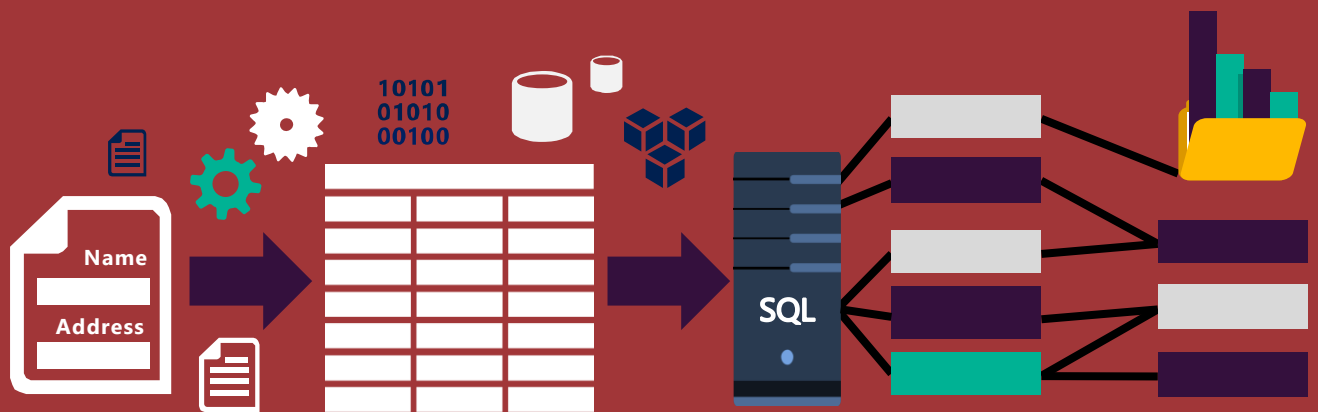




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- Protect and customize a database



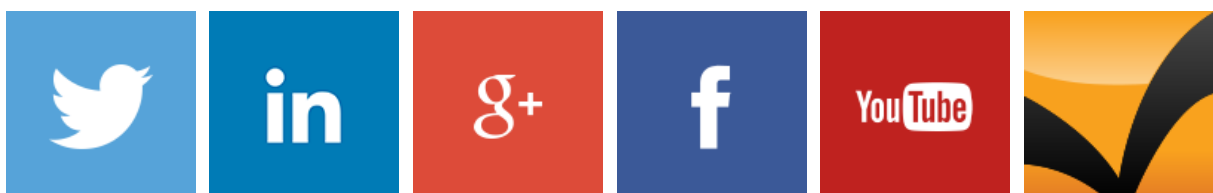
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# Unit 1: Creating advanced forms

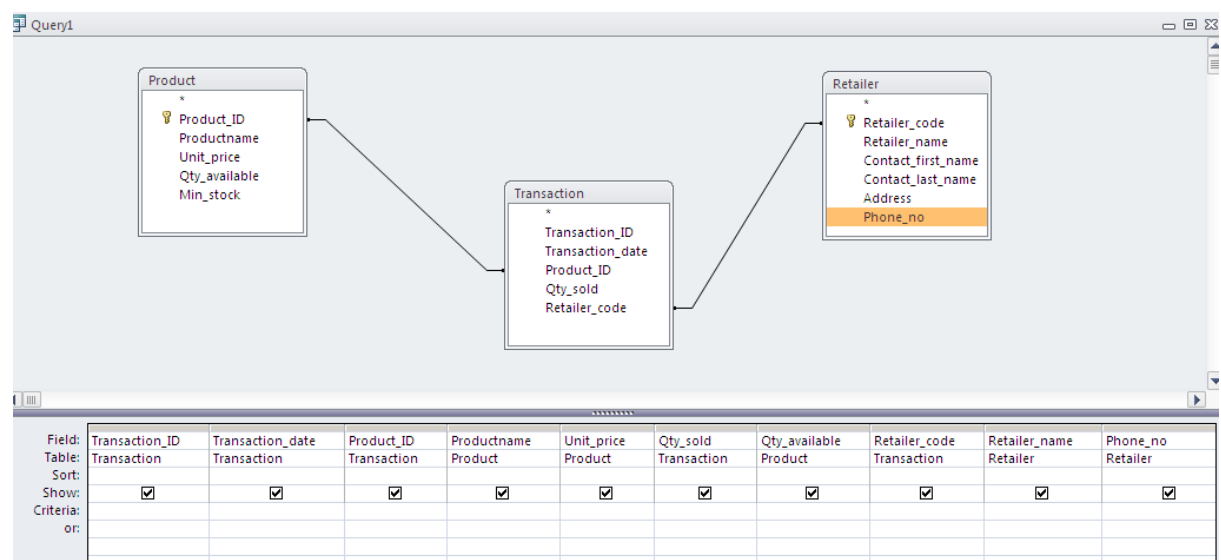
In this unit you will learn how to:

- Build a form based on joined tables
- Use a functions to automate form data entry
- Add tab controls to a form
- Insert a subform and change subform properties
- Create and use group controls in forms

## Build a form based on joined tables

Forms can be built with Access based on multiple tables provided there are links between the tables. These forms can be useful for displaying data from different sources in one place. They can also help with data entry by automatically populating fields from the related tables.

To show a simple example create a query in the Advanced\_form database based on the 3 tables; Products, Retailer and Transaction as shown below. Access automatically adds join links between the tables.



Add the fields in the order shown above then save the query as qryTransaction\_Details. Close the query then while selecting qryTransaction\_Details from the Navigation pane click **Create, Form**.

Now add a new record, enter today's date for the transaction\_date and P003 for the Product\_ID.

Transaction_ID	16	Qty_sold	0
Transaction_date	04/05/2016	Qty_available	
Product_ID	P003	Retailer_code	
Productname		Retailer_name	
Unit_price		Phone_no	

After pressing enter or tab the fields Productname, Unit\_Price and Qty\_available automatically fill in. Enter a Qty\_sold and a Retailer\_Code (eg R004) and the Retailer\_name and Phone\_no are automatically filled in as well.

Save the form as frmTransaction\_Details.

## Use functions to automate form data entry

Another way to automate data entry is to create calculated fields with built in functions. For example, when entering an employee date of birth, a calculated field can be created to work out the employee's age.

To insert a calculated field in a form (for example, the frmEmployee form in the Orderingdb database):

1. In form design view, select the **Ab** textbox tool.
2. Place the control next to the DateOfBirth field.
3. Type the following expression

= INT((Date()-[DateOfBirth])/365.25)

The calculated field works out the number of years between today's date and the employee date of birth. The INT function removes the decimal part resulting in an integer value for the age. (Preventing rounding up).

Change the caption of the calculated field to Age.

Another example of a calculated field is the Total of Order in the subform frmOrdersub

Use the Ab tool again to enter a calculated field into the form footer:

=Sum([TotalCost])

## Add tab controls to a form

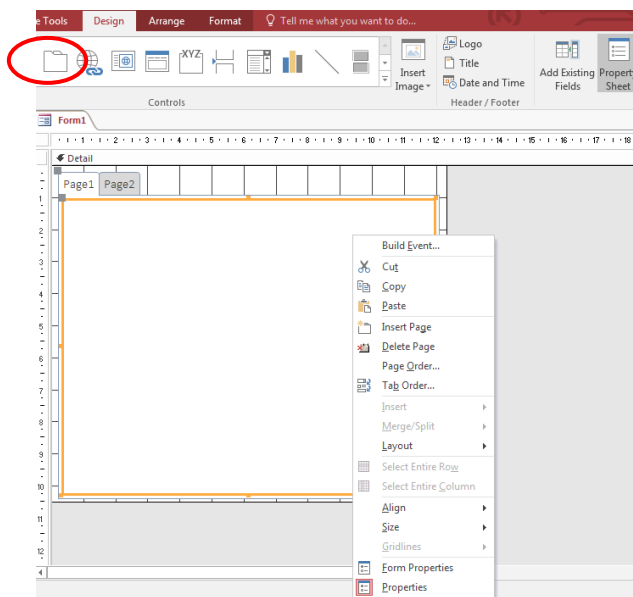
Forms that hold a large amount of information can be designed for easier use by inserting tab pages. For example, the form below contains a tab for General details and a tab for order details.

More tabs can be added, reordered or deleted if required.

To create this form start by selecting tblOrder (in the Orderingdb database) and choose **Create, Form Design**

This creates a blank form in design view based on tblOrder.

Now select the **Tab Control** and draw a page filling the Detail section.  
This 2 pages for the form.



## Inserting and reordering pages

---

To add further pages, right click and choose **Insert Page**.

Select **Page Order** to change the sequence of tabs and **Delete Page** to remove a page.

## Renaming a page

---

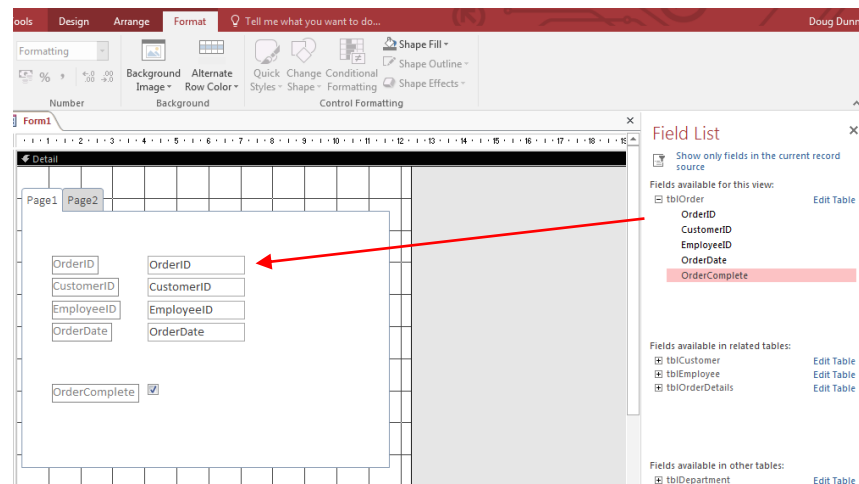
To rename a page right click the default name Page 1 and choose **Properties**.  
Change the first page name to General and the second to Order details.

## Adding fields

---

To add fields to a tab page, click the option **Add Existing Fields**. Choose the table containing the fields then drag the first field to the page. Use the Shift key to add a further group of fields.

In this example add all the fields from tblOrder.



Select Design, Form View to display the form.

As the OrderID field is automatically updated it does not need to be selected.

Change its field property to:

Locked Yes

Enabled No

Border style Transparent

Also in design view change the CustomerID and EmployeeID to combobox fields.

## Insert a subform and change subform properties

As well as having tabbed forms it is possible to display a form within a form. This is useful in a relational database where there are one to many relationships. The main form displays the primary record (one) and an embedded subform displays the related records (many).

