



Microsoft **Access** 101

Course Handbook Supplement

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Welcome

Welcome to the 599CD **Microsoft Access 101** Handbook.

This handbook is designed to be a **supplement** to the full 599CD video course for **Microsoft Access 101**. We recommend you use this handbook to follow along with the class videos. This handbook is not meant as a stand-alone study guide.

We do recommend that you watch the course videos one time through, paying attention to the lessons covered. Follow along with the course videos using this guide. Take notes on the pages where needed. Then, watch the videos a second time, practicing the examples yourself on your computer.

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Lesson 1. Introduction

Welcome to **Microsoft Access 101**, brought to you by **MyOnlineLearningPartner.com** and **599CD.com**.
I am your instructor, Richard Rost.



Objectives for today's class:



In this class we will be using **Microsoft Access XP (2002)** and Windows XP, however this course is valid for any version of Windows, you should have no problems following this course if you are using Access 97, 2000 or 2003.

Pre-Requisites: Windows 101, 102, or 110. Word 101 and Excel 101 are also recommended.

Lesson 2. Terminology

A computer **database** is a program that lets you store, manage, and manipulate data.

Some **examples** of databases include Microsoft Access, Microsoft SQL Server, your customer list in Microsoft Excel, a card catalog, a phone book.

Microsoft Access databases are a collection of one or more of the following **components**: Tables, Queries, Forms, Reports, Pages, Macros, and Modules.

Tables allow us to store data, much like a spreadsheet.

Tables


MYOLP.com

Tables allow us to store data

Confomant 1: Table

EmpID	First Name	Last Name	Company	Phone	Address	City	State	ZIP	Notes	EmpID	Custom	Credit	Ind	Active
1	Richard	Ross	Amicron	7168374686	137 Hurdlegh	Amherst	NY	14226	Great guy!	7	2/1/94	\$100.00		<input checked="" type="checkbox"/>
2	Joe	Smith	XYZ Corp	7168374686	101 Main	Depew	NY	14043		3	1/1/90	\$150.00		<input checked="" type="checkbox"/>
3	Bill	Williams	ABC Data	5126276372	5 Bull Ave	Sheepsville	TX	53625	Nice fellow	109	5/2/97	\$1,000.00		<input checked="" type="checkbox"/>
4	Sam	Johnson	Motor Inc	7168252626	10 Penn Dr	Anywhere	PA	19082		15	1/1/98	\$0.00		<input type="checkbox"/>
5	Ian	Barclay	Amicron	7168374686	PO Box 1453	Buffalo	NY	14226	Cool dude	7	6/1/97	\$200.00		<input checked="" type="checkbox"/>
6	Janet	Smith	ATQ Design	7168376372	1 Park Ave	Orchard P	NY	14127	Great comm	15	1/1/90	\$50.00		<input checked="" type="checkbox"/>
										0		\$0.00		<input type="checkbox"/>

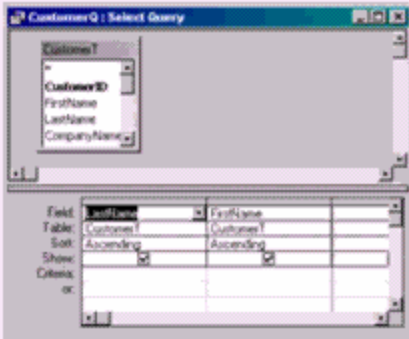
Records: 1 of 6

Access 101: Introduction to Microsoft Access


Queries allow us to view data in different ways.


Queries

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Queries allow us to view data in different ways

Access 101: Introduction to Microsoft Access




Forms allow us to build a user-friendly interface for our users. Forms also allow us to add functionality to our databases.

Forms

MYOLP.com

Forms allow us to build a user-friendly interface for our users



Access 101: Introduction to Microsoft Access



Reports allow us to format data to be printed.

Forms

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**Forms allow us to
build a user-friendly
interface for our users**

Access 101: Introduction to Microsoft Access

Data Access Pages allow us to take data and work with it on a Web page.

Macros allow us to automate repetitive tasks.

Modules allow us to write Visual Basic programming code for our database.

We will work with tables, queries, forms, and reports today. We will cover these last three components in future classes.



Lesson 3. Planning Your Database

Before you start working with Access, sit down with paper or a whiteboard and **plan** out your database.

Determine what **kinds** of information you need to work with.

What **Tables** do you need in your database? What are you storing? Customers, orders, products, vendors, and employees are all examples.

What **fields** does each table need? A customer table, for example, might contain a customer name, address, phone number, how long they've been a customer, whether or not he receives a catalog, etc.

What kinds of **queries** will you need. If you have 1000 customers in your database, for example, you can make a query to sort them by last name, for example.

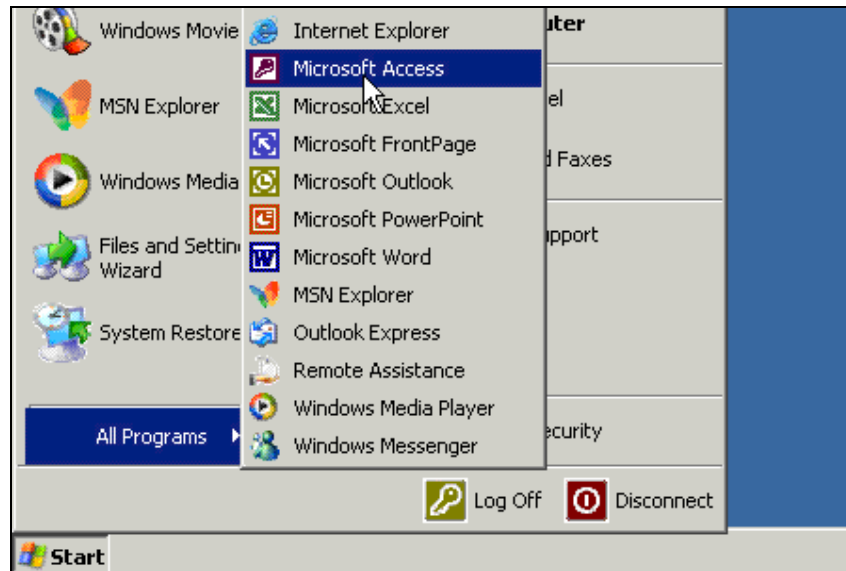
What kinds of **forms** will you need. How user-friendly does your database need to be? What's the skill level of your average user?

What kinds of **reports** will you need? Plan them out on paper! It helps to have the previous paper versions on hand (you know, the ones you've been using up until now).

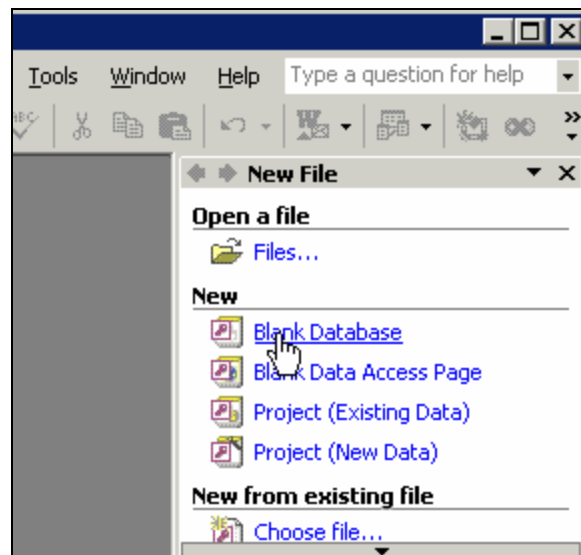
The more **planning** you do before building your database, the easier building your database will be.

Lesson 4. Getting Started

Let's begin by starting Microsoft Access. Click on **Start > All Programs > Microsoft Access**.

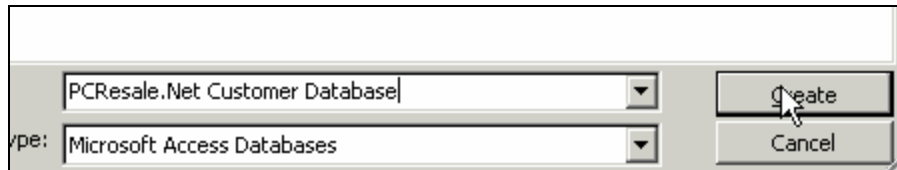


Access does not start you off in a blank database, unlike Word and Excel that start you off in a blank document and spreadsheet respectively. Let's create a new, blank database file. Click on **Blank Database** on the Task Pane under the **New** section.

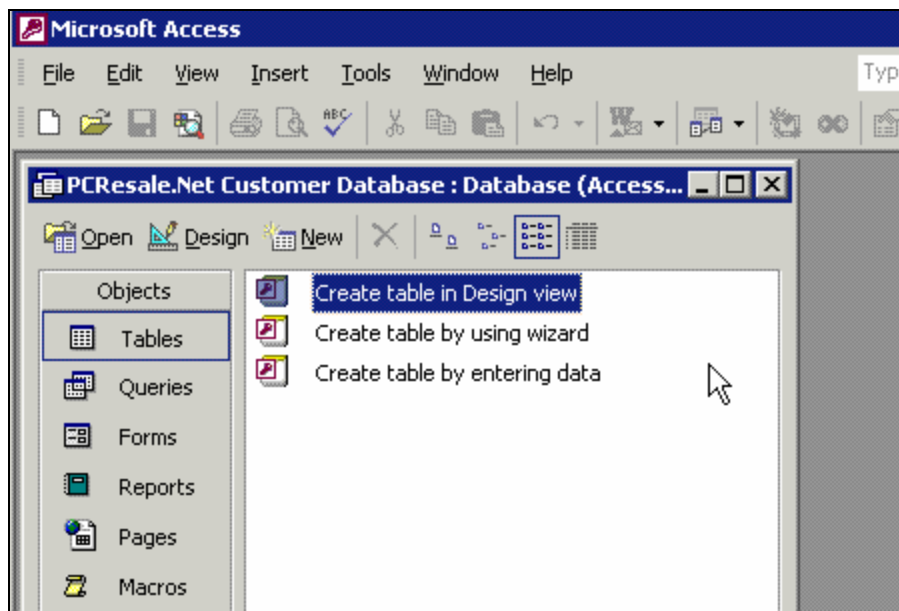


Note: if you are using a version of Access before XP, just click on **File > New Database**.

Access wants you to provide a filename for your database. The **New File Database** window appears. Let's type in a filename for this database. I'm creating a database for my fictional computer company PCResale. So I'll type in **PCResale.Net Customer Database**. Click Create.

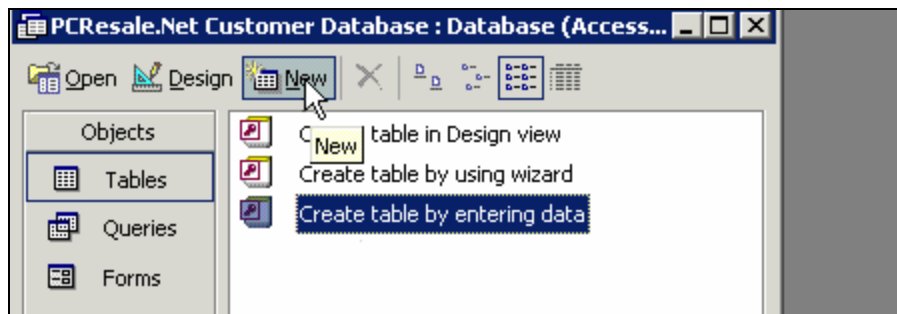


You will now see the blank **Microsoft Access Database** window.

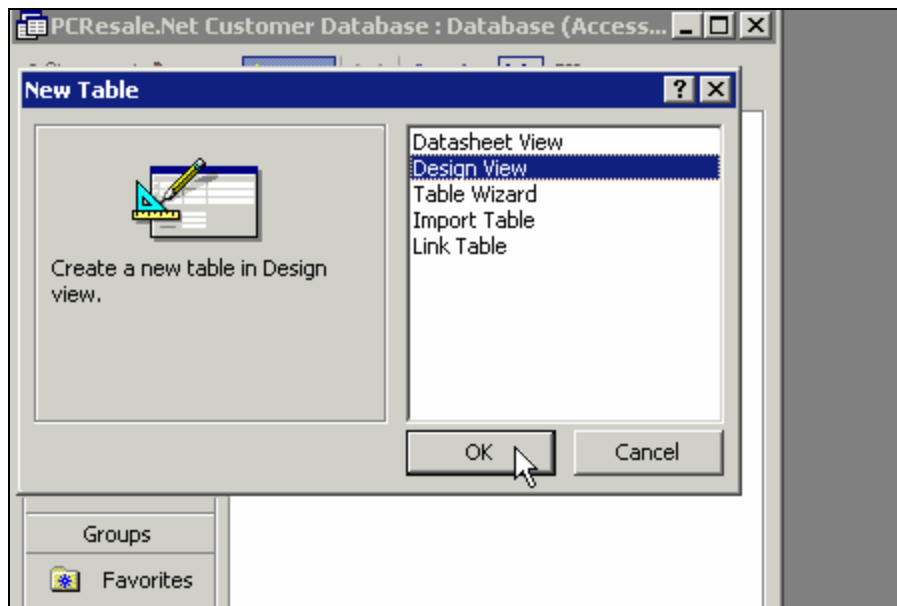


Lesson 5. Customer Table, Part One

Make sure you have **Tables** clicked on, and click on **New** to create a new table.



Click on **Design View** and then **OK**.



You will now see a blank table window.

	Field Name	Data Type	Description
▶			

Field Properties

General | Lookup

We can now begin entering in the fields for our table. Under the Field Name column, type: **FirstName**

	Field Name	Data Type	Description
▶	FirstName		

Field Properties

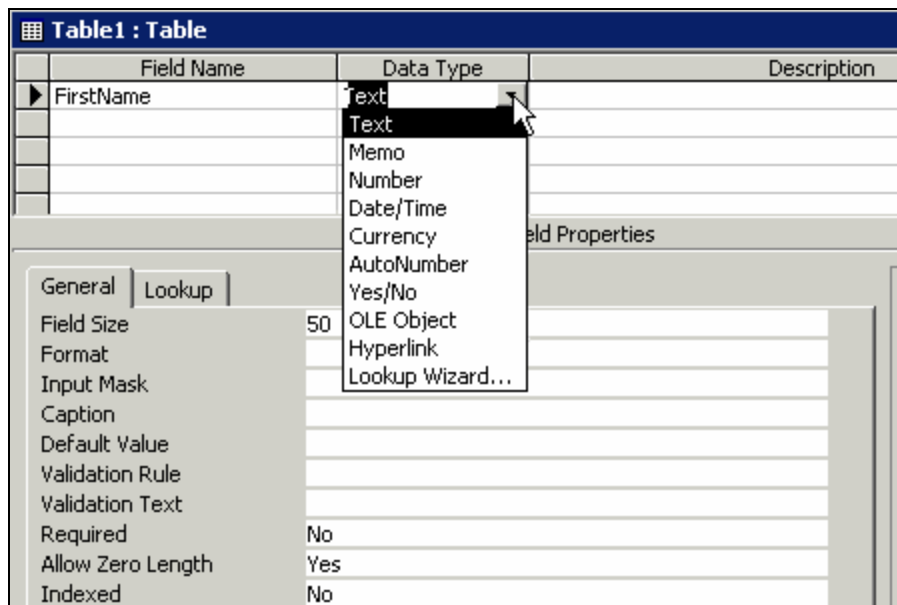
General | Lookup

Do not use a space between “First” and “Name.” I’ll explain why later. For now, do not use spaces in your field names. You **can**, but trust me, you don’t want to... you’ll thank me later.

I’ve only capitalized “First” and “Name” to make it easier to read.

Lesson 6. Customer Table, Part Two

Hit the **TAB** key and this moves you to the **Data Type** column. The default data type is **Text**. If you click on the drop-down arrow in this column, you'll see the long list of data types available.



Text is any printable character: a-z, 0-9, and all the other characters like space, @, \$, &, and so on. A text field can be up to 255 characters long. A **Memo** field is a big text field, and can store thousands of characters, but lacks some of the functionality that text fields have. Use sparingly.

Numbers can include counting numbers, integers, decimals, and so on. The **Date/Time** data type stores dates, times, or both. The **Currency** data type is a special number that's optimized for dealing with dollar values.

AutoNumbers are a special kind of number that start at 1 and automatically count up with each number. These are good for customer IDs, for example. **Yes/No** data type fields are good for tracking true/false data. **OLE Objects** (Object Linking & Embedding) can be used to store pictures, sound clips, and more. **Hyperlinks** are used for storing web links. Don't worry about the **Lookup Wizard**.

Select **Text** for the **FirstName** field, and then press **TAB**.

Lesson 7. Customer Table, Part Three

The **Description** column is optional. If you want to store notes here, you can. This information will show up on the status bar in your forms.

Table1 : Table		
Field Name	Data Type	Description
▶ FirstName	Text	This is the customer's first name

Field Properties	
General	Lookup
Field Size	50
Format	
Input Mask	
Caption	
Default Value	
Validation Rule	
Validation Text	
Required	No
Allow Zero Length	Yes
Indexed	No

Press **TAB** again, and enter in a new field name: **LastName**.

Table1 : Table		
Field Name	Data Type	Description
▶ FirstName	Text	This is the customer's first name
▶ LastName		

Field Properties	
General	Lookup

Again, select **Text** for the data type for **LastName**.

Table1 : Table			
	Field Name	Data Type	Description
	FirstName	Text	This is the customer's first name
	LastName	Text	
Field Properties			

Now, go ahead and enter in the following fields:

- CompanyName (text)
- Phone (text)
- Fax (text)
- Address (text)
- City (text)
- State (text)
- ZIP (text)
- Country (text)
- Notes (memo)
- NumEmployees (number)
- CustomerSince (date/time)
- CreditLimit (currency)
- Active (yes/no)

Sometimes you might have a phone number with letters in it. That's why we will use a text field for phone. **Here's the test:** if you are ever going to be doing **calculations** on the data, use a number field. If not, use text – it's easier to deal with. Are you ever going to add up a column of phone numbers? Probably not. Also, some ZIP codes in the US begin with **zero**. If you use a number field for this, you'll lose the leading zero. The same problem exists with Social Security Numbers. Use text for these fields.

Table1 : Table			
	Field Name	Data Type	Description
	NumEmployees	Number	
	CustomerSince	Date/Time	
	CreditLimit	Currency	
	Active	Yes/No	Customer will get newsletter
Field Properties			
General Lookup			
Format Yes/No			
Caption			

Notice that with your number types, there is a drop-down option below that let's you pick what type of number you want. For today, all you have to worry about is **Long Integer** and **Decimal**. Long Integers are whole numbers and their negatives. Decimals allow you to store numbers with a fractional component.

Table1 : Table		
Field Name	Data Type	Description
ZIP	Text	
Country	Text	
Notes	Memo	
NumEmployees	Number	

Field Properties

General

Lookup

Field Size

Format

Decimal Places

Input Mask

Caption

Default Value

Validation Rule

Validation Text

Required

Indexed

Long Integer

Byte

Integer

Long Integer

Single

Double

Replication ID

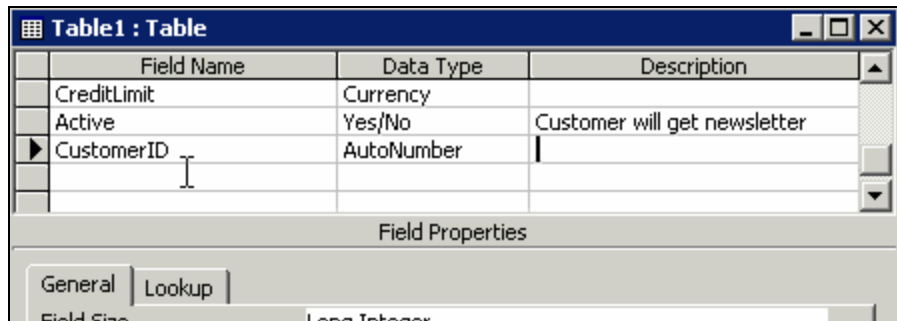
Decimal

No

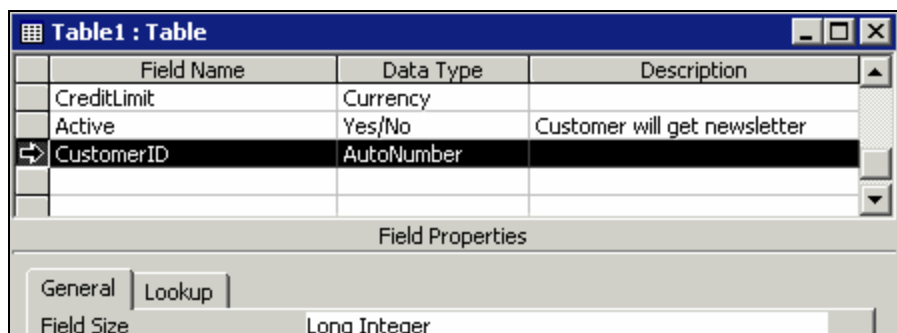
Yes (Duplicates OK)

Lesson 8. Customer Table, Part Four

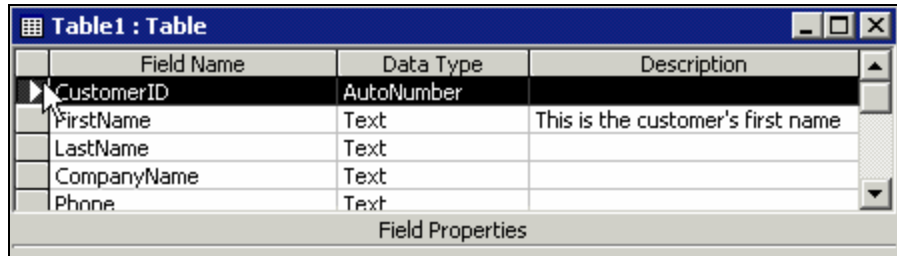
We need a way to uniquely identify each customer. None of our existing fields are appropriate, as some may be duplicated (two “John Smith’s” for example.) Let’s add a **CustomerID** field. Let’s make that an **Autonumber** field.



I like to have my ID at the top of the table. Let’s move it. Click in the grey box to the left of CustomerID. This will highlight the row.

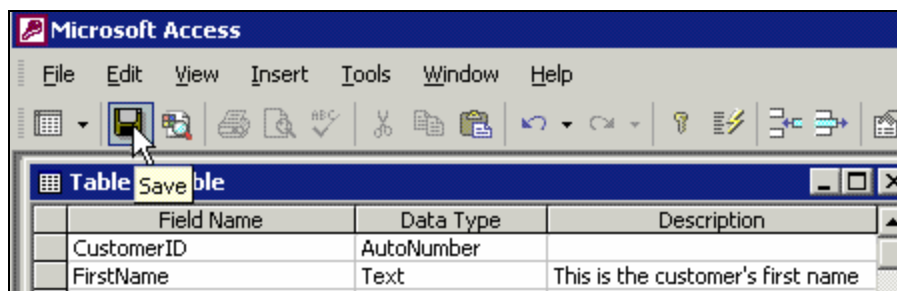


Now, **let go** of the mouse button. Click on the **same** spot again and **hold** the mouse button down. **Drag** the row up to the top of the table field list.



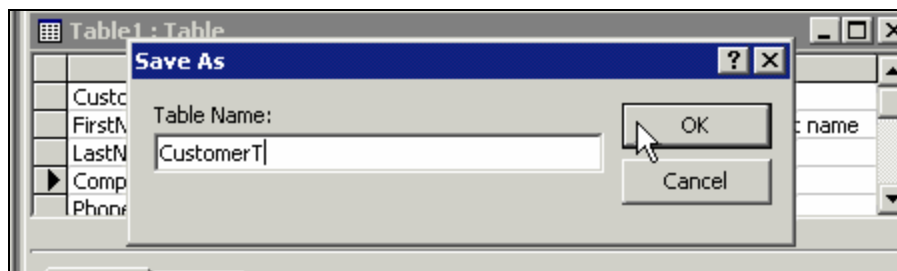
This is just a matter of form – it doesn't change the functionality of the table. Every table **should** have an ID. A product table should have a **ProductID**. Employees should have an **EmployeeID**, and so on.

Let's now save our table. Click on the **Save** button.

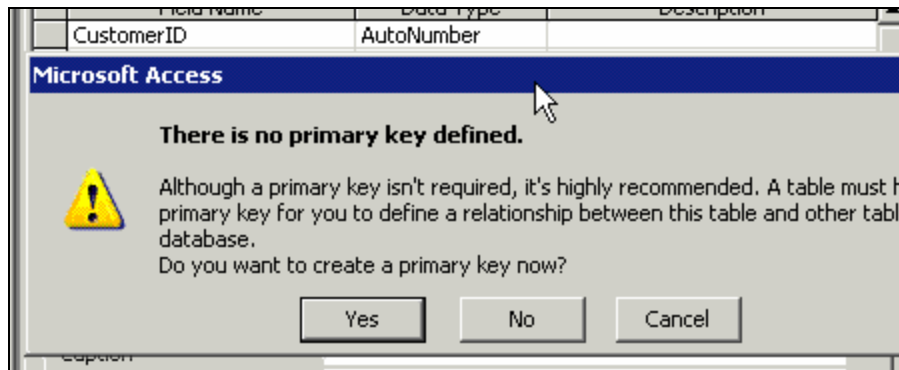


Let's type in **CustomerT** for the table name. Don't use any spaces. I like to end all of my tables with the letter "T." This is just something that I do. You can use any name you like, but I recommend that – for now – you stick with my naming conventions. Click **OK**.

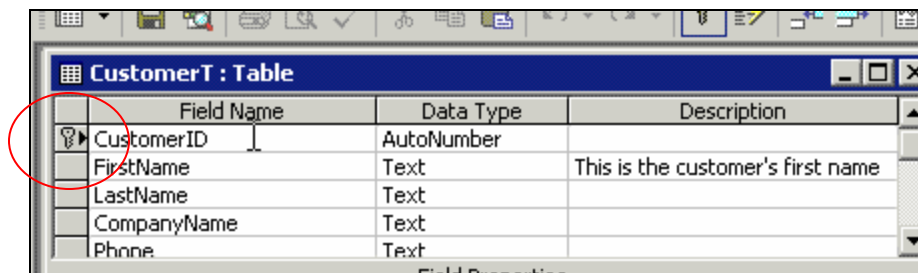
Note: in some books or classes, you may see them name a customer table like this: **tblCustomers**. That's fine too. Just pick a naming convention and stick with it. Click OK.



Now you should receive an error message saying that there is no **primary key** defined. The primary key field is the one field in your table that uniquely identifies each record – in this case the CustomerID. Click **Yes** and Access will set your CustomerID as your primary key field. Listen to the dialog in the video for a better explanation of primary key fields.

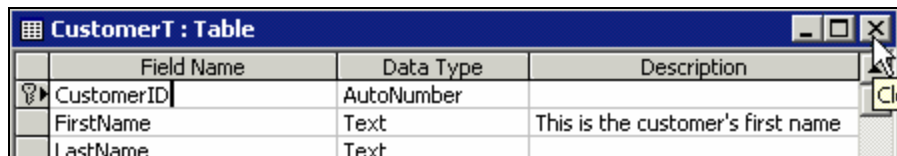


Notice the little **key symbol** next to CustomerID. This field is now your primary key – no two can be alike.



