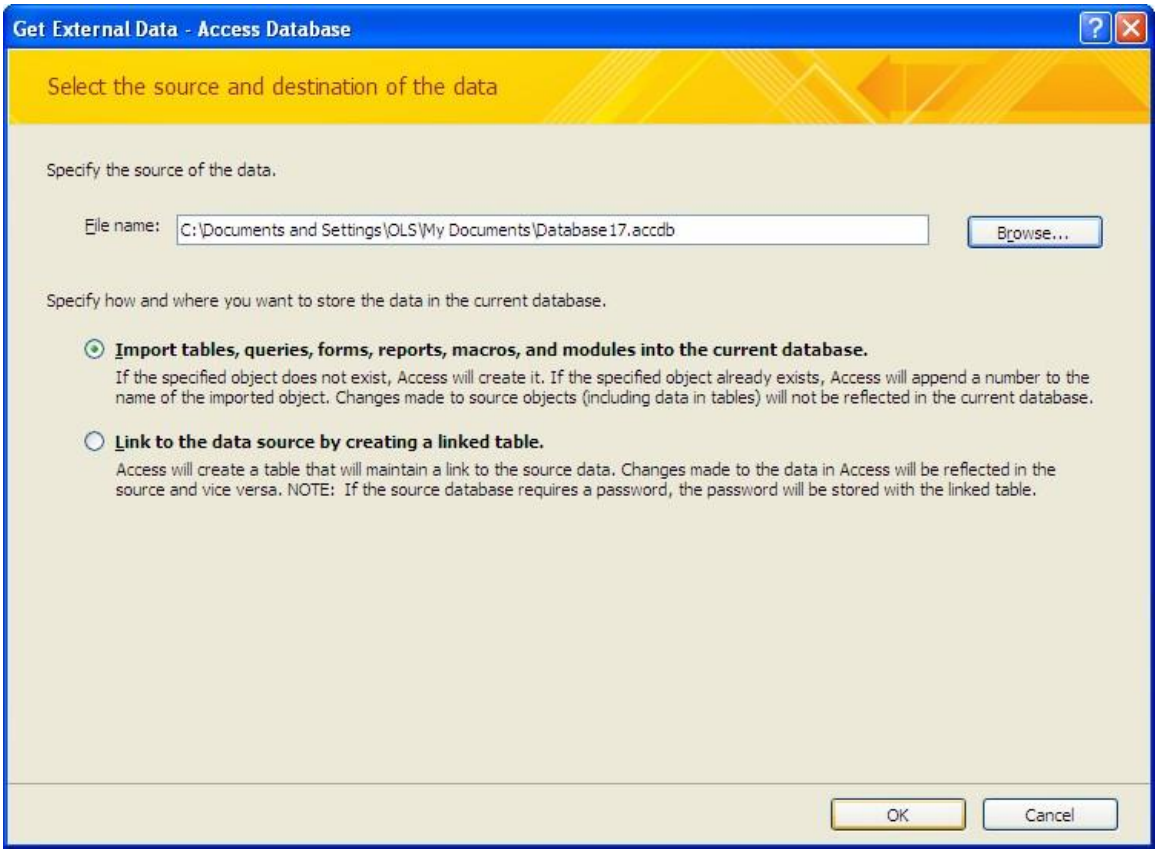
Importing from an Access Database

To import from an Access database:

1. Go to the "External Data" tab and choose the Access icon from the Import & Link box.



2. The "Get External Data – Access Database" will open up.



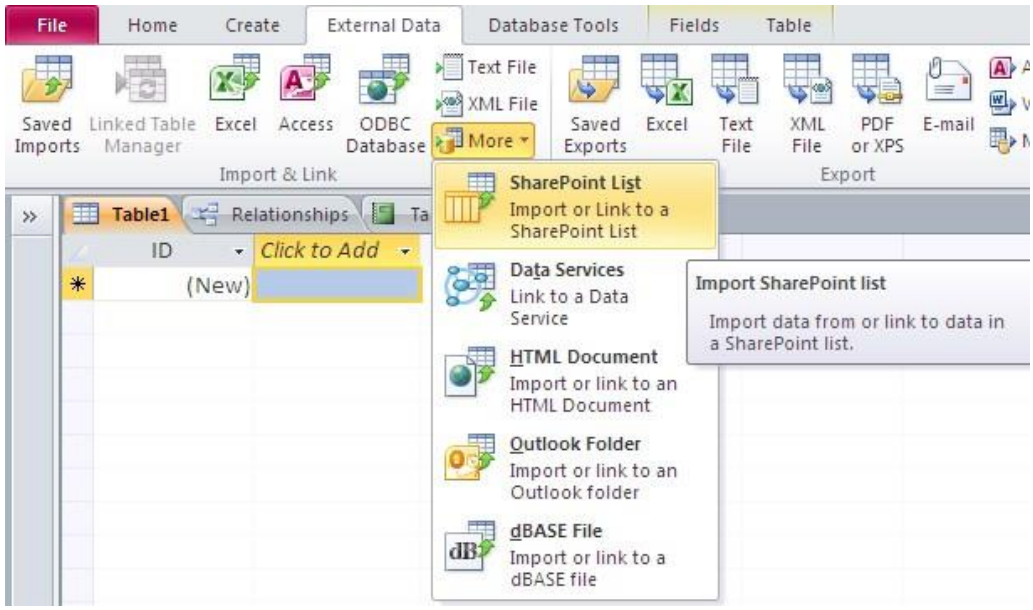
6. Browse for the source of the data.
7. Choose “Import tables, queries, forms, reports, macros, and modules into the current database.”
8. Hit “OK.”

Importing from a SharePoint List

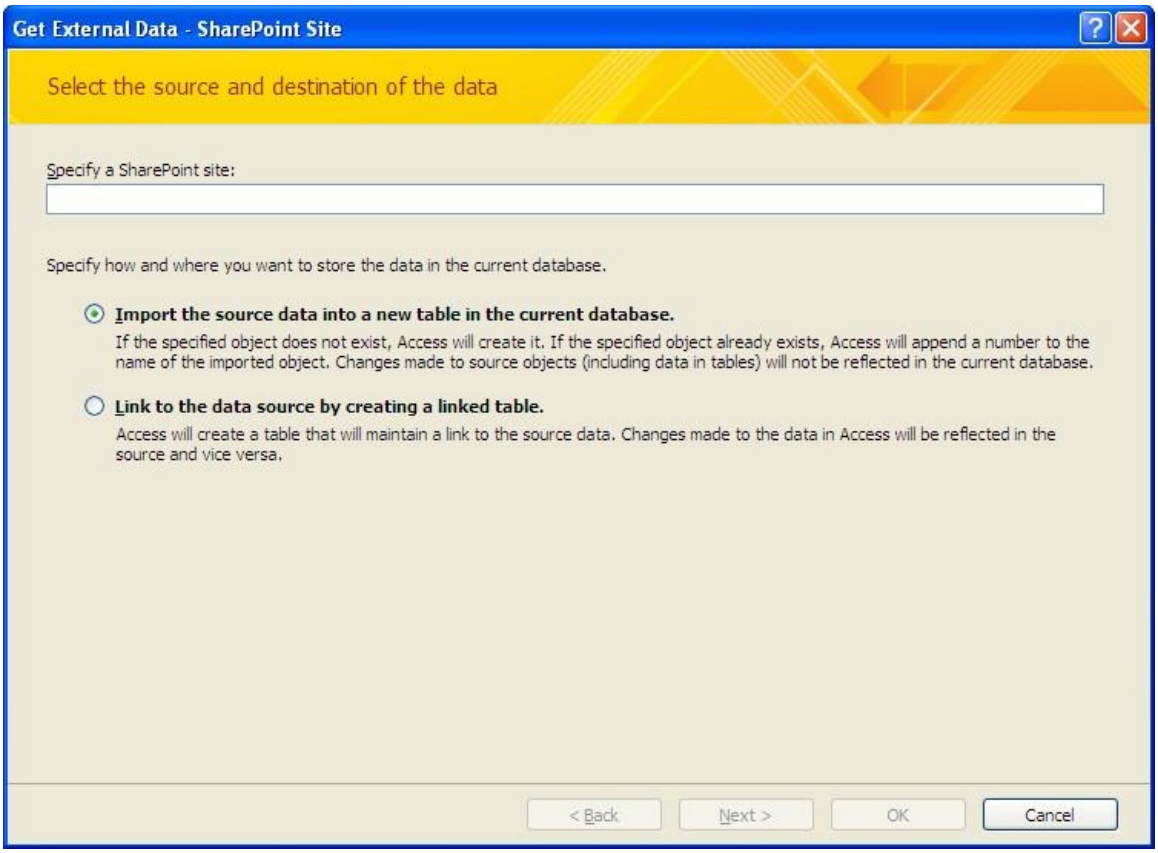
To import from a SharePoint list:

1. Go to the "External Data" tab and choose the "More" icon from the Import & Link box.

2. Select "SharePoint List" from the dropdown menu.



3. The "Get External Data – SharePoint Site" will open up.

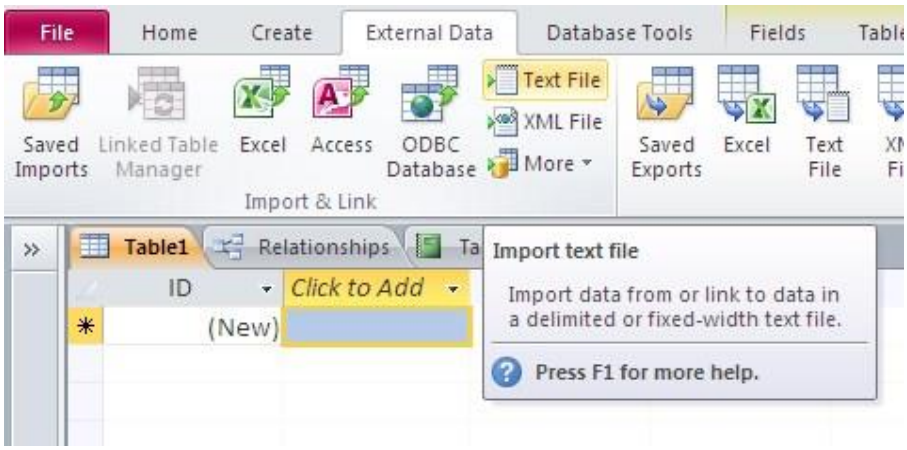


4. Specify a SharePoint site.
5. Choose "Import the source data into a new table in the current database."
6. Hit "OK," or "Next" if applicable.