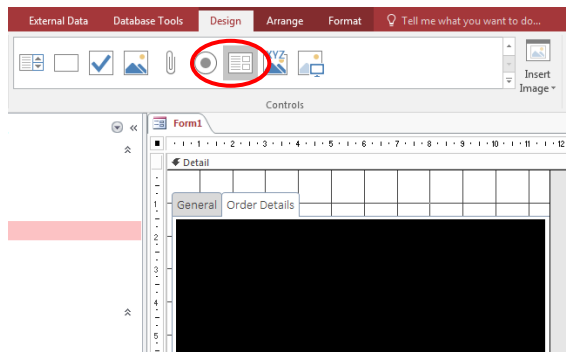
The subform can be either a columnar, tabular form or a datasheet.

The following Retailer details form contains a subform showing the transaction details for that retailer.

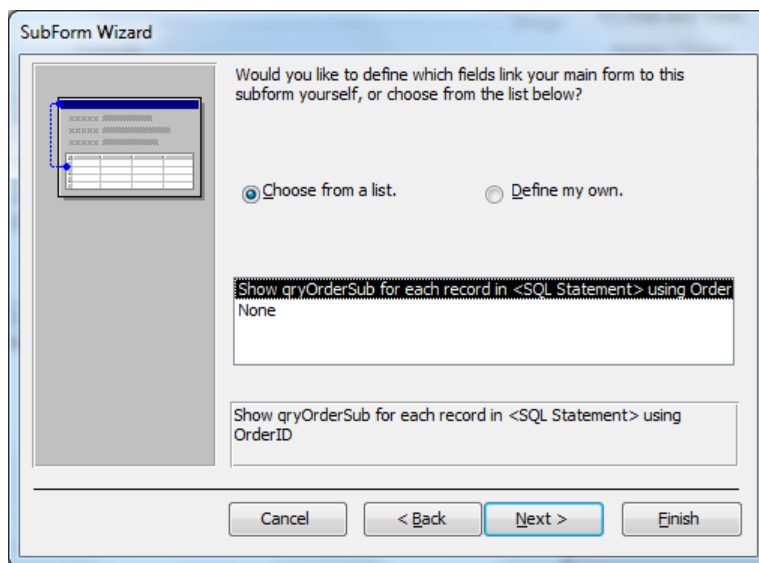
Click next retailer record to view a different set of transactions.

To insert a subform:

1. First create and save the subform.
2. From design view of the main form for frmOrder select the second tab page Order Detail.
3. Click the **Subform/Subreport** control and draw out the shape for the subform.



4. Select the subform, frmOrderSub.
5. Choose the option to link the main form with the subform based on OrderID then click Finish.



Order Form

General Order Details

Product	Quantity	UnitCost	TotalCost
Slim Case	100	£12.99	£1,299.00
Toaster	20	£45.99	£919.80
Vacuum Cleaner	10	£111.50	£1,115.00

Total of Order £3,333.80

View the form and select the Order Details tab to see the subform data.

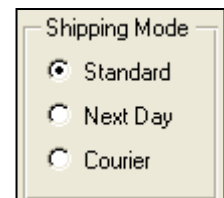
Note that the ProductId field has been changed to a combo box to display the Product Name field.

# Create and use group controls in forms

Another control available to forms is the **Option Group**. This allows a field to be displayed as a series of multiple choices.

For example, a field for selecting the shipping mode of a purchase.

Only one choice can be made from an option group and a default value can be set. In this example Standard is the default value. With Option groups the choice made is stored in the table as a value (1,2,3 etc) but displayed in the form as a description.



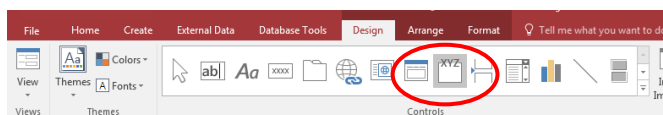
Shipping Mode

☒ Standard

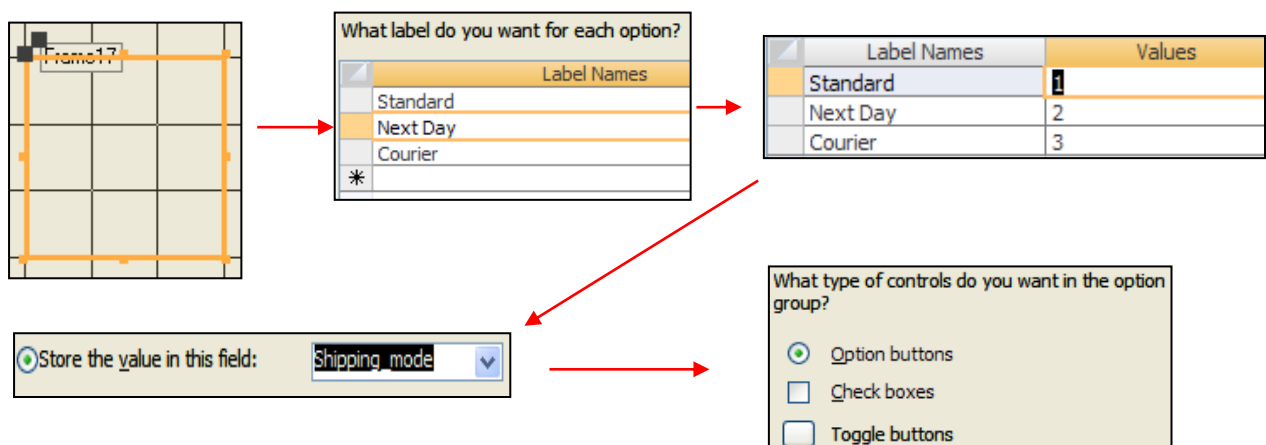
☐ Next Day

☐ Courier

To create an option group:



1. Select the **Option Group** control on the Form Design tab.
2. Draw a frame on the form.
3. Enter the labels for each option.
4. Choose the field in the table that stores the values.
5. Choose which type of option control (option buttons, check box or toggle button).
6. Finally enter a caption for the group (Shipping Mode).



Finally switch to form view to display the option group. The default is Standard for a new record.

## Creating macros and automation

---

In this unit you will learn how to:

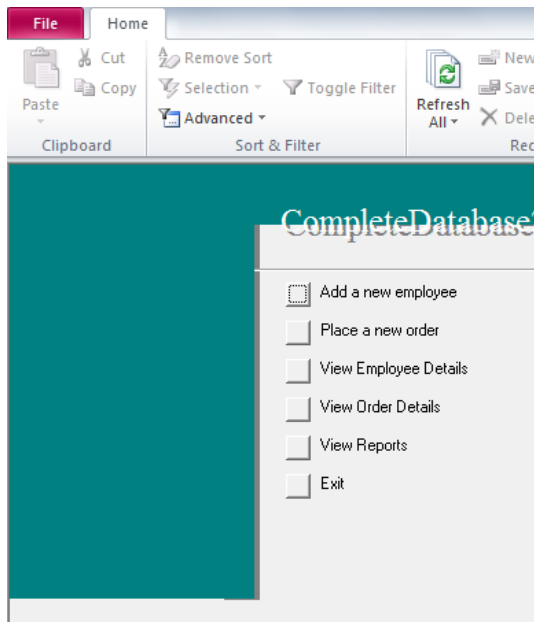
- Build a standard Switchboard
- Create a macro to automate tasks
- Attach macros to events of database objects

### Build a standard Switchboard

---

When a database application is completed and ready to use it helps to have a start up screen or menu. This allows users to operate and use the database easily and effectively. The start up screen can be designed either from a blank form containing a group of command buttons or by using the built in Switchboard Manager.

Here is a switchboard that can be created for the OrderingdbCompleted database.

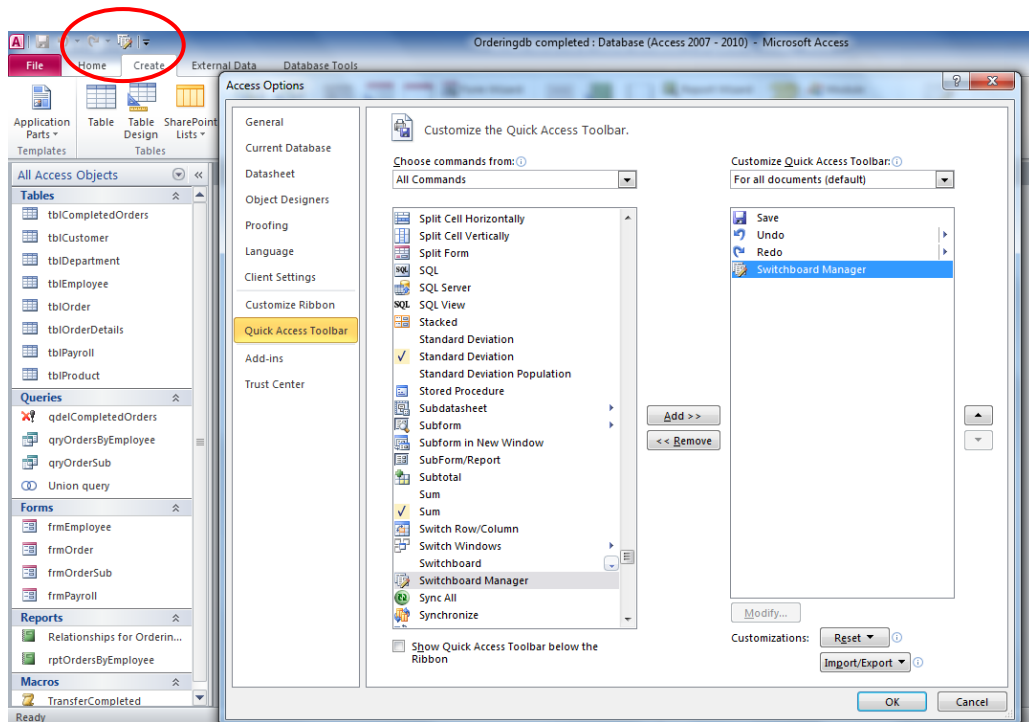


The switchboard can be set to open automatically when the database is opened. In addition, the ribbon tabs can be changed to control or restrict user access to the database objects.

### **Adding the Switchboard Manager**

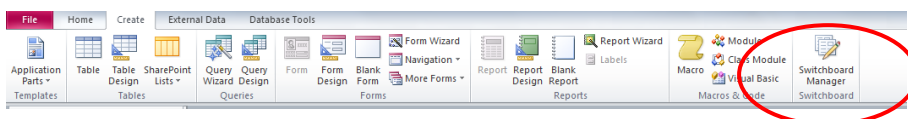
The Switchboard Manager is no longer on the main Ribbon tabs but can be added to either the Quick Access Toolbar or as a new group on the Create ribbon.

When customising the Quick Access Toolbar choose commands from **All Commands**.



Alternatively, to add the Switchboard manager to the Create ribbon:

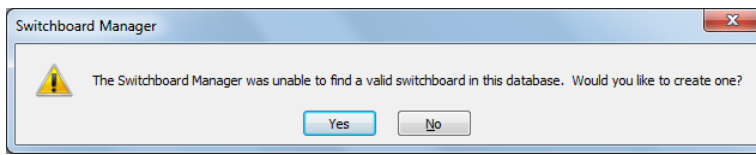
1. Choose **File, Options, Customize Ribbon**
2. Select the **Create** ribbon then click New Group.
3. **Rename** the group to SwitchBoard.
4. Choose **All Commands** and add the Switchboard Manager to the Switchboard group.