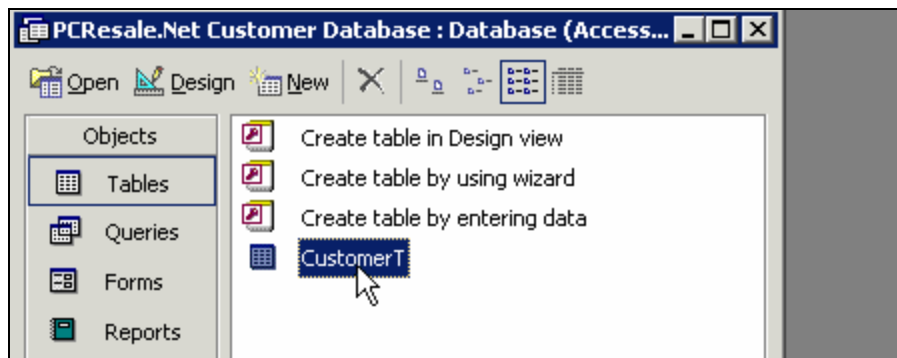
One of the things that a primary key does for you is that it prevents duplicate values in your table. You wouldn't want, for example, two customers with the ID number 1827.

Now, go ahead and close your table.



Lesson 9. Entering Data.

Notice in your database window, you now have a **CustomerT** table showing. **Double-click** on it to open it.



Your table now opens in **data-entry** mode.

CustomerT : Table					
	CustomerID	FirstName	LastName	CompanyName	PH
▶	(AutoNumber)				

Hit the **TAB** key to the **FirstName** field. Type in your first name. I'll type in "Richard." Notice as soon as I do, the **CustomerID** changes to "1."

CustomerT : Table					
	CustomerID	FirstName	LastName	CompanyName	PH
✎	1	Richard			
*	(AutoNumber)				

Continue entering in data, hitting the **TAB** key between fields.

- LastName: Rost
- CompanyName: Amicron
- Phone: 7168374685

For now, enter in your phone number as just a series of digits. We'll see how to format this in a future class to appear with dashes or parentheses. Continue with your fields:

- Fax: 7168336724
- Address: PO Box 1308

You can resize your columns by clicking and dragging on the border between the column headers (just like in Excel):

CustomerT : Table					
	Address	City	State	ZIP	Co
▶	PO Box 1308				
*					

Continue entering in your data:

- City: Amherst
- State: NY
- ZIP: 14226
- Country: (leave blank)
- Notes: Such a swell guy
- NumEmployees: 10
- CustomerSince: 1/1/94

Note: If you enter in a two-digit year, anything from 00 to 29 will become 2000 to 2029. Anything from 30 to 99 will become 1930 to 1999.

- CreditLimit: \$500.00

Active is a check box. You can either use the **mouse** to check it on or off, or use the **spacebar**.

CustomerT : Table				
	NumEmployees	CustomerSince	CreditLimit	Active
✎	10	1/1/1940	\$500.00	<input type="checkbox"/>
*	0		\$0.00	<input type="checkbox"/>

Hitting **TAB** again will bring you down to the next record.

CustomerT : Table					
	CustomerID	FirstName	LastName	CompanyName	Ph
	1	Richard	Rost	Amicron	716837
▶	(AutoNumber)				

Go ahead and enter in four or five more customers. The data itself isn't important. Enter in whatever you'd like. Just make sure you enter in customers from a few different states and a few different countries. You can leave **some** fields – like phone numbers – blank, if you want.

CustomerT : Table					
	CustomerID	FirstName	LastName	CompanyName	P
	1	Richard	Rost	Amicron	71683
	2	Joe	Smith	XYZ Corp	71655
	3	Sue	Jones	123 Packing	56243
	4	Alan	Watson	Forestry Service	41938
	5	Anna	Picore	Pharmacon	71323
	6	Ronald	Simms	LMNOP Wholes	78074
	7	Donald	Barker	GamerSkum Inc	41644
	8	Benny	Sperduti	Euro Real Estat	
▶	(AutoNumber)				

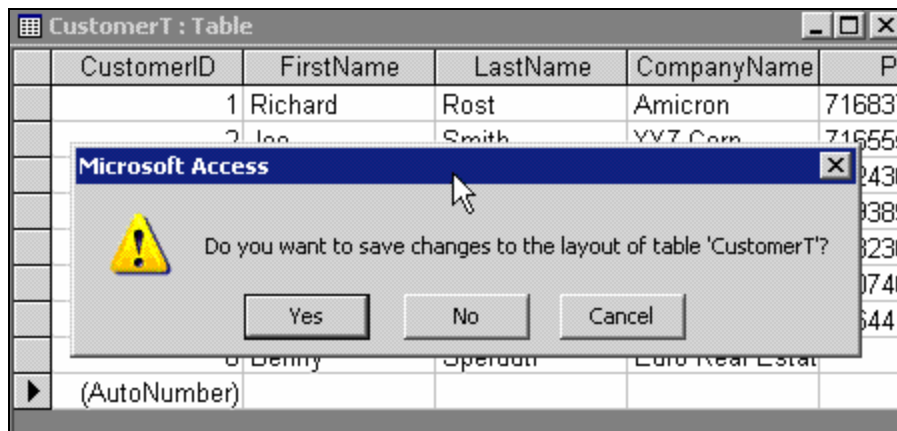
Record: 9 of 9

If you decide you want to **delete** a record, just click on the box to the left of the row, and hit Delete on your keyboard. Say **yes** when asked if you're sure you want to delete the record.

CustomerT : Table					
	CustomerID	FirstName	LastName	CompanyName	P
	1	Richard	Rost	Amicron	71683
	2	Joe	Smith	XYZ Corp	71655
	3	Sue	Jones	123 Packing	56243
	4	Alan	Watson	Forestry Service	41938
	5	Anna	Picore	Pharmacon	71323
	6	Ronald	Simms	LMNOP Wholes	78074
	7	Donald	Barker	GamerSkum Inc	41644
	8	Benny	Sperduti	Euro Real Estat	
	9	Herb	Jones		
*	(AutoNumber)				

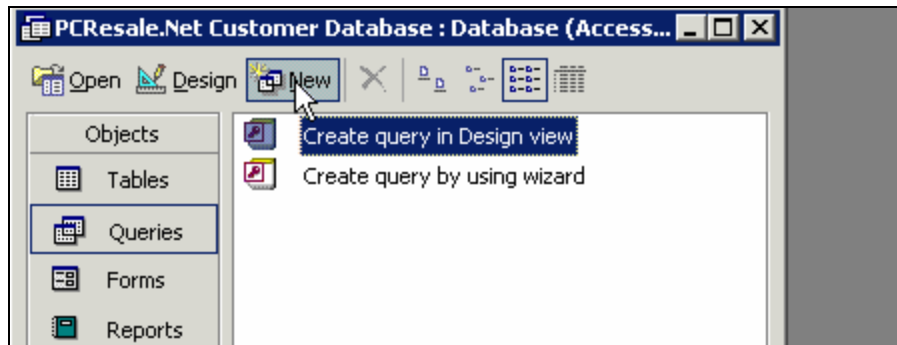
Record: 9 of 9

Go ahead now and **close** your table down. You may be asked to save **changes to the layout** of your table. This is because you resized a column or two. Say **yes** and your table will be saved.

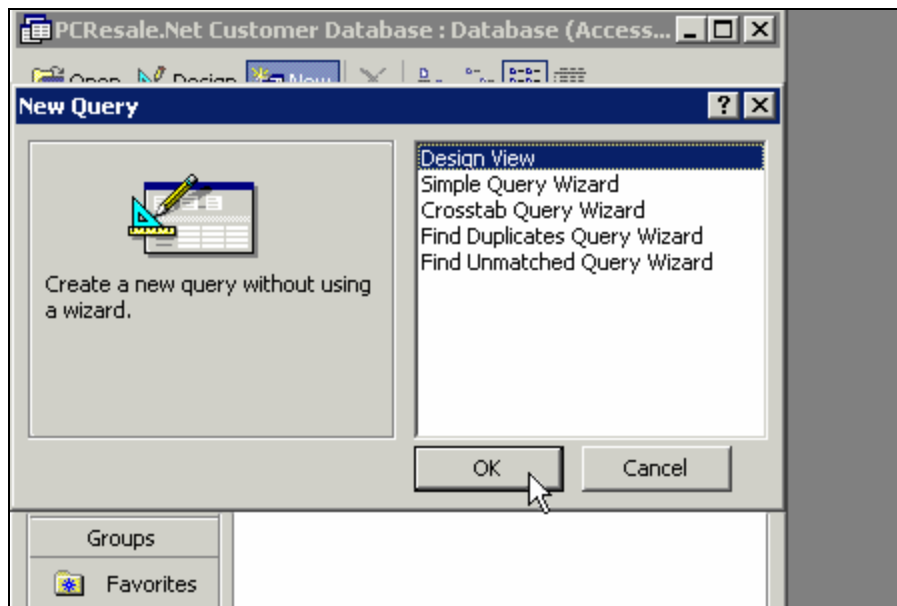


Lesson 10. Customer Query

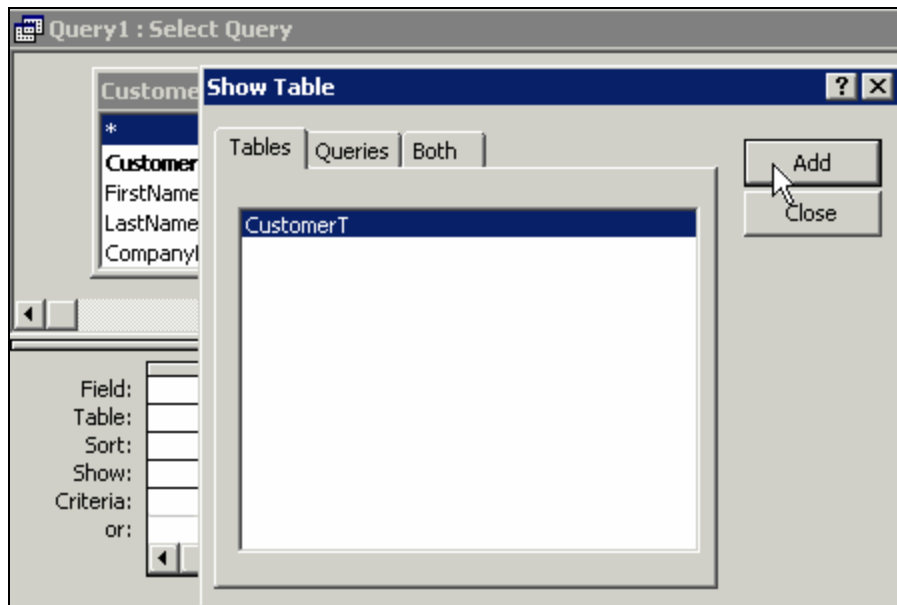
We only have a few customers in our database now, but let's pretend we have thousands of customers, and we want to sort the list and add some other criteria – like only showing customers from NY. Click on **Queries** and then **New**.



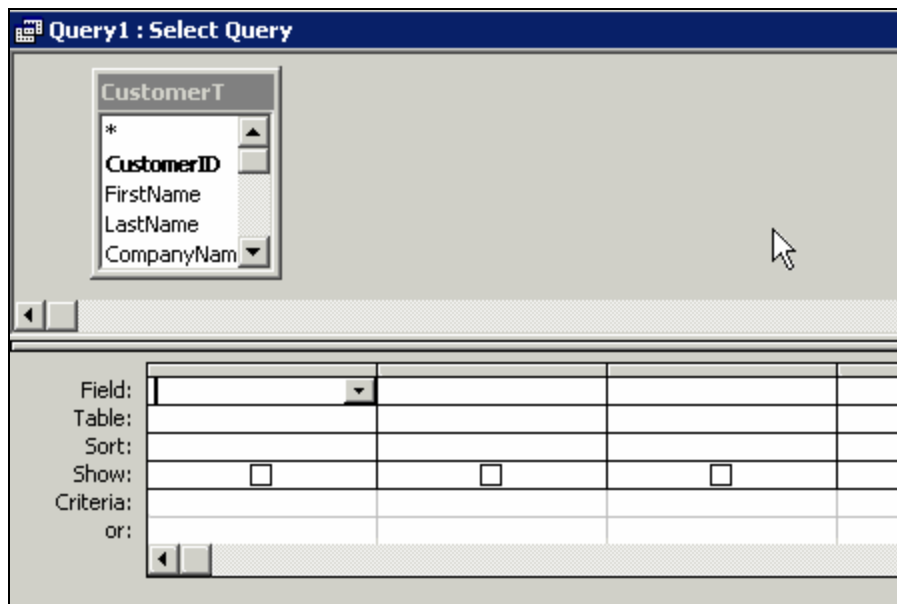
The **New Query** window appears. Select **Design View** and click **OK**.



The **Query Design** window appears and the **Show Table** window appears in front of it. Access wants you to select a table to go into your query. Select **CustomerT** (the only table we have right now) and click Add. You will notice a mini **CustomerT** window will appear behind the show table window.



Click on **Close** to close the **Show Table** window. You are now in the **Query Design** window.



Click and drag the FirstName field down into your query.

Query1 : Select Query

CustomerT

*
CustomerID
FirstName
LastName
CompanyNam

Field:				
Table:				
Sort:				
Show:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Criteria:				
or:				

Notice the field now appears in your query.

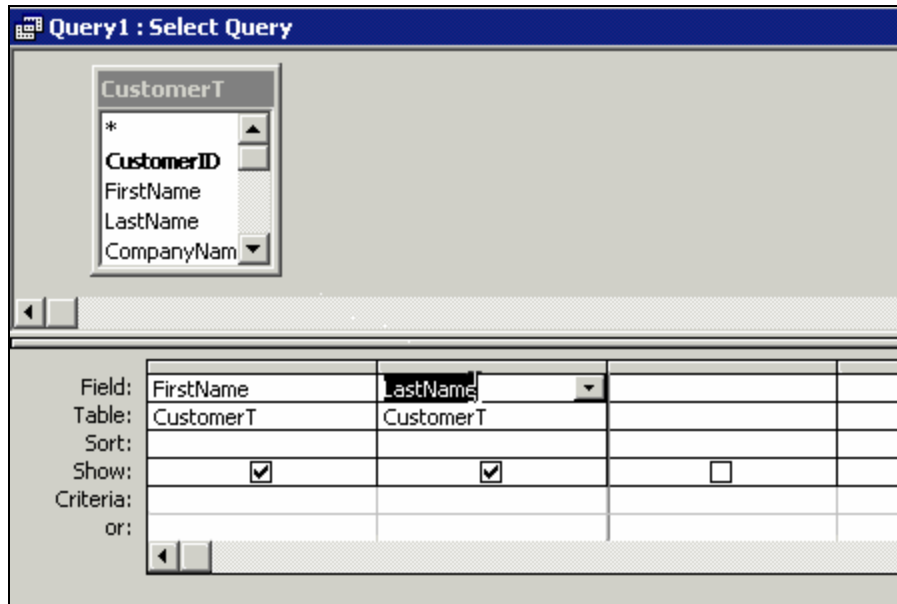
Query1 : Select Query

CustomerT

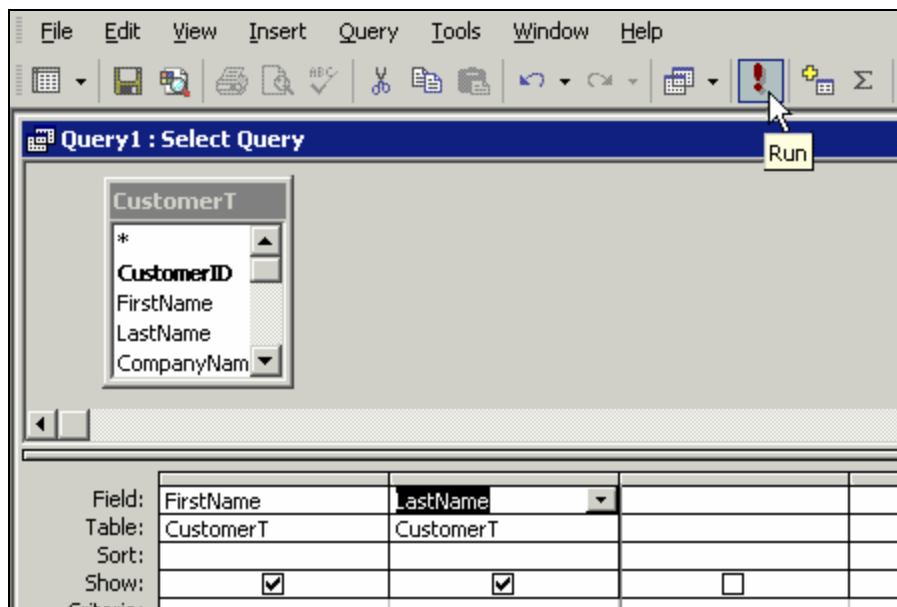
*
CustomerID
FirstName
LastName
CompanyNam

Field:	FirstName			
Table:	CustomerT			
Sort:				
Show:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Criteria:				
or:				

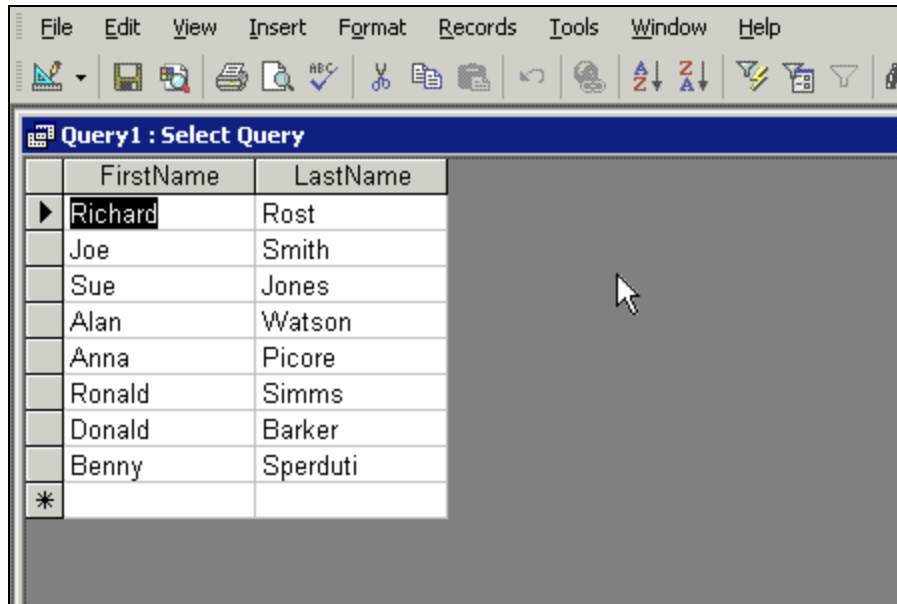
Do the same now for the **LastName** field.



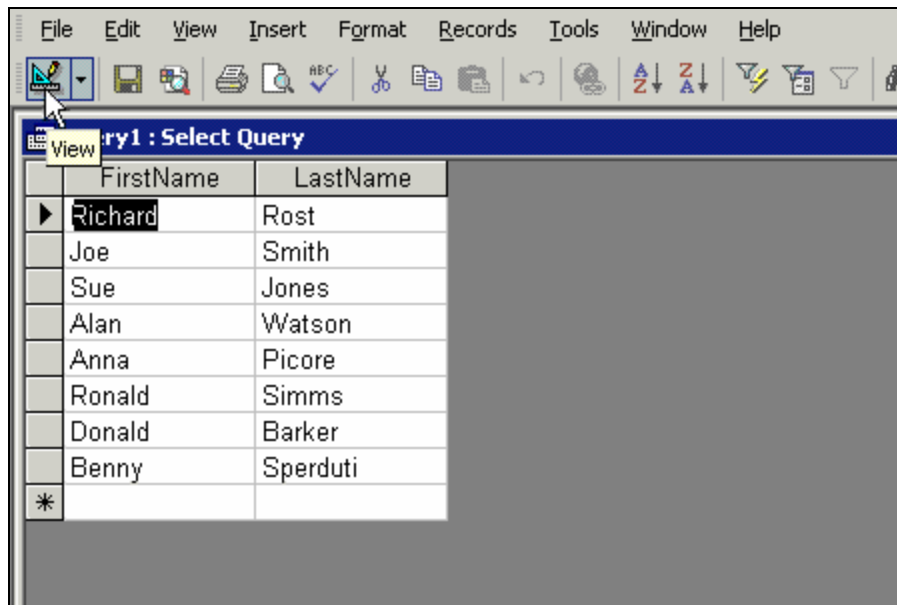
Click on the **Run** button to run the query.



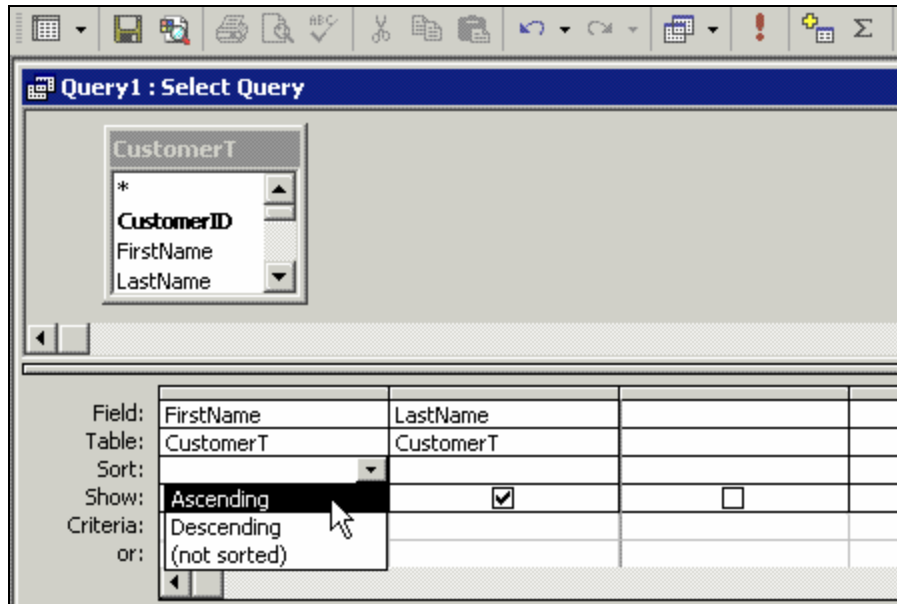
The query has now “run.” You can see the data you requested.



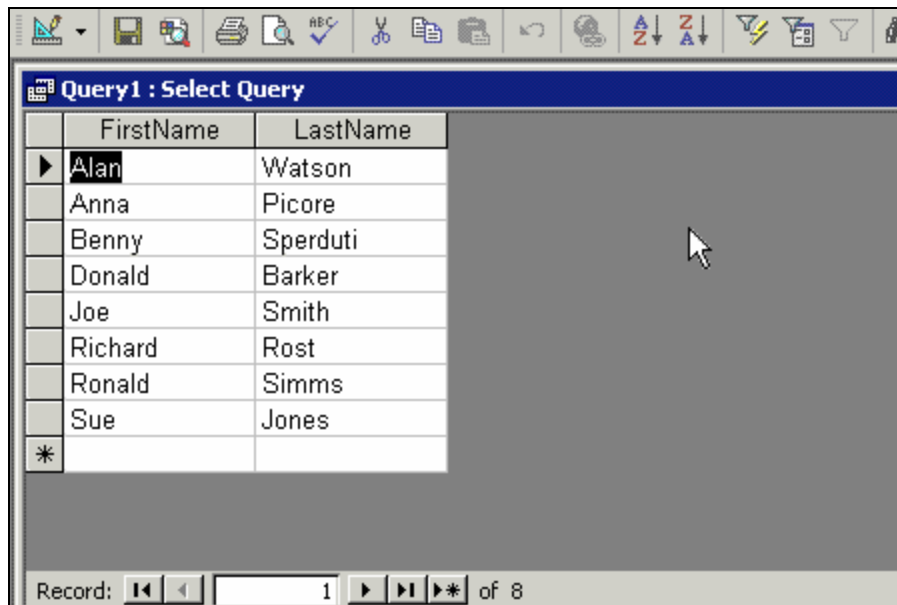
Let's go back to **Design View**. Click on the **View** button.



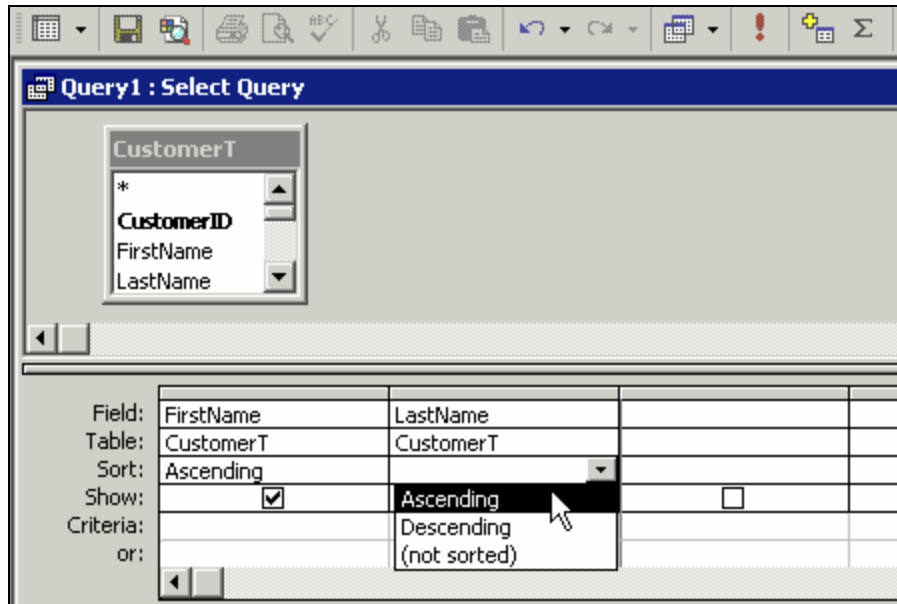
Click in the **Sort** row under the **FirstName** column. Select **Ascending** from the list of choices.



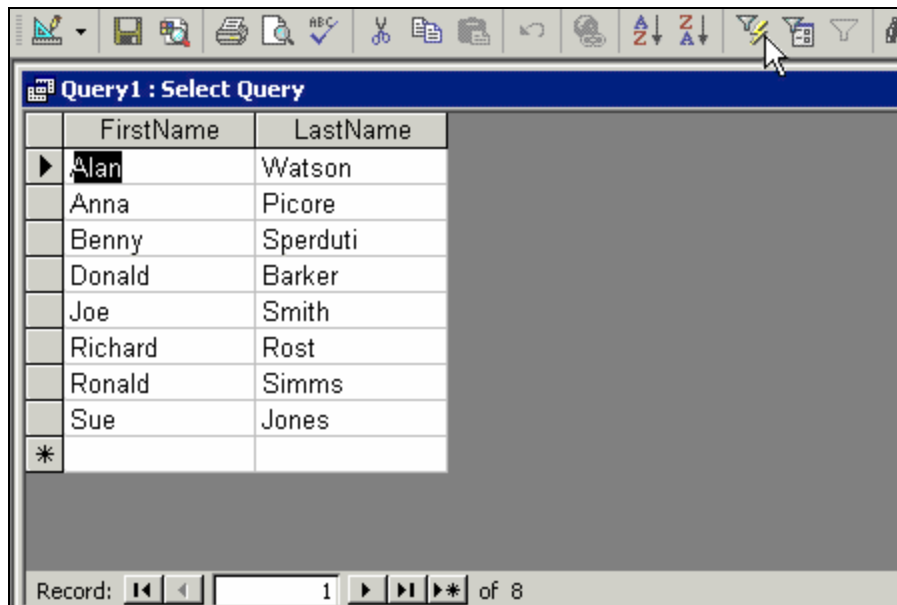
Now **run** your query. Notice the records are sorted by FirstName in ascending order.