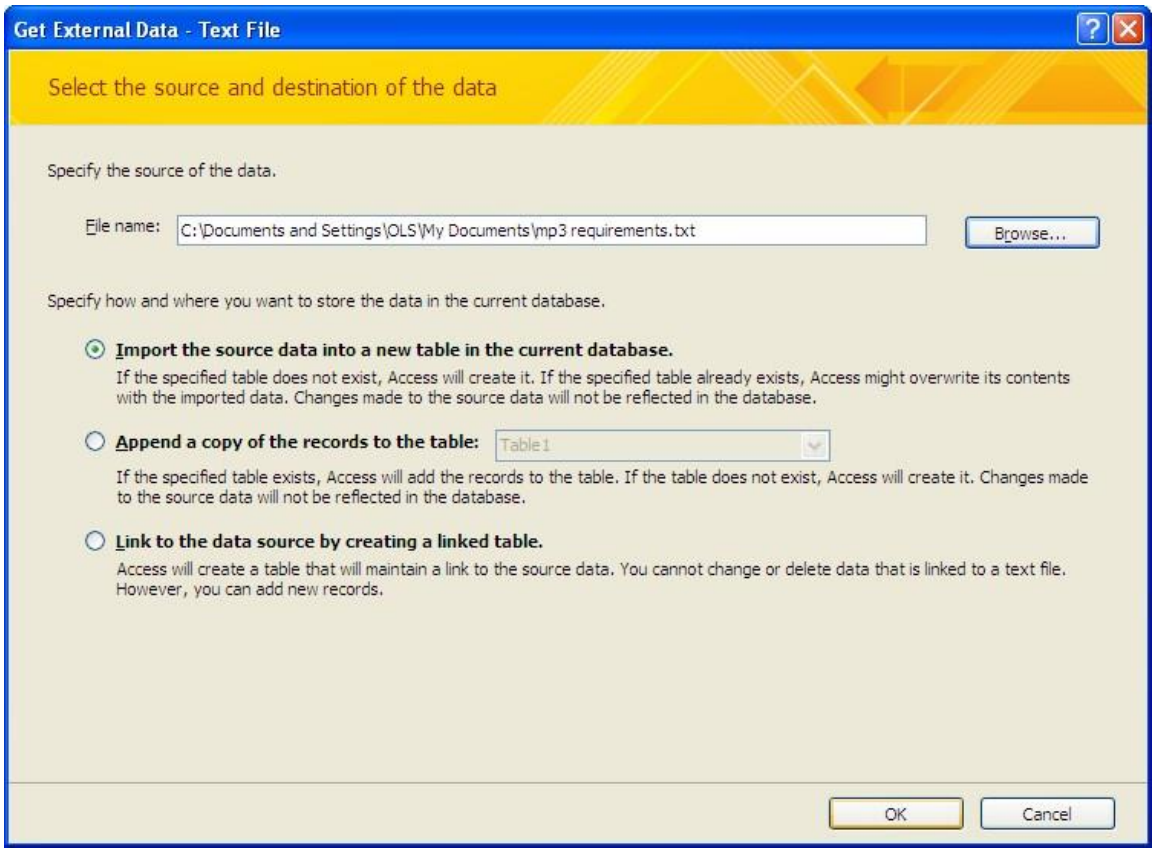
Importing From a Text or XML File

To import from a text file:

1. Go to the "External Data" tab and choose the Text File icon from the Import & Link box.



2. The "Get External Data – Text File" will open up.

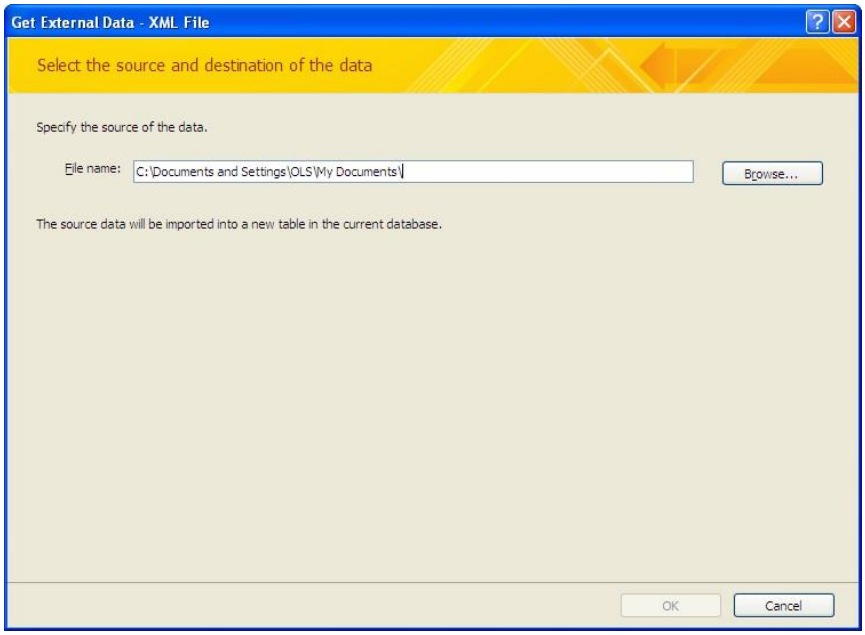


3. Browse for the source of the data.
4. Choose "Import the source data into a new table in the current database."
5. Hit "OK."

To link to an XML file:

1. Go to the "External Data" tab and choose the XML File icon from the Import & Link box.

2. The "Get External Data – XML File" will open up.



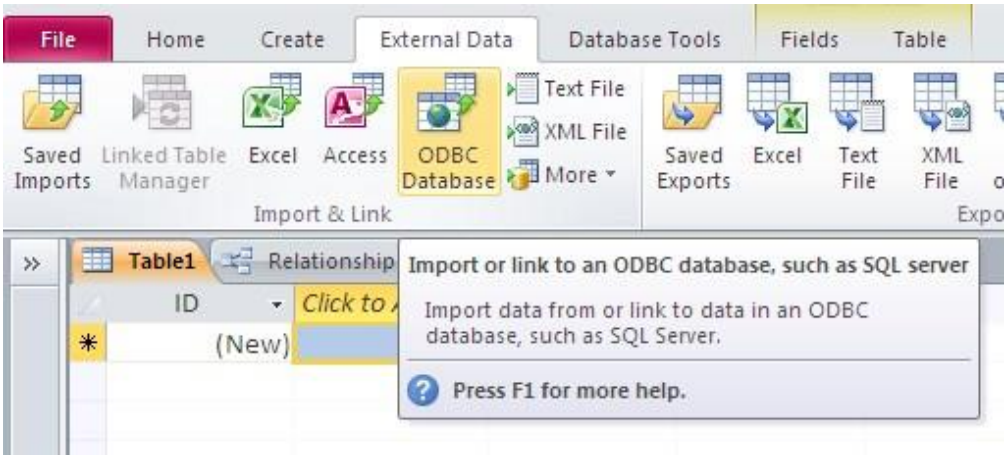
3. Browse for the source of the data.

4. Hit "OK."

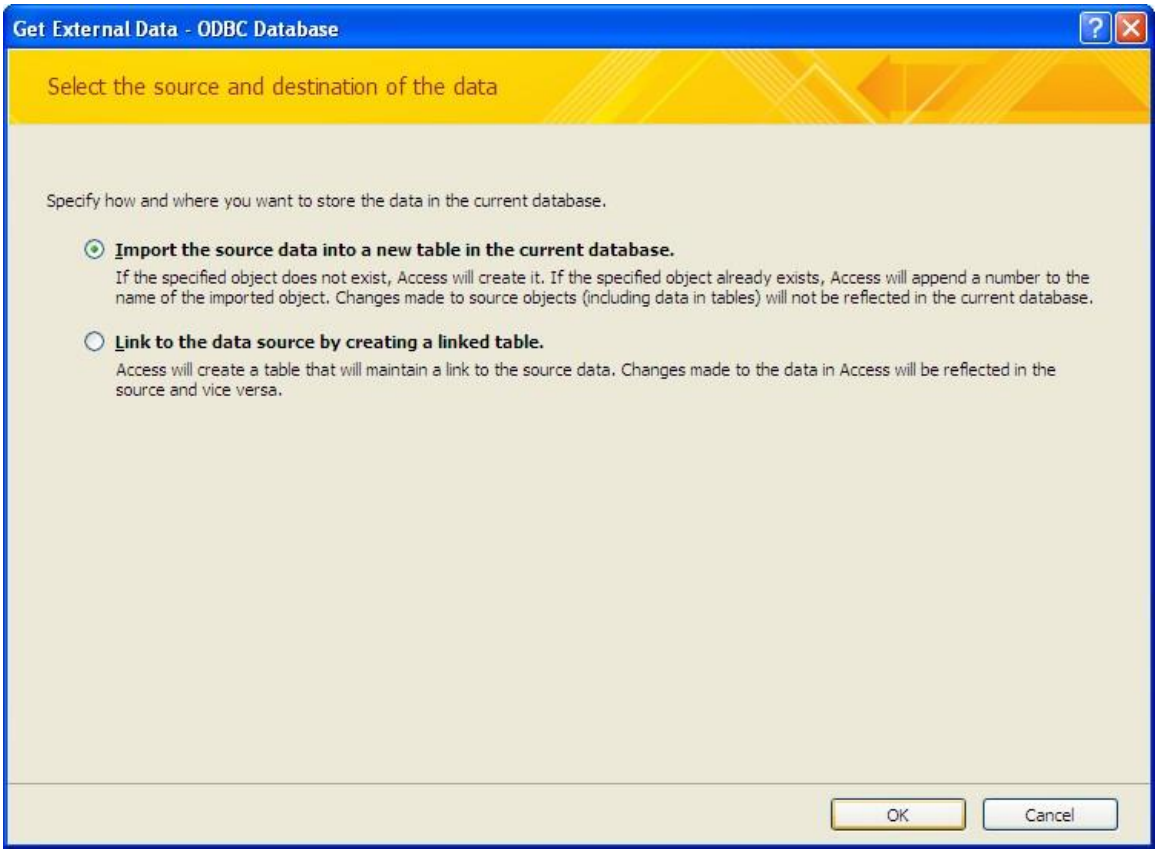
Other Types of Imports

To import from an ODBC database:

1. Go to the "External Data" tab and choose the ODBC Database icon from the Import & Link box.



2. The "Get External Data – ODBC Database" box will open up.

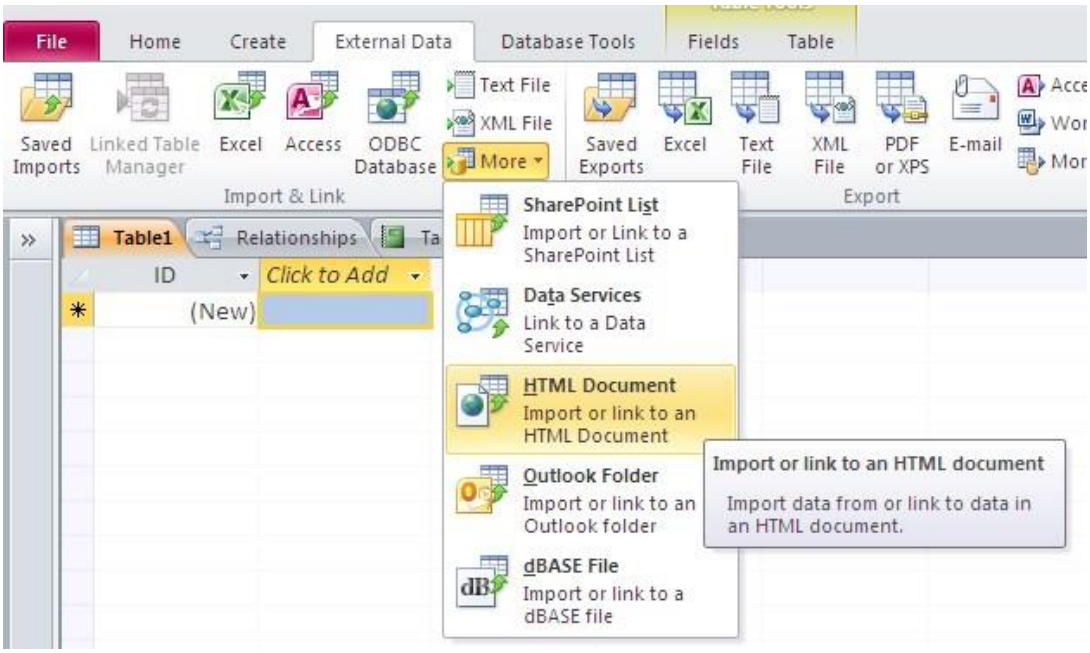


5. Choose "Import the source data into a new table in the current database."
6. Hit "OK."

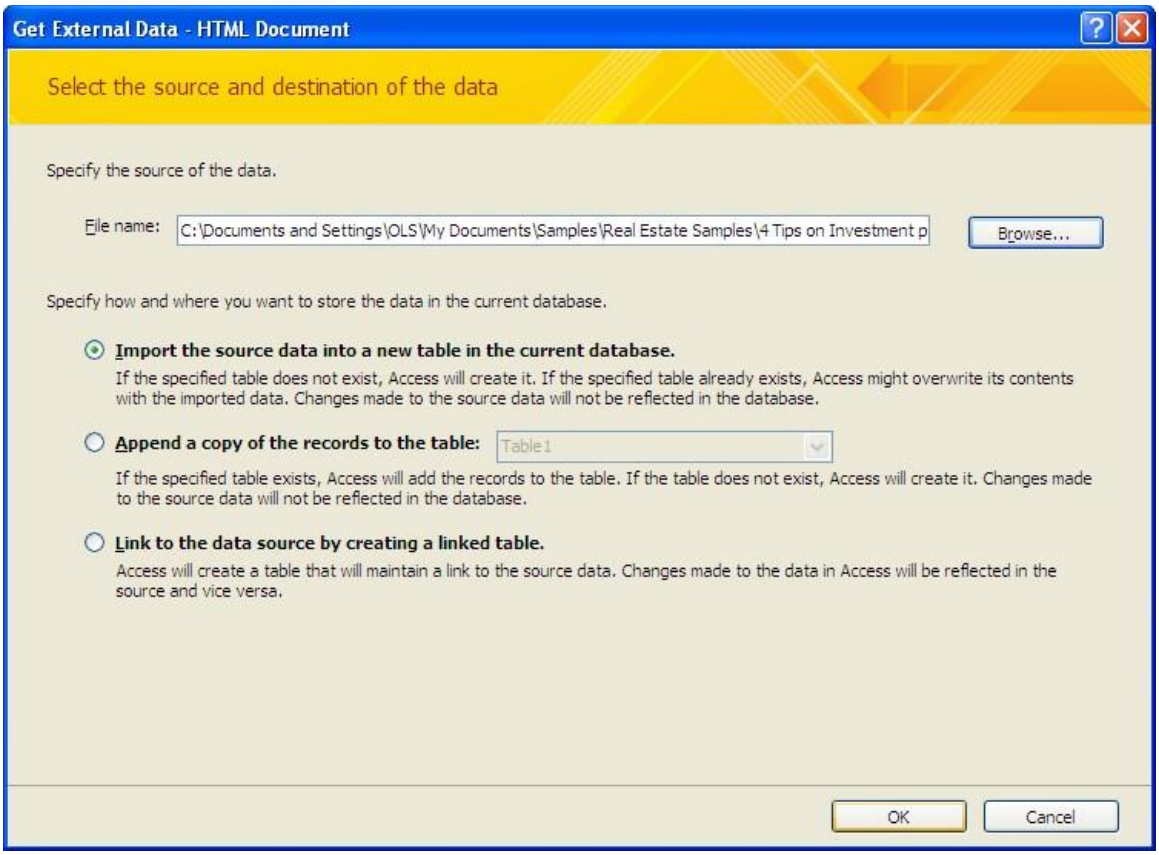
To import from an HTML document:

1. Go to the “External Data” tab and choose the “More” icon from the Import & Link box.

2. Select “HTML Document” from the dropdown menu.



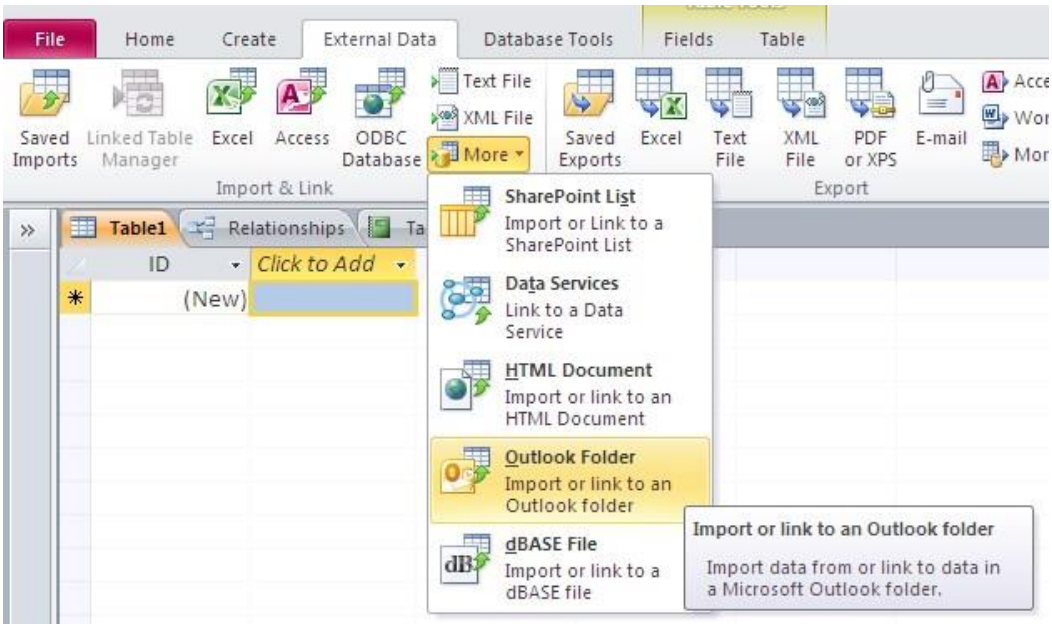
3. The “Get External Data – HTML Document” will open up.



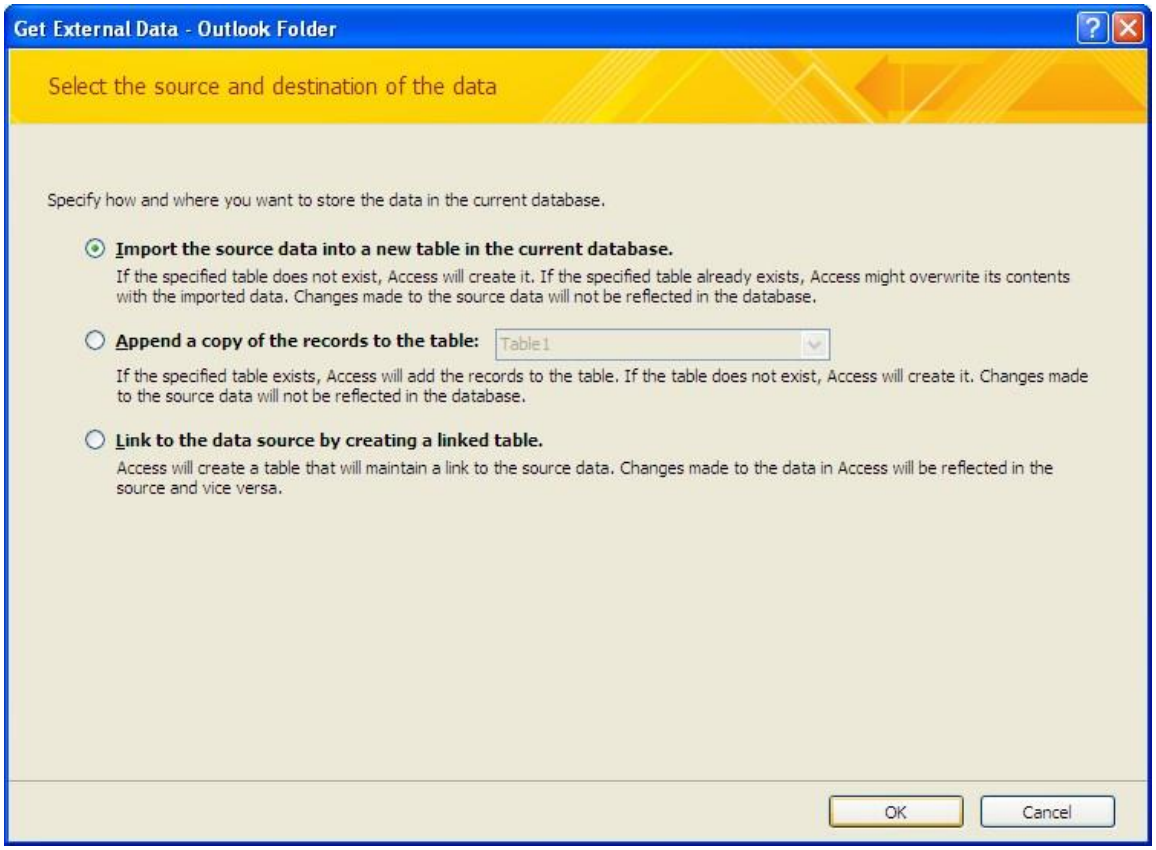
4. Browse for the source of the data.
5. Choose "Import the source data into a new table in the current database." 6. Hit "OK."

To import from an Outlook folder:

1. Go to the "External Data" tab and choose the "More" icon from the Import & Link box.
2. Select "Outlook Folder" from the dropdown menu.



3. The "Get External Data – Outlook Folder" box will open up.



4. Choose “Import the source data into a new table in the current database.” 5.

   Hit “OK.”