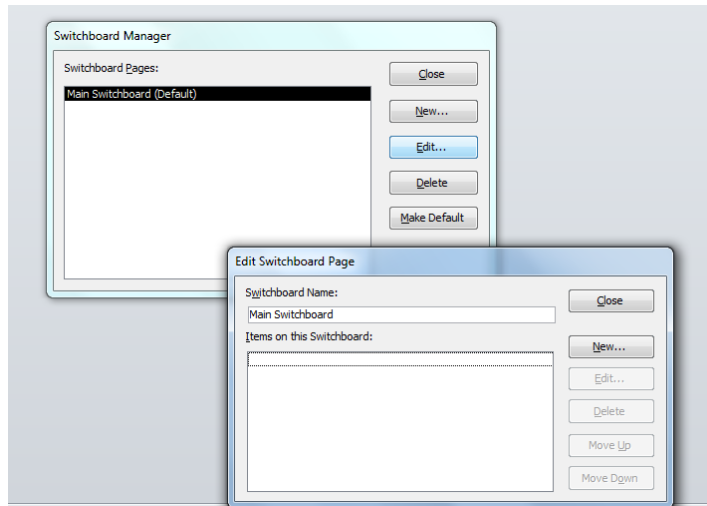
## Working with the Switchboard Manager

To create a new switchboard and start adding items to it follow the following steps:

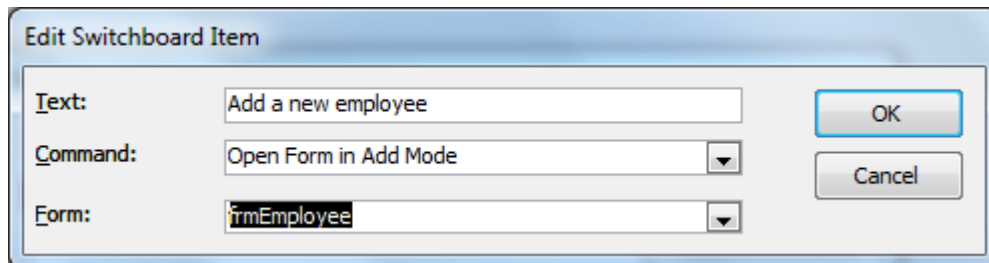
1. Click the **Switchboard Manager** and choose **Yes** the first time it is used.



2. On the next screen click **Edit** to edit the main switchboard.
3. Then click **New** to create a new item on the Main Switchboard.



4. Type the name 'Add a new employee'.



5. Choosing the command **Open Form in Add Mode** allows entry into a blank form without seeing the other records.
6. Select frmEmployee as the entry form.

Press Ok then continue to add another item to the switchboard by returning to step 3.

Add the following items

Text

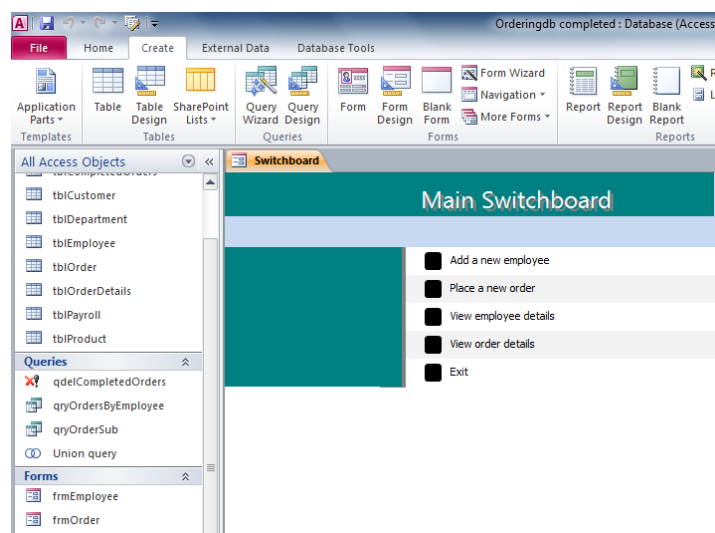
Command

Form

Place a new order	Open Form in Add Mode	frmOrder
View employee details	Open Form in Edit Mode	FrmEmployee
View order details	Open Form in Edit Mode	frmOrder
Exit	Exit Application	

When all the items have been added choose close and close the Switchboard Manager.

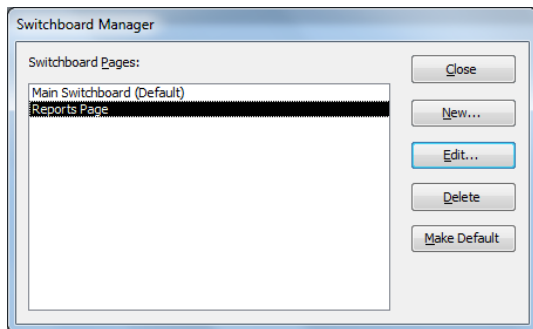
A form called Switchboard is now created. Open the form and check the items all work as required.



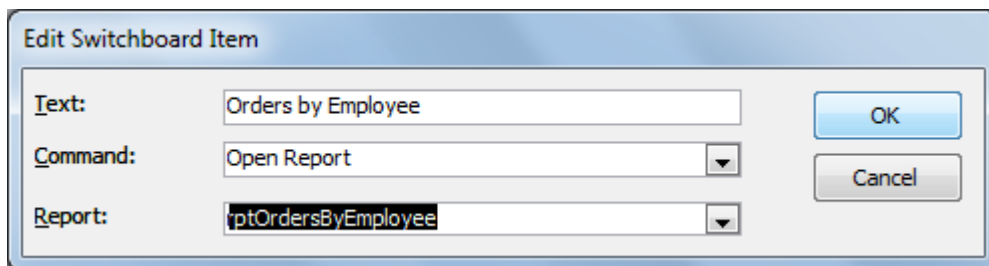
## Adding a new Switchboard page

The Switchboard Manager allows only 8 items per page but you can link to other pages. For example, a Reports page.

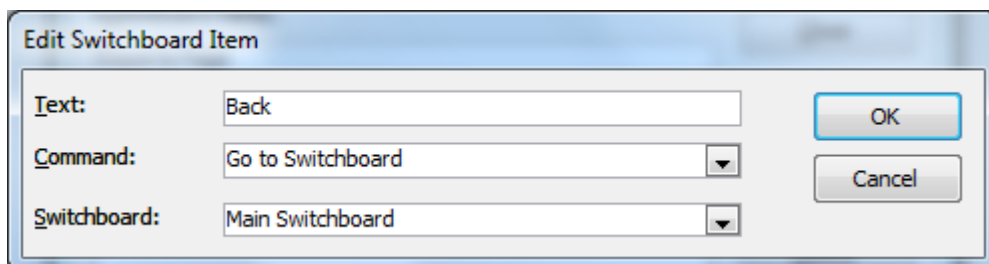
To add a page, start the Switchboard Manager and select **New** to create a new page. Name the new page Reports Page.



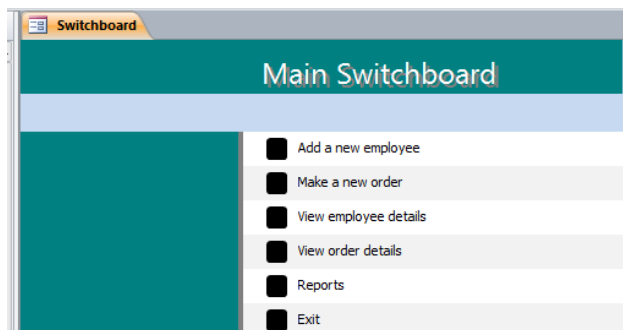
Click **Edit** to add report to the Reports Page. Set to open the report rptOrdersByEmployee.



Also create an item called Back on the Reports page with the command **Go to Switchboard**. This return the user back to the main switchboard.



Finally, on the Main Switchboard create a new item called Reports that goes to the Reports Page. The Main Switchboard now includes an item called Reports.



## Setting the Switchboard to Auto Open

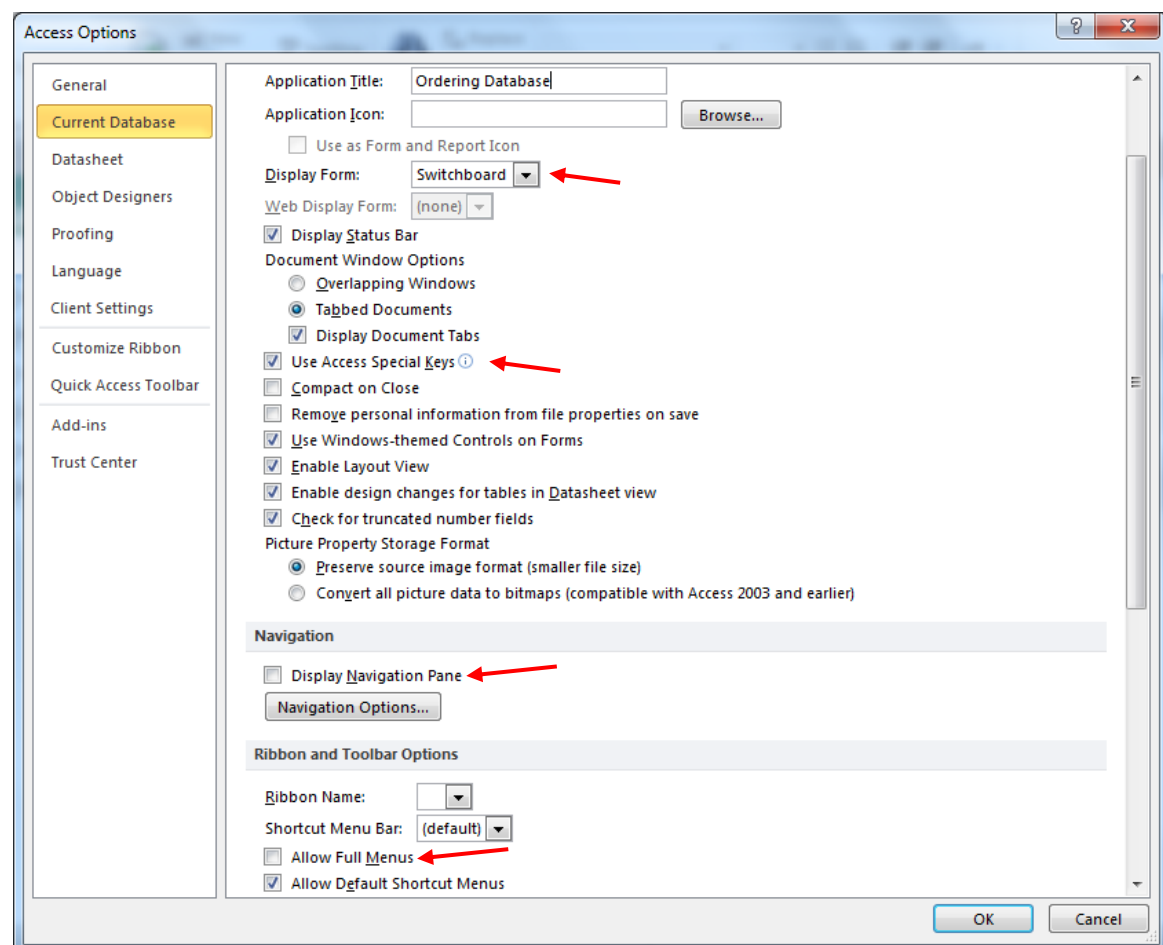
Having created a Switchboard or a form with command buttons that does a similar job you will probably want it to open the form automatically on opening the database. To do that:

1. Select **File, Options**
2. Choose **Current Database**
3. Next to the setting **Display Form** select Switchboard
4. Add an Application Title to change Access window title

## Restricting views

Untick **Show Navigation Pane** and untick **Use Access Special Keys** (to prevent users pressing F11 to view the navigation pane).