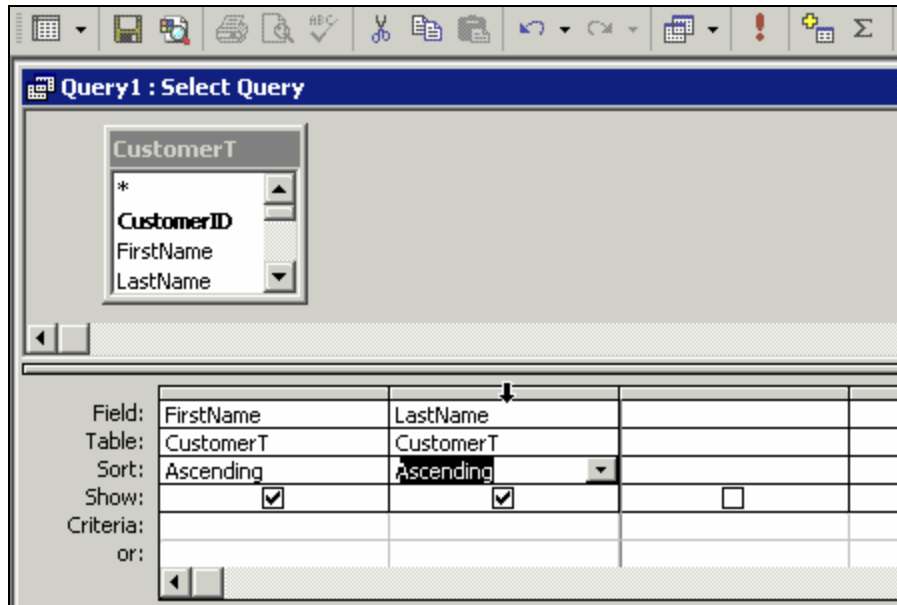
Return to **design view**. Click in the **Sort** row under the **LastName** column. Change it to **Ascending**.



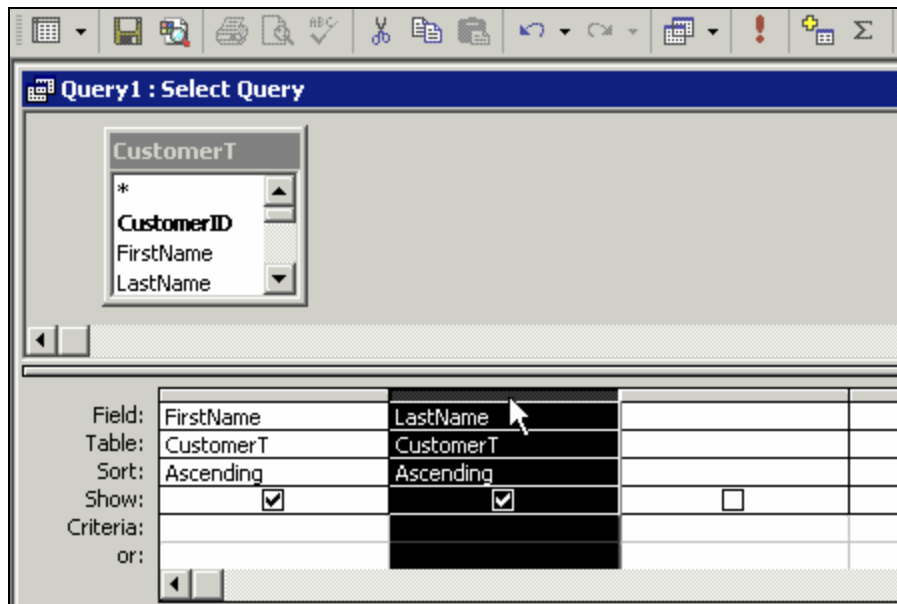
Save and run your query.



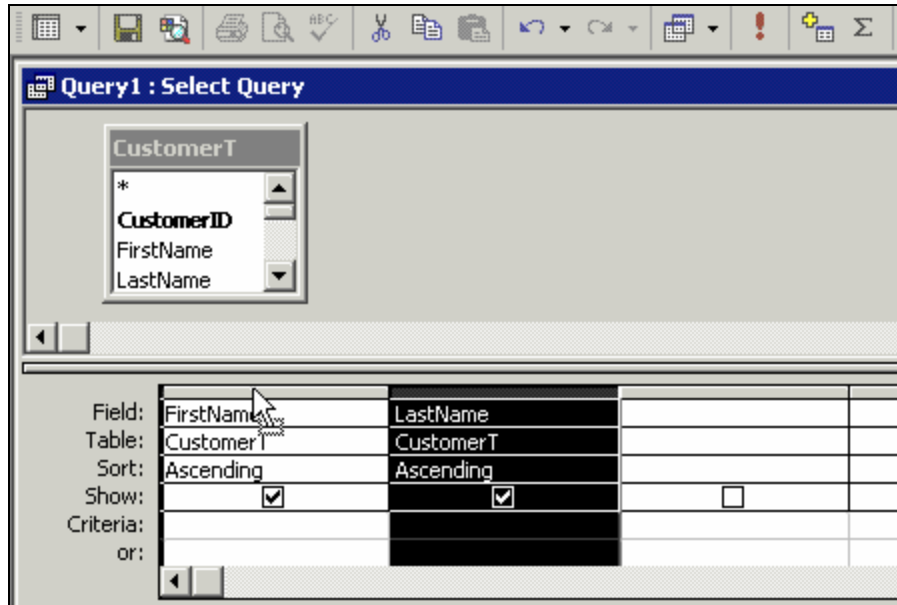
Notice that this isn't exactly what we were looking for. We're still sorted by first name. Return to design view. The key to remember here is that Access sorts the fields left to right. If you want to sort by last name then by first name, you have to move the LastName field to the left of the FirstName field. Here's how you do it. First move your mouse over the column, right on the little gray bar.



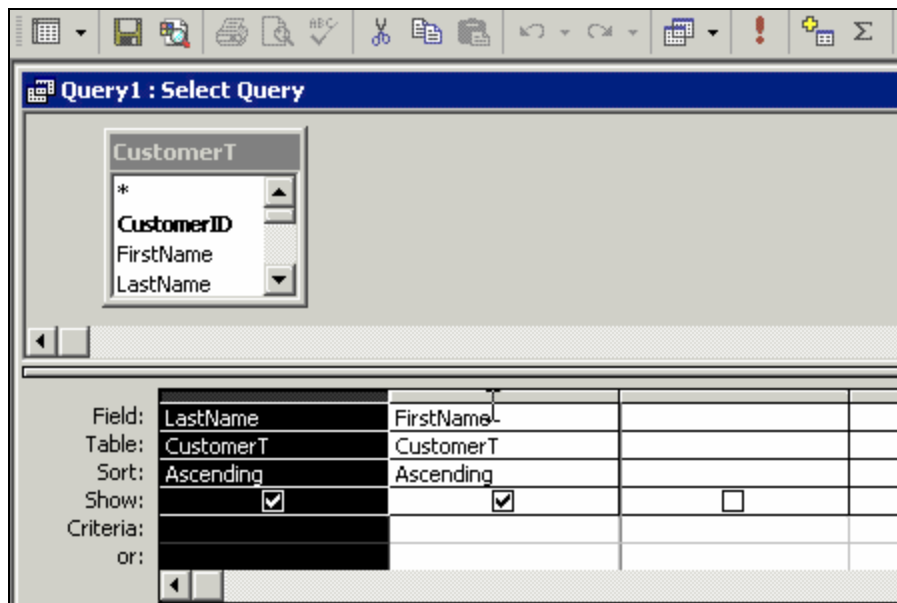
Now, click on that bar. Notice the column is highlighted.



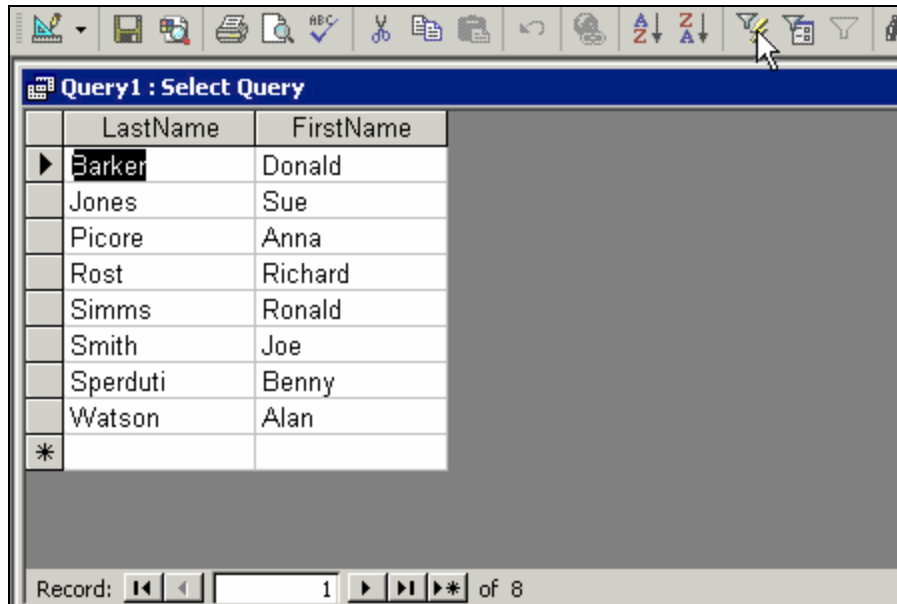
Now, let go of the mouse button. Click on that same spot, and drag the column to the left. You'll see the mouse "carrying" a little box with it. Let it go to the left of the FirstName column.



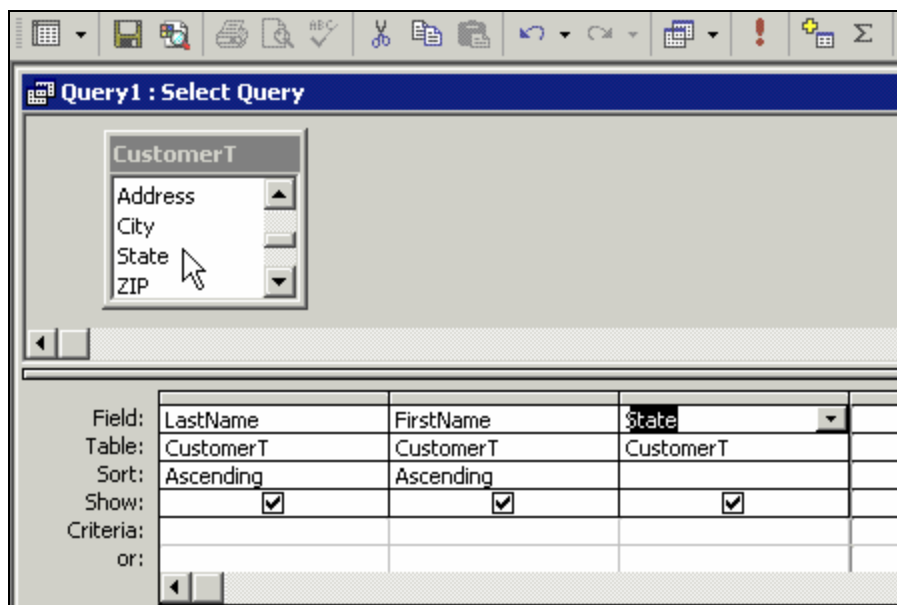
And now you should notice the column has moved.



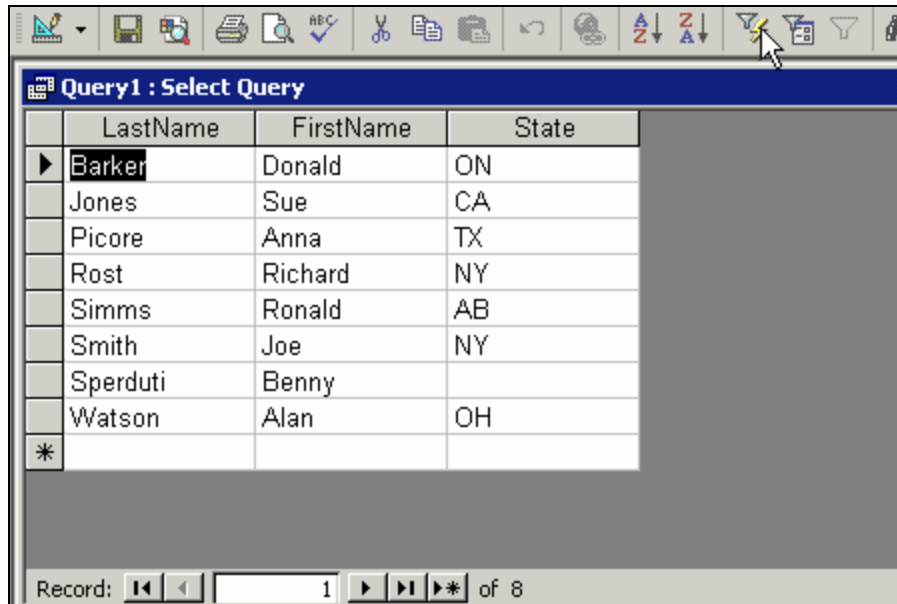
Now, run the query, and you should see what we were after in the first place.



Now the boss wants to only see customers from New York. To do this, we need to add the State field to our query. Find the State field in your table field list, and double-click on it to add it to the query.

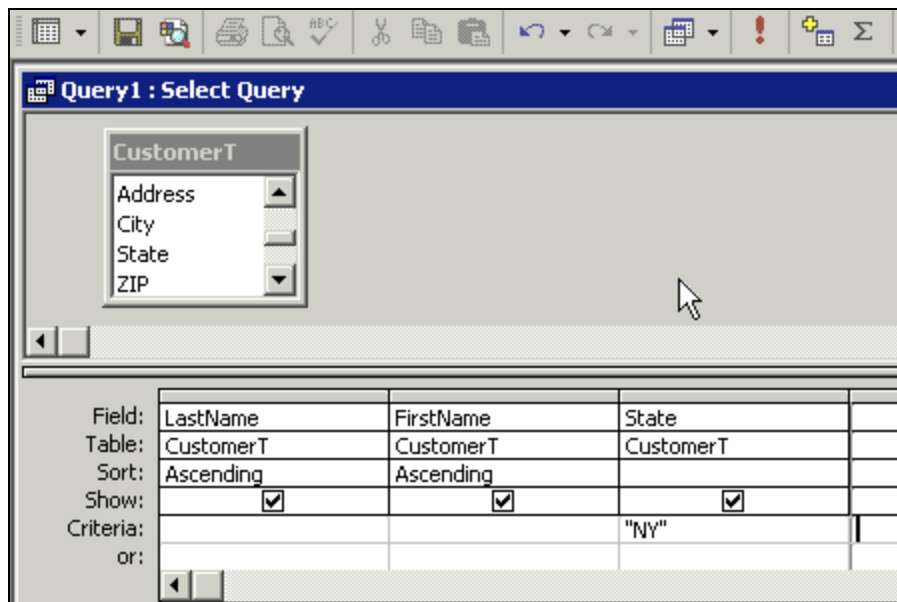


Now run your query, and you will see all of the customers with their states.



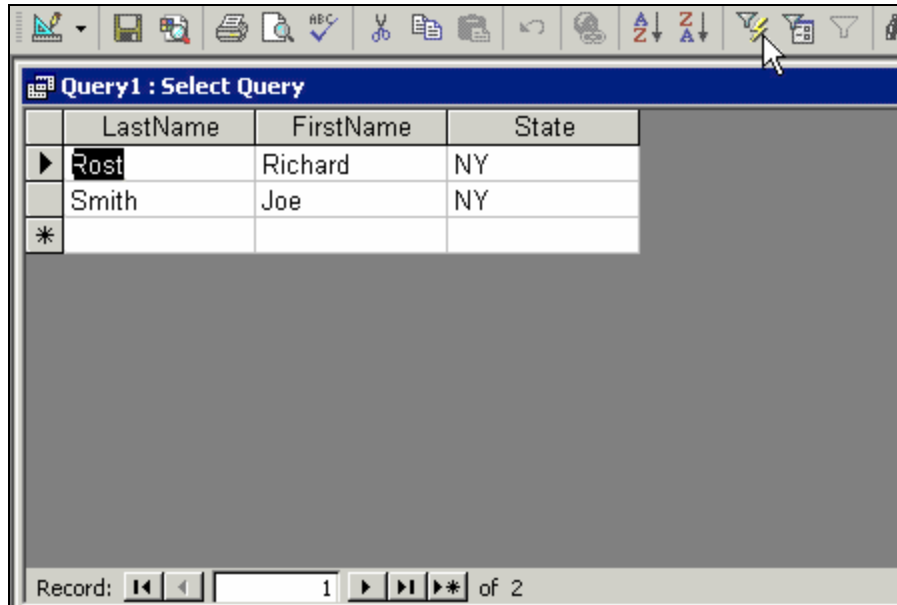
LastName	FirstName	State
Barker	Donald	ON
Jones	Sue	CA
Picore	Anna	TX
Rost	Richard	NY
Simms	Ronald	AB
Smith	Joe	NY
Sperduti	Benny	
Watson	Alan	OH

Return to design view. To limit the customers only from NY, click in the criteria row under the State column. Type in “NY” and hit TAB. You don’t need to type in the quotes – Access will put them there for you (although it is a good idea to get in the habit of typing them).

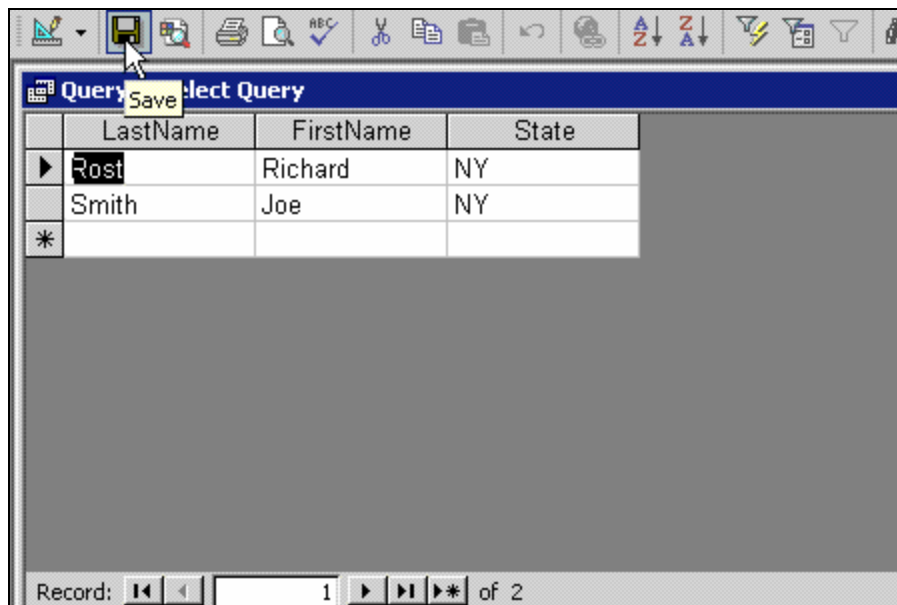


Field:	LastName	FirstName	State
Table:	CustomerT	CustomerT	CustomerT
Sort:	Ascending	Ascending	
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:			"NY"
or:			

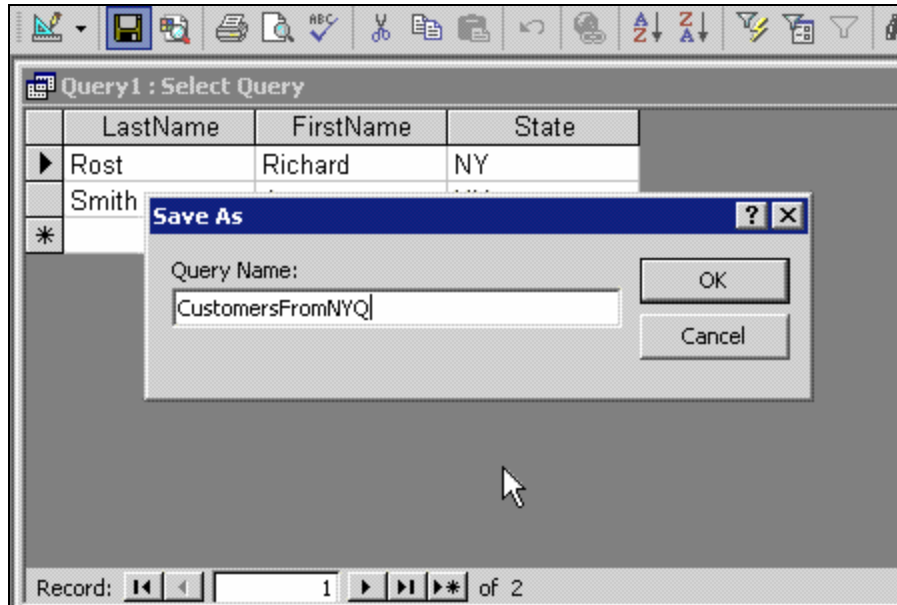
Go ahead and run your query, and now you can see that only customers that match our criteria (those customers from NY) are showing up.



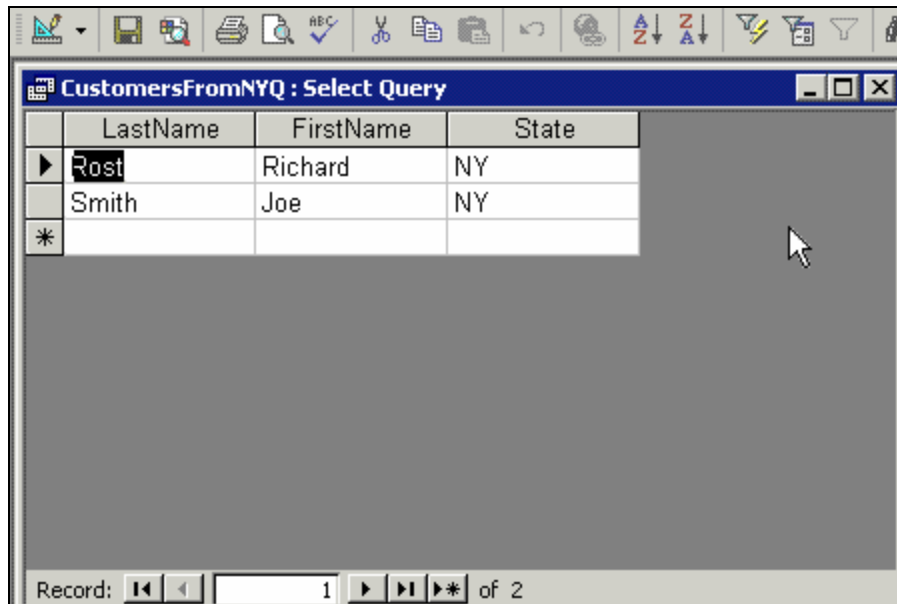
Let's go ahead and save our query now. Click on the Save button.



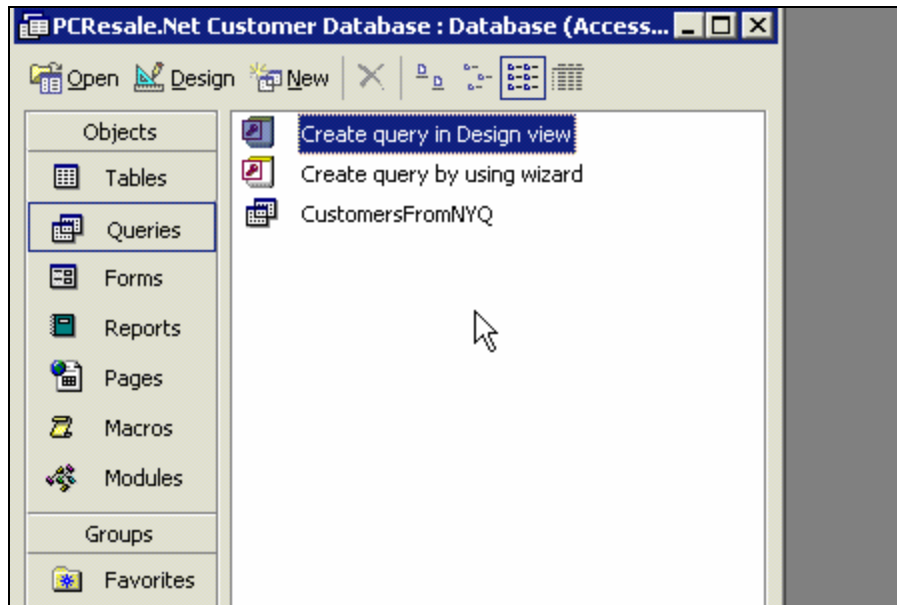
I'm going to call my query **CustomersFromNYQ**. Notice I've used no spaces, and I put a "Q" at the end. Again, this is just my personal style for naming my objects.



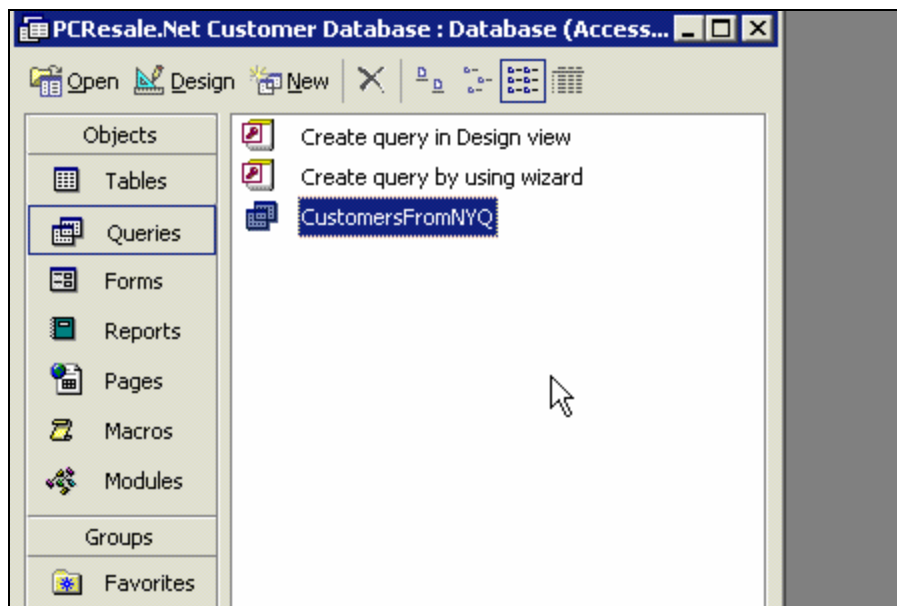
My query is now saved. Notice the title at the top of the query window.



Let's close this query now, and return to the main database window. Notice that we have one query showing up in our Queries section.