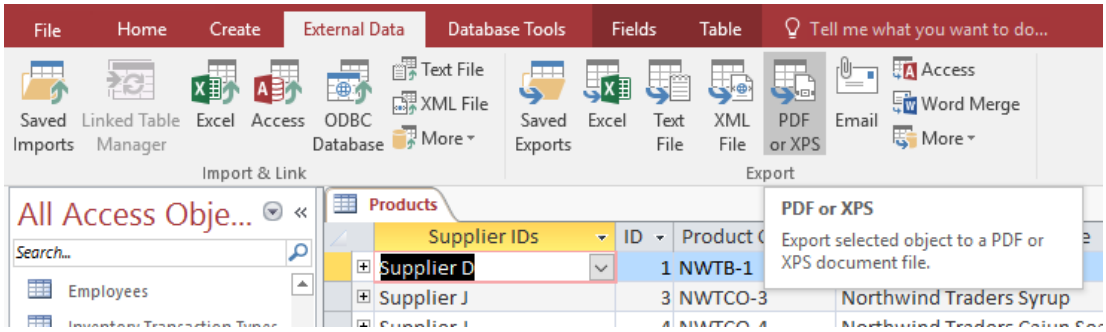
Module Ten: Exporting Data

In this module, students will learn how to export data. Topics will include saving an object as a PDF, exporting to an Excel spreadsheet, exporting to a SharePoint list and exporting to a Word or text file. We will also look at other types of exports.

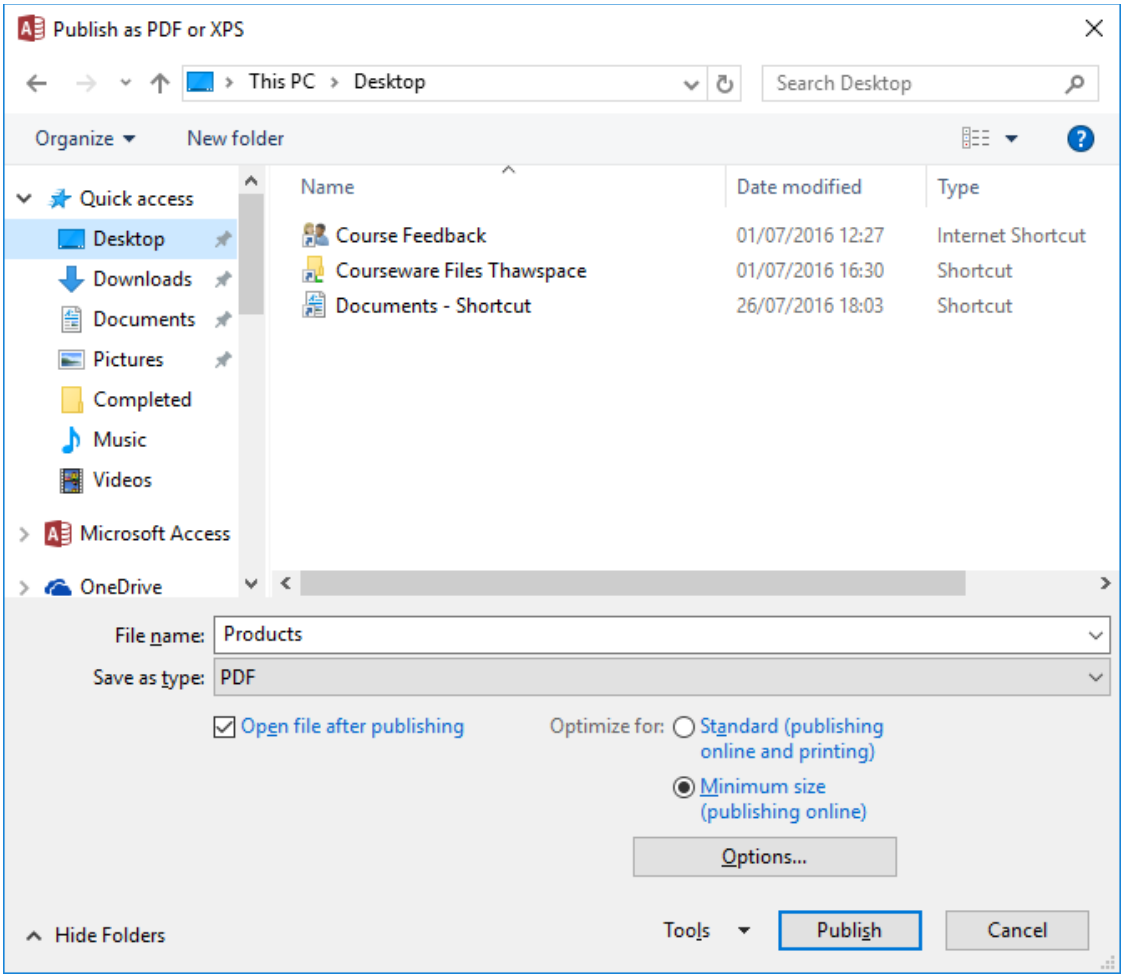
Saving an Object as a PDF

To save an object as a PDF:

1. Go to the "External Data" tab and choose the PDF or XPS icon from the Export box.



3. The "Publish as PDF or XPS" box will pop up.

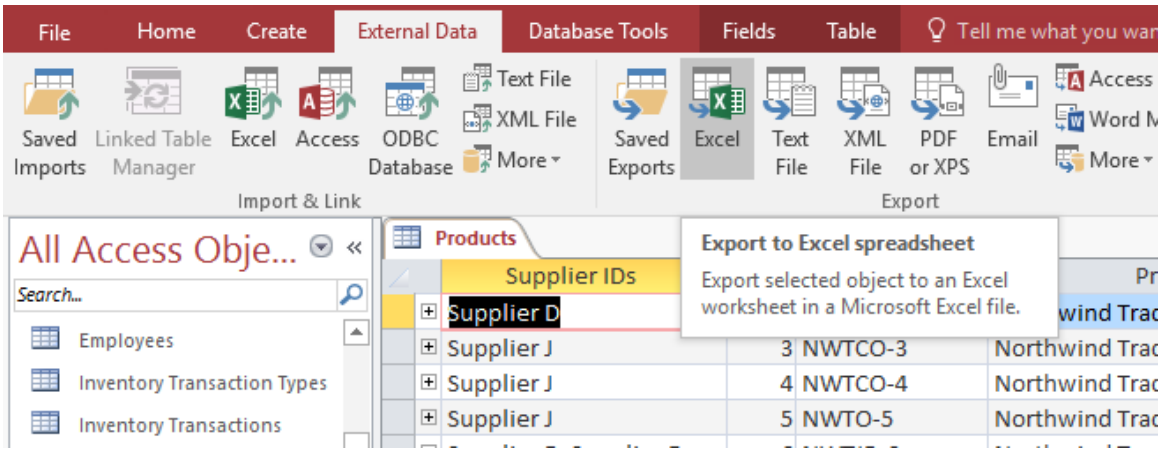


9. Choose a “Save in” location.
10. Specify a file name and ensure that the “Save as type” is PDF
11. Place a checkmark in the “Open file after publishing” box if you want to select that option.
12. Select an “Optimize for” choice.
13. Hit “Publish.”

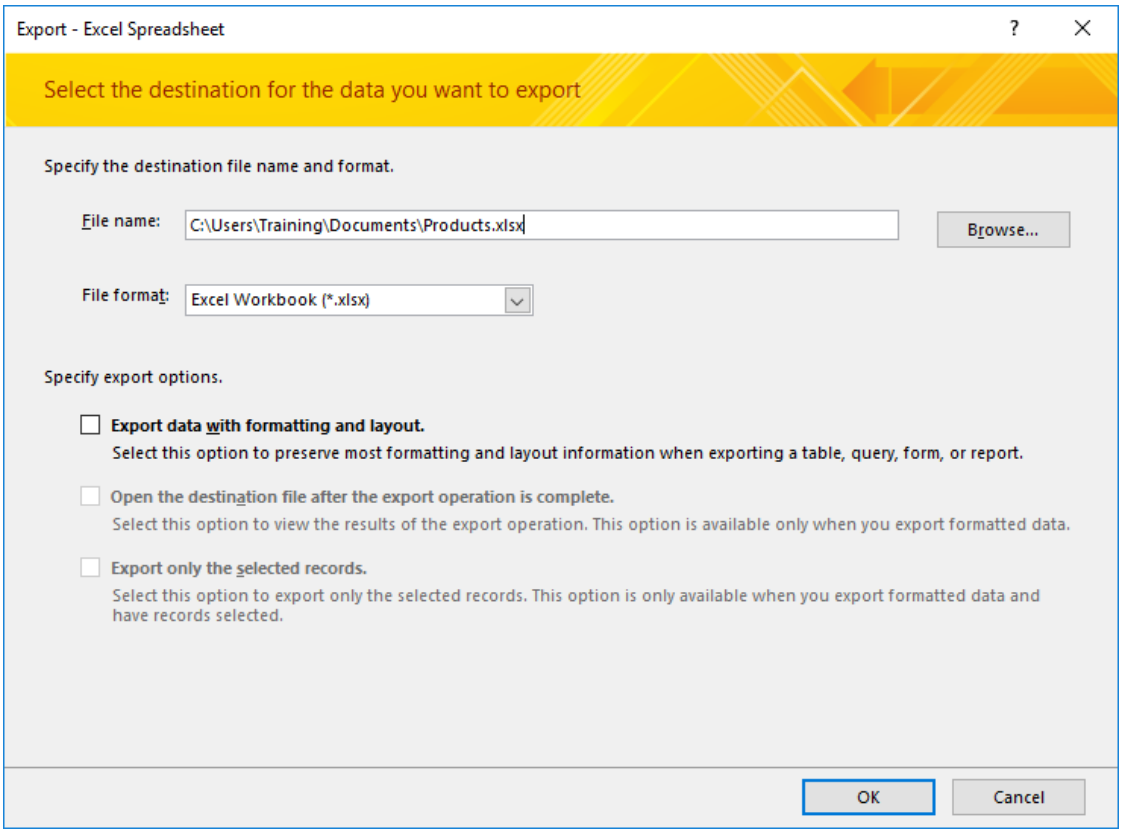
Exporting to an Excel Spreadsheet

To export to an Excel spreadsheet:

1. Go to the "External Data" tab and choose the Excel icon from the Export box.



2. The "Export – Excel Spreadsheet" box will pop-up.

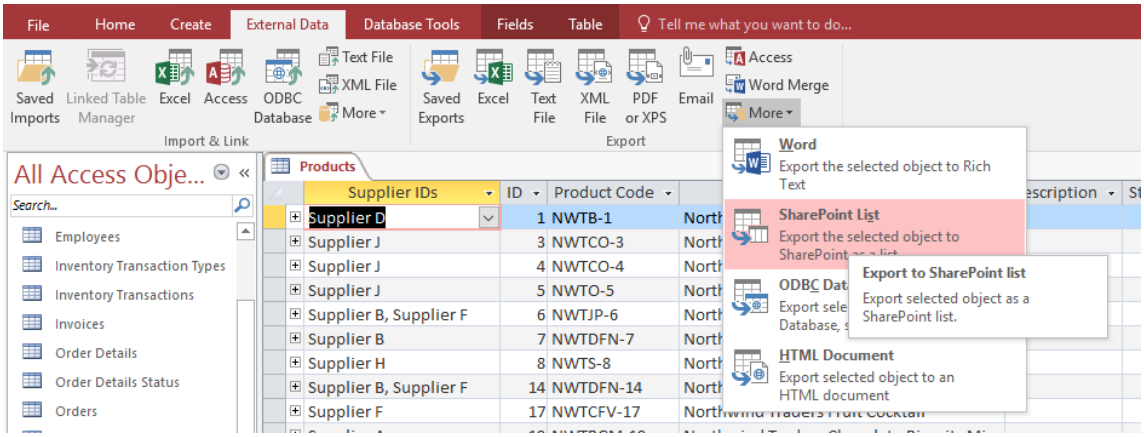


3. Browse for the destination file.
4. Select a file format.
5. Place a checkmark in the “Export data with formatting and layout” box.
6. The option to “Open the destination file after the export operation is complete” will open up. Choosing this is optional. Place a checkmark in the box if you want it. 7. Hit “OK.”