Untick **Allow Full Menus** to display only the File and Home ribbon.



## Unrestricting views

---

Select **File, Privacy Options** to access these start up settings.

Hint: To bypass the start up setting open the database by selecting Shift + Open.

## Create a macro to automate tasks

---

As with Switchboard buttons, macros buttons can be also created onto a blank form. They can be used to open tables, queries and reports or a series of different actions. Macros help users automate a set of repetitive tasks.

While Access macros cannot be recorded as they can in Excel, they can be built from the macro design screen without the need to write any code. Macros can also be set to trigger by events such as after updating a field or when navigating from record to record. Here are some examples of macros.

### Macro example 1

Suppose you wish to have a macro that archives records from a table that are marked complete. This would require two main actions: Running an Append query to copy records to an archive table then running a Delete query to delete the original completed records. Before creating the macro there are some objects to create:

1. In the Orderingdb database copy the table tblOrder and create a blank table called tblOrdersCompleted.
2. In the design view of tblOrdersCompleted change the first field data type from Autonumber to Number.
3. Create an Append query (qryAppendCompleted) that appends only records where the OrderComplete field is ticked from tblOrder to tblOrdersCompleted.
4. Create a Delete query (qryDeleteCompleted) which deletes records from tblOrder where OrderComplete is ticked.

Now we are set to build the macro for running these two queries. The macro will carry out the following steps:

Turn off screen prompts

Save the current record

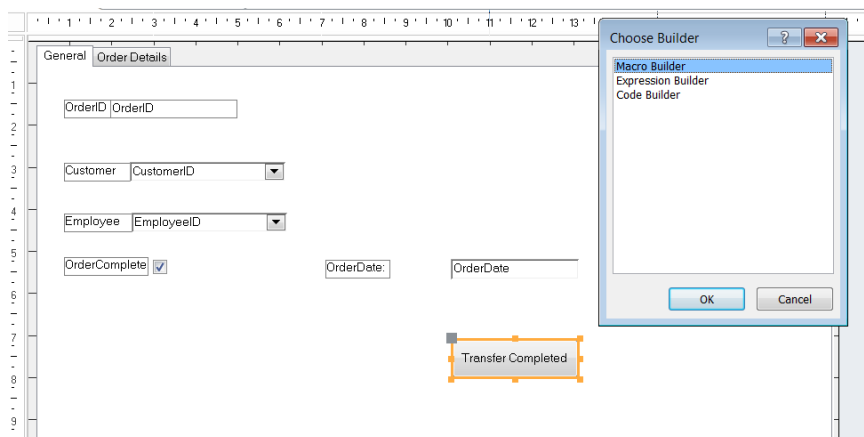
Run qryAppendCompleted  
Run qryDeleteCompleted  
Refresh the screen  
Add a prompt to say "Completed records transferred"

## Creating the macro

---

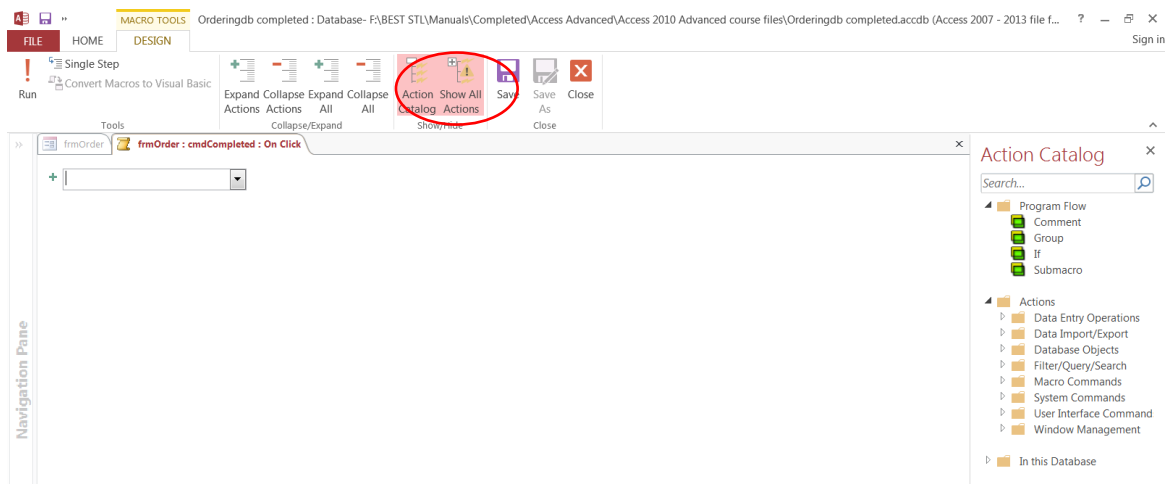
This macro will be run from a button on a form so start by:

1. Opening frmOrder in design view.
2. Turn off the Control Wizard and create a button for the macro.
3. Right click the button and from **Properties** name the button cmdTransferCompleted with a caption Transfer Completed.
4. Now right click the button and select **Build Event...**



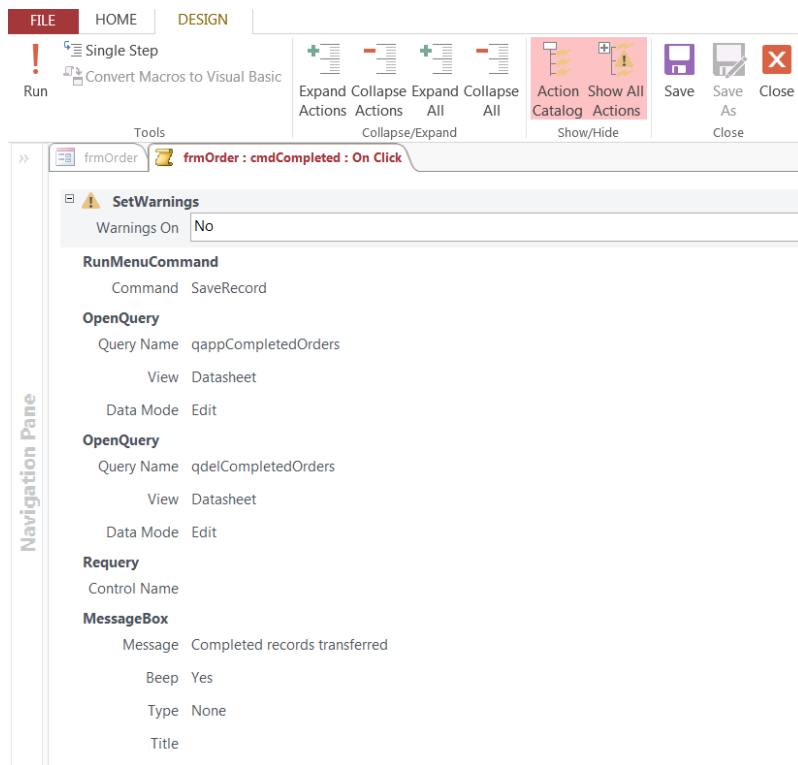
In this case choose **Macro Builder** (Code Builder would be used to build a macro by writing or copying VBA code).

From the macro design screen start choosing the actions you wish the macro to perform. Click **Show All Actions** to give a longer list of actions to choose from.

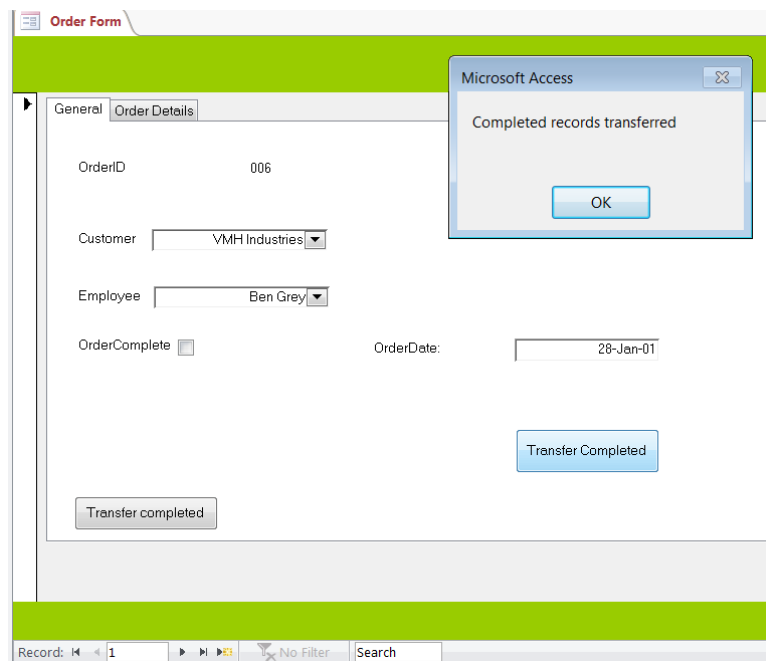


Action	Argument
SetWarnings	No
RunMenuCommand	SaveRecord
OpenQuery	qryAppendCompleted
OpenQuery	qryDeleteCompleted
Requery	(leave blank)

The macro design appears as follows for these actions.



Finally click Close and from Form view test the macro runs by navigating to any record and ticking the Order Complete field. Then when you click the Transfer Completed button the number of records should reduce by one after closing the message box.



## Macro example 2

This macro opens and previews a sales report then filters the report to show sales for one employee. The macro is to be run by clicking a button on a form (frmEmployee).

1. Start by opening the Orderingdb database and the form frmEmployee in design view.
2. Check that the Control wizard is on this time.
3. Create a button to preview the report rptSalesByEmployee.
4. Name the button cmdSalesReport and add the caption View Sales Report.