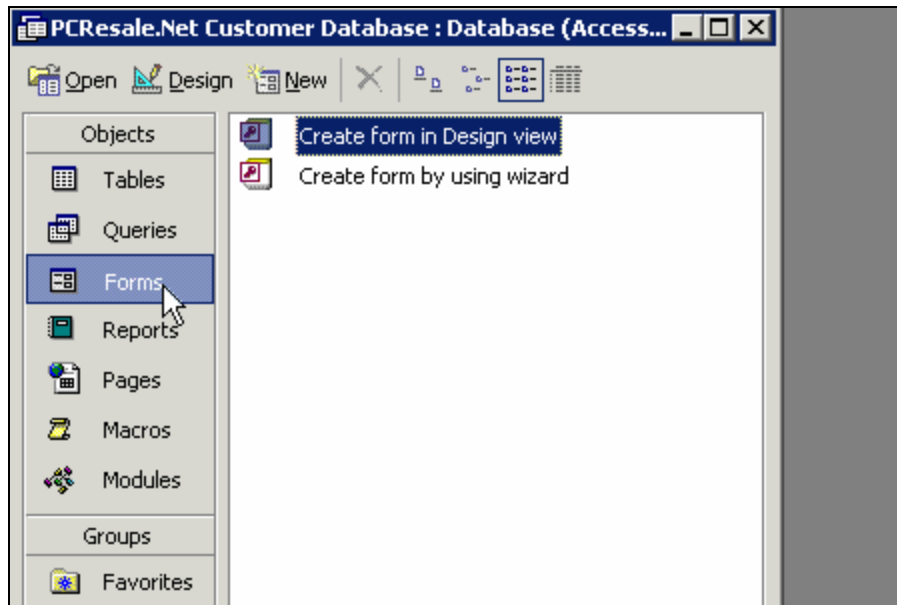


The beauty of a query is that now all you have to do is double-click on the query to run it again. The work is already done. Next month, when the boss wants this same report again, it's there. Also, a user who doesn't know how to build queries can run this query just by double-clicking on it.

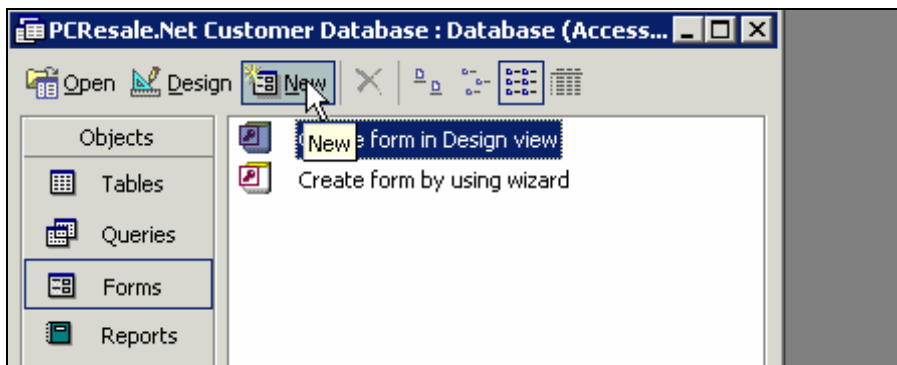


Lesson 11. Building a Customer Form

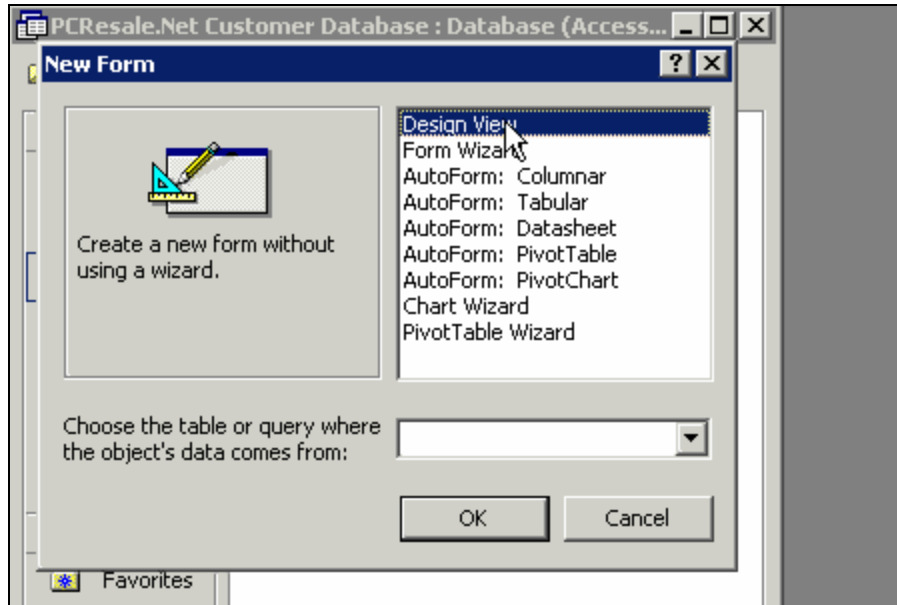
Forms are objects for working with your data on the screen in a nice pretty, user-friendly screen. This takes practice! You're not going to have great-looking forms after one lesson. Practice makes perfect. Begin by clicking on **Forms** from the database window.



Now click on **New** on the top toolbar.



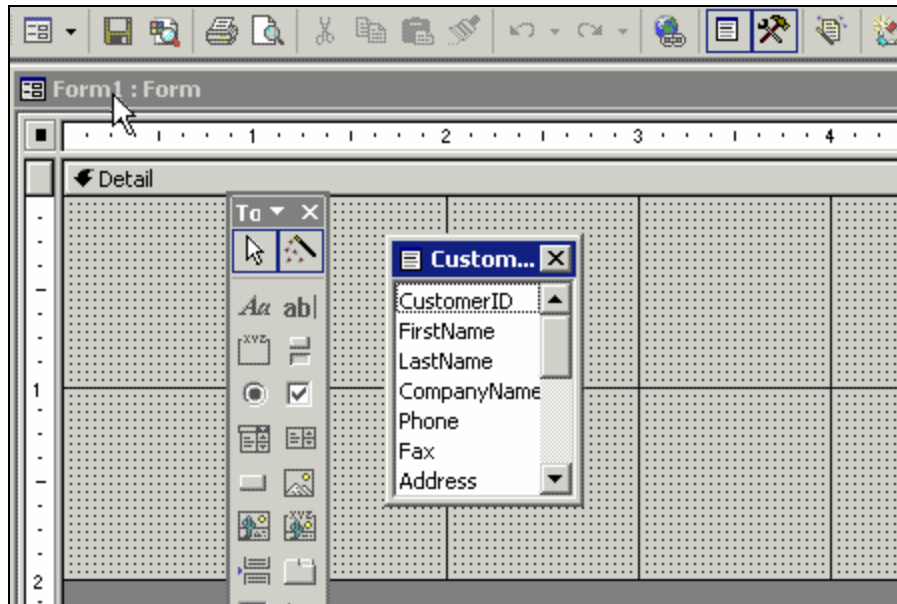
There are a lot of different ways to make forms. We'll go over some of these other options in future classes. For today, click on **Design View**.



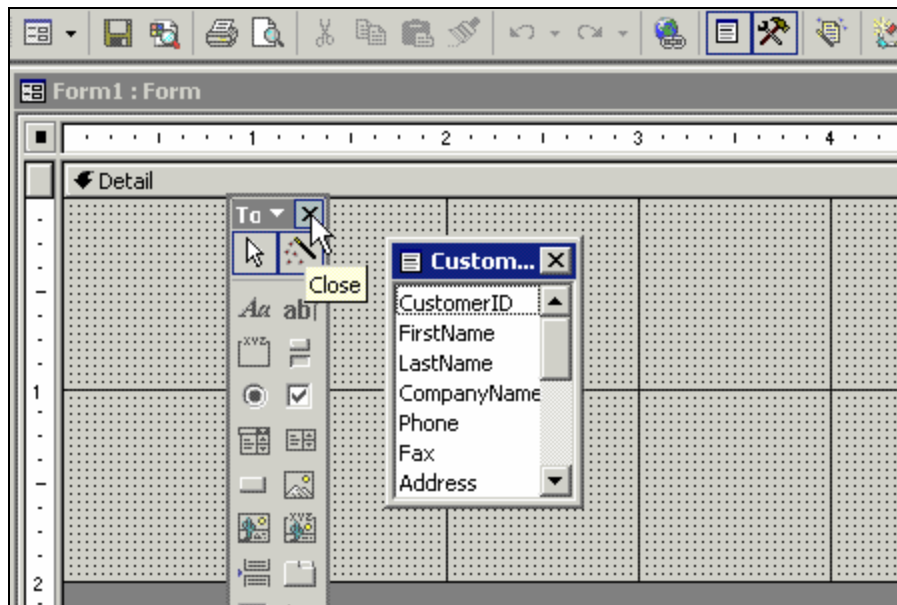
Next we have to tell the form where to get its data. Drop down the box at the bottom of the form and select **CustomerT** from the list. Click OK.



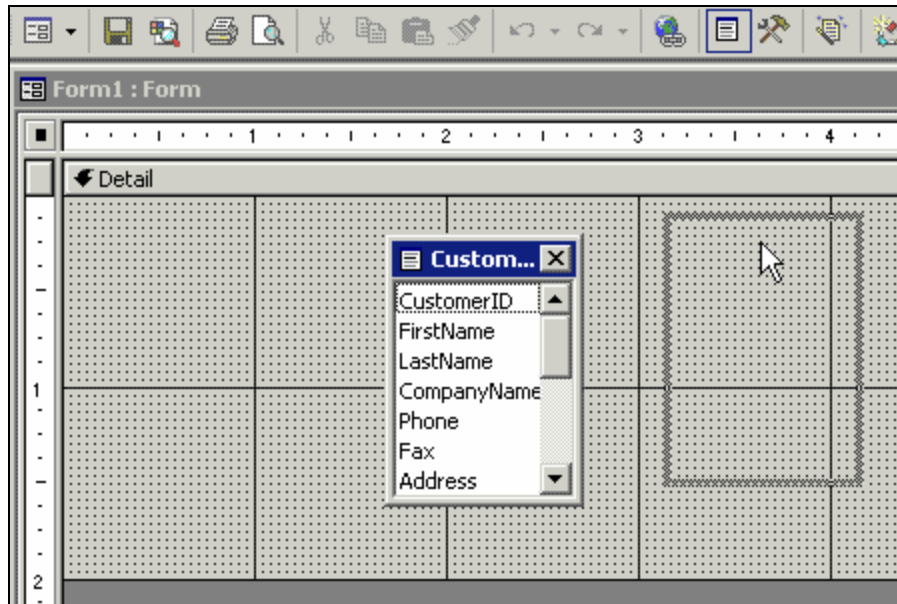
You should now see a **blank form** (Form1) along with a **toolbox** and a **field list**.



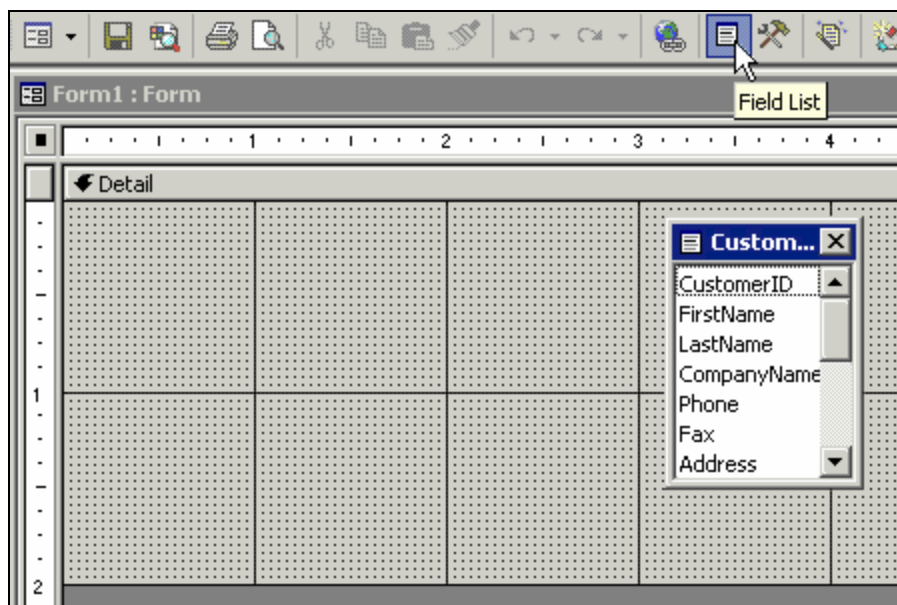
For today, we're not going to use the Toolbox. Let's go ahead and close it.



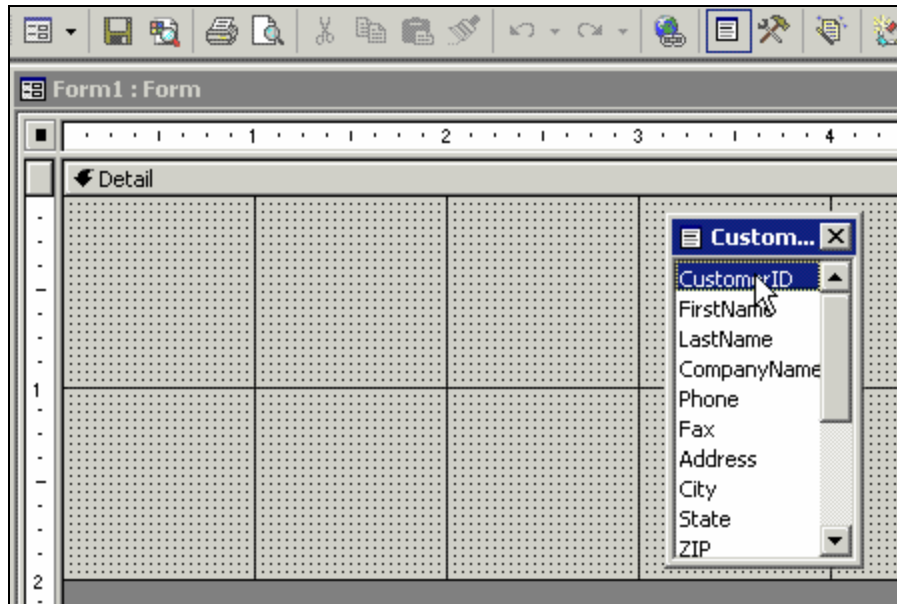
Let's move the Field List over to the side. Click and drag it's titlebar and move it over.



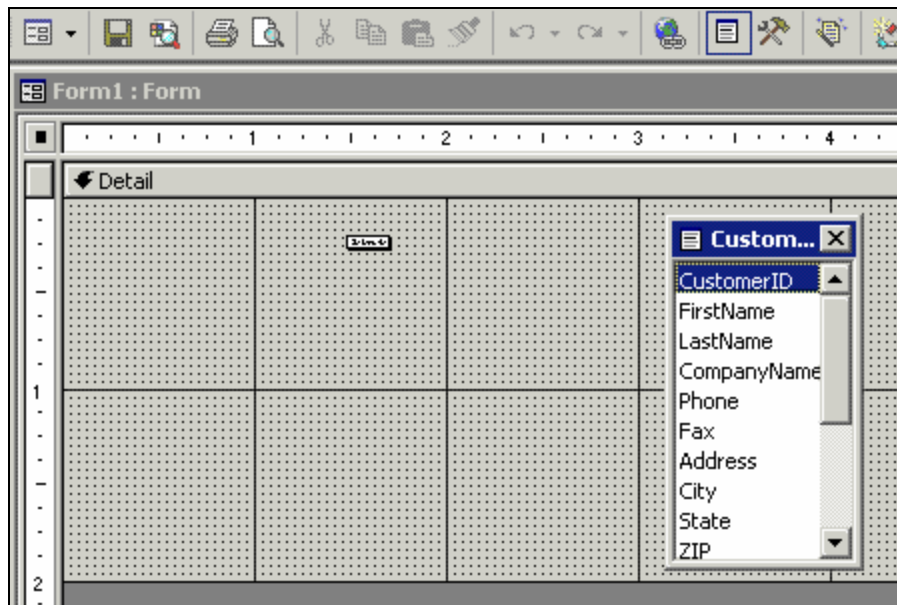
Note: if you don't see the Field List, don't panic. Look on your toolbar for the following button. Just click on this button to open and close the Field List.



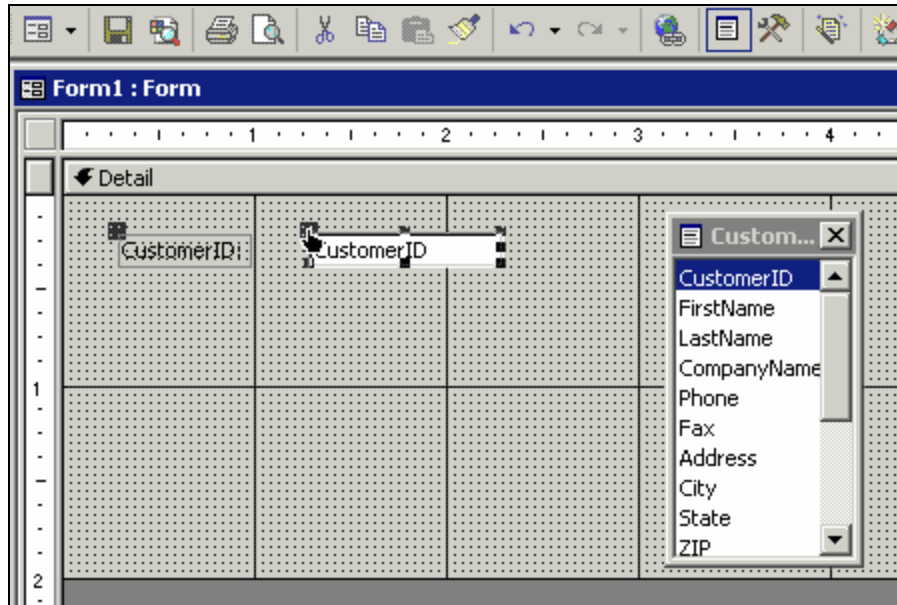
Now, let's move the fields we want from the Field List onto our Form. Click on the **CustomerID** field.



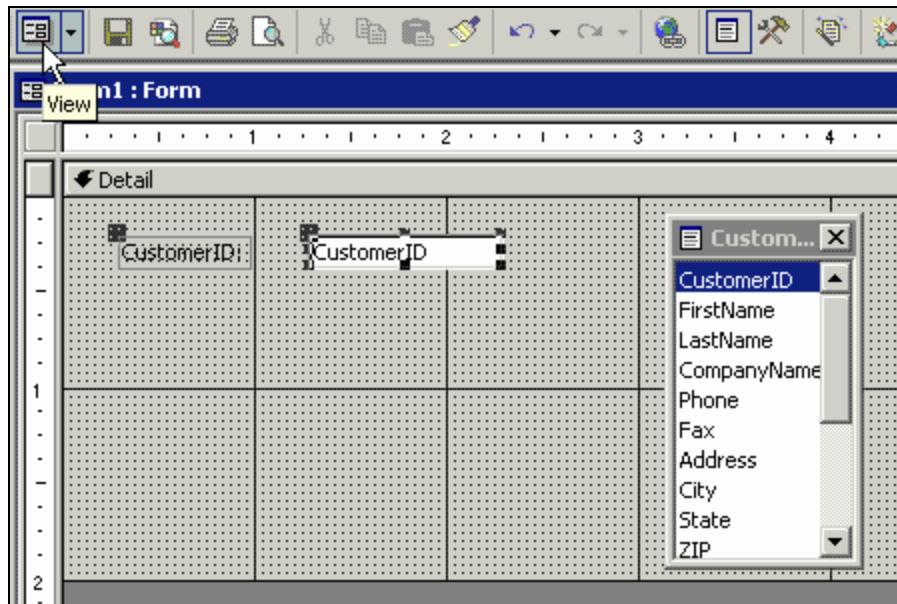
Now, click and drag the field from the Field List over to the Form.



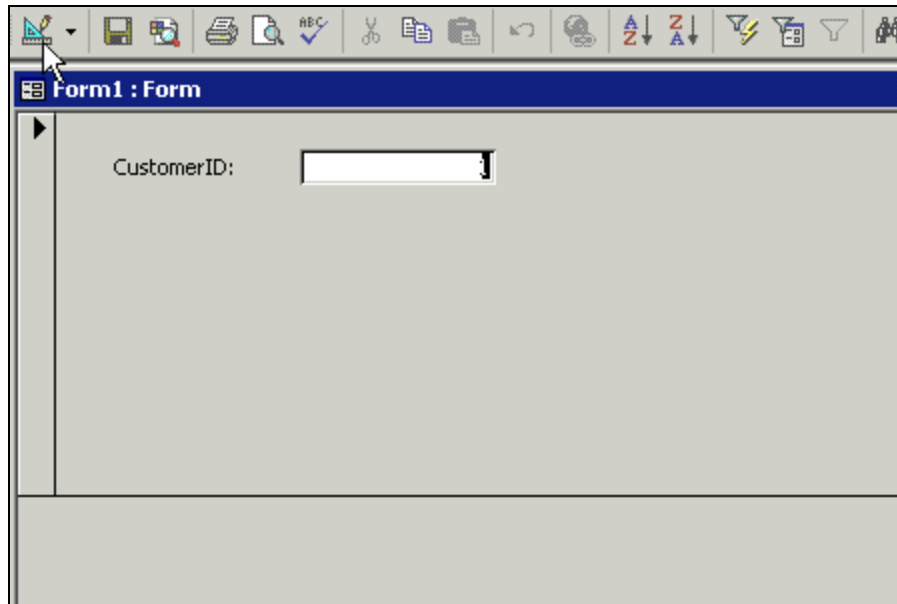
When you release the mouse button, the field appears. Notice you have two objects. The first is a **Label** that tells the user what field this is. The second is a **Text Box** that will actually display the data.



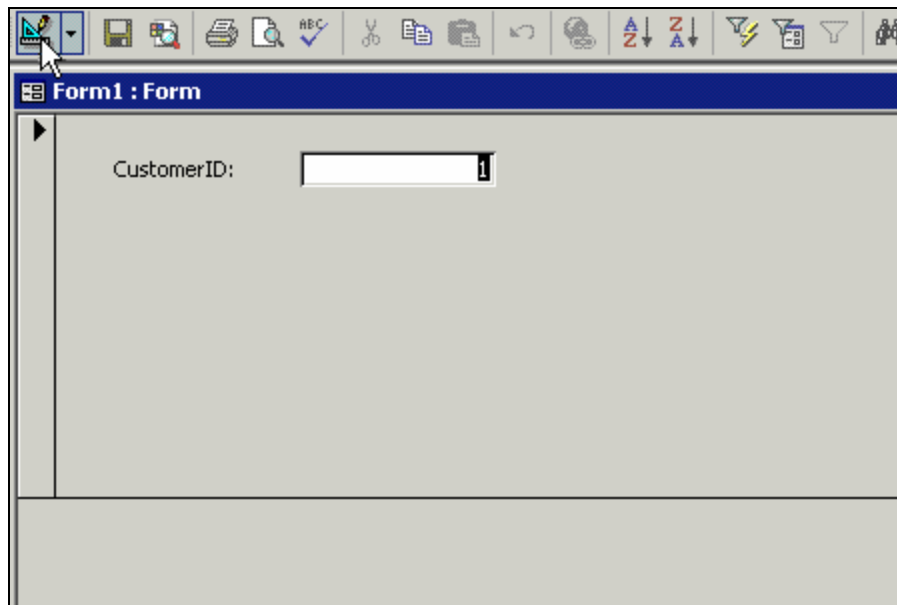
To see the form “in action” click on the **View** button on the toolbar. This will take you to “form view” mode where you will see the form as the user sees it – with the data in it.



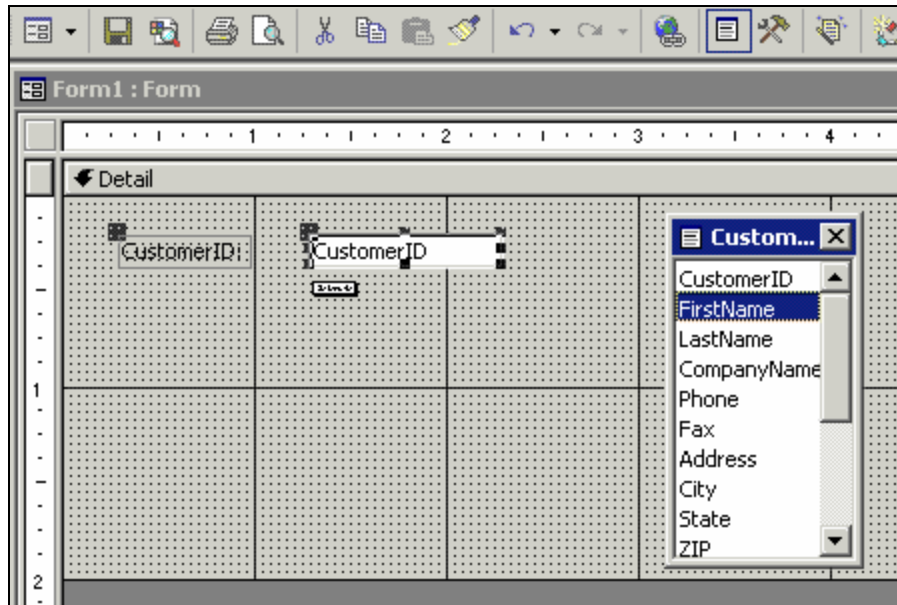
Notice you can now see the form with the one field we placed on it, and the data from that record.



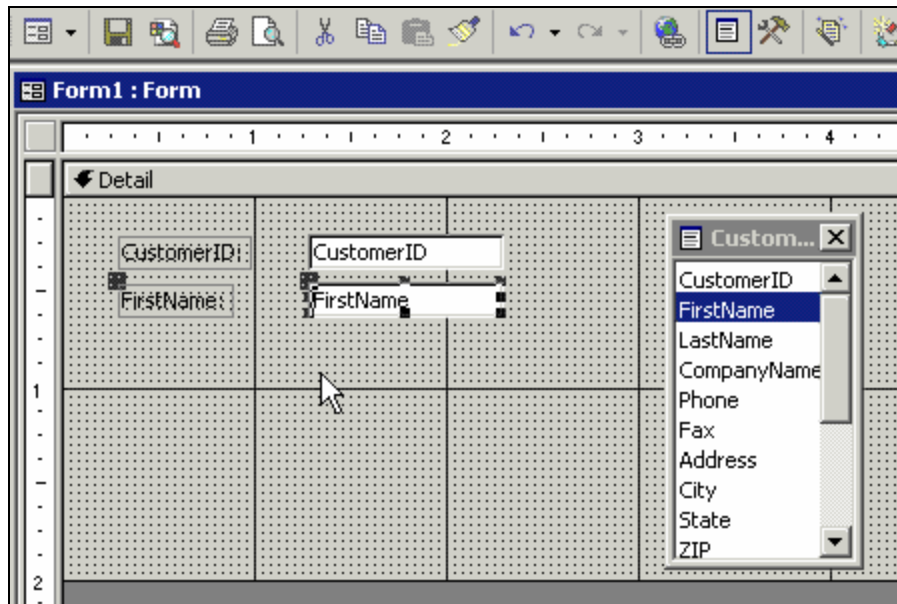
Now, click on the T-square button to return to design view (just like with queries).



Now, let's drag over another field. Click and drag the FirstName field. Here's a tip: when you're lining up your fields, don't line the little tiny box that you're dragging up with the label. Line it up with the text box from the previous field, like this:



If you get it just right, your fields will be perfectly lined up – one beneath the other.



Again, let's go back to Form View. Notice the additional field with its data.

The screenshot shows a Microsoft Access window titled 'Form1 : Form'. The form contains two text boxes. The first text box is labeled 'CustomerID:' and contains the value '1'. The second text box is labeled 'FirstName:' and contains the value 'Richard'. The form is displayed in a window with a standard toolbar at the top.

At the bottom of the window, you will see little **Navigation Buttons** that you can use to move between the different records. There is a button to move to the next record, previous record, first record, last record, and a new blank record.