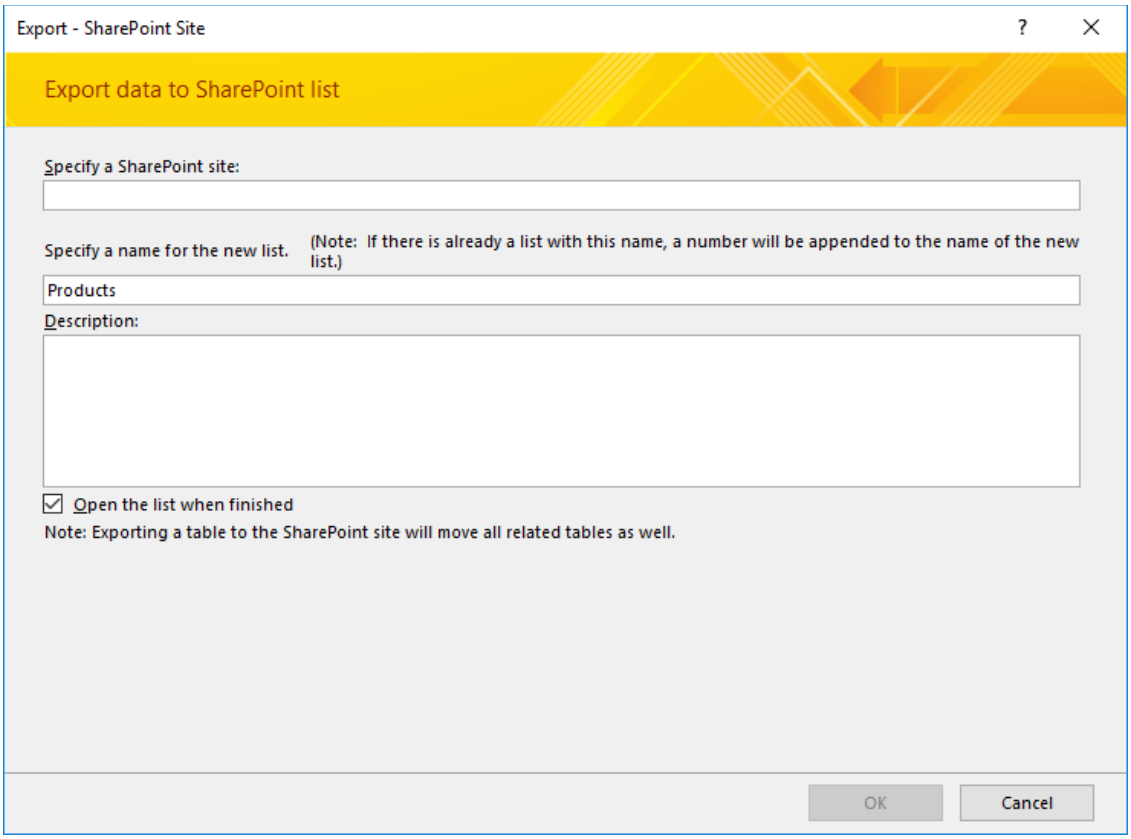
Exporting to a SharePoint List

To export to a SharePoint list:

1. Go to the “External Data” tab and choose the “More” icon from the Export box.
2. Select “SharePoint List” from the dropdown menu.



3. The “Export – SharePoint Site” will open up.



4. Specify a SharePoint site.
5. Choose a name for the new list.
6. Write in a description of the new list
7. Place a checkmark in the "Open the list when finished" box if you want that option. 8.

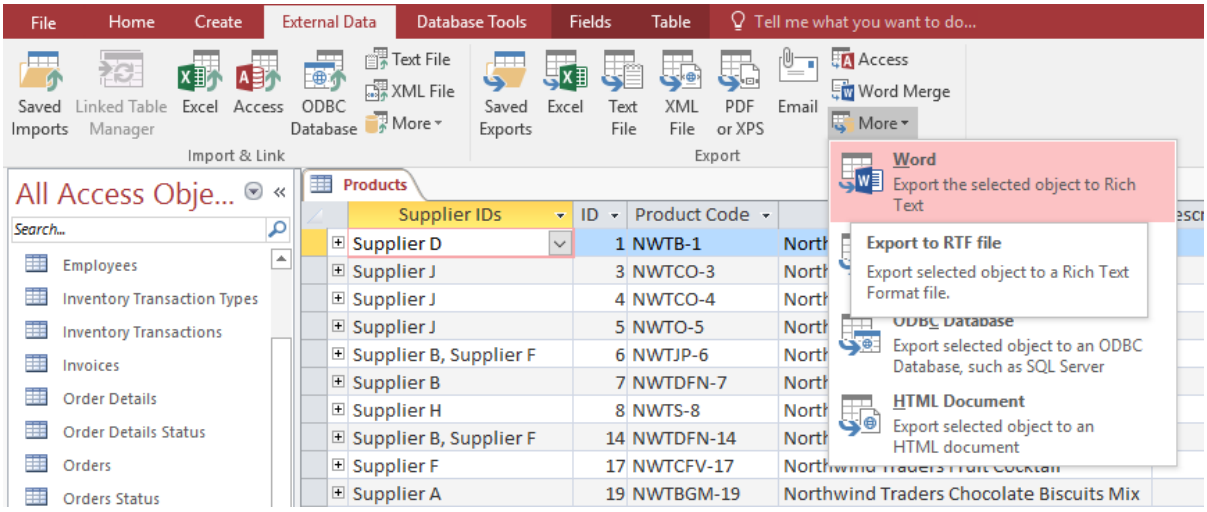
   Hit "OK."

Exporting To a Word or Text File

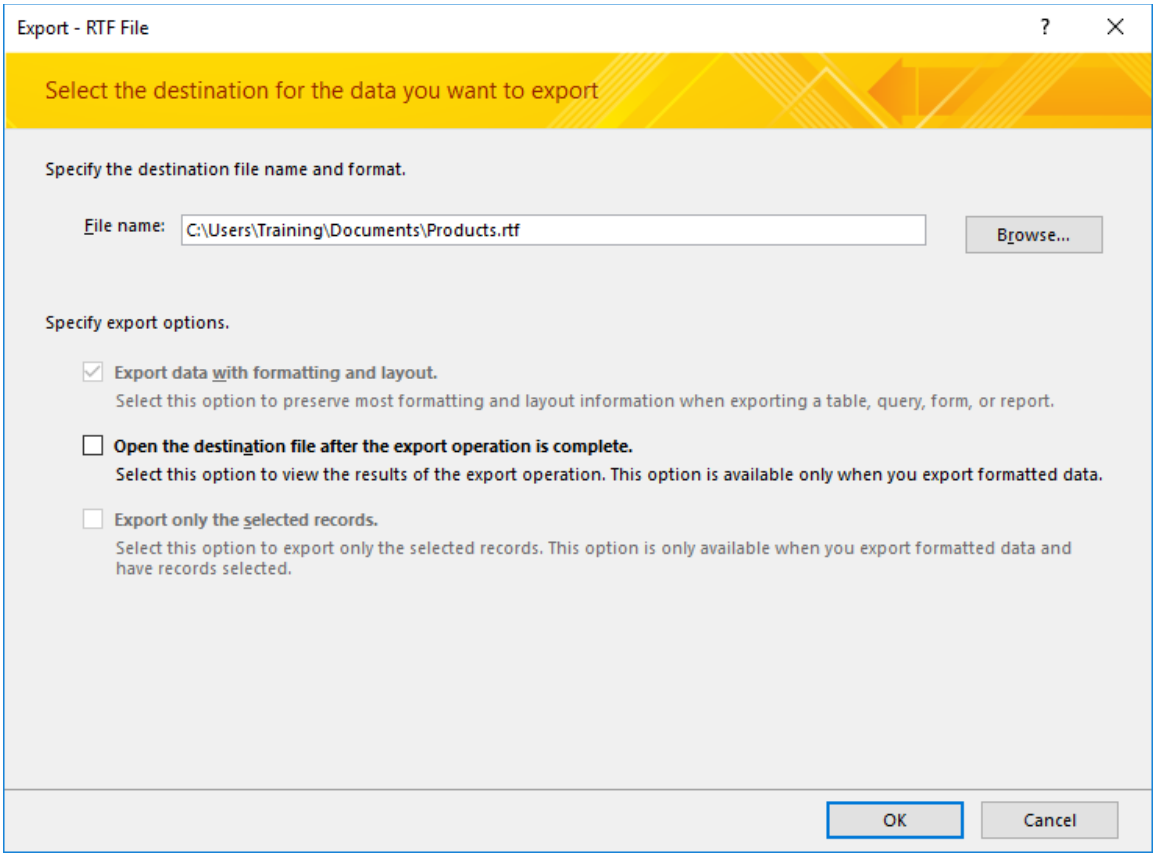
To export to a Word file:

1. Go to the "External Data" tab and choose the "More" icon from the Export box.

2. Select “Word” from the dropdown menu.



3. The “Export – RTF File” box will open up.



4. Browse for the file that you want to export the data to.

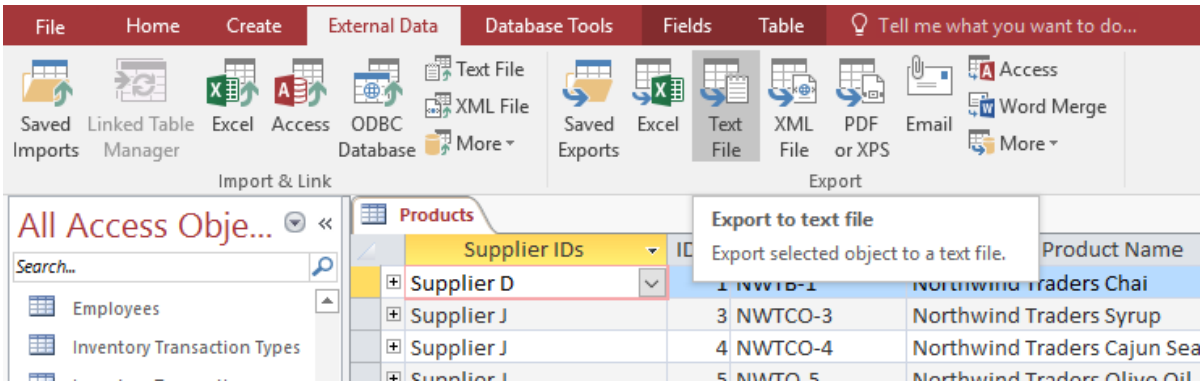
5. Place a checkmark in the "Export data with formatting and layout" if it is not already selected.