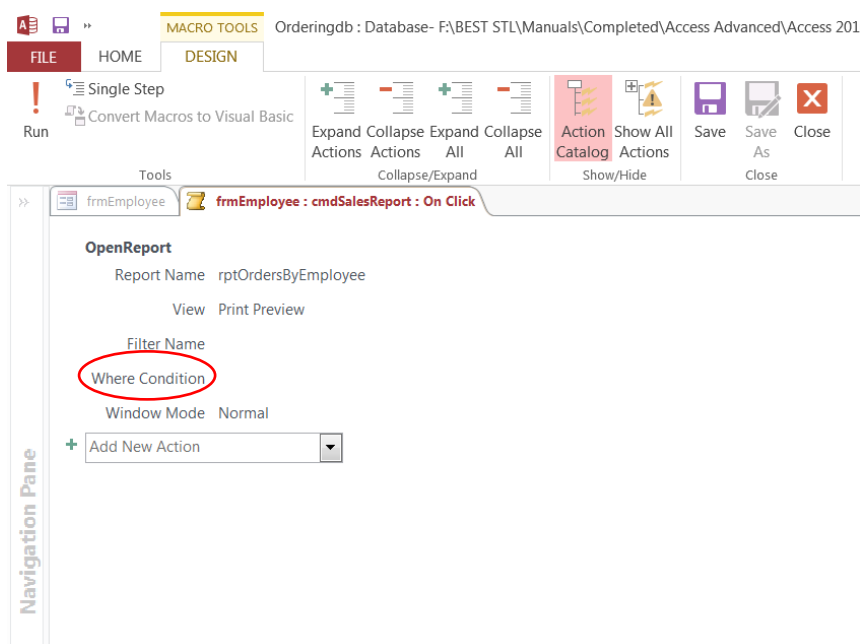
## Editing the macro

---

This button is based on a macro embedded in the frmEmployee form.

To edit the macro:

From design view, right click the button and choose **Build Event...**



Click **Where Condition** then click the Builder icon on the right.

Create the following expression:

FullName=Forms!frmEmployee!Forename & " " & Forms!frmEmployee!Surname

Close and save the macro then test that the button views the sales report just for the current employee.

Employee Form

qryOrdersByEmployee

## Employee Sales

FullName	ProductName	Quantity	UnitCost	TotalCost
Knut Hansen	Bent CD-ROM	2	45.00	90.00
	Bent CD-ROM	2	45.00	90.00
	Poker Card Game	100	4.00	400.00
	T-shirt	100	4.00	400.00
	USB Pen	10	4.00	40.00
	Poker Set	1000	4.00	4000.00
	Poker Book	1000	4.00	4000.00
	Jazz Book	2	4.00	8.00
	T-shirt	10	4.00	40.00
	Bent	10	4.00	40.00
Total Sales Report				653,961.50

Grand Total:

653,961.50

22 Nov 2010

Page 1 of 1

## Attach macros to events of database objects

The two previous examples of macros were attached to the *on click* event of a button.

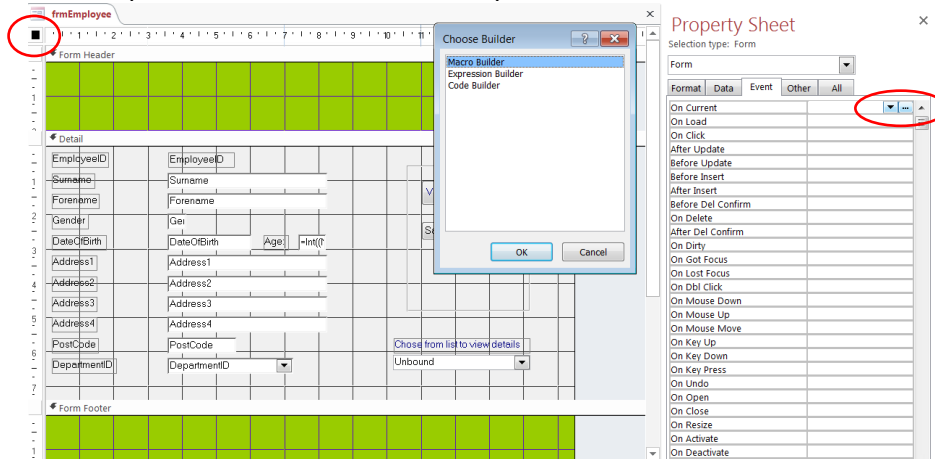
This can be seen by selecting the Events tab on the button properties. Macros can be assigned to run for other object events. For example, after a field on a form is updated or changed. (After Update, On Change). Macros can be triggered to run when navigating to the next or previous record. (This event is called **On Current**).

### Macro example 3

Suppose you want the user to only view reports for employees who are in a sales department (in this example DepartmentID 1 or 9). This can be done by creating a macro assigned to the On Current event of the form that enables the Sales Report

button only for employees in specific departments. The macro will run whenever a new record becomes current in the form.

1. From design view of frmEmployee double click the form properties button (left of the horizontal ruler).



2. Click the Events tab and for the On Current event click the ... button.  
Choose Macro Builder to open the macro design view.

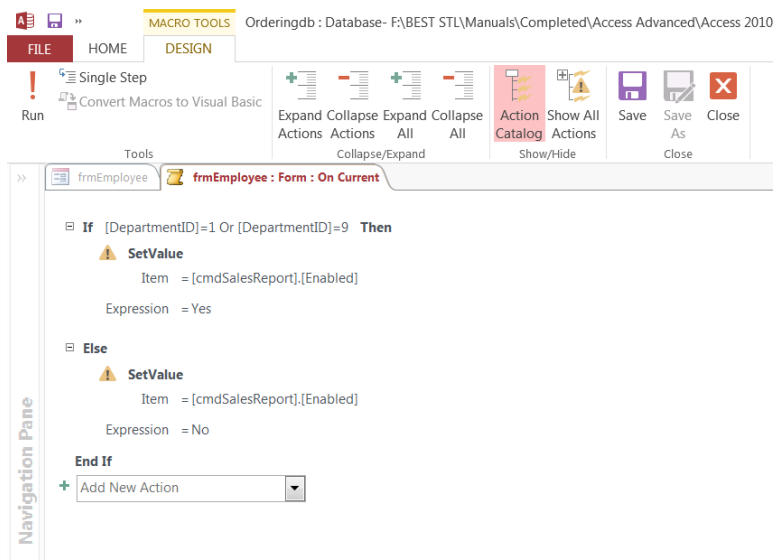
The first command is an IF statement:

If DepartmentID = 1 OR DepartmentID = 9

Then

use the **SetValue** command to set the Enabled property to Yes

Else set the Enabled property to No.



3. Save and test that the macro works. The Sales Report button becomes disabled for employee 004 because she does not work in sales.

## Exploring Access SQL

---

In this unit you will learn how to:

- Identify different clauses in SQL statements
- Write SQL statements that create queries
- Attach an SQL statement to a database object
- Creating a Union query

### Identify different clauses in SQL statements

---

When Access opens a query it executes an SQL (Structured Query Language) statement. The SQL statement is a series of clauses that perform the query. The SQL can be viewed or edited by selecting Design, SQL View.

To write a new query in SQL select **Create, Query Design** and close the table list. Then choose **View, SQL View**.

Here are some SQL statements that can be typed for the Orderingdb database.

## Selecting specific fields

---

```
SELECT ProductName, UnitCost  
FROM tblProduct
```

## Selecting All fields in a table

---

```
SELECT * FROM tblEmployee
```

## Selecting fields with a criteria

---

```
SELECT * FROM tblProduct  
WHERE UnitCost > 10
```

## SQL Statement to display matching data

---

```
SELECT tblEmployee.Surname, tblEmployee.Forename, tblOrder.OrderID  
FROM tblEmployee INNER JOIN tblOrder ON tblEmployee.EmployeeID = tblOrder.EmployeeID;
```

## SQL Statement to display matching data and all data from primary table

---

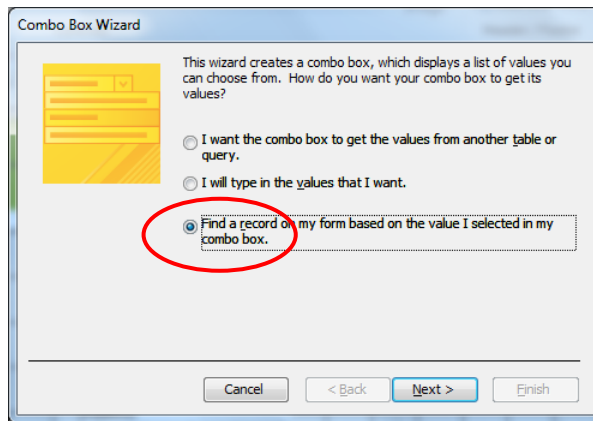
```
SELECT tblEmployee.Forename, tblEmployee.Surname, tblEmployee.EmployeeID  
FROM tblEmployee LEFT JOIN tblOrder ON tblEmployee.EmployeeID = tblOrder.EmployeeID
```

## Attaching an SQL statement to a database object

---

SQL can be inserted directly into the **Row Source** property of either a combo box or list box, thus enabling more customised selections than would be available if the control had been built with the wizard.

For example, suppose you use the Access Combo Box wizard to find a record based on the EmployeeID in the frmEmployee form (Orderingdb).



To make the combo box search for a fullname rather than an employeeID type the following SQL statement into the Row Source property of the combo box.

```
SELECT EmployeeID, [Forename] & " " & [Surname] AS FullName FROM tblEmployee Order by Forename;
```

The combo box displays the employee fullname in Forename order.

The SQL can instead be created in design view by clicking the ... button.

Note that the EmployeeID is hidden by setting the first column width to 0. Set the Column Count property to 2 and the Bound Column to 1.

## Creating a Union Query

A Union query is a query written in SQL that combines data from multiple tables into one dataset. For example, client names from two different tables can be combined into one list.

To show an example in the Orderingdb database first import a table called Clients from the Sales database.

Suppose you wish to combine the Firstname and Lastname from the Clients table with the Forename and Surname from tblEmployee.

Select **Create, Query Design** and close the show table dialog.

Select **Union** (or Data Definition) and type the following:

```
SELECT Firstname, Lastname from Clients
UNION SELECT
Forename, Surname from tblEmployee;
```

Click Datasheet View to display the combined names from both tables.

Note that data is automatically sorted by Firstname and the field headings are from Clients, the first table referred to in the Union query.



Firstname	Lastname
Alan	Foxx
Alan	Otwell
Alexander	Campbell
Alice	Neuhoff
Alistair	Lakeland
Alonzo	Gillis
Alonzo	Lu
Amy	Butler
Andrea	Hoffman
Andrea	Krupke
Art	Roarke
Arthur	Brand
Arthur	Greystoke
Ben	Grey
Bepe	Hamsen
Bob	Lock
Brian	Herman
Caitlin	Jones
Caitlin	May
Carmen	Campbell
Carole	Cooke
Charles	Goodwin
Charles	Lyman
Charles	Thackeray

Add **ORDER BY** Lastname to change the sort order.

Add **UNION ALL SELECT** instead of UNION SELECT to include any duplicate names. This also changes the order and keeps the names from the tables in separate blocks.

