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# Contents

**Introduction** ................................................................. xi
- Who this book is for .......................................................... xi
- How this book is organized ................................................ xii
- Download the practice files ............................................... xii
- Your companion ebook .................................................... xiv
- Get support and give feedback ......................................... xiv
  - Errata .............................................................................. xiv
  - We want to hear from you ................................................ xv
  - Stay in touch ............................................................... xv

**PART 1**

Simple database techniques

## 1 Explore Microsoft Access 2013 ........................................ 3

- Identifying new features of Access 2013 ........................................ 4
  - If you are upgrading from Access 2010 .................................. 4
  - If you are upgrading from Access 2007 .................................. 5
  - If you are upgrading from Access 2003 .................................. 6
- Working in the Access 2013 user interface .................................... 8
  - Identifying program window elements ...................................... 9
  - Working with the ribbon ...................................................... 13
  - *Sidebar*: Adapting exercise steps ........................................ 17
  - *Sidebar*: Getting help with Access 2013 ................................ 23
- Understanding database concepts ............................................. 24
  - *Sidebar*: Enabling macros and other active content .................. 26
- Exploring tables ...................................................................... 28
- Exploring forms ..................................................................... 33
- Exploring queries .................................................................. 38
### 2 Create databases and simple tables

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating databases from templates</td>
<td>54</td>
</tr>
<tr>
<td>Sidebar: Getting started with Access web apps</td>
<td>61</td>
</tr>
<tr>
<td>Creating databases and tables manually</td>
<td>64</td>
</tr>
<tr>
<td>Sidebar: Database design</td>
<td>73</td>
</tr>
<tr>
<td>Manipulating table columns and rows</td>
<td>74</td>
</tr>
<tr>
<td>Refining table structure</td>
<td>77</td>
</tr>
<tr>
<td>Defining relationships between tables</td>
<td>83</td>
</tr>
<tr>
<td>Key points</td>
<td>89</td>
</tr>
</tbody>
</table>

### 3 Create simple forms

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating forms by using the Form tool</td>
<td>92</td>
</tr>
<tr>
<td>Formatting forms</td>
<td>98</td>
</tr>
<tr>
<td>Arranging the layout of forms</td>
<td>107</td>
</tr>
<tr>
<td>Key points</td>
<td>113</td>
</tr>
</tbody>
</table>

### 4 Display data

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting information in tables</td>
<td>116</td>
</tr>
<tr>
<td>Sidebar: How Access sorts</td>
<td>120</td>
</tr>
<tr>
<td>Filtering information in tables</td>
<td>121</td>
</tr>
<tr>
<td>Filtering information by using forms</td>
<td>125</td>
</tr>
<tr>
<td>Sidebar: Wildcards</td>
<td>129</td>
</tr>
<tr>
<td>Locating information that matches multiple criteria</td>
<td>129</td>
</tr>
<tr>
<td>Sidebar: Saving filters as queries</td>
<td>133</td>
</tr>
<tr>
<td>Key points</td>
<td>133</td>
</tr>
</tbody>
</table>
# 5 Create simple reports

- Creating reports by using a wizard .................................................. 136
- Modifying report design ................................................................. 142
- Previewing and printing reports ....................................................... 150
- Key points ....................................................................................... 154

## PART 2

# Relational database techniques

## 6 Maintain data integrity

- Specifying the type of data ............................................................... 158
- Setting the field size ....................................................................... 163
- Restricting the format of data .......................................................... 165
  - *Sidebar*: Creating custom formats ............................................. 172
- Validating the data ........................................................................... 173
  - *Sidebar*: Simple validation rules .............................................. 176
- Allowing only values in lists ............................................................. 183
  - *Sidebar*: Multicolumn lookup lists ............................................ 188
- Allowing only values in other tables ............................................... 188
  - *Sidebar*: Multivalued fields ....................................................... 194
- Key points ....................................................................................... 195

## 7 Create queries

- Creating queries by using a wizard .................................................. 198
- Creating queries manually ............................................................... 203
- Summarizing data by using queries ............................................... 208
- Calculating by using queries .......................................................... 212
- Updating records by using queries ............................................... 218
- Deleting records by using queries .................................................. 222
- Key points ....................................................................................... 225
8 Create custom forms

Modifying forms created by using a wizard ........................................... 228
   Sidebar: Different types of forms ................................................... 230
Adding controls .............................................................................. 237
Displaying subforms ..................................................................... 245
   Sidebar: Selecting fields for main forms and subforms ............... 245
Key points ..................................................................................... 253

9 Create custom reports

Creating reports manually ................................................................. 256
   Sidebar: Adding hyperlinks, charts, and buttons ......................... 258
Modifying report content ................................................................. 262
   Sidebar: Layouts ......................................................................... 264
Adding subreports ......................................................................... 270
Key points ..................................................................................... 276