6. Place a checkmark in the "Open the destination file after the export operation is complete" if you want to choose that option.

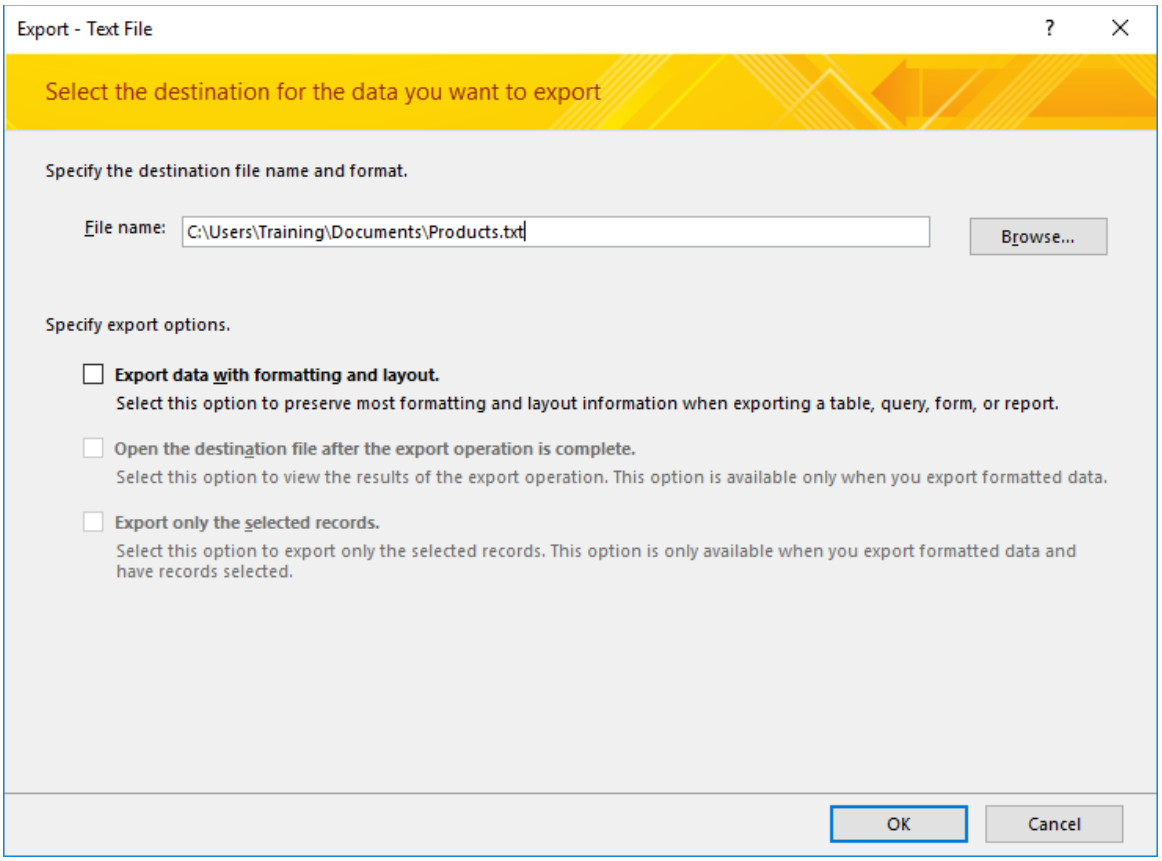
7. Hit "OK."

To export to a text file:

1. Go to the "External Data" tab and choose the Text File icon from the Export box.



2. The "Export – Text File" will open up.

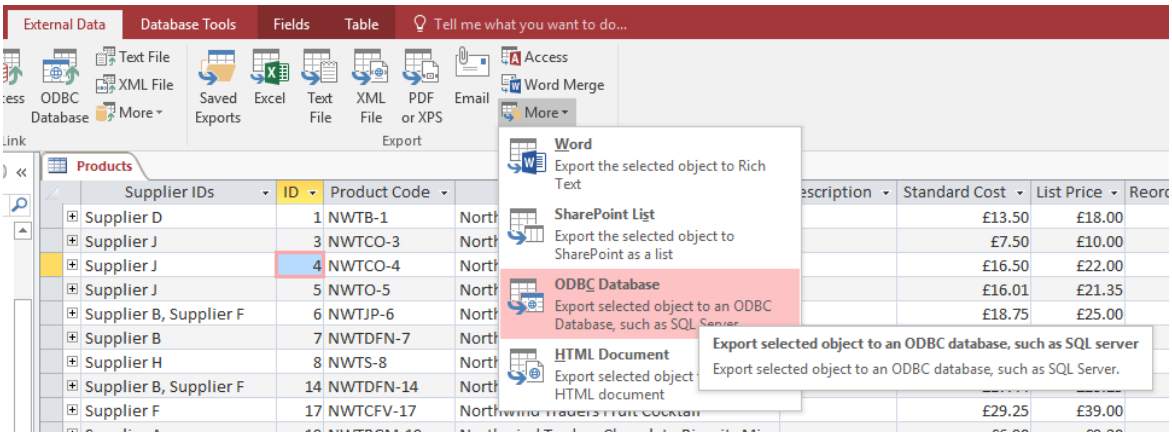


3. Browse for the file that you want to export the data to.
4. Place a checkmark in the "Export data with formatting and layout."
5. Place a checkmark in the "Open the destination file after the export operation is complete" if you want to choose that option.
6. Hit "OK."

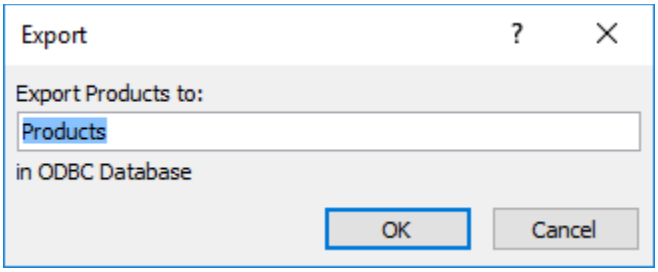
Other Types of Exports

To export to an ODBC database:

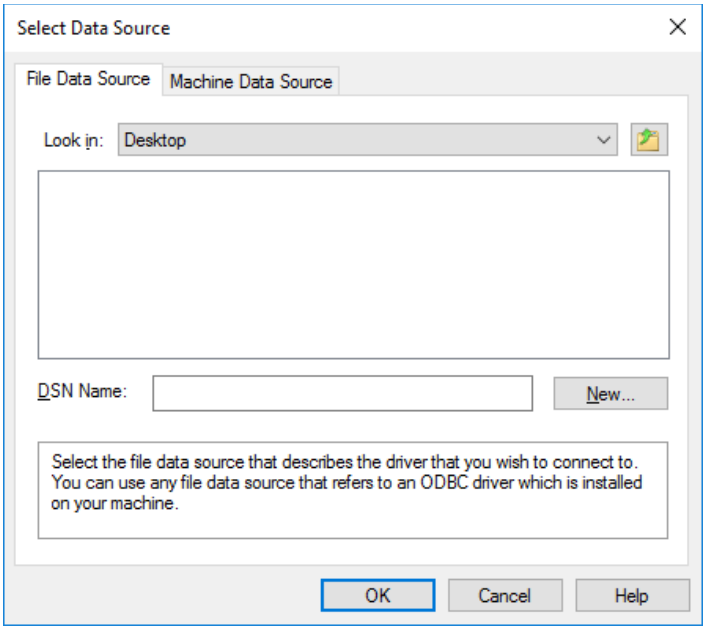
1. Go to the "External Data" tab and choose the "More" icon from the Export box.
2. Select "ODBC Database" from the dropdown menu.



3. An Export box will pop up. Type in the name of the place in which you want to export the current database to.



4. The "Select Data Source" box will open up. Choose the file source data from the dropdown menu and specify a DSN name. You can also use a machine data source.

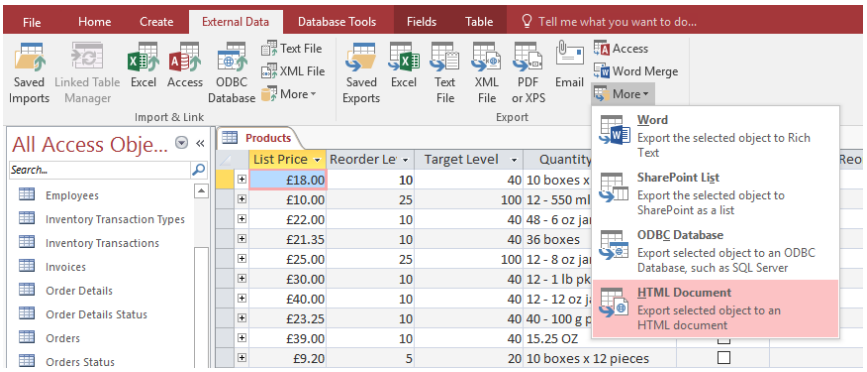


7. Hit "OK."

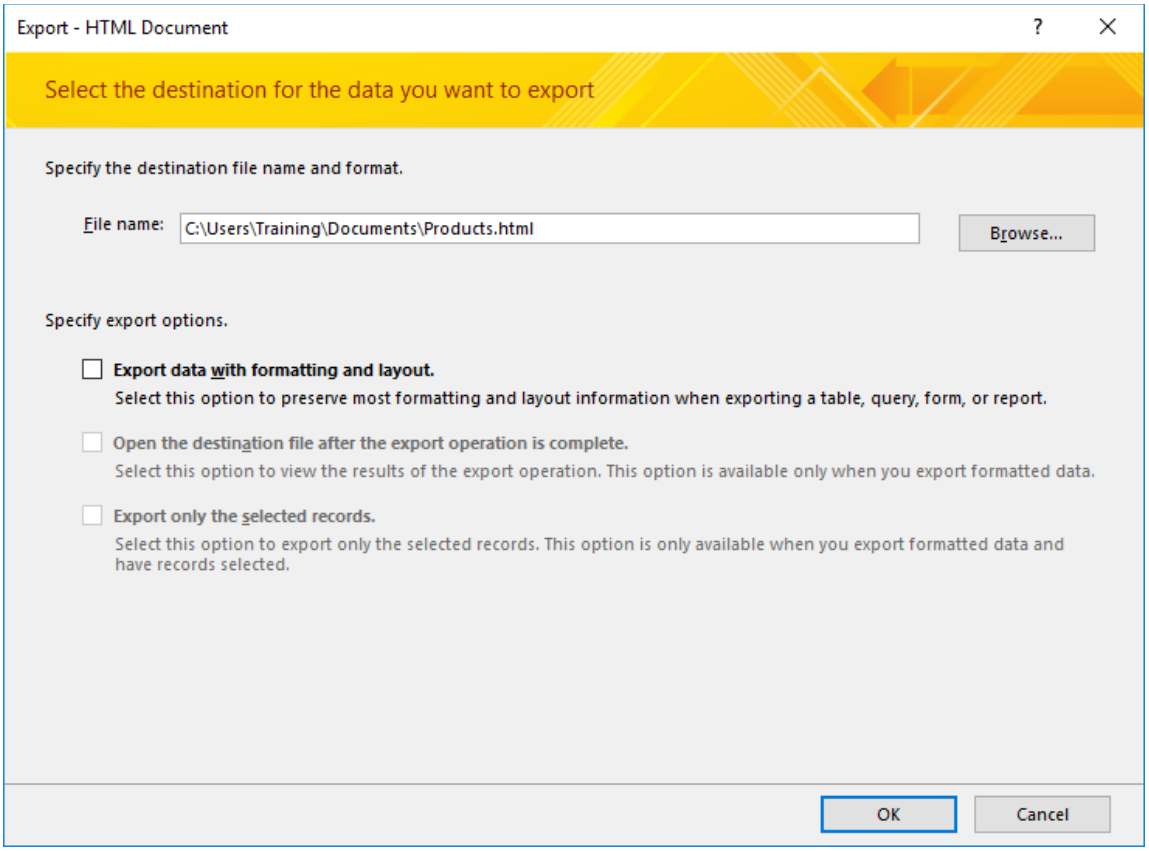
To export to an HTML document:

1. Go to the “External Data” tab and choose the “More” icon from the Export box.

2. Select “HTML Document” from the dropdown menu.



3. The “Export – HTML Document” will open up.



4. Browse for the file that you want to export the data to.

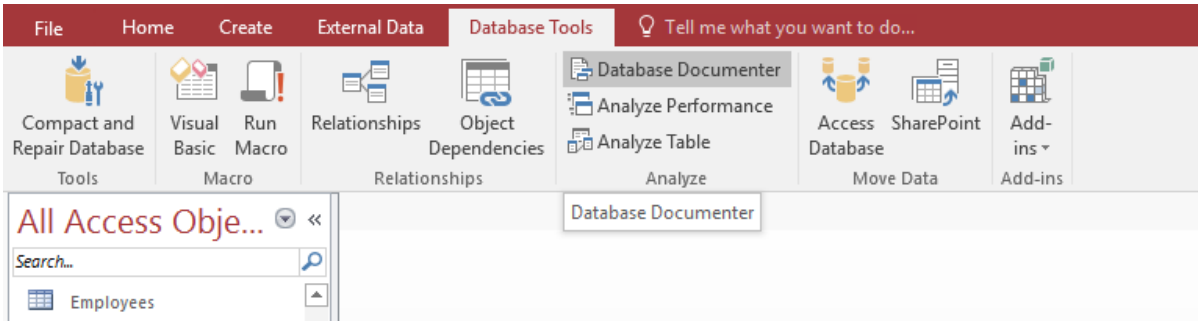
5. Place a checkmark in the “Export data with formatting and layout.”
6. Place a checkmark in the “Open the destination file after the export operation is complete” if you want to choose that option.
7. Hit “OK.”

Module Eleven: Advanced Database Tools

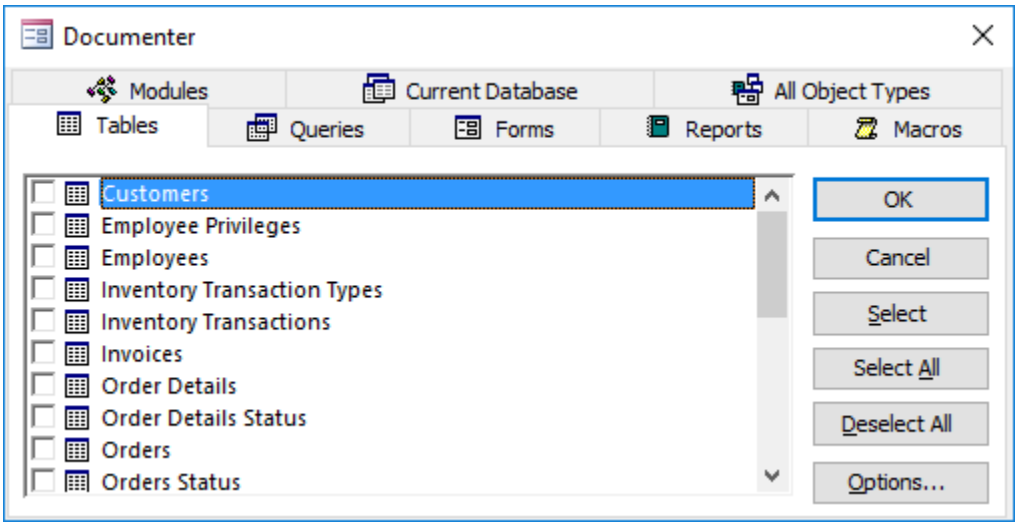
In this module, students will learn how to use advanced database tools. These tool include the database documenter, the analyze performance functions and the repair/compact database tool.

Using the Database Documenter

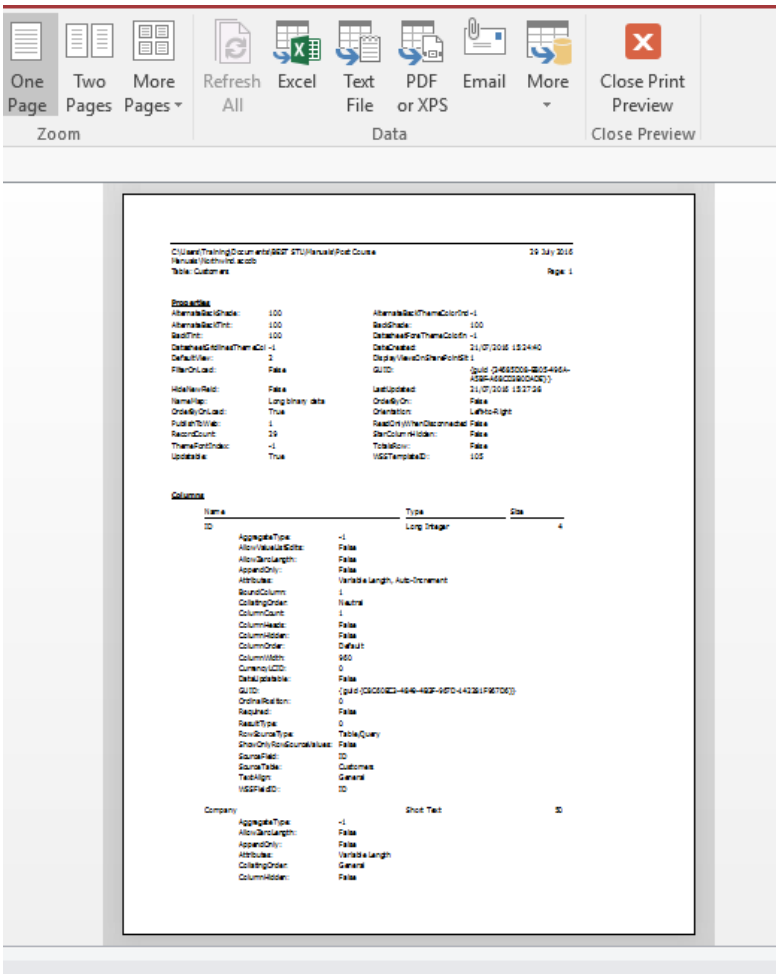
1. Click in the "Database Documenter" under the Database Tools tab in the Analyze box.



2. The documenter box will pop up. Put a check mark in the box next to each part of the database that you want to print.



3. Hit "OK."

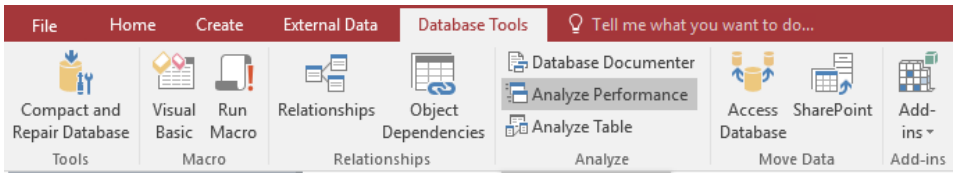


1. View your selected items in print mode. You can view one, two or more pages at a time. You can also change the size and margins, insert columns or switch to landscape formatting before you print.

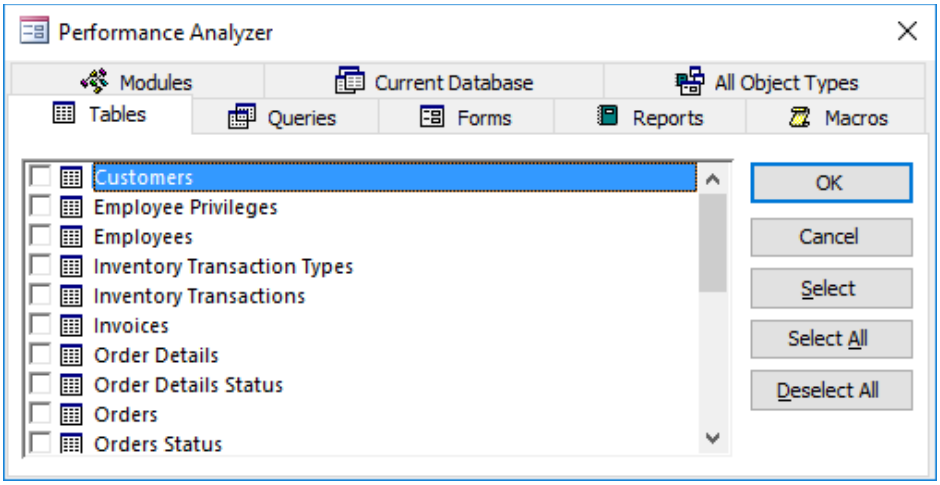
2. You can also zoom in on your document by clicking directly on it.