# Use hyperlinks, attachments and embedded objects

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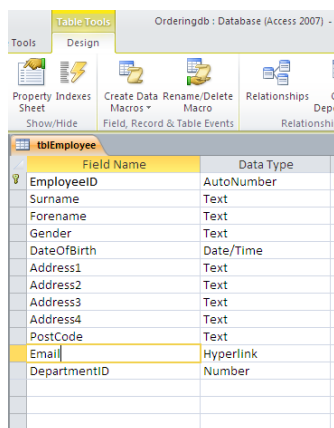
In this unit you will learn how to:

- Create and work with hyperlink fields
- Create and work with attachment fields
- Create and use embedded object fields

## Create and work with hyperlink fields

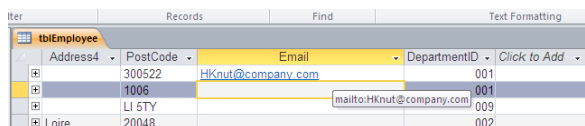
---

Access provides a number of useful field types to help with integrating with other Office Applications. One of these field types called Hyperlink allows a user to click to send an Outlook email message or visit an Internet web page.



Field Name	Data Type
EmployeeID	AutoNumber
Surname	Text
Forename	Text
Gender	Text
DateOfBirth	Date/Time
Address1	Text
Address2	Text
Address3	Text
Address4	Text
PostCode	Text
Email	Hyperlink
DepartmentID	Number

After creating the hyperlink field, the email address can be typed directly into the table. Then clicking on the hyperlink creates a new email message.



Address4	PostCode	Email	DepartmentID	Click to Add
	300522	HKnut@company.com	001	
	1006	mailto:HKnut@company.com	001	
	LI 5TY		009	
	Loire 20048		002	

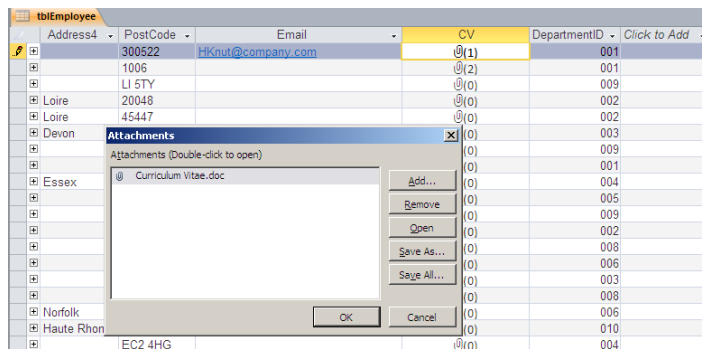
Access recognises the difference between an email address and a website address.

## Create and work with attachment fields

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The Attachment field type allows hyperlinking to an external document. For example to a resume, invoice or an graphical image.

To add an attachment, right click the attachment field and choose **Manage Attachments**.



Multiple attachments can be added with the number of attachments displayed in brackets. As well as clicking **Open** to view an attachment a copy of an attachemnt can be made by choosing **Save As**.

## Create and use embedded object fields

The OLE Object filed type is another way of intigrating other documents into each record of a table. This is useful for viewing a picture inside a form that is different for each record.

This form includes an OLE picture (Company Car), a hyperlink field (Email) and an attachment (CV).

## Manage and split a database

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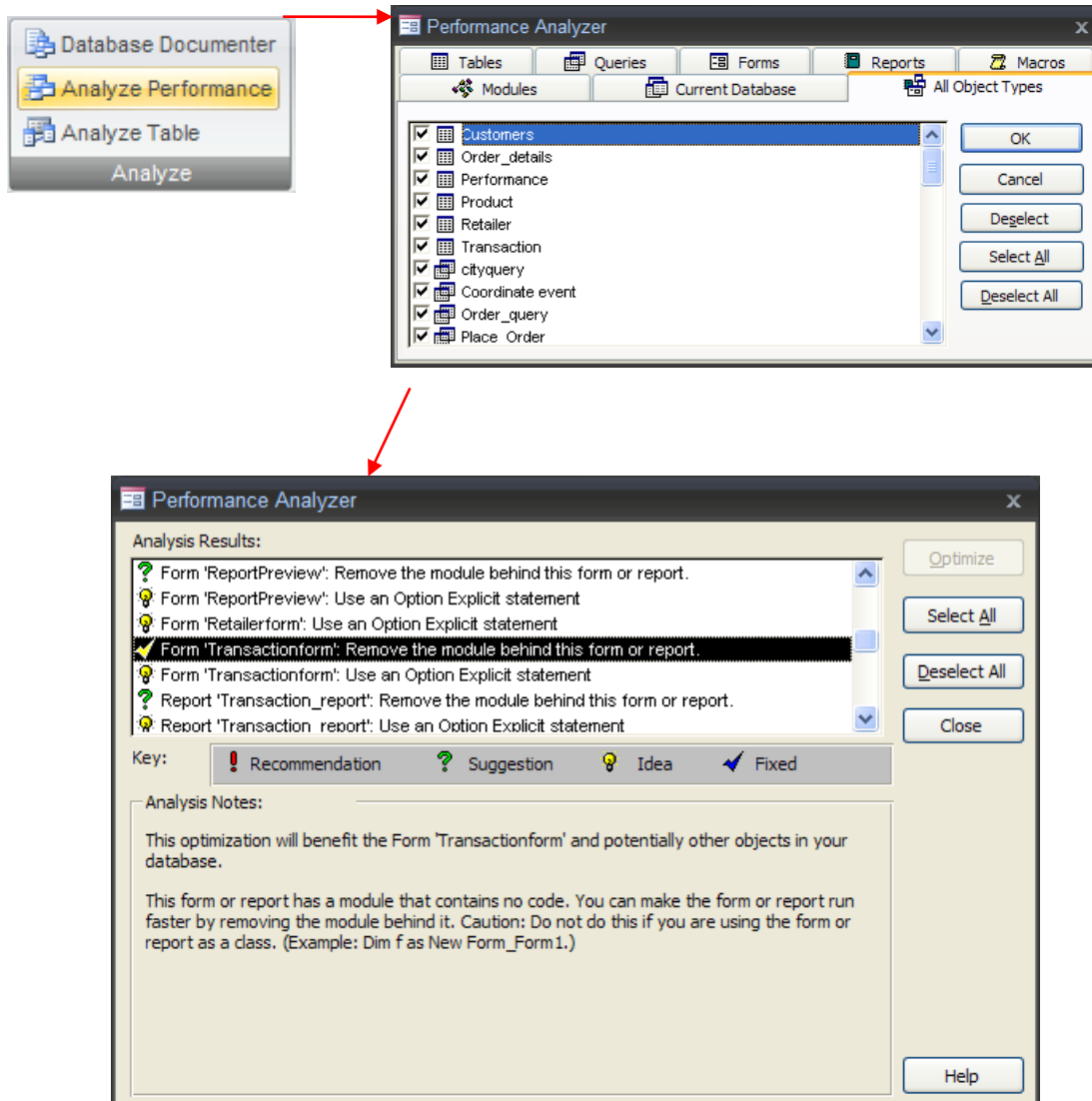
In this unit you will learn how to:

- Use analyse performance
- Save a database to an earlier version
- Split a database

## Use Analyze Performance

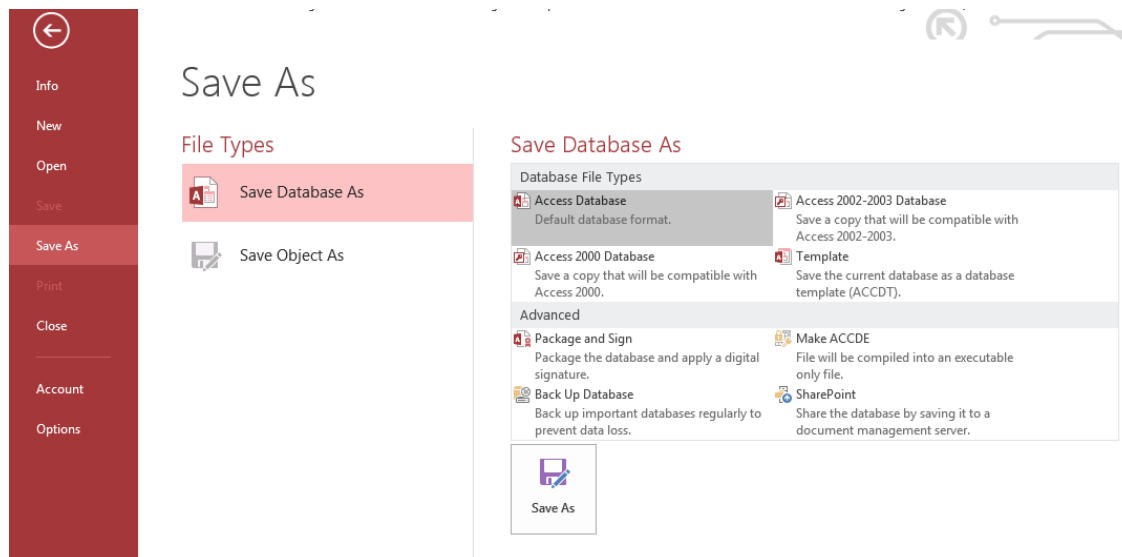
---

Under Database Tools, **Analyze Performance** allows Access to make recommendations and suggestions to improve your database performance. Selecting All Object Types allows you to select all objects at once.



## Save a database to an earlier version

To save an Access database to an earlier version (earlier than version 2010) close all the objects then select File, SaveAs

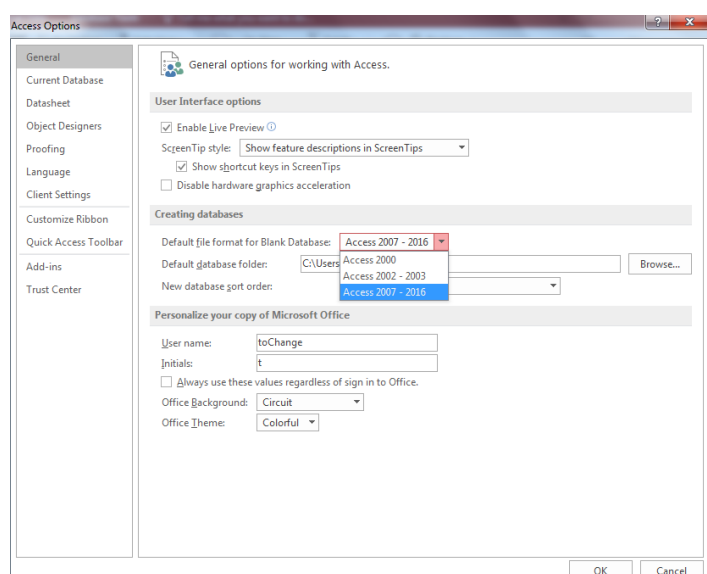


With Save Database As selected choose either Access 2002-2003 Database or Access 2000 Database then select the Save As button to confirm the database name.