PART 3

Database management and security

10 Import and export data

Importing information .................................................................... 280
   Importing from other Access databases .................................. 281
   Importing from Excel worksheets ........................................... 282
   Importing from text files .......................................................... 282
   Importing from other database programs ................................ 283
   Importing from Outlook folders ............................................. 283
   Importing from SharePoint lists ............................................. 283
   Importing from .html files ........................................................ 285
   Importing from .xml files ........................................................ 286
   Sidebar: Linking to information ............................................... 295
Exporting information .......................................................... 295
  Exporting to other Access databases ........................................ 297
  Exporting to Excel worksheets ............................................. 297
  Exporting to Word documents ............................................. 297
  Exporting to text files ....................................................... 297
  Exporting to .pdf and .xps files ........................................... 298
  Exporting to SharePoint lists ............................................... 298
  Exporting to .html files ...................................................... 299
  Exporting to .xml files ....................................................... 299
  Copying to and from other Office programs ......................... 306
  Key points ........................................................................ 309

11 Make databases user friendly 311

  Designing navigation forms .................................................. 312
  Creating custom categories .................................................. 319
  Controlling which features are available ................................. 323
  Key points ........................................................................ 327

12 Protect databases 329

  Assigning passwords to databases .......................................... 330
  Splitting databases ................................................................ 334
  Securing databases for distribution ....................................... 338
    Sidebar: Packaging and signing databases ........................... 341
  Preventing database problems ............................................. 342
  Key points ........................................................................ 347

13 Work in Access more efficiently 349

  Changing default program options ......................................... 350
    Sidebar: Using add-ins ....................................................... 362
  Customizing the ribbon ....................................................... 363
    Sidebar: Customizing the status bar .................................... 369
  Manipulating the Quick Access Toolbar .................................. 370
  Key points ........................................................................ 375
### Glossary

**Keyboard shortcuts**

```
Access 2013 keyboard shortcuts ................................................ 385
  Open, save, and print databases ........................................ 385
  Work in Design, Layout, or Datasheet view ......................... 386
  Work in the Navigation pane ........................................... 386
  Work in the Property Sheet pane ................................... 387
  Work in the Field List pane ......................................... 387
  Edit controls in forms or reports in Design view ................ 387
  Work with combo boxes or list boxes ............................. 388
  Set properties for a table in Design view ......................... 388
  Work with text and data ................................................ 389

Navigate records ................................................................. 391
  Navigate in Design view ................................................. 391
  Navigate in Datasheet view ............................................ 392
  Navigate in Form view .................................................. 393
  Navigate in Print Preview .............................................. 394
  Navigate in the Query Designer ....................................... 394

Access web app keyboard shortcuts ........................................ 396
  Customize a web app in Access ....................................... 396
  Work with a web app in a web browser .............................. 396

Office 2013 keyboard shortcuts ............................................. 397
  Work with menus .......................................................... 397
  Use Open and Save As in the Backstage view ....................... 397
  Use the Open and Save As dialog boxes ................................ 398
  Display and use windows ................................................ 398
  Navigate on the ribbon .................................................. 399
  Move around in text or cells .......................................... 399
  Work with text ............................................................. 400
  Move around in and work in tables .................................. 400
  Work with panes ........................................................... 400
  Work with wizards ........................................................ 400
  Work with dialog boxes .................................................. 401
  Use edit boxes within dialog boxes ................................... 402
  Use the Help window ..................................................... 402
```
Index ........................................................................................................... 405
About the authors .......................................................................................... 427
How to download your ebook .......................................................................... 431
Survey page ....................................................................................................... 432
Introduction

Over the years, Microsoft has put a lot of effort into making Access not only one of the most powerful consumer database programs available, but also one of the easiest to learn and use. Because Access is part of Microsoft Office 2013, you can use many of the techniques you use with Microsoft Word and Microsoft Excel. For example, you can use familiar commands, buttons, and keyboard shortcuts to open and edit the information in Access tables. And you can easily share information between Access and Word, Excel, or other Office programs. *Microsoft Access 2013 Step by Step* offers a comprehensive look at the features of Access that most people will use most frequently.

Who this book is for

*Microsoft Access 2013 Step by Step* and other books in the *Step by Step* series are designed for beginning-level to intermediate-level computer users. If part of your job involves entering data in or producing reports from a database designed by someone else, this book will help you understand the behind-the-scenes functionality of the database. If you are tasked with the maintenance of an existing database, you will learn important techniques for ensuring data integrity. Although we don’t cover the macro and VBA functionality that enables experienced developers to create full-featured database applications, we do touch on more advanced topics such as controlling access and preventing problems.

Examples shown in the book generally pertain to small and medium businesses but teach skills that can be used in organizations of any size. The databases you create and work with are desktop databases, designed to be used in Access 2013 on a local computer. Access 2013 has powerful new capabilities to enable more advanced users to create applications, called *Access web apps*, that are stored as SQL databases on a Microsoft SharePoint 2013 site and can be viewed and manipulated through a web browser. Because of the behind-the-scenes requirements of these databases, we briefly describe them but don’t cover them in depth.