Analyzing Table Performance

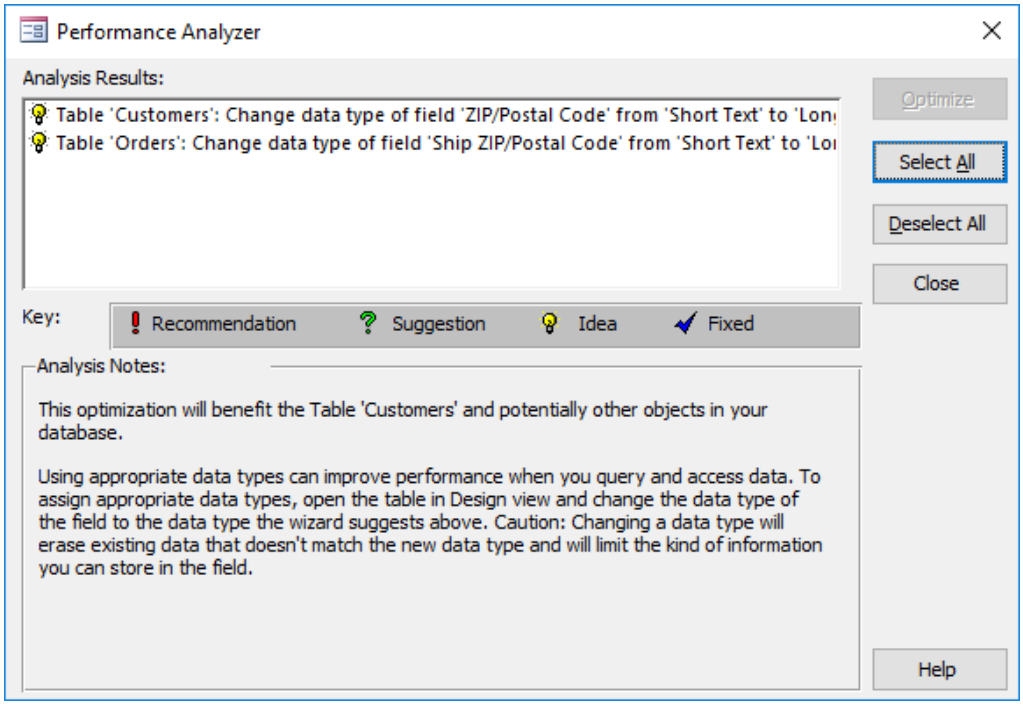
1. Click on the "Analyze Performance" button under the Database Tools tab in the Analyze box.



2. The Performance Analyzer box will open up. Choose the Tables tab and then place a check mark next to the tables that you want to analyze.



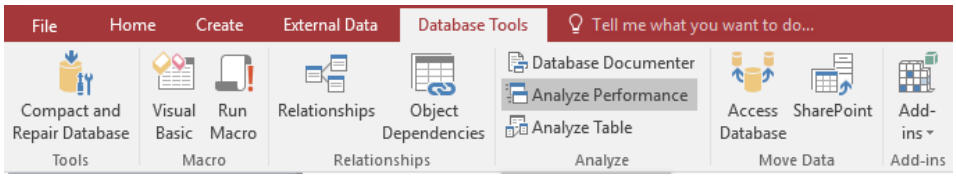
3. If there are suggestions for improvement, you will be notified of them and able to make the suggested changes.



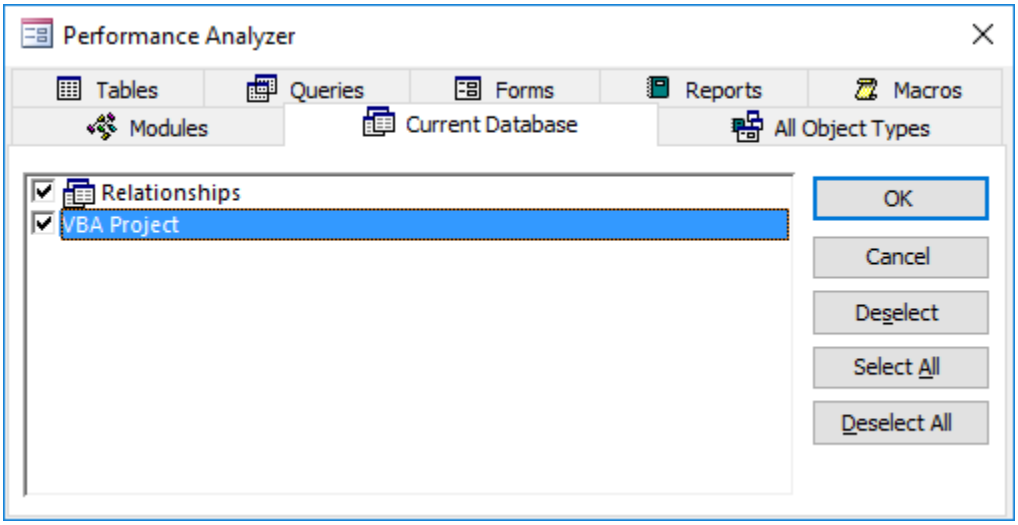
If there are no suggestions a message displays.

Analyzing Database Performance

1. Click on the "Analyze Performance" button under the Database Tools tab in the Analyze box.



2. The Performance Analyzer box will open up. Choose the Current Database tab and then place a check mark next to the tables that you want to analyze.



3. Hit "OK."

1. The Performance Analyzer box will open up with analysis results. There are 4 result categories:

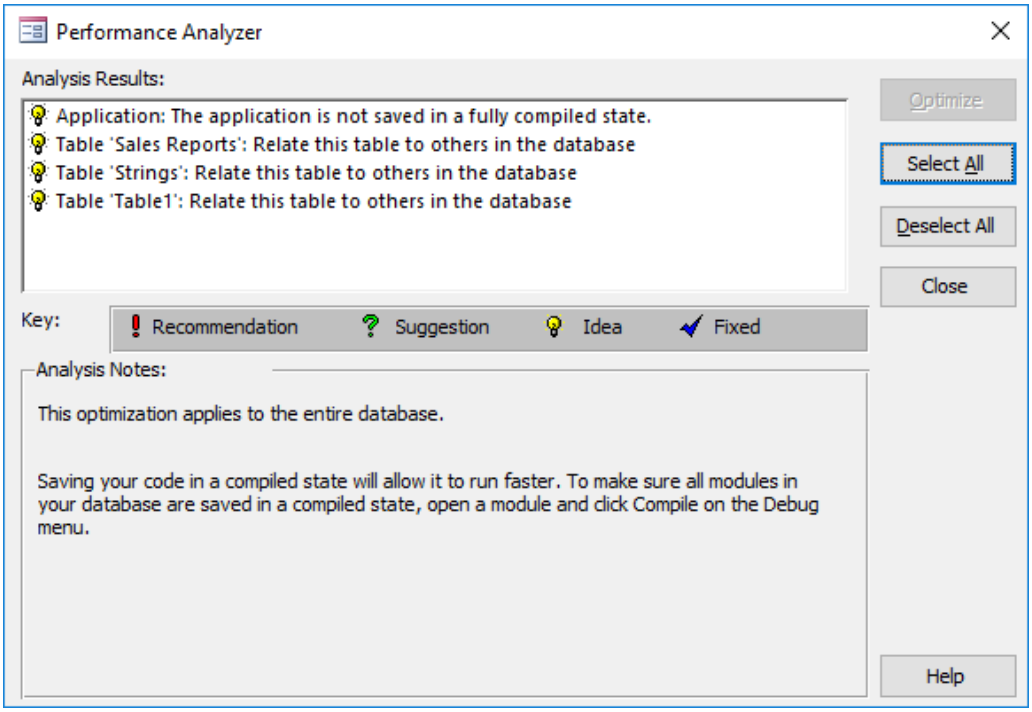
    a. Recommendation

    b. Suggestion

c. Idea

d. Fixed

2. Click on the recommendations, suggestions and ideas that you want to implement.



3. Hit the "Optimize" button.

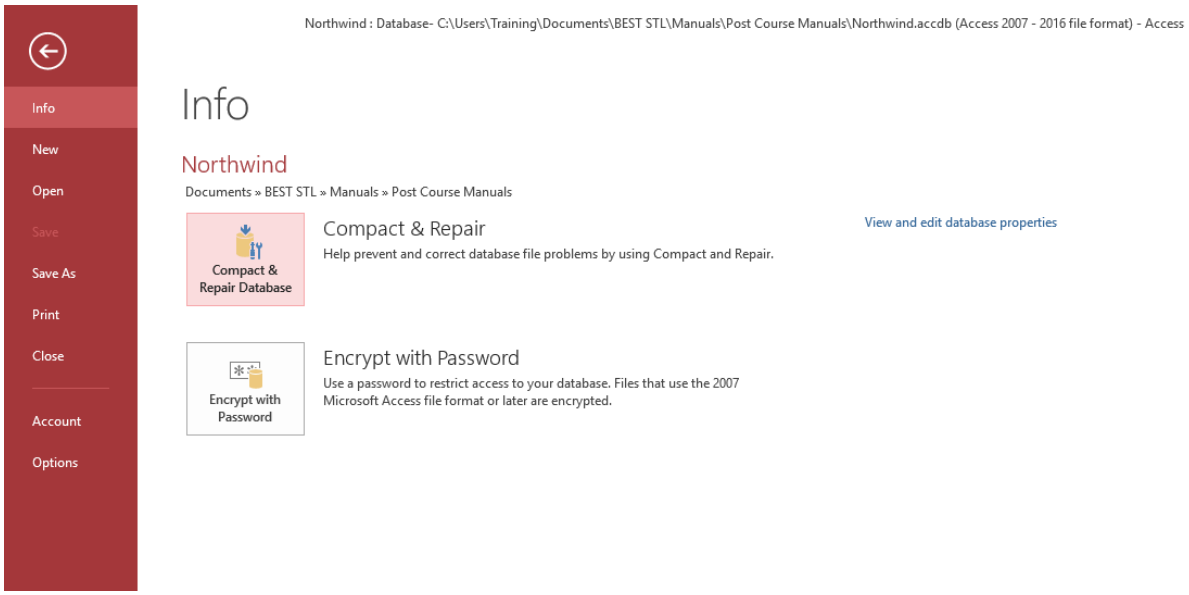
Compacting and Repairing a Database

You can compact and repair a database in one of two ways:

4. Click on the pink "File" button.

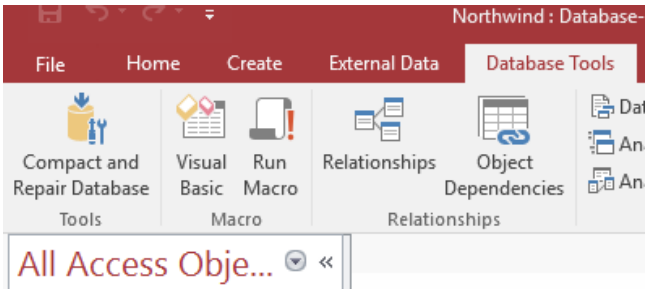
5. Choose "Info" from the left-hand side menu.

6. Select the "Compact & Repair" button.



Or:

4. Close all of your open items.
5. Click on the "Database Tools" tab.
6. Select "Compact & Repair Database" from the Tools box.



Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to improve your Advanced Access skills is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

Words from the Wise

Here are just some of the features that set Access apart from its predecessor versions:

- "Conditional formatting now supports data bars and you can now manage your conditional formatting rules from a single intuitive view."
- "The addition of Office themes in Access gives you the ability to coordinate numerous database objects."
- "Build your databases with new modular components using new Application Parts and add prebuilt Access components for common tasks to your database."
- "The Backstage view replaces the traditional File menu in all Office applications to provide a centralized, organized space to manage your database and customize your Access experience."
- "Expression Builder simplifies your formulas and expressions with IntelliSense."