The screenshot shows the same Microsoft Access window titled 'Form1 : Form'. At the bottom of the window, there is a navigation bar. It includes buttons for moving between records (first, previous, next, last) and a status bar that reads 'Record: 1 of 8'. A mouse cursor is pointing at the 'next' button.

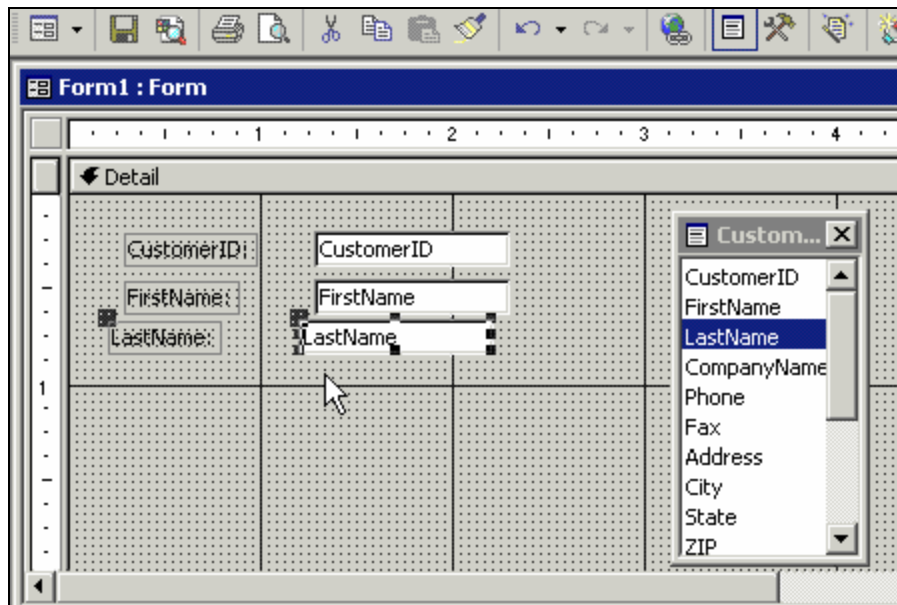
Click on the **Next Record** button and Access takes you to record #2.

The screenshot shows a Microsoft Access form titled "Form1 : Form". It contains two text boxes: "CustomerID:" with the value "2" and "FirstName:" with the value "Joe". At the bottom, there is a record navigation bar that says "Record: 2 of 8". A mouse cursor is pointing at the "Next Record" button (represented by a right-pointing arrow) in the navigation bar.

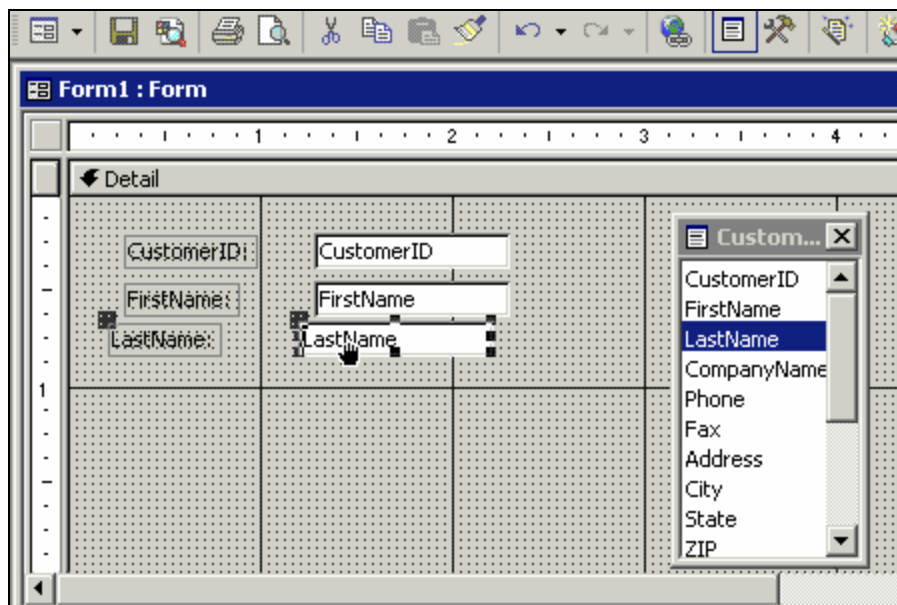
Click on the **New Record** button and you're taken to a blank new record. You will see (**AutoNumber**) in the CustomerID. As soon as you enter in a FirstName, this number will be assigned – just as if you were entering information directly into the table.

The screenshot shows the same Microsoft Access form titled "Form1 : Form". The "CustomerID:" text box now contains the text "(AutoNumber)" and is highlighted. The "FirstName:" text box is empty. The record navigation bar at the bottom now says "Record: 9 of 9". A mouse cursor is pointing at the "New Record" button (represented by a star icon) in the navigation bar.

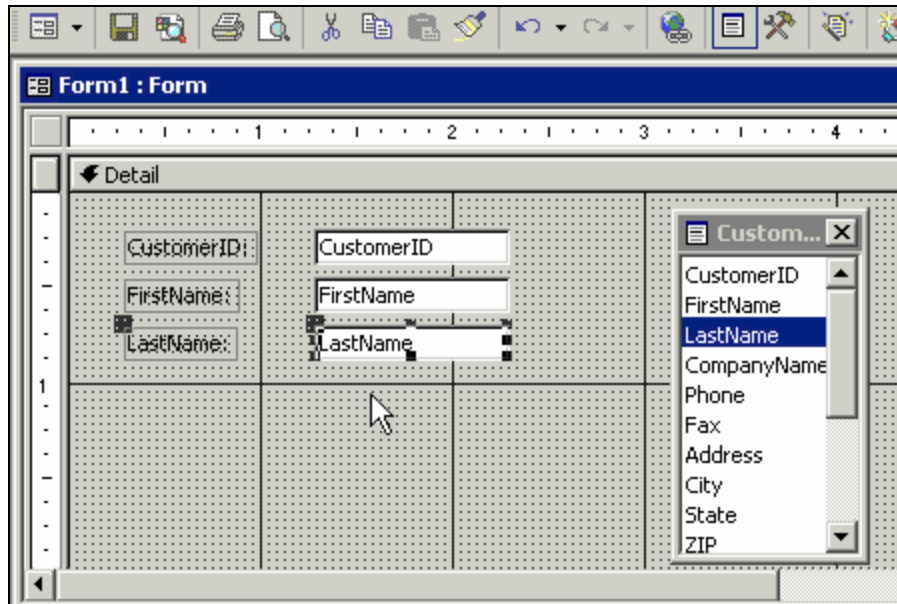
Remember, this is **Live Data!** If you add records, make changes to existing records, or delete records, you're changing the data in the table. This is not a copy of the data. Let's return to design view now and add the LastName field to our form.



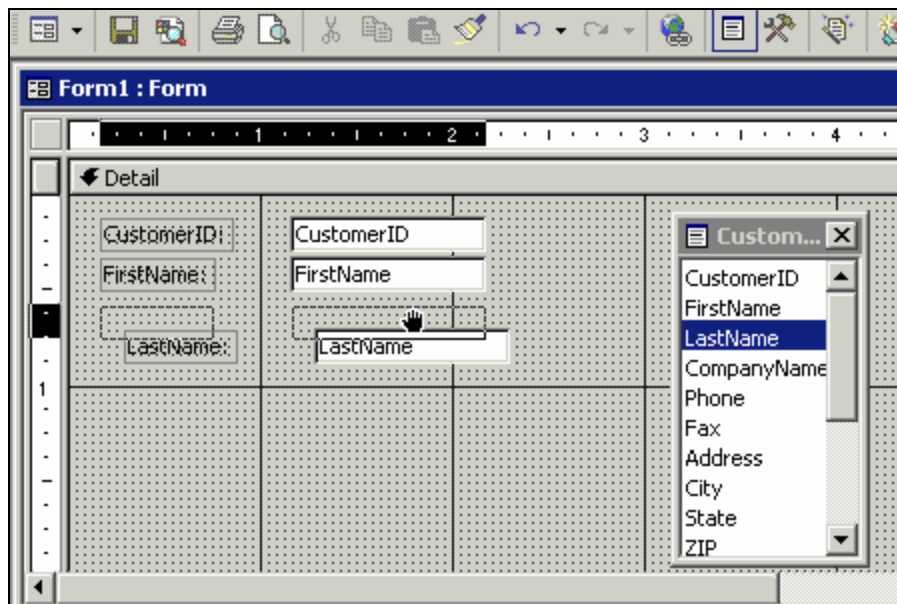
Oops! I missed. I wasn't quite perfect with my dragging and I dropped it in the wrong place. How do we move it? Notice how LastName is highlighted (see the dots around it). If it's not highlighted, then just click once on it. Now, move your mouse over it until you see a **hand** like this:



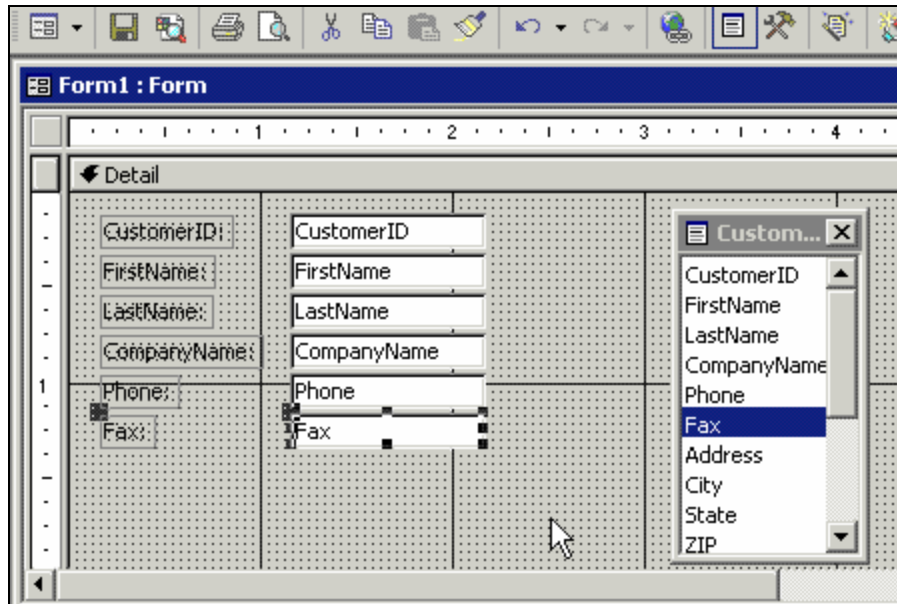
Now, click and drag to move the field wherever you want it.



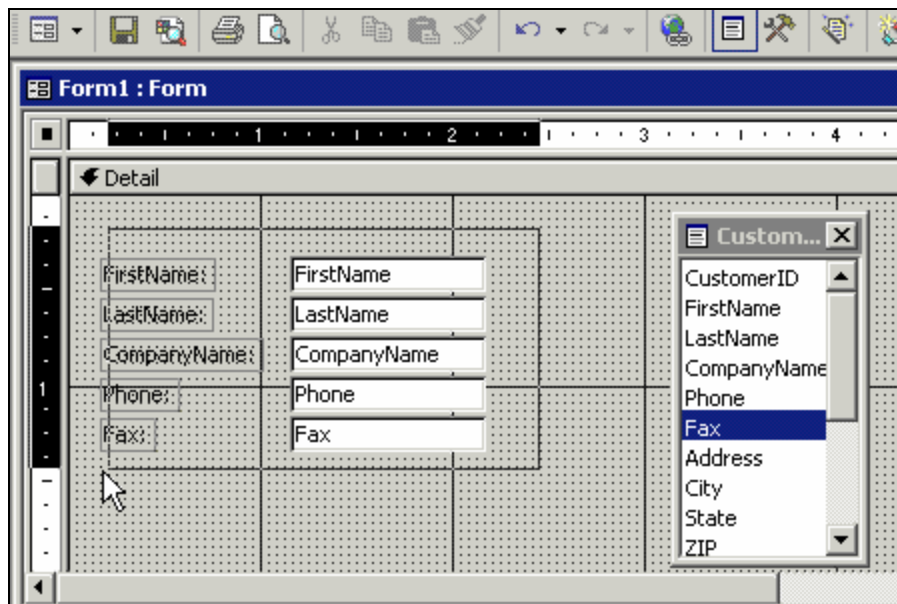
Alternatively, you can also click and drag the field in one motion, provided it was not highlighted to begin with. Just click off in "right field" somewhere to unhighlight all of the fields, and then click and drag one of the fields.



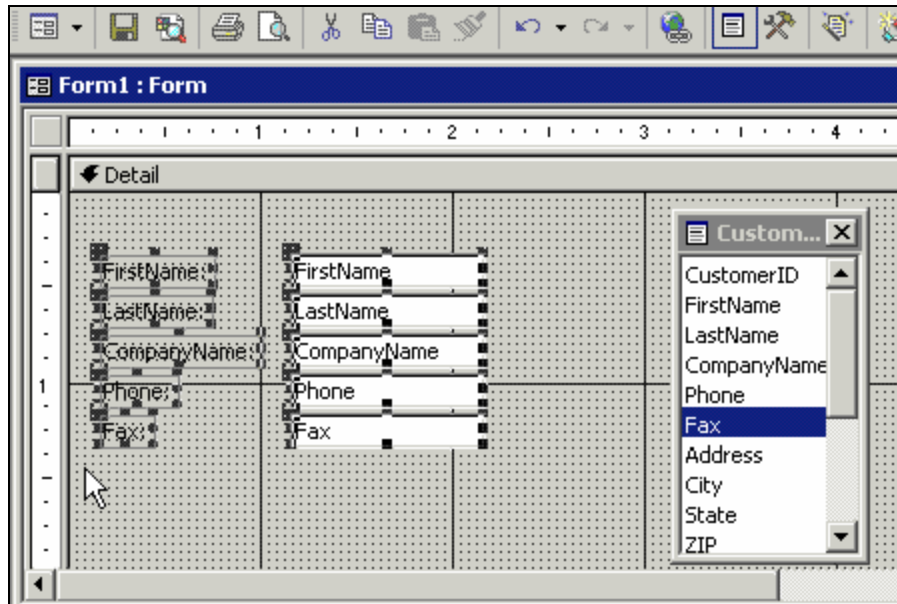
Continue practicing by bringing the fields into the form one at a time.



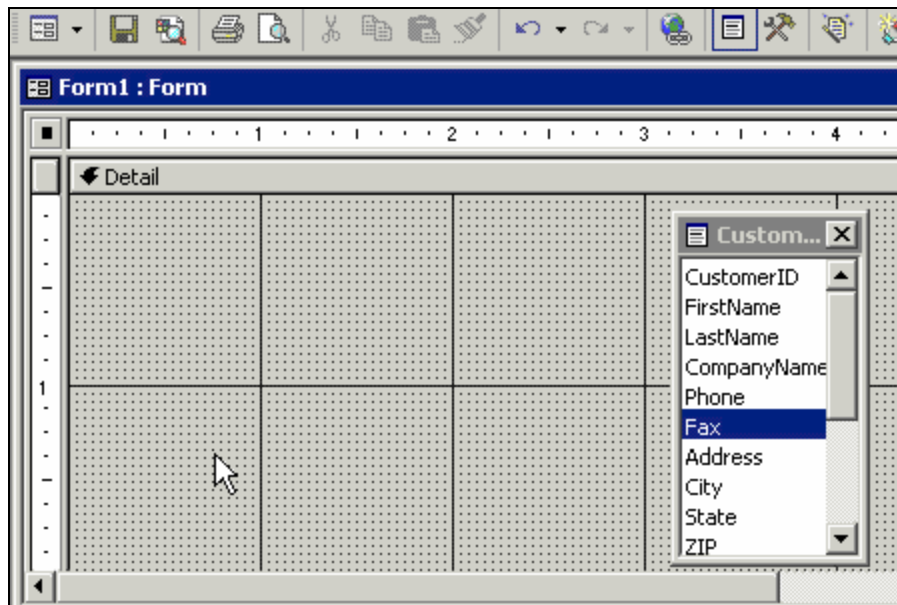
Yes, as a shortcut, you can bring them all over at once. To show you this, let's first remove all of the current fields from our form. To remove one field, you can just click on it and press DELETE on your keyboard. To remove them all, draw a box around all of them...



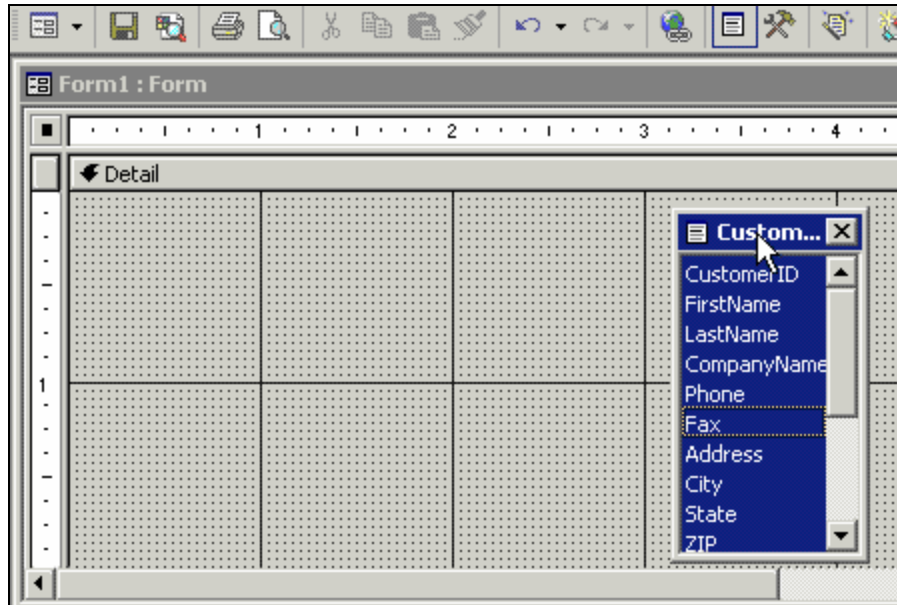
This will select them all...



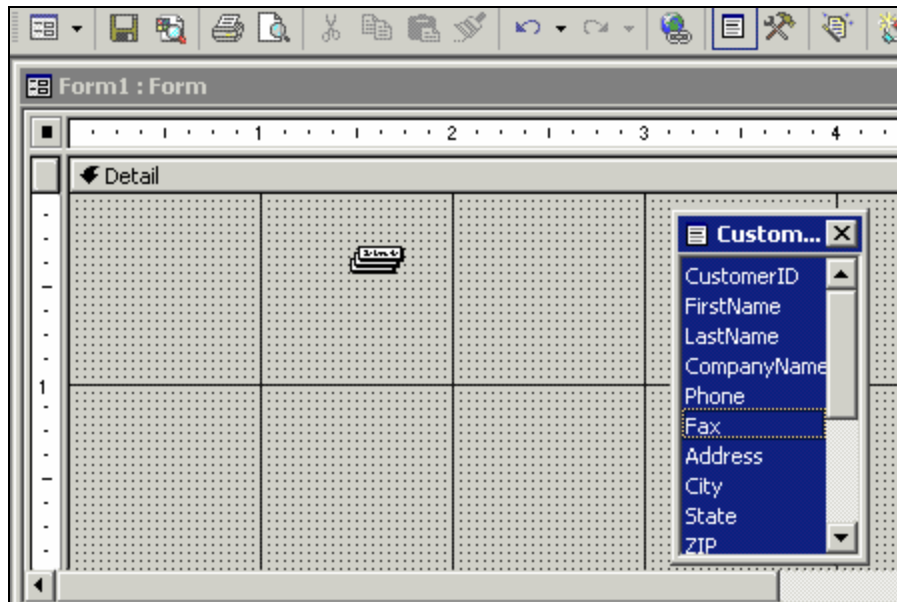
Now hit DELETE on your keyboard.



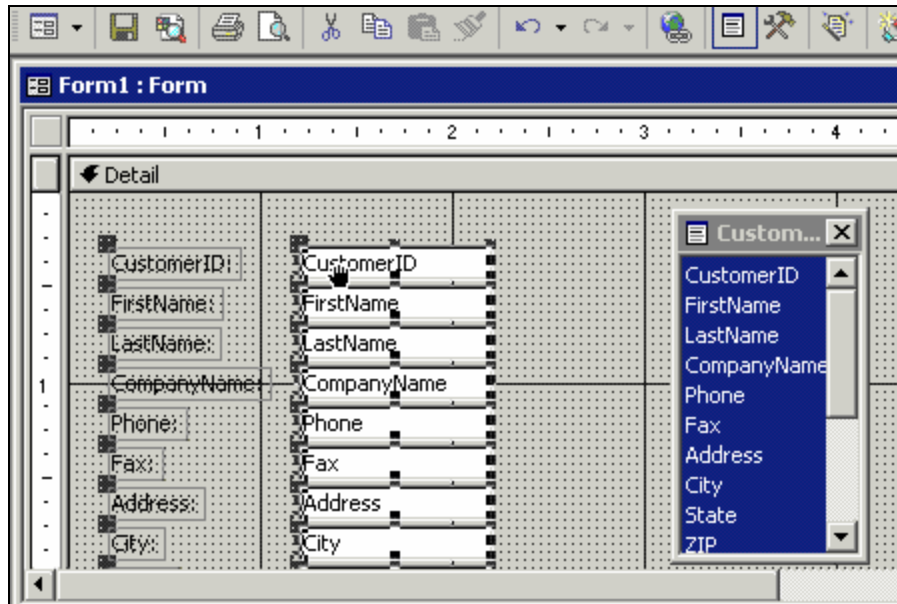
To bring all of the fields over at once, double-click on the **Title Bar** of the field list box. This will highlight all of the fields.



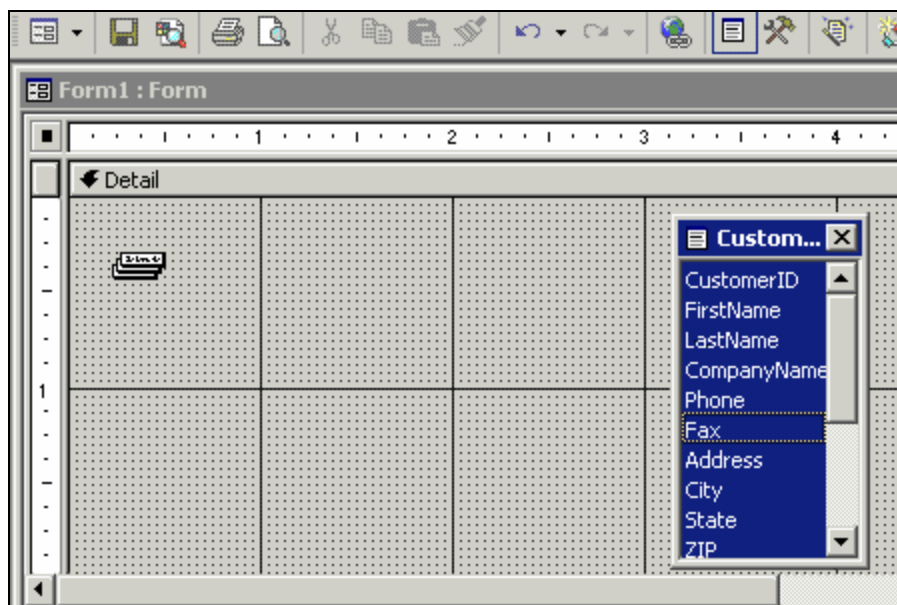
Now, click on any one of them and drag it over to the form. Notice how the little box is different because you're dragging multiple fields.



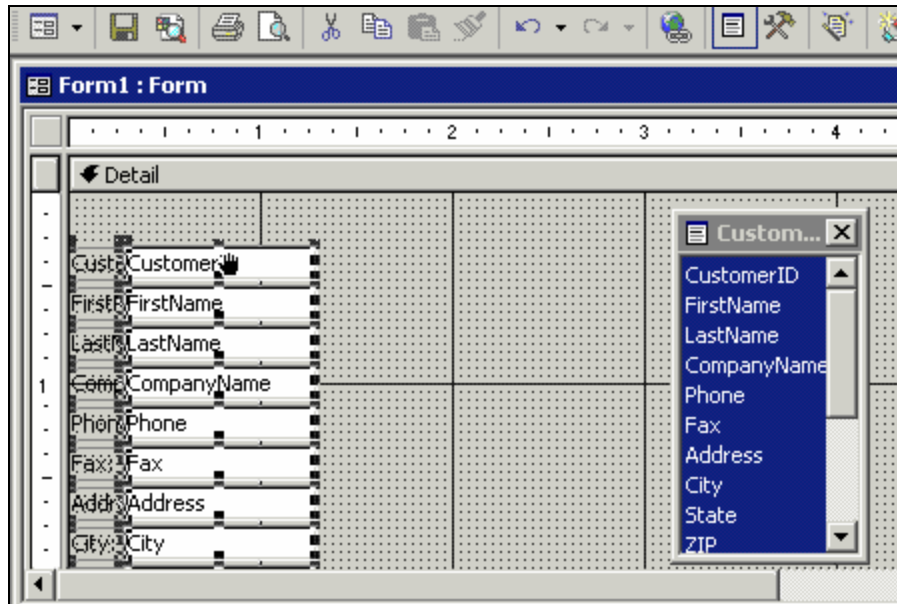
When you release the mouse button, all of the fields are placed.



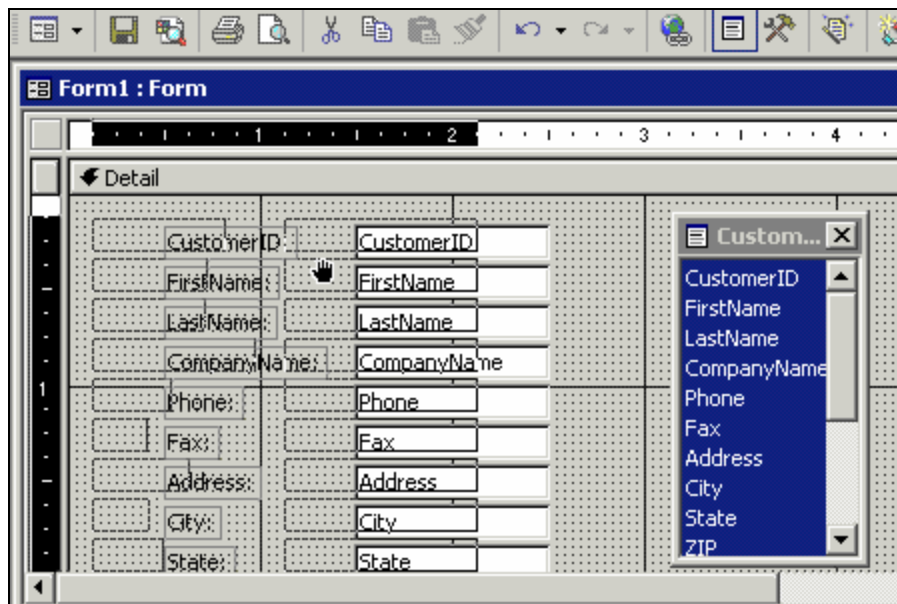
One mistake that people commonly make is that they bring their fields over too close to the edge of the form...