## Default blank database version

If you regularly need to make databases in earlier Access versions then use

**File, Options, General** and you change the default file format for blank databases.



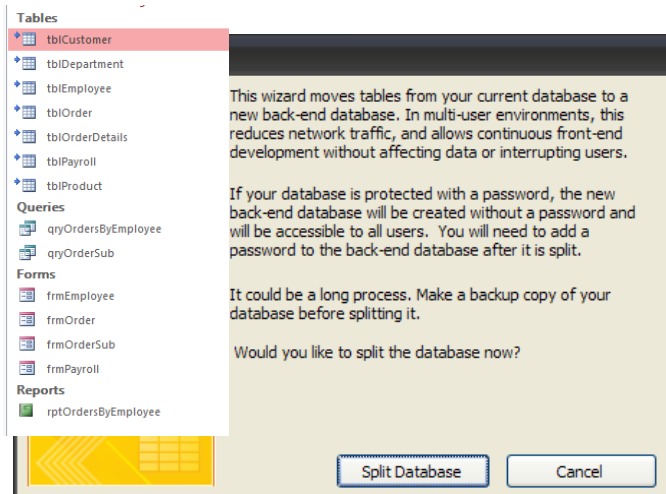
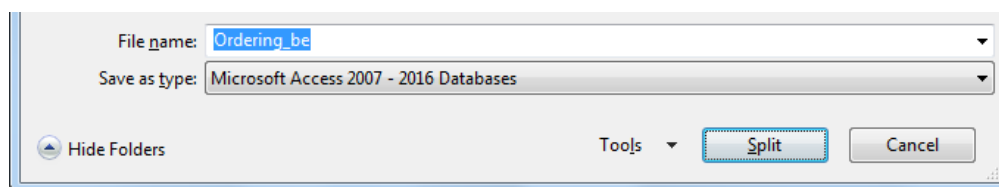
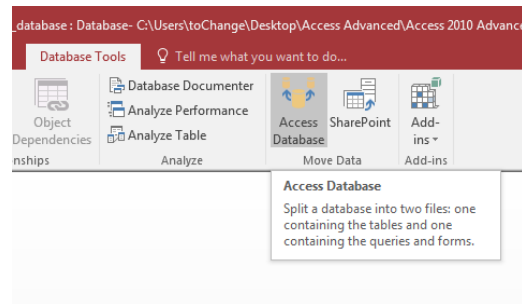
# Split a database

---

Before splitting a database, it is recommended you create a backup copy first.

Also close all open database objects before splitting the database.

To split a database choose **Database Tools, Access Database**



Splitting a database removes the tables from the original file and saves them into another database called the back-end.

All of the tables in the back-end database are linked to the object database containing the queries, forma and reports.

# protect and customize a database

---

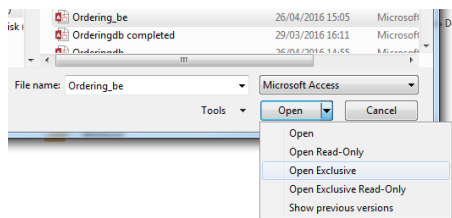
In this unit you will learn how to:

- Open a database as exclusive
- Set a database password
- Remove a database password
- Use Access options to custom a database

## Open a database as exclusive

---

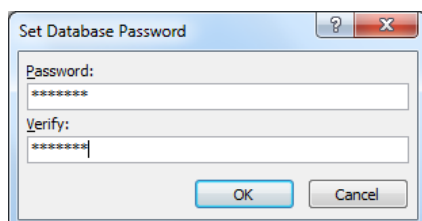
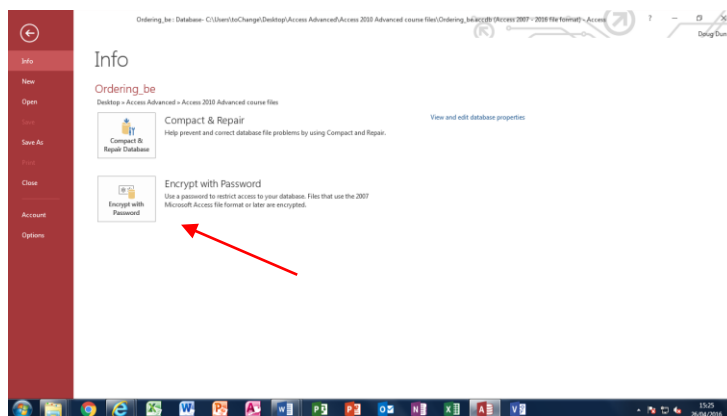
Before setting a database password the database must be opened as Exclusive.



## Set a database password

---

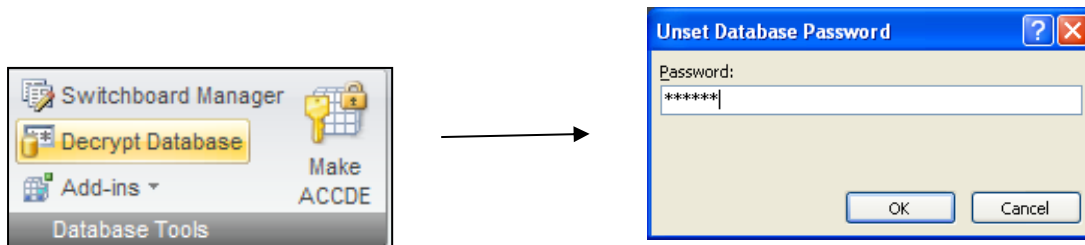
After opening the database exclusive select File, Encrypt with Password



## Remove a database password

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First open the database Exclusive



## Use Access options to custom a database

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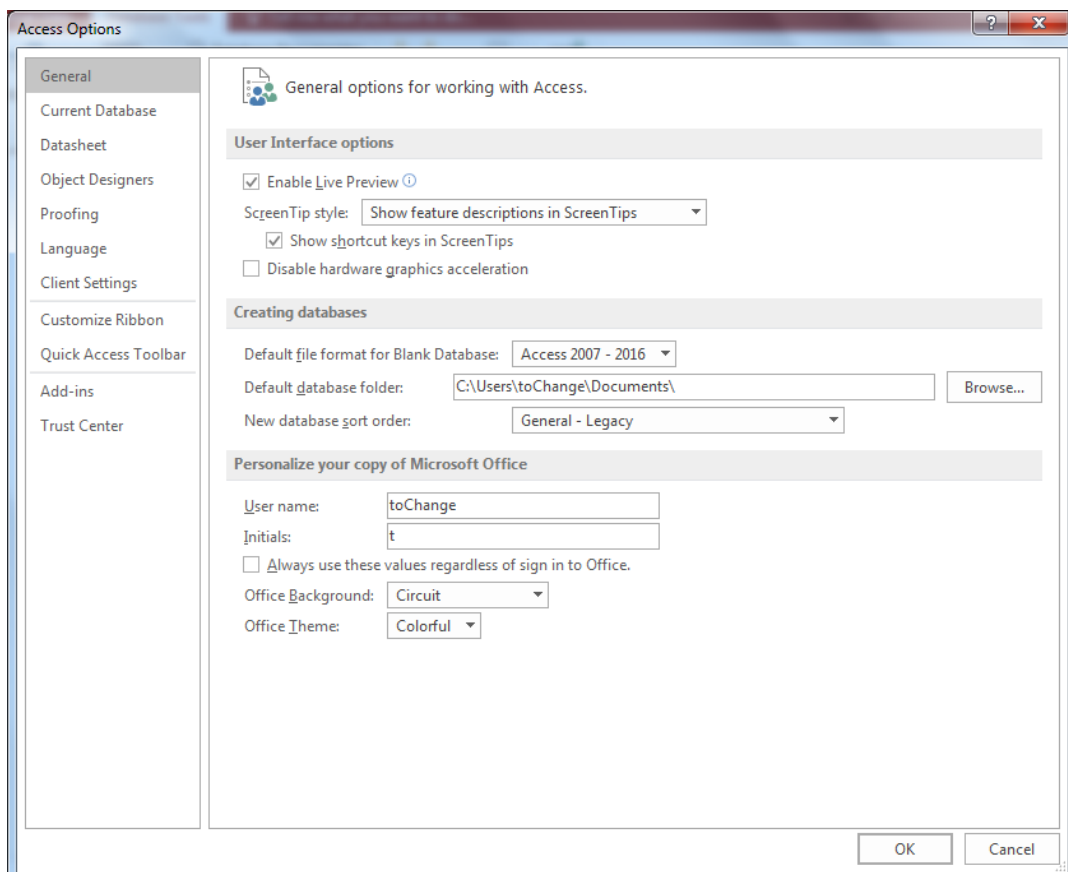
Access can be modified to suit every facet of your needs.

Select **File, Access Options** to view the options dialog box.