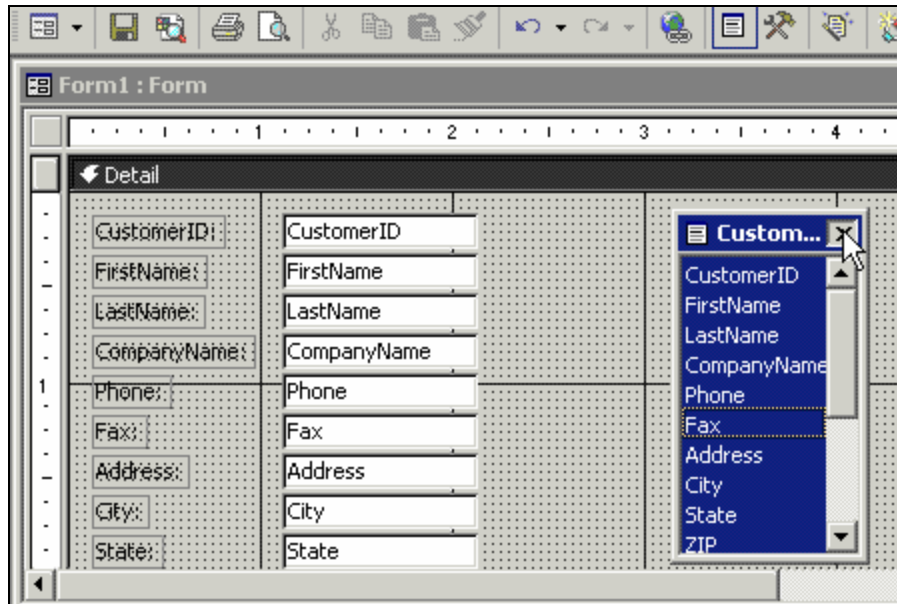
And then their labels are all squished up against the side...



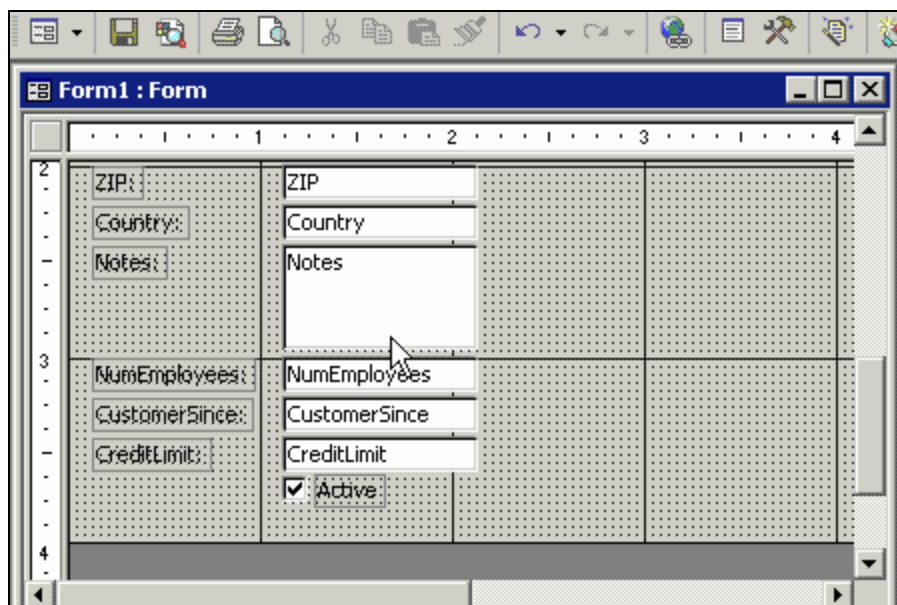
Make sure when you're bringing your fields over, you don't go any farther over than, say, the 1-inch marker on the rulerbar. You can also drop them over at, say, the 1.5-inch mark and then while they're all still highlighted, use your **Hand** tool and drag them all over so they look nice.



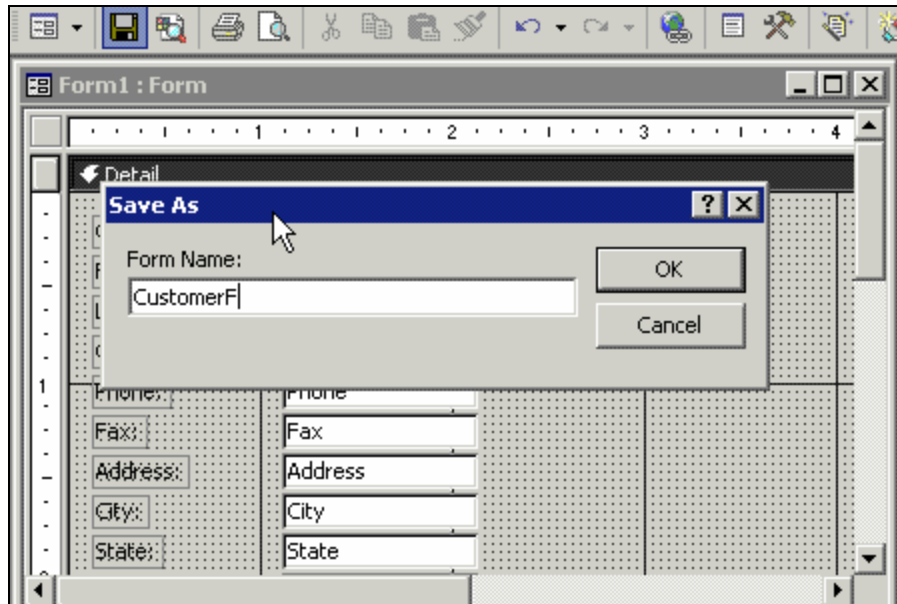
Let's go ahead and close the field list.



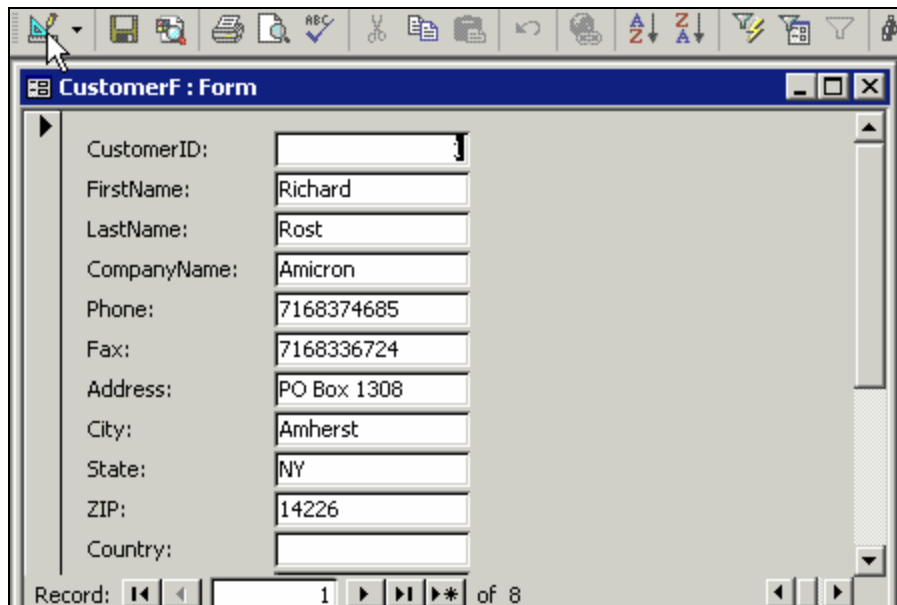
If you scroll down the form, you'll see all of your fields. Notice that **Notes** came in as a larger text box because it's a memo field. Also notice that **Active** is a check box.



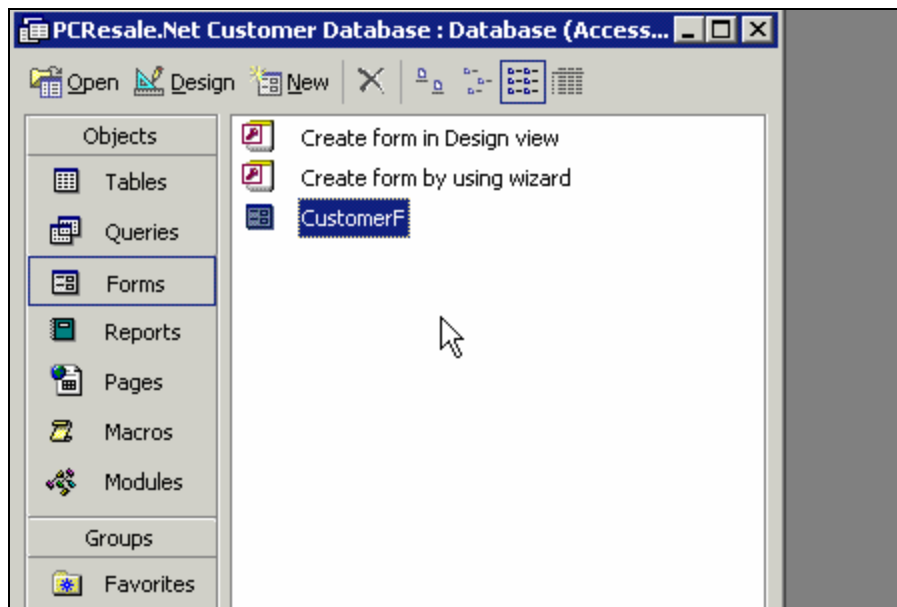
Let's save our form. Click on the floppy disk Save button. I'll call my form **CustomerF** and click OK.



Go to **Form View** and you'll now see all of your fields on the form.

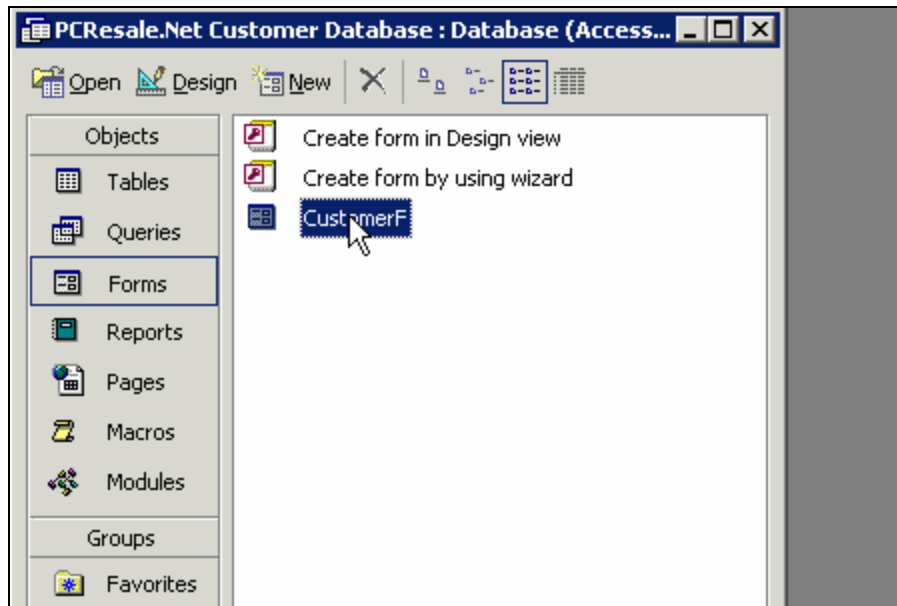


Close the form and return to the database window. Notice your form shows up in the Forms section.

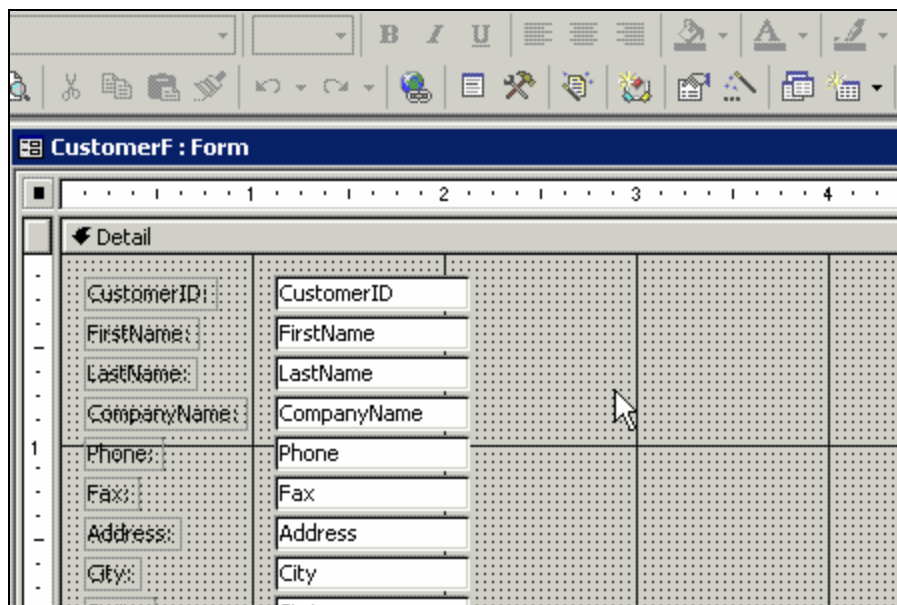


Lesson 12. Formatting Your Form

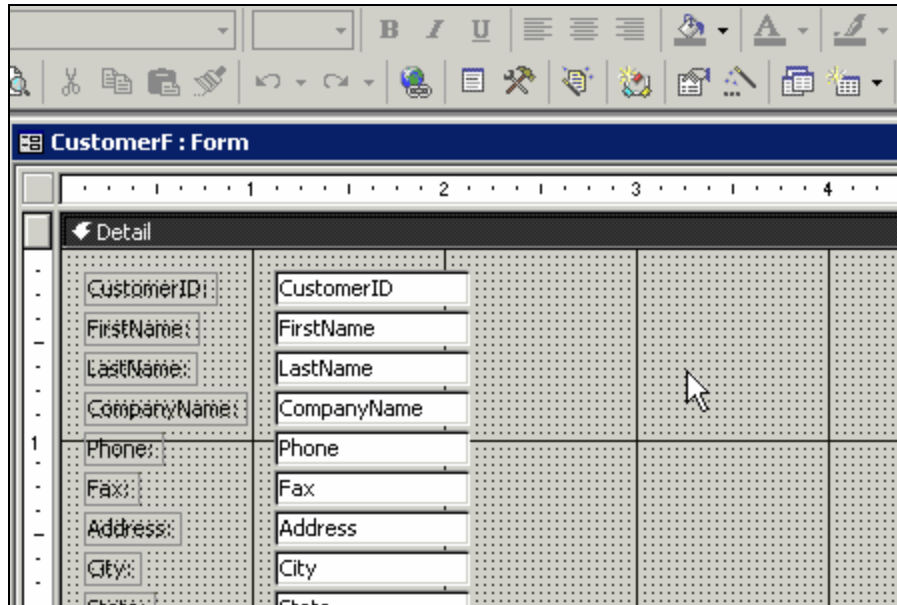
Let's open up our customer form from the last lesson.



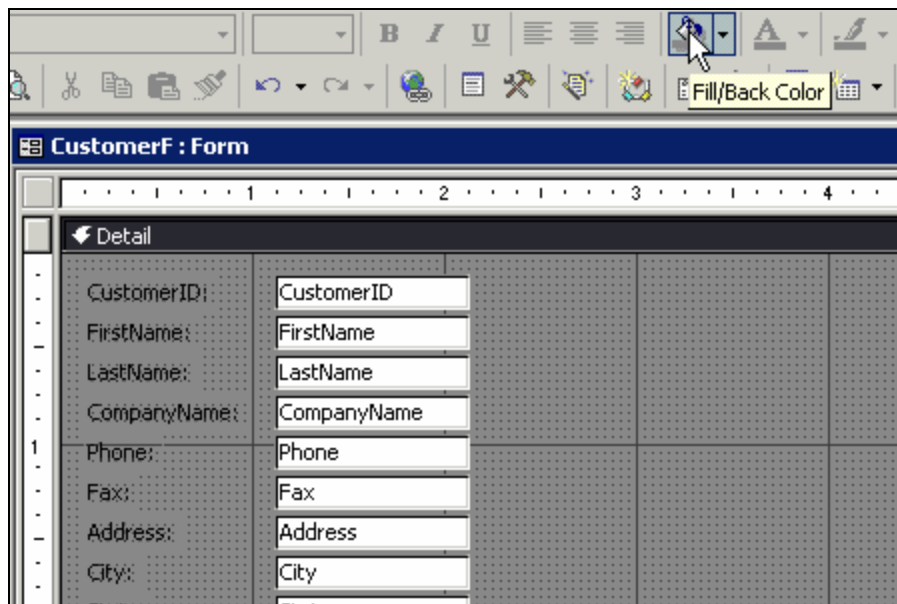
Go to design view.



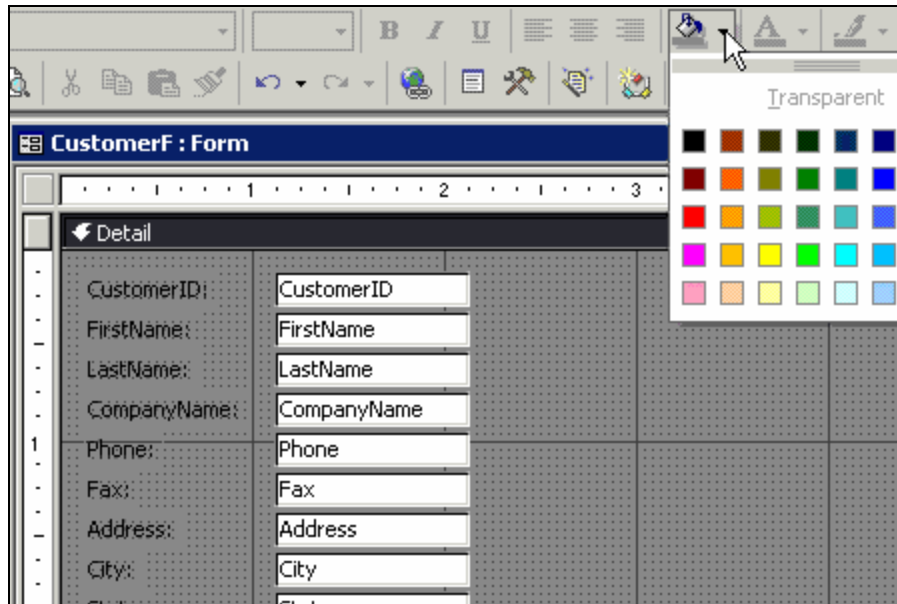
First, let's change our background color. Click somewhere on the background of the form. You will notice the horizontal band that says "Detail" will become highlighted.



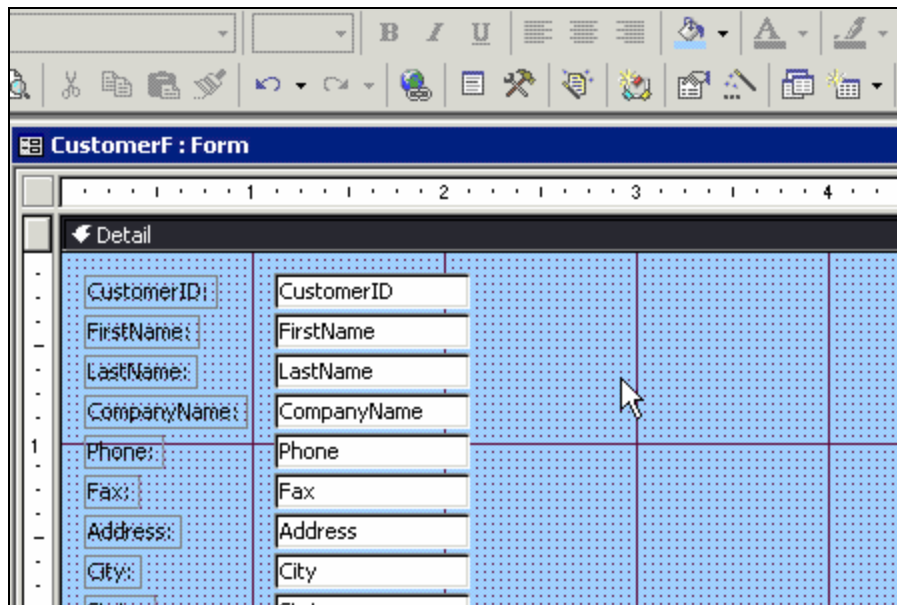
Notice on the toolbar there is a button that looks like a paint can. This is the background / fill color button. If you click on it now, you get the color that's under the paint can (dark gray right now).



If you click on the down-arrow next to the paint can, you can select any color from the color palette.



I'll select a light blue color.



Click on the label for the LastName field.

The screenshot shows a Microsoft Access form titled "CustomerF : Form". The form is in "Detail" view. It contains a list of fields: CustomerID, FirstName, LastName, CompanyName, Phone, Fax, Address, City, State, ZIP, and Country. The LastName field is highlighted with a mouse cursor, indicating it is selected for deletion.

Now delete it. Hit DELETE on your keyboard.

The screenshot shows the same Microsoft Access form "CustomerF : Form" in "Detail" view. The LastName field is still highlighted with a mouse cursor, indicating it is selected for deletion.

Using your Hand tool, drag the LastName textbox up next to the FirstName textbox.

The screenshot shows the 'CustomerF : Form' in Design View. The 'Detail' section contains a grid of controls. The 'FirstName' label and its text box are selected. A dashed box with a hand cursor is positioned to the right of the 'FirstName' text box, indicating the area where the 'LastName' text box will be moved.

Let's now change the text in the label. Click on the FirstName label once to select it.

The screenshot shows the 'CustomerF : Form' in Design View. The 'FirstName' label is selected, and the 'LastName' text box has been moved to the right of the 'FirstName' text box.

Click on the label a second time to edit the text in that label. Now you can type in whatever you want for the label (remember this is what shows up on the form).

The screenshot shows the 'CustomerF : Form' in Design View. The form has a 'Detail' section with the following fields and their corresponding controls:

- CustomerID: CustomerID (text box)
- FirstName: FirstName (text box)
- LastName: LastName (text box)
- CompanyName: CompanyName (text box)
- Phone: Phone (text box)
- Fax: Fax (text box)
- Address: Address (text box)
- City: City (text box)
- State: State (text box)
- ZIP: ZIP (text box)
- Country: Country (text box)

I'm going to type in **Name (F,L)**. I think most people can figure out that this means first name, last name.

The screenshot shows the 'CustomerF : Form' in Design View after editing. The 'FirstName' and 'LastName' fields are now labeled 'Name (F,L)'. The 'CompanyName' field is highlighted with a mouse cursor.

Switch to **Form View** and see what your form looks like now.

CustomerF : Form

CustomerID:	1
Name (F,L):	Richard Rost
CompanyName:	Amicron
Phone:	7168374685
Fax:	7168336724
Address:	PO Box 1308
City:	Amherst
State:	NY
ZIP:	14226
Country:	
Notes:	Such a swell

Return to design view. Move your CompanyName field up.

CustomerF : Form

Detail

CustomerID:	CustomerID
Name (F,L):	FirstName LastName
CompanyName:	CompanyName
Phone:	Phone
Fax:	Fax
Address:	Address
City:	City
State:	State
ZIP:	ZIP

Edit the label for CompanyName and put a space between “Company” and “Name.” Remember, this is what the user sees – it’s a label – you can break the rules for labels to make them look good.

The screenshot shows the Microsoft Access form design view for a form titled "CustomerF : Form". The form is in "Detail" view. The design grid shows the following fields and their labels:

Field Name	Label
CustomerID	CustomerID
FirstName	Name (F,L)
LastName	
CompanyName	Company Name
Phone	Phone
Fax	Fax
Address	Address
City	City
State	State
ZIP	ZIP

A mouse cursor is pointing at the "Company Name" label.

Let’s make the CompanyName field wider. Click on the field.

The screenshot shows the same Microsoft Access form design view for "CustomerF : Form". The "Company Name" label is now wider, and the "Company Name" field is highlighted with a mouse cursor. The design grid is the same as the previous screenshot.

Move your mouse over the little box on the right side of the field. Notice your mouse pointer changes to a double-arrow.

Click and drag on this box...

Notice that the text box is now resized.

Go to Form View and notice how it is resized.

Move the Phone field up. Delete the label for the Fax field. Slide the Fax field up next to the Phone field. Finally, edit the label to reflect the change...

The screenshot shows the design view of a form titled 'CustomerF : Form'. The form is divided into a 'Detail' section. The fields are arranged as follows:

- Customer ID: CustomerID
- Name (F,L): FirstName, LastName
- Company Name: CompanyName
- Phone / Fax: Phone, Fax
- Address: Address
- City: City
- State: State
- ZIP: ZIP

A mouse cursor is positioned over the 'Phone / Fax' label, indicating it is being edited or moved.

Slide the Address label up and make it bigger.

The screenshot shows the same form design view, but the 'Address' label has been resized and repositioned. It is now larger and moved closer to the 'Phone / Fax' label, as indicated by the mouse cursor pointing at it.

Let's move City, State, ZIP, and Country all up at the same time. Draw a box around all four of them. Note that your box really just needs to *touch* them – it doesn't have to completely enclose them.

The screenshot shows a Microsoft Access form titled "Detail". The form has a blue background with a grid of fields. The fields are arranged in two columns. The left column contains labels: "Customer ID:", "Name (F,L):", "Company Name:", "Phone / Fax:", "Address:", "City:", "State:", "ZIP:", "Country:", and "Notes:". The right column contains text boxes: "CustomerID", "FirstName" and "LastName" (split), "CompanyName", "Phone" and "Fax" (split), "Address", "City", "State", "ZIP", "Country", and "Notes". A red selection box is drawn around the "City:", "State:", "ZIP:", and "Country:" labels and their corresponding text boxes. The box is positioned such that it touches the top and left sides of the text boxes, but does not completely enclose them.

Using the Hand tool, drag them up in place.

The screenshot shows the same Microsoft Access form as before. The "City:", "State:", "ZIP:", and "Country:" labels and their corresponding text boxes are now moved up in place. A hand cursor is visible over the "City" text box, indicating that the Hand tool is being used to move the fields. The selection box from the previous screenshot is no longer present.

Delete the labels for State and ZIP code.

Detail

CustomerID: CustomerID

Name (F,L): FirstName LastName

Company Name: CompanyName

Phone / Fax: Phone Fax

Address: Address

City: City

State

ZIP

Country: Country

Notes: Notes

Slide up the State and ZIP fields, and resize them accordingly as shown.

Detail

CustomerID: CustomerID

Name (F,L): FirstName LastName

Company Name: CompanyName

Phone / Fax: Phone Fax

Address: Address

City: City

State ZIP

Country: Country

Notes: Notes

Edit the label...

The screenshot shows a Microsoft Access form in design view. The form is titled 'Detail' and contains several text boxes for data entry. The fields are arranged in a grid-like fashion. The 'Country' label is highlighted with a mouse cursor, indicating it is selected for editing. The form has a blue background with a dotted pattern.

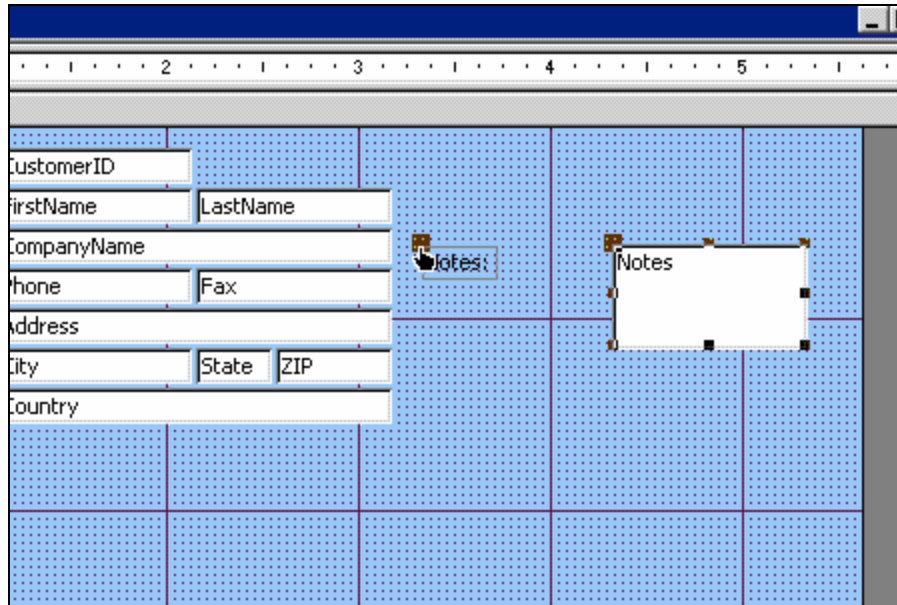
Slide Country up and resize it.

The screenshot shows the same Microsoft Access form in design view. The 'Country' label has been moved up and resized, as indicated by the mouse cursor pointing to its bottom right corner. The form layout remains the same, with the blue dotted background.

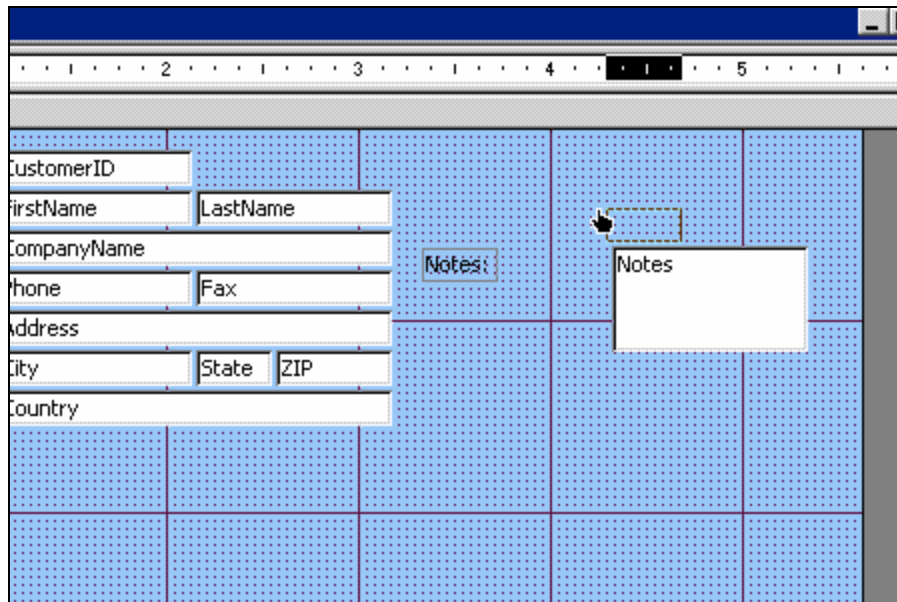
Let's drag the Notes field up to the top, right side of the form. Notice if you drag the Notes field too far to the right, it will actually make the Form itself wider.

You can make the form wider by clicking on the border of the form and dragging it manually.

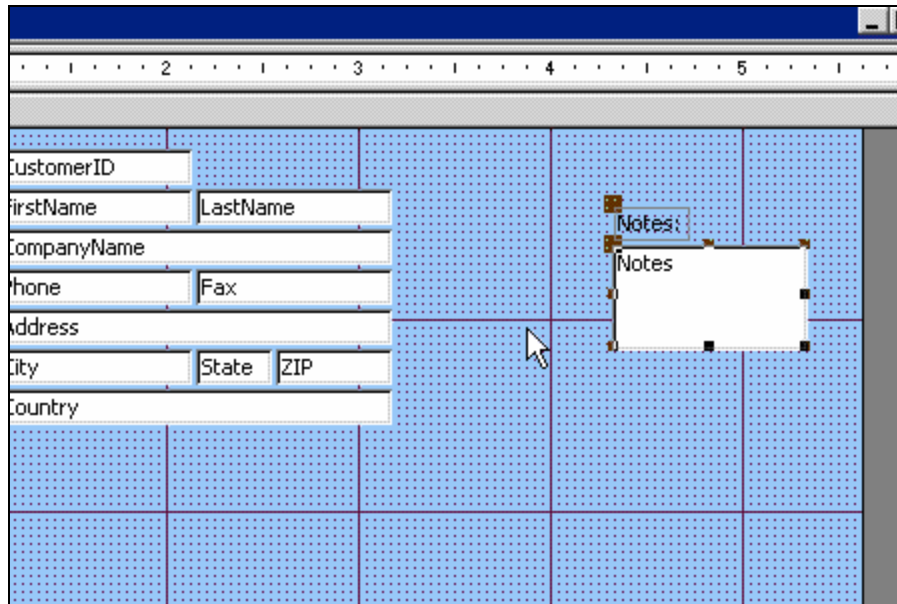
Let's move the Notes label *over* the textbox. Move your mouse over the large box in the upper-left corner of the Notes label. Notice you now have a single finger.



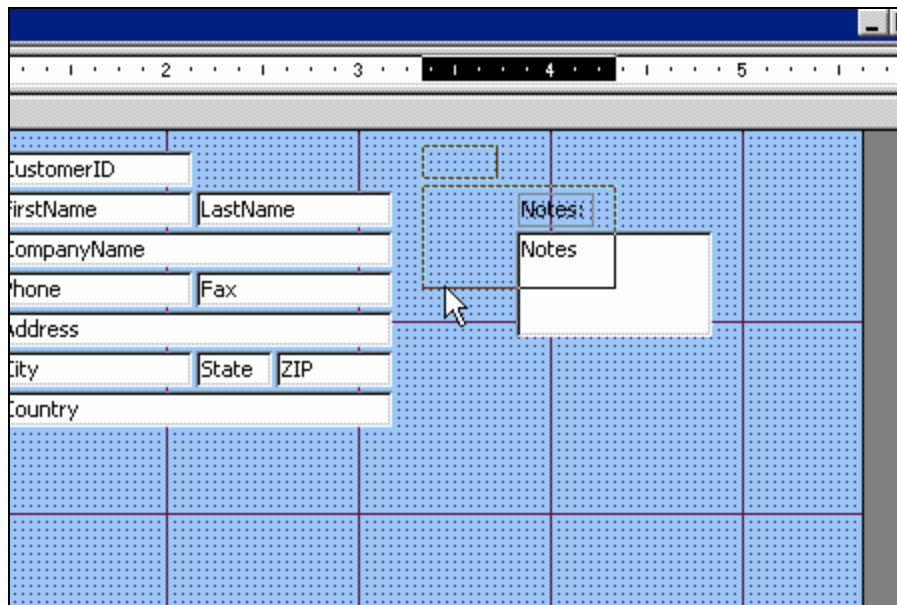
Now, click and drag using the finger tool to move the label above the textbox. The finger tool moves a label or textbox independent of the other, whereas the hand tool moves them both together.



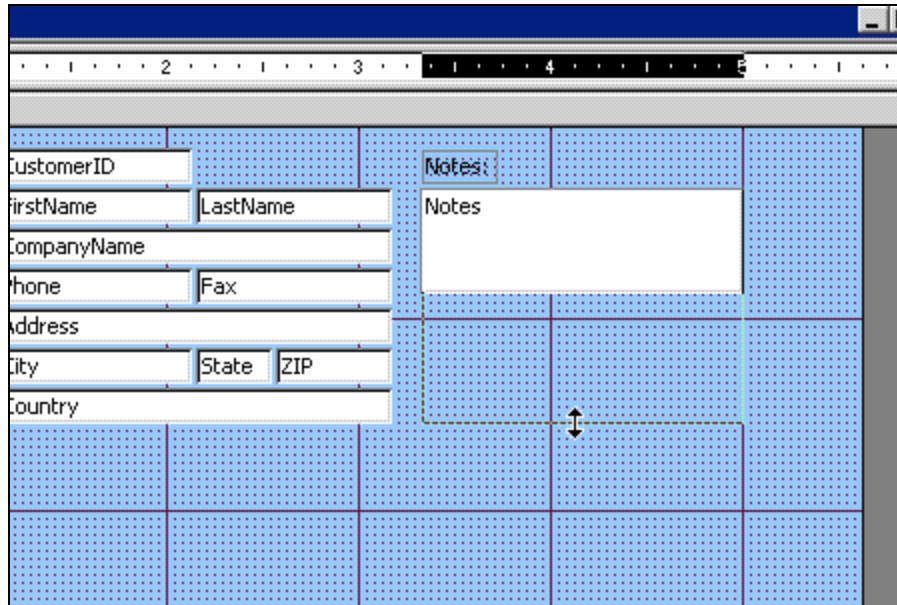
Notice what we have done...



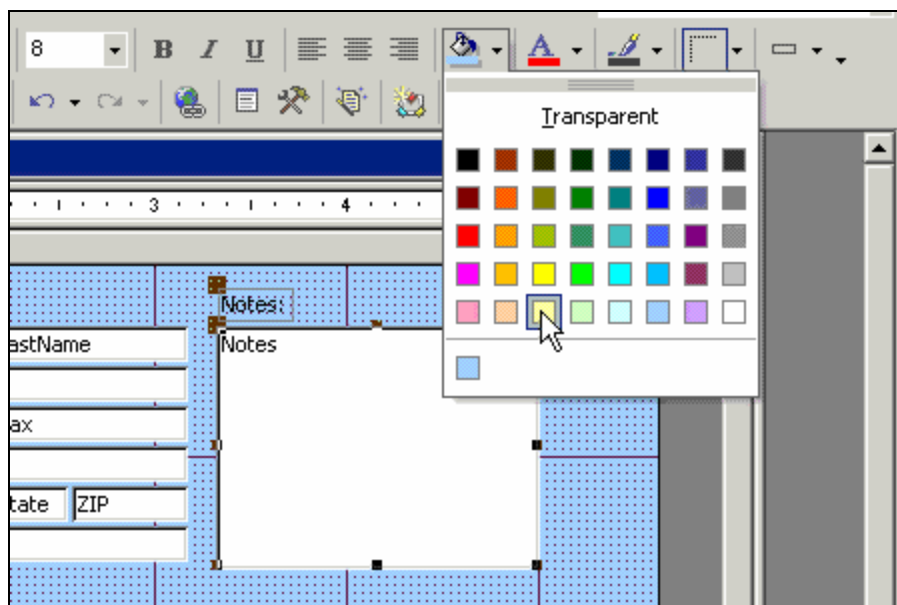
Now you can use the Hand tool to move them both...



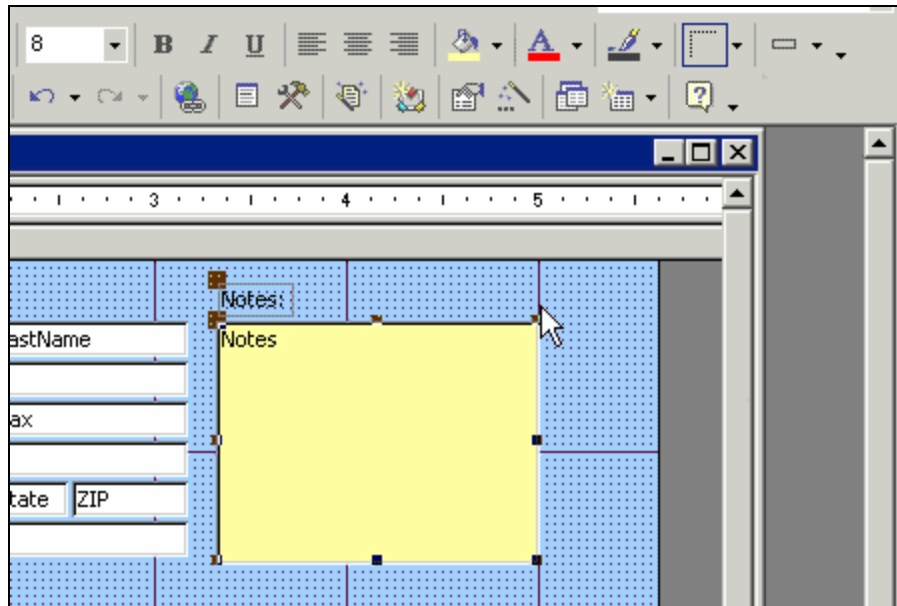
Let's resize our Notes box to make it wider and taller. Note that you can use the other boxes (like the ones in the corners or the bottom middle) to resize the text box in different directions.



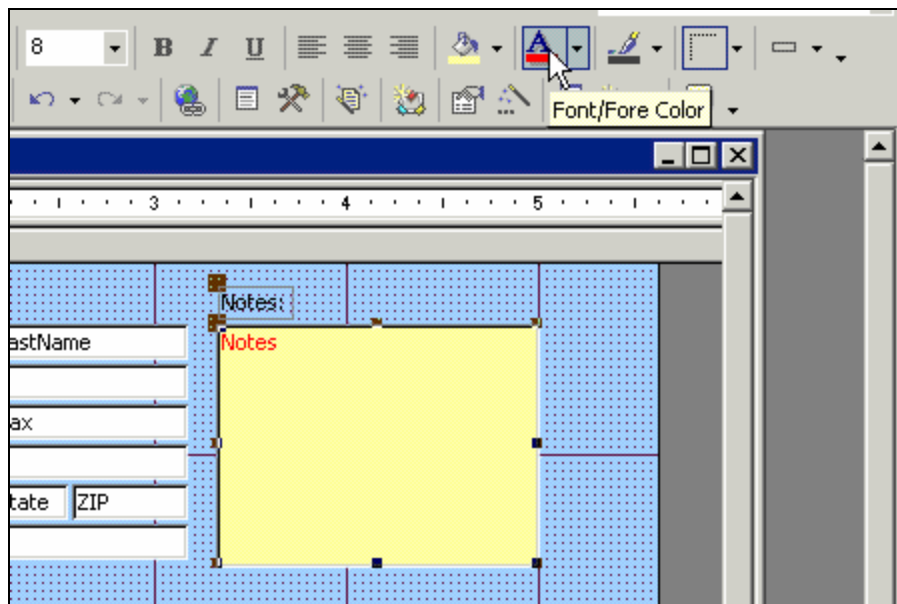
Now, using our Paint Can (fill tool) let's select a light yellow to change the background color of this field.



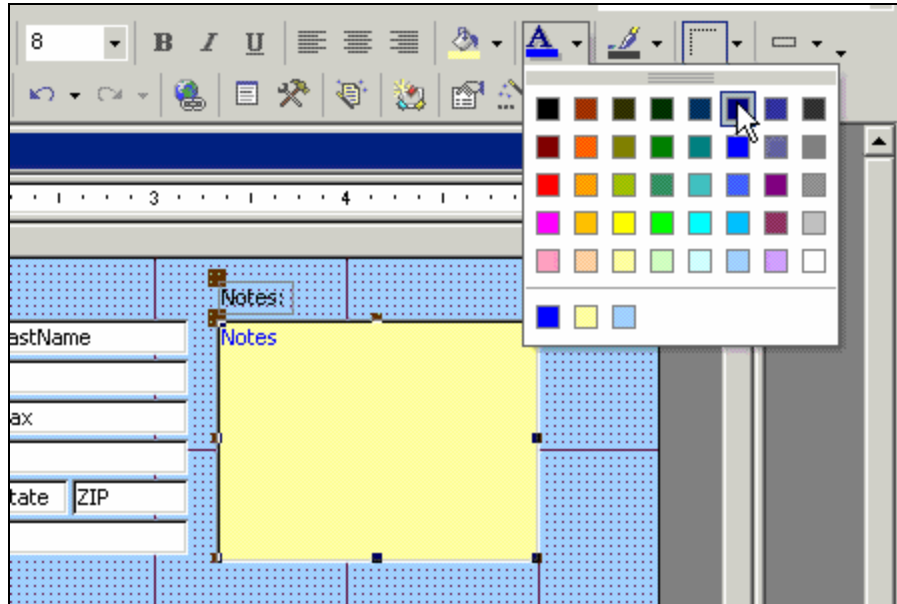
Notice our Notes field is now light yellow.



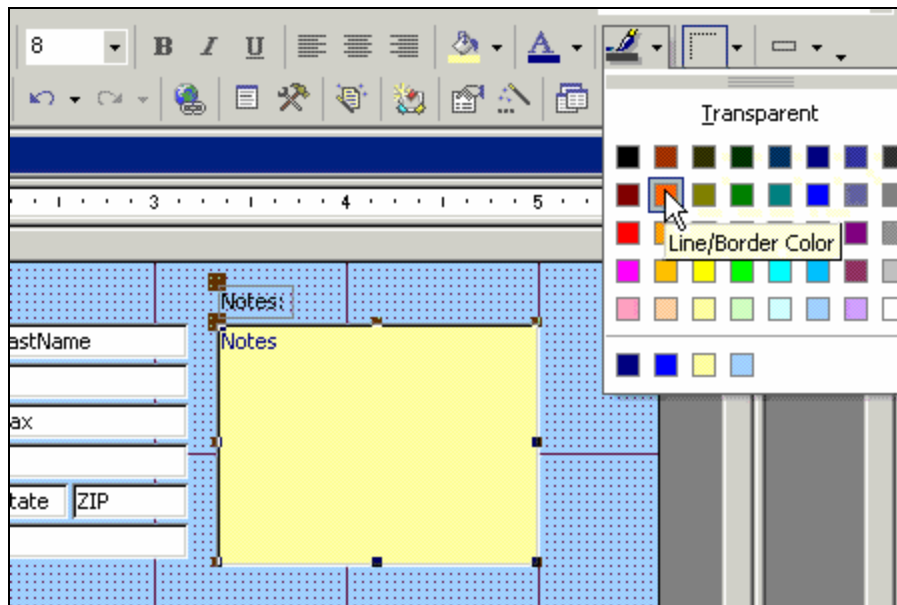
Notice that there are tools similar to the fill color tool that will let you change other attributes of the box. For example, there is a font/fore color tool that changes the color of the text. This one, for example will change the text to Red.



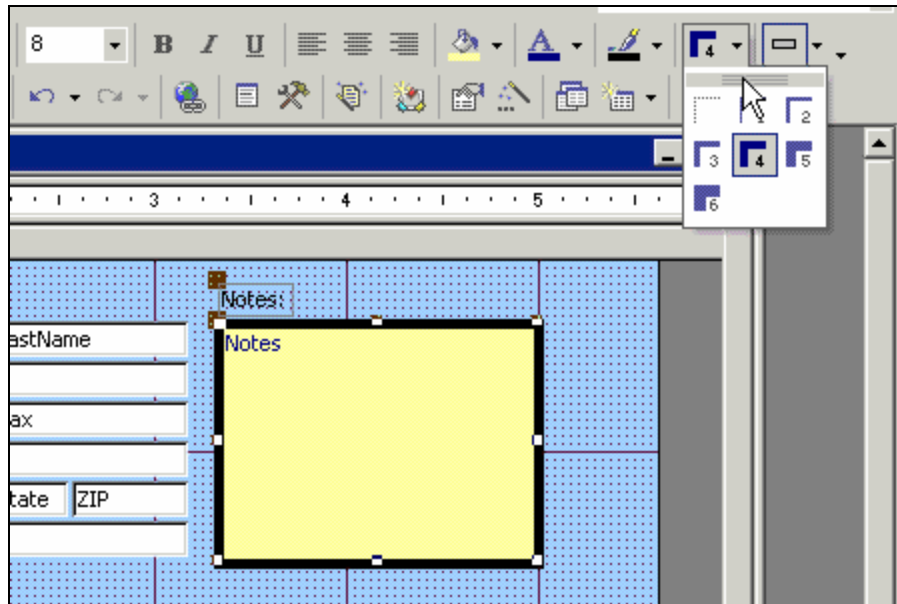
You can drop the color palette down and select a different color, like blue.



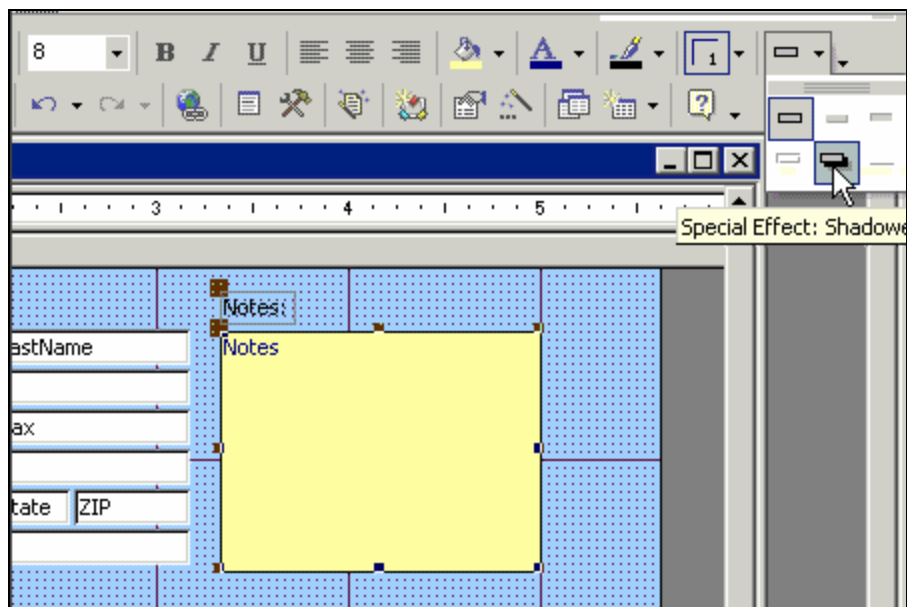
You can use this box to change the border color...



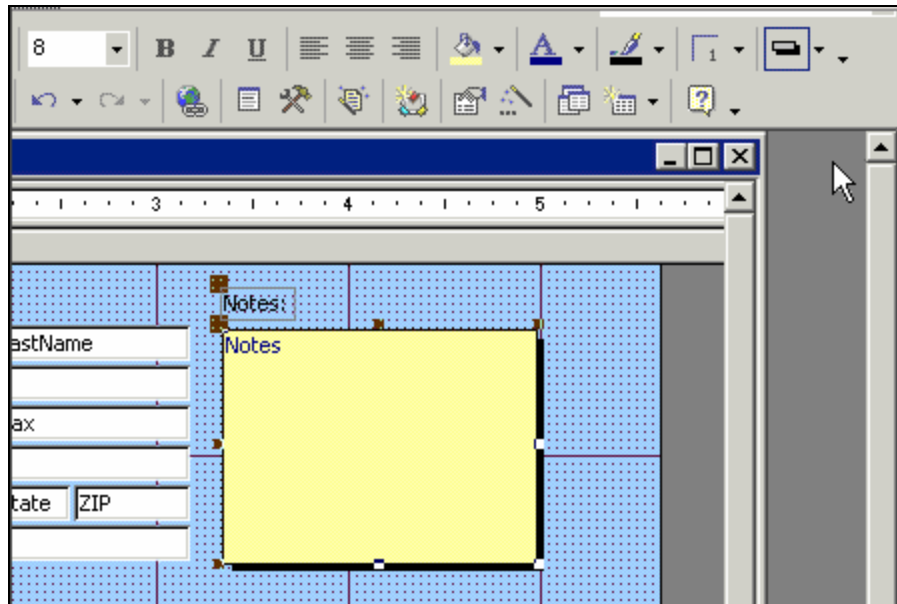
This box changes the line width, the thickness of the box border...



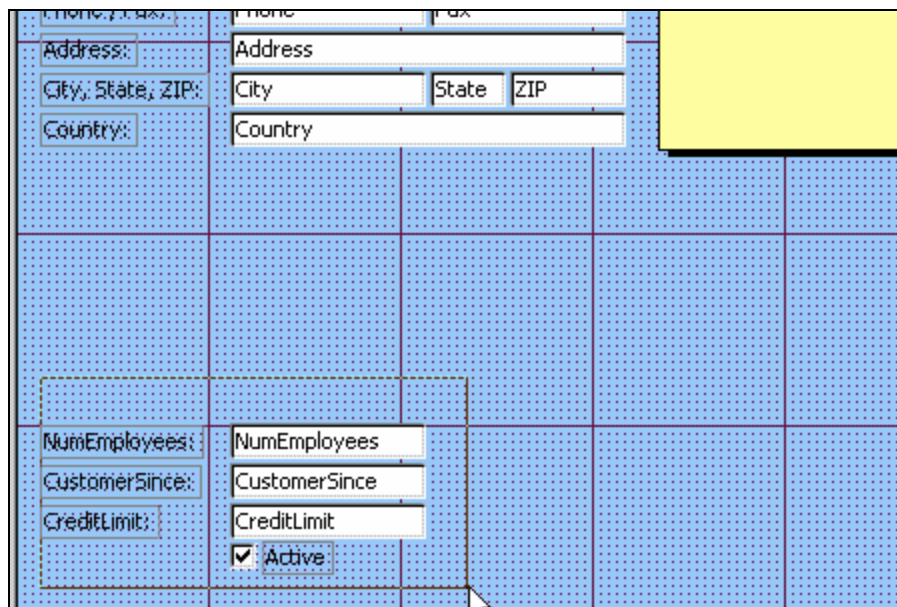
From the next box I'm going to select the Shadowed special effect.



My notes box is now shadowed...



Now let's move the rest of the fields up. Highlight all of the fields on the bottom of the form...



Using the Hand tool, move them up...

The screenshot shows a form design view with a light blue grid background. The form has several fields arranged in a table-like structure. The fields are: Phone, Address, City, State, ZIP, Country, NumEmployees, CustomerSince, CreditLimit, and an Active checkbox. A hand cursor is positioned over the Active checkbox, indicating it is being moved.

Let's move the Active checkbox over to the right to save space.

The screenshot shows the same form design view as before, but the Active checkbox has been moved to the right, next to the CreditLimit field. The hand cursor is still positioned over the checkbox, indicating it is being moved.

Now you can take the bottom of the form and resize it – to make the form shorter and save even more space.

Save your form. You won't be prompted for a name because you've already saved your form with a name. Nothing will appear to happen – but your form is saved.

Now, take a look at your form in Form View.

CustomerF : Form

Customer ID:

Name (F,L):

Company Name:

Phone / Fax:

Address:

City, State, ZIP:

Country:

NumEmployees:

CustomerSince: ☒ Active

CreditLimit:

Notes:

To add a new record, simply click on the Add New button.

CustomerF : Form

Customer ID:

Name (F,L):

Company Name:

Phone / Fax:

Address:

City, State, ZIP:

Country:

NumEmployees:

CustomerSince: ☒ Active

CreditLimit:

Notes:

Record: of 8

Groups

Favorites

This will bring you to a new blank form.

CustomerF : Form

Customer ID: (AutoNumber) Notes:

Name (F,L):

Company Name:

Phone / Fax:

Address:

City, State, ZIP:

Country:

NumEmployees: 0

CustomerSince:

CreditLimit: \$0.00 ☒ Active

Record: 9 of 9

Groups

Favorites

You can type in your new record – notice the (AutoNumber) will be replaced with the next counter number once you enter in your first bit of data.