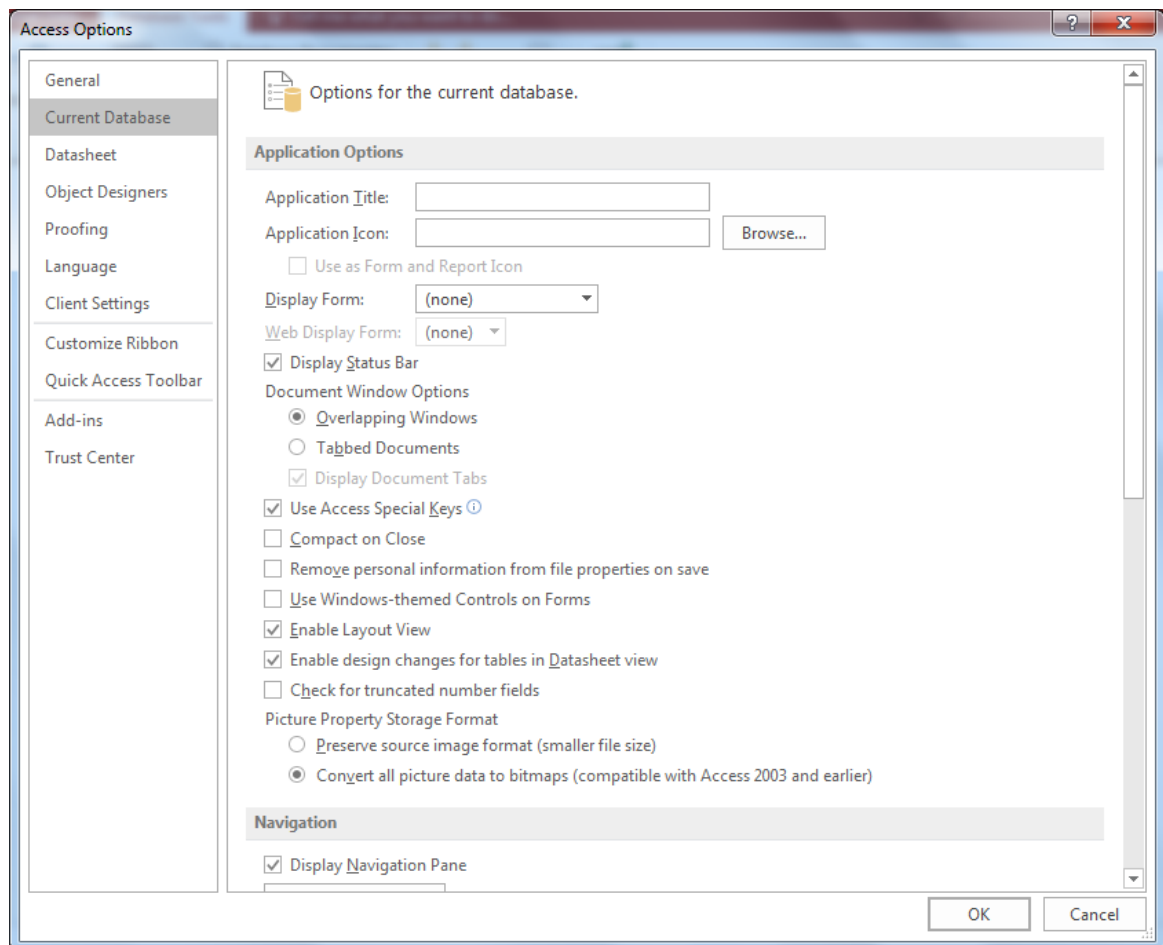
### The Options dialog box

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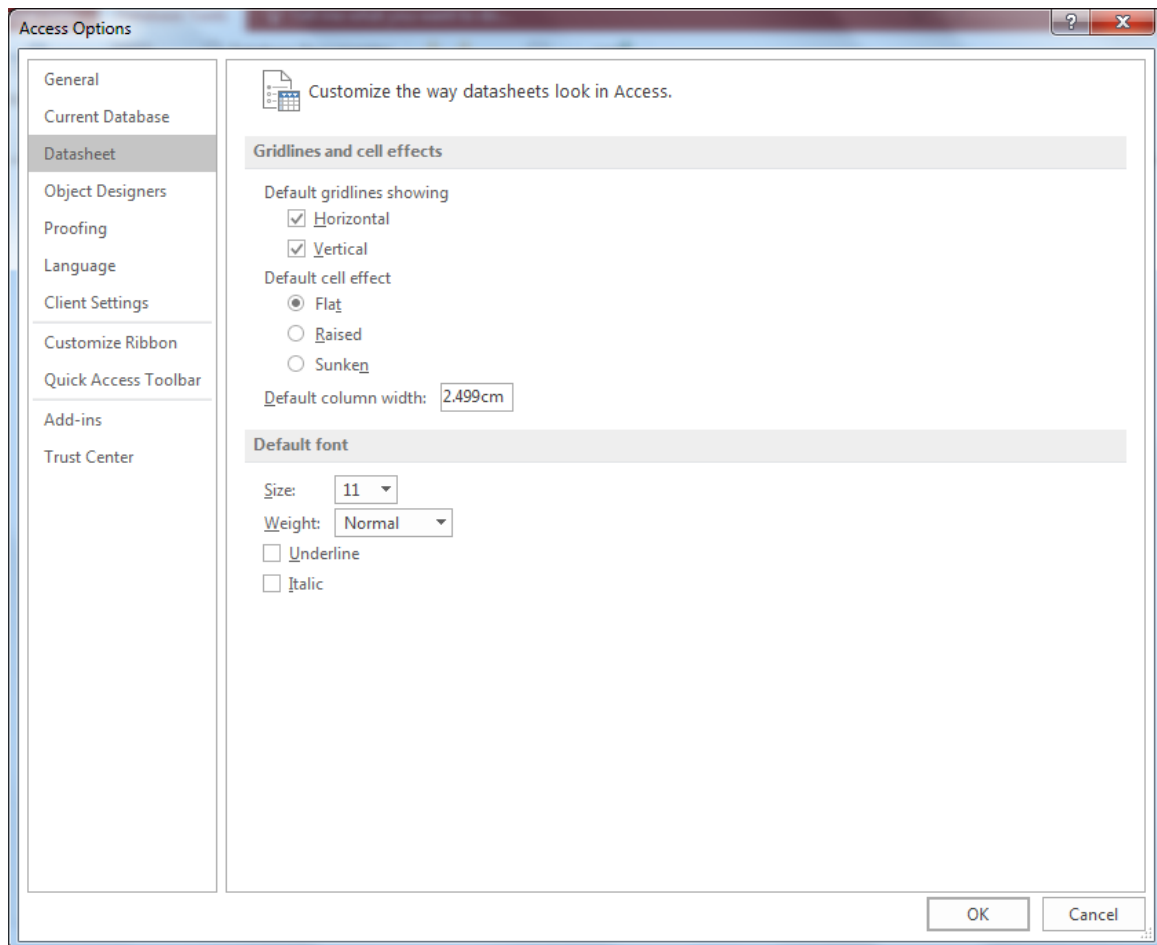
**General** – This pane will allow you modify some of the more basic options.



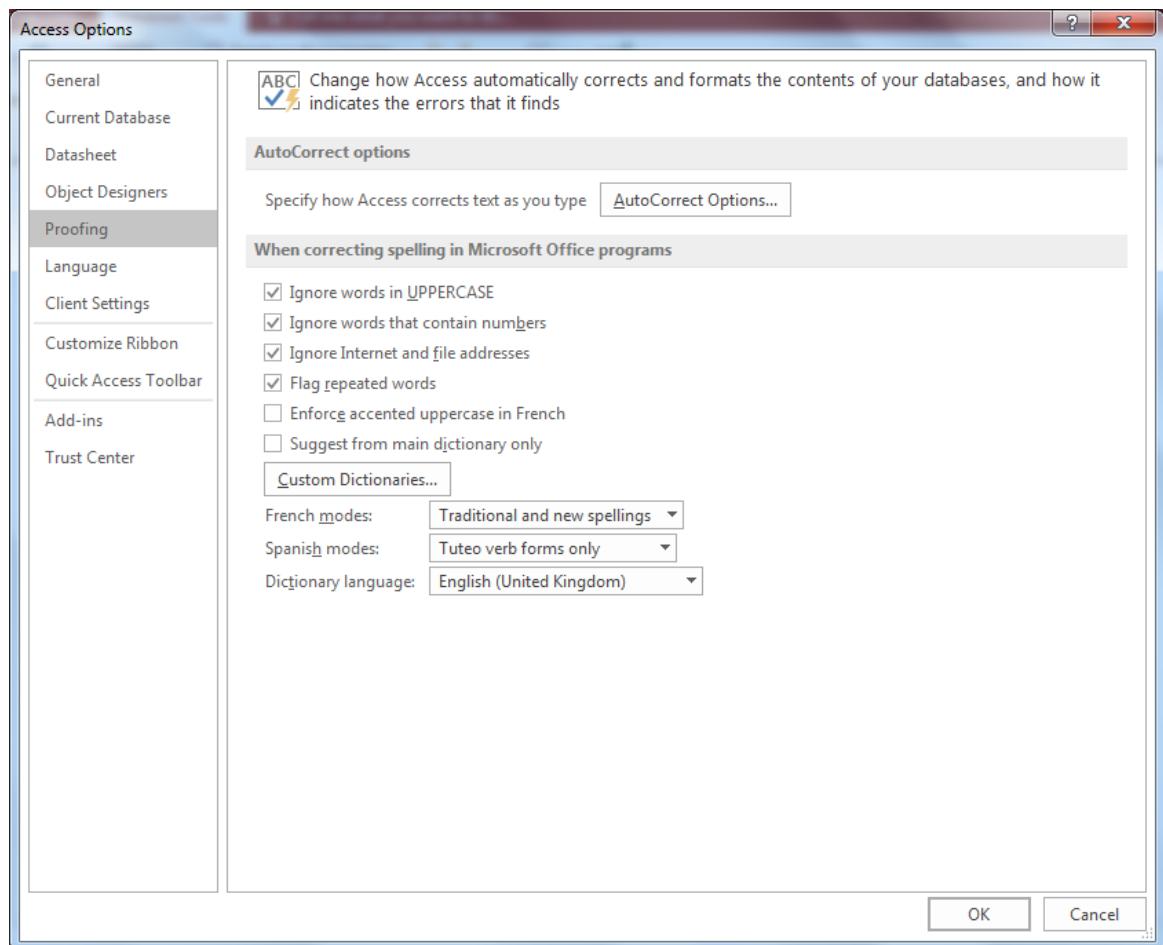
**Current Database** – Adjust the settings, look and functionality of the database you currently have opened.



**Datasheet** – The options in this pane adjust how datasheets are displayed, the color schemes used in the cells, the font, and the effects applied directly to the datasheet.



**Proofing** – These options deal with AutoCorrection and the error checking Access uses when dealing with input from a user.



## Quick Reference: Access Shortcuts

Command	Keystroke
Add new record	Ctrl +
Builder	Ctrl-F2
Check/uncheck box or option button	spacebar
Close	Ctrl-W
Copy	Ctrl-C
Cut	Ctrl-X
Cut current line and copy to Clipboard	Ctrl-Y
Cycle through sections	F6/Shift-F6
Cycle through tab of each object's type (toggle)	Ctrl-Tab/Shift-Ctrl-Tab
Database window	F11
Delete current record	Ctrl -
Edit/Navigation mode (toggle)	F2
Exit subform and move to next/previous field in next record	Ctrl-Tab/Shift-Tab
Extend selection to next/previous record	Shift-Down/Up
File/Save As	F12
Find	Ctrl-F
Find Next	Shift-F4
Find Previous	Shift-F3
GoTo	Ctrl-G
Insert current date	Ctrl ;
Insert current time	Ctrl :
Insert default value	Ctrl-Alt-spacebar
Insert new line	Ctrl-Enter
Insert value from same field in previous record	Ctrl '
Menu bar	F10
Move to beginning/end of multiple-line field	Ctrl-Home/End
Move to current field in first/last record (Navigation mode)	Ctrl-Up/Down
Move to first field in first record (Navigation mode)	Ctrl-Home

<b>Command</b>	<b>Keystroke</b>
Move to first/last field in current record (Navigation mode)	Home/End
Move to last field in last record (Navigation mode)	Ctrl-End
Move to left edge of page	Home or Ctrl-Left
Move to page number/record number box	F5
Move to right edge of page	End or Ctrl-Right
Next window	Ctrl-F6
Open combo box	F4
Open in Design view	Ctrl-Enter

<b>Command</b>	<b>Keystroke</b>
Paste	Ctrl-V
Print	Ctrl-P
Property sheet	Alt-Enter
Refresh combo box	F9
Replace	Ctrl-H
Requery underlying tables in subform	Shift-F9
Save current record	Shift-Enter
Screen left/right	Ctrl-PgUp/PgDn
Select/unselect column (Navigation mode)	Ctrl-spacebar
Switch to Form view	F5
Turn on Move mode	Ctrl-F8
Undo	Ctrl-Z
Undo previous extension	Shift-F8
Zoom box	Shift-F2

## E&OE

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