CustomerF : Form

Customer ID: 10 Notes:

Name (F,L): Peter Smalls

Company Name:

Phone / Fax:

Address:

City, State, ZIP:

Country:

NumEmployees: 0

CustomerSince:

CreditLimit: \$0.00 ☐ Active

Record: 9 of 9

Groups

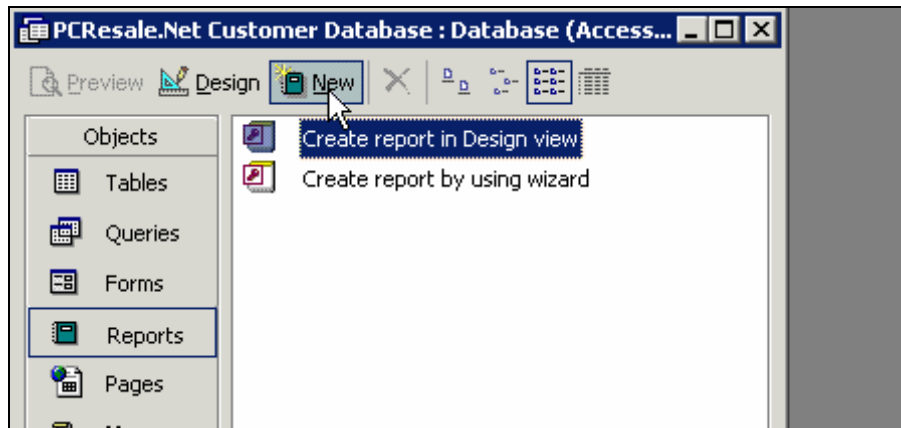
Favorites

To delete a record, click on the big vertical gray bar to the left of the form. This will select the entire record.

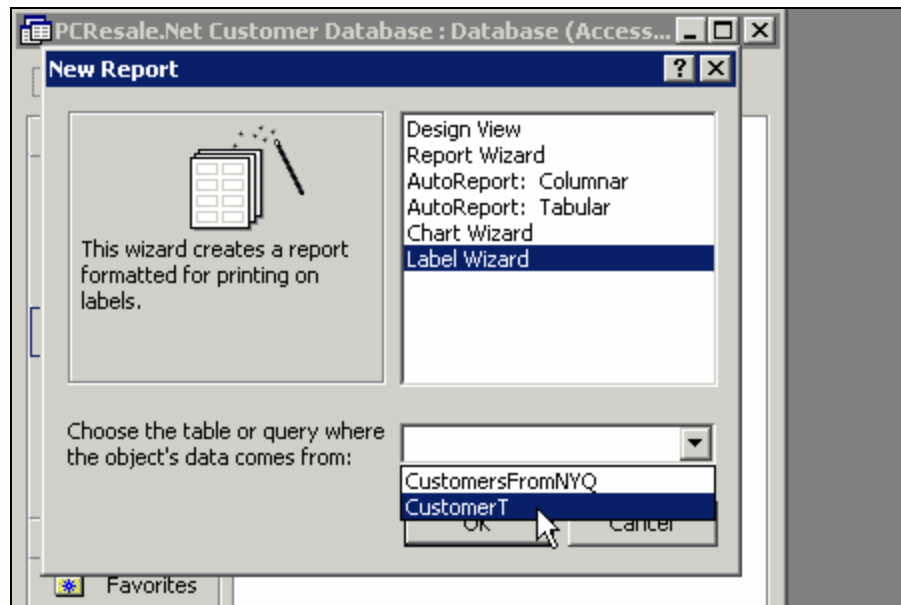
Now hit Delete on your keyboard. You will be asked if you're sure you wish to delete the record. Answer Yes and it's gone – note that you cannot undo this delete.

Lesson 13. Mailing Label Report

We're going to create customer mailing labels using the Reports feature of Access. Click on Reports, then New.



Select the **Label Wizard** from the list of options. Then, from the drop-down menu, select **CustomerT** as the source of your data.



Click OK.

The Report Wizard starts. You're first asked to select the type and style of labels you want. We want **Avery 5160** labels. This is just the type of label that I've chosen to use – it's a very common label style with 3 columns of 10 rows of labels (30 per page) – standard address labels. Click Next.

What label size would you like?

Product number:	Dimensions:	Number across:
5097	1 1/2" x 4"	2
5159	1 1/2" x 4"	2
5160	1" x 2 5/8"	3
5161	1" x 4"	2
5162	1 1/3" x 4"	2

Unit of Measure: ☒ English ☐ Metric

Label Type: ☒ Sheet feed ☐ Continuous

Filter by manufacturer:

☐ Show custom label sizes

Next you're asked what kind of font you want for your labels. Arial, 8 point, black is fine with me. Just click Next.

What font and color would you like your text to be?

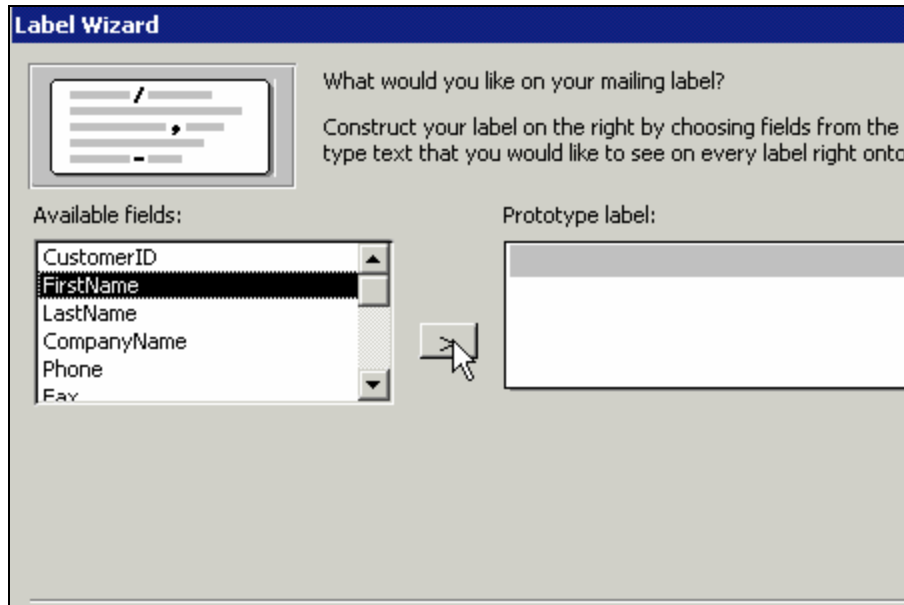
Text appearance

Font name: Font size:

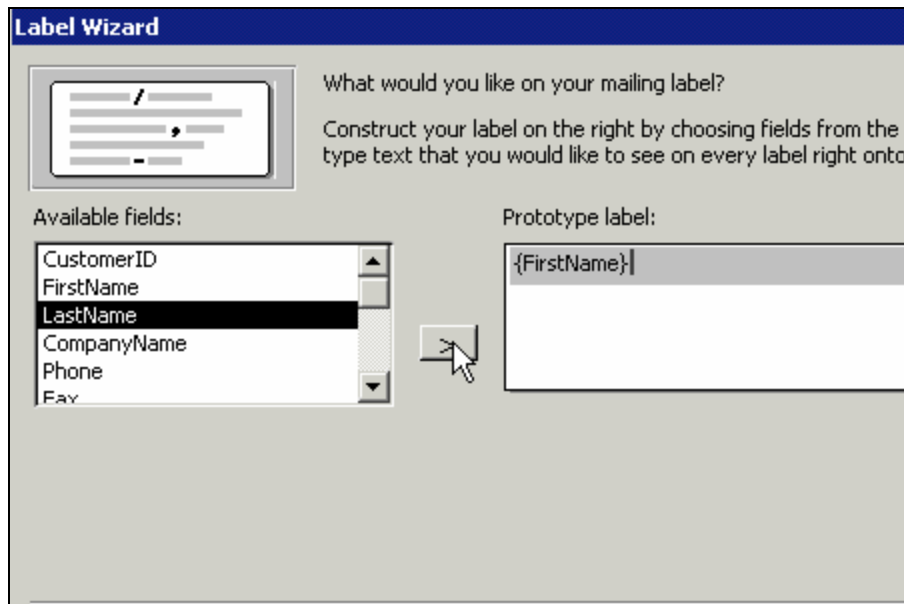
Font weight: Text color: ...

☐ Italic ☐ Underline

Next we have to set up our Prototype label. This just means we need to lay the fields out on one master label, and Access will make all of the rest of them for us. Begin by bringing over the fields from the left that we want on our label – in the order we want them. Make it look like a regular address label. Start by clicking on the **FirstName** field and then click on the little right-arrow button.



Now notice that after you click on the button, the field is brought over onto the prototype label.



Now, you would want a SPACE between then FirstName and LastName, so hit the SPACEBAR on your keyboard.

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the type text that you would like to see on every label right onto

Available fields:

- CustomerID
- FirstName
- LastName
- CompanyName
- Phone
- Fax

Prototype label:

{FirstName} |

Now bring over the LastName field. Then, press ENTER on your keyboard to move down to the next line.

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the type text that you would like to see on every label right onto

Available fields:

- CustomerID
- FirstName
- LastName
- CompanyName
- Phone
- Fax

Prototype label:

{FirstName} {LastName}

|

Now bring over CompanyName and press ENTER.

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the type text that you would like to see on every label right onto

Available fields:

- CustomerID
- FirstName
- LastName
- CompanyName
- Phone
- Fax

Prototype label:

{FirstName} {LastName}
{CompanyName}

>

Same thing for Address...

Label Wizard

What would you like on your mailing label?

Construct your label on the right by choosing fields from the type text that you would like to see on every label right onto

Available fields:

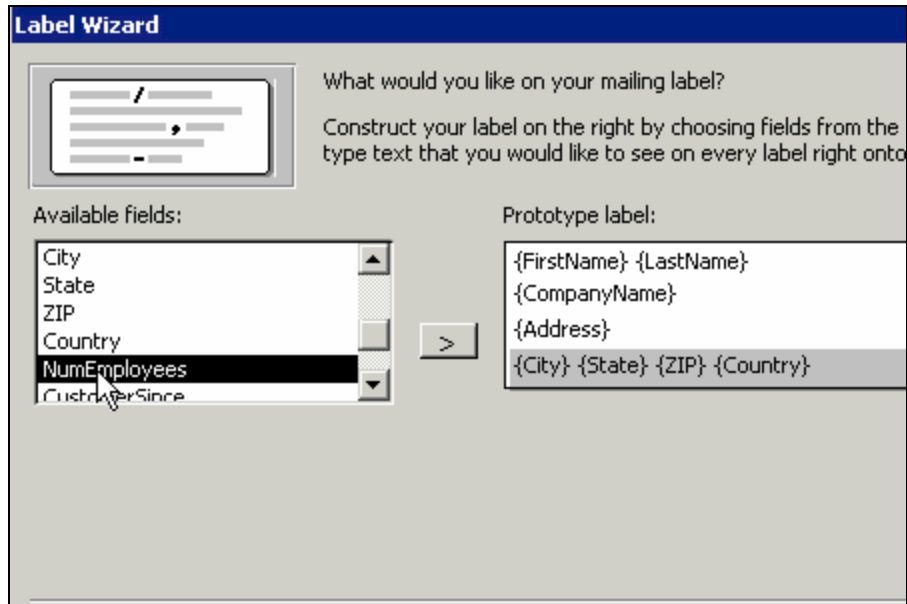
- Address
- City
- State
- ZIP
- Country
- NumEmployees

Prototype label:

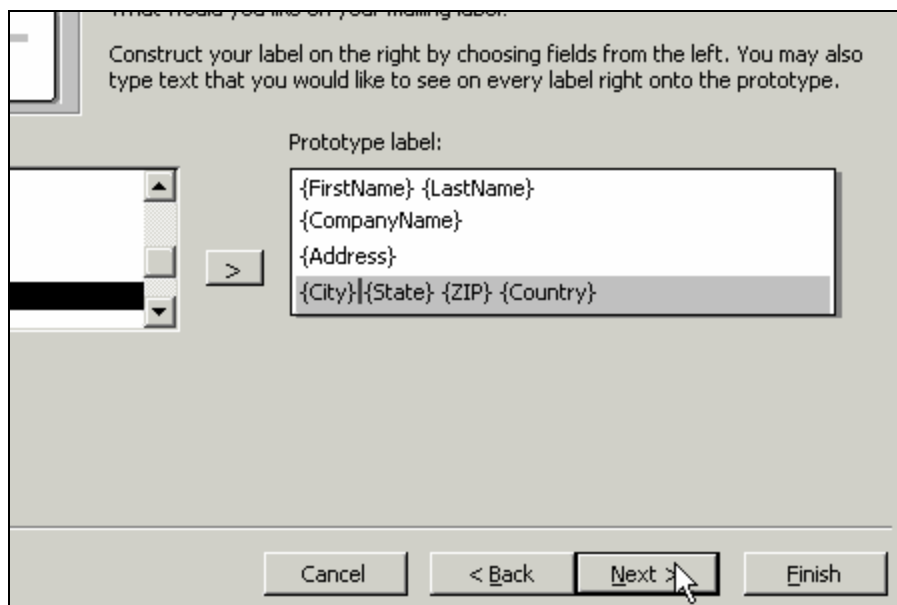
{FirstName} {LastName}
{CompanyName}
{Address}

>

Now bring over City, press SPACEBAR, State, SPACEBAR, ZIP, SPACEBAR, and optionally Country.



If you want to insert a comma or any other characters in your prototype label (like a comma between city and state), you can. Click Next.



Now you're asked if you want to sort by any particular fields. Let's sort our results by ZIP code. Click on ZIP code and then click on the single-right-arrow button. Click Next.

You can sort your labels by one or more fields in your database. You might want to sort by more than one field (such as last name, then first name), or by just one field (such as postal code).

Which fields would you like to sort by?

Available fields:		Sort by:
Address	<input type="button" value=">"/> <input type="button" value=">>"/> <input type="button" value="<"/> <input type="button" value="<<"/>	ZIP
City		
State		
Country		
NumEmployees		
CustomerSince		
CreditLimit		
Active		

Cancel < Back Next > Finish

You can also sort by Address (if the Zip codes are the same, they'll next be sorted by Address). Click Next.

You can sort your labels by one or more fields in your database. You might want to sort by more than one field (such as last name, then first name), or by just one field (such as postal code).

Which fields would you like to sort by?

Available fields:		Sort by:
Fax	<input type="button" value=">"/> <input type="button" value=">>"/> <input type="button" value="<"/> <input type="button" value="<<"/>	ZIP
City		Address
State		
Country		
NumEmployees		
CustomerSince		
CreditLimit		
Active		

Cancel < Back Next > Finish

Let's give this report a good name, like **MailingLabelsR**. Click Finish.

What name would you like for your report?

MailingLabelsR

That's all the information the wizard needs to create your labels!

What do you want to do?

☒ See the labels as they will look printed.

☐ Modify the label design.

☐ Display Help on working with labels.

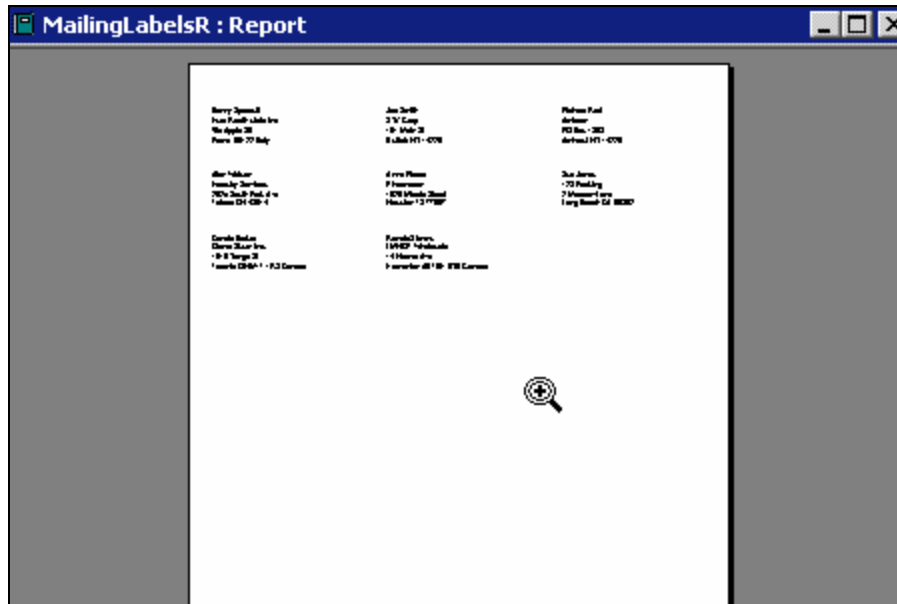
Cancel < Back Next > Finish

Our mailing labels are finished. They will appear on the screen.

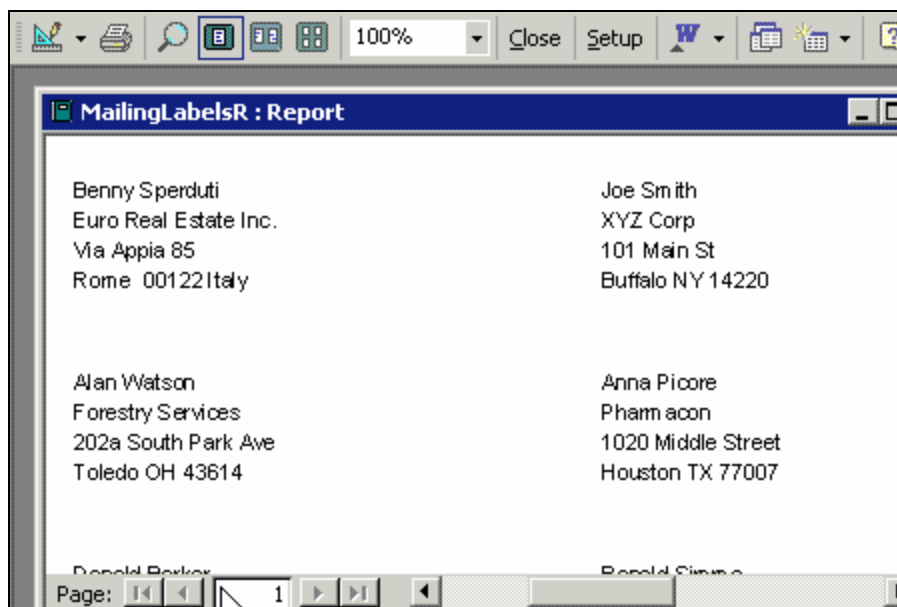
MailingLabelsR : Report

Benny Sperduti Euro Real Estate Inc. Via Appia 85 Rome 00122 Italy	Joe Smith XYZ Corp 101 Main St Buffalo NY 14220
Alan Watson Forestry Services 202a South Park Ave Toledo OH 43614	Anna Picore Pharm acon 1020 Middle Street Houston TX 77007

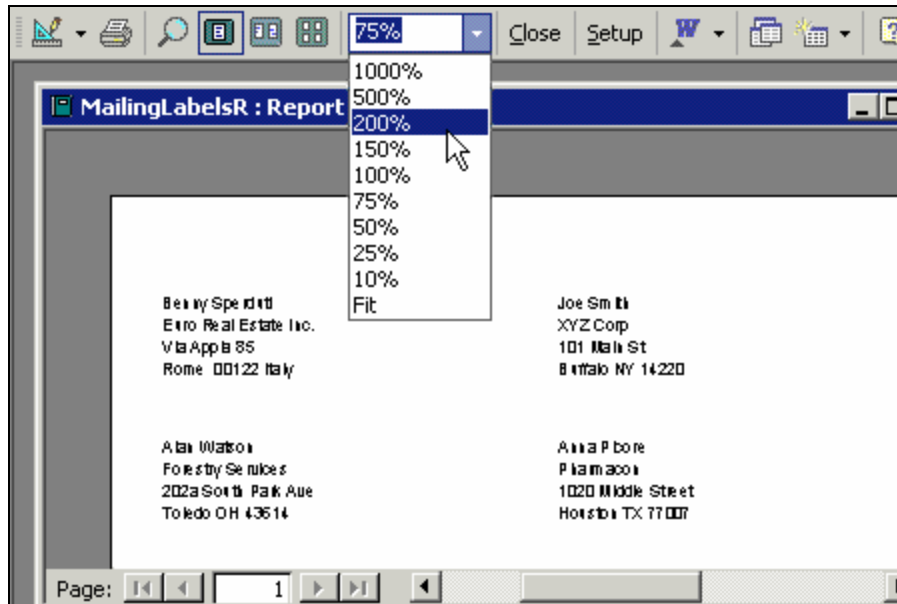
Notice your mouse has turned into magnifying glass. You can click to zoom in and out.



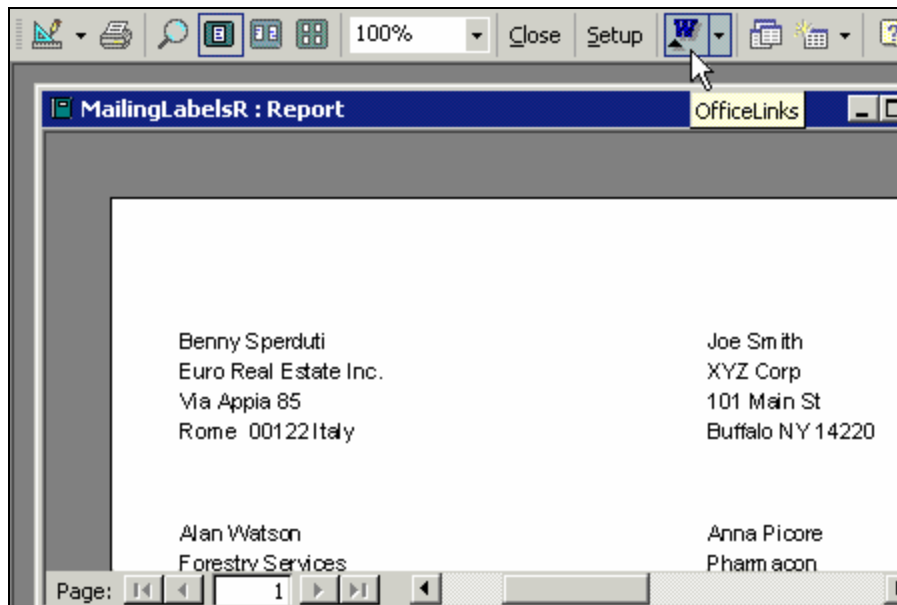
There are navigation buttons on the bottom of the form so you can move between the pages (if you have more than one page of 30 labels – which we do not).



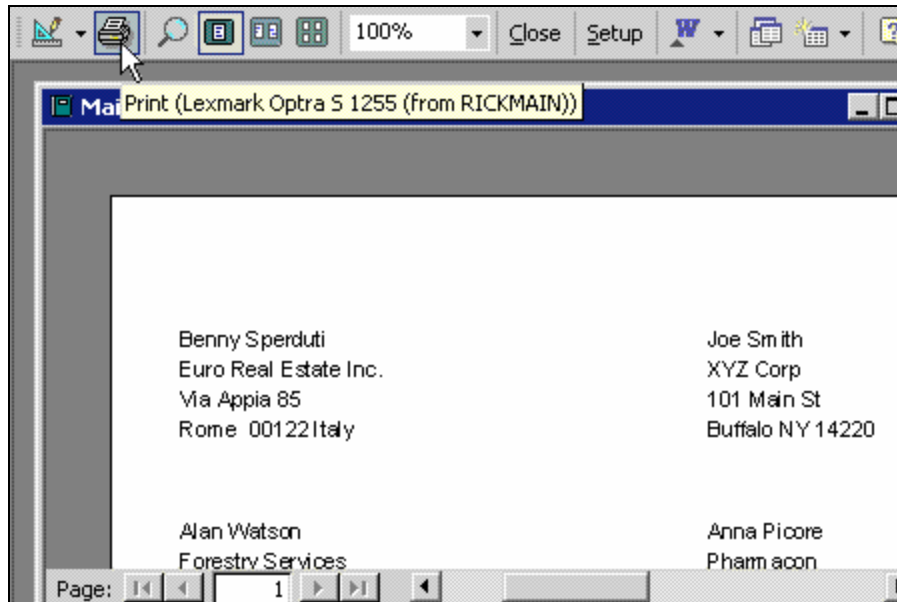
There is a drop-down box that will also let you zoom in or out.



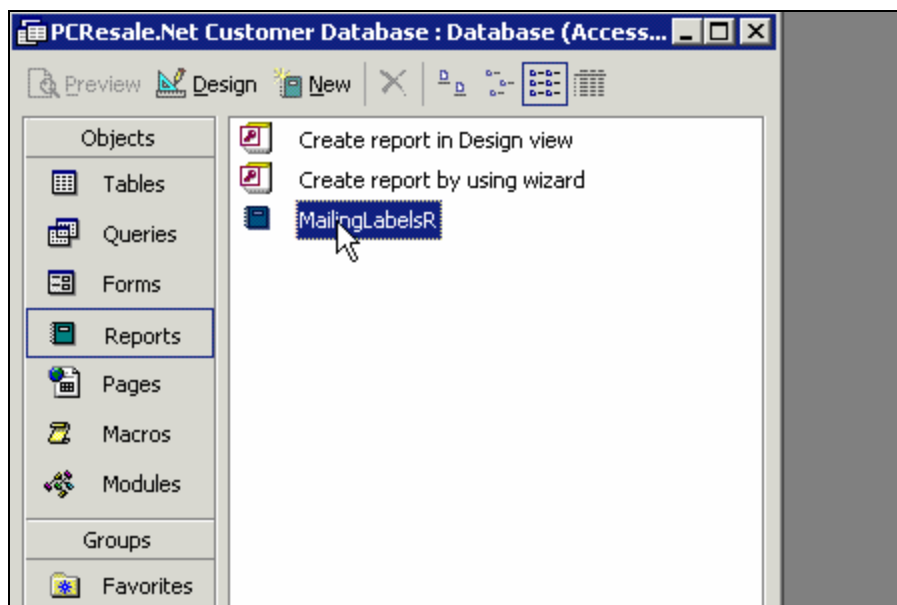
You can also click on the “OfficeLinks” button to export your report to Word or Excel.



When you're ready to print, just click on the Print button.

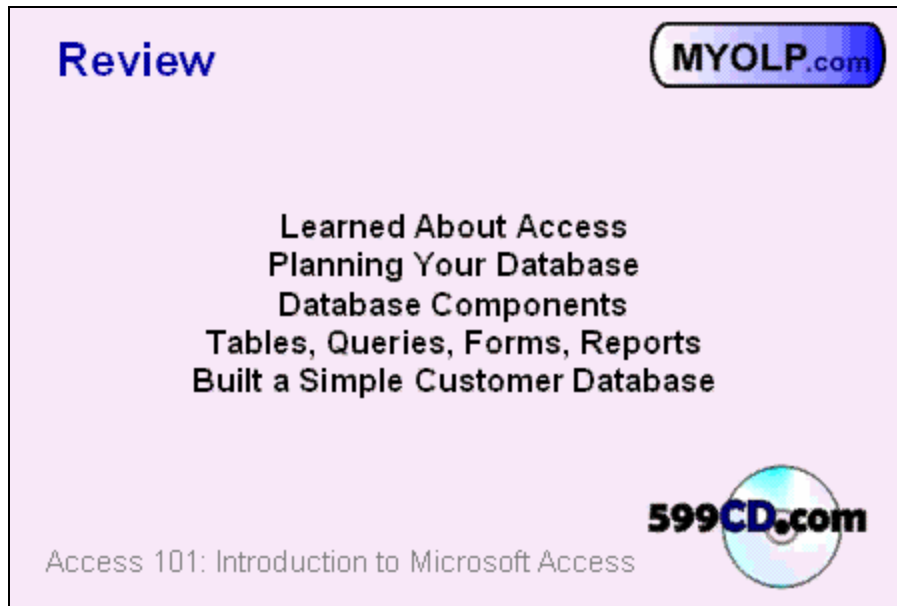


Again, you'll notice your mailing labels are listed in the Reports section. To open the report again, just double-click on it.



Lesson 14. Review

Review topics.



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