Whether you are already comfortable working in Access and want to learn about new features in Access 2013 or are new to Access, this book provides invaluable hands-on experience so that you can confidently create and work with many types of desktop databases.
How this book is organized

This book is divided into three parts. Part 1 explains how to get data into a database, either directly by entering it into tables or indirectly by using forms; and how to get information out of a database, either by displaying it on the screen or by printing it in reports. Part 2 discusses ways to ensure that the data in related tables is accurate, how to use queries to extract data from related tables, and how to create forms and reports that use related tables. Part 3 covers more advanced Access techniques, including securing the database and customizing the program to fit the way you work. With this three-part structure, readers who are new to the program can acquire basic skills and then build on them, whereas readers who are comfortable with Access 2013 basics can focus on material that is of the most interest to them.

Chapter 1 contains introductory information that will primarily be of interest to readers who are new to Access or are upgrading from Access 2003 or an earlier version. If you have worked with a more recent version of Access, you might want to skip directly to Chapter 2.

This book has been designed to lead you step by step through all the tasks a beginning-level or intermediate-level user is most likely to want to perform with Access 2013. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create simple databases and work with more complex databases created by experts. However, each chapter is self-contained, so you can jump in anywhere to acquire exactly the skills you need.

Download the practice files

Before you can complete the exercises in this book, you need to download the book’s practice files to your computer. These practice files can be downloaded from the following page:

http://aka.ms/Access2013sbs/files

IMPORTANT The Access 2013 program is not available from this website. You should purchase and install that program before using this book.
The following table lists the practice files for this book.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1: Explore Microsoft Access 2013</td>
<td>GardenCompany01.accdb</td>
</tr>
<tr>
<td>Chapter 2: Create databases and simple tables</td>
<td>None</td>
</tr>
<tr>
<td>Chapter 3: Create simple forms</td>
<td>GardenCompany03.accdb</td>
</tr>
<tr>
<td></td>
<td>Logo.png</td>
</tr>
<tr>
<td>Chapter 4: Display data</td>
<td>GardenCompany04.accdb</td>
</tr>
<tr>
<td>Chapter 5: Create simple reports</td>
<td>GardenCompany05.accdb</td>
</tr>
<tr>
<td>Chapter 6: Maintain data integrity</td>
<td>GardenCompany06.accdb</td>
</tr>
<tr>
<td>Chapter 7: Create queries</td>
<td>GardenCompany07.accdb</td>
</tr>
<tr>
<td>Chapter 8: Create custom forms</td>
<td>GardenCompany08.accdb</td>
</tr>
<tr>
<td></td>
<td>Hydrangeas.jpg</td>
</tr>
<tr>
<td>Chapter 9: Create custom reports</td>
<td>GardenCompany09.accdb</td>
</tr>
<tr>
<td>Chapter 10: Import and export data</td>
<td>Customers.xlsx</td>
</tr>
<tr>
<td></td>
<td>Employees.txt</td>
</tr>
<tr>
<td></td>
<td>GardenCompany10.accdb</td>
</tr>
<tr>
<td></td>
<td>ProductsAndSuppliers.accdb</td>
</tr>
<tr>
<td></td>
<td>Shippers.xlsx</td>
</tr>
<tr>
<td>Chapter 11: Make databases user friendly</td>
<td>GardenCompany11.accdb</td>
</tr>
<tr>
<td></td>
<td>Icon.ico</td>
</tr>
<tr>
<td></td>
<td>Logo.png</td>
</tr>
<tr>
<td>Chapter 12: Protect databases</td>
<td>GardenCompany12.accdb</td>
</tr>
<tr>
<td>Chapter 13: Work in Access more efficiently</td>
<td>GardenCompany13.accdb</td>
</tr>
</tbody>
</table>

If you would like to be able to refer to the completed versions of practice files at a later time, save the modified practice files at the end of each exercise. If you might want to repeat the exercises, save the modified practice files with a different name or in a different folder.
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Chapter at a glance

Create
Create forms by using the Form tool, page 92

Format
Format forms, page 98

Arrange
Arrange the layout of forms, page 107
Create simple forms

IN THIS CHAPTER, YOU WILL LEARN HOW TO

▪ Create forms by using the Form tool.
▪ Format forms.
▪ Arrange the layout of forms.

A database that contains the day-to-day records of an active company is useful only if it is kept current and if the information stored in it can be found quickly. Entering, editing, and retrieving information from tables in Datasheet view is fairly easy for someone who is familiar with Access. But for occasional users or people who are not familiar with Access, these tasks might be tedious and inefficient and leave far too much room for error, especially if details of complex transactions have to be entered into several related tables. The solution to this problem is to create and use forms.

A form is an organized and formatted view of some or all of the fields from one or more tables. Forms work interactively with the tables in a database. You use controls in the form to enter new information, to edit or remove existing information, or to locate information. The controls you will use most frequently in an Access form are as follows:

▪ **Text box controls** You can view or enter information in these controls. Think of a text box control as a little window through which you can insert data into the corresponding field of the related table or view information that is already in that field.

▪ **Label controls** You can tell what type of information you are looking at in the corresponding text box control, or what you are expected to enter in the text box control by using these controls.

**TIP** An Access form can also include a variety of other controls that transform the form into something very much like a Windows dialog box or wizard page. For information, see “Allowing only values in lists” in Chapter 6, “Maintain data integrity.”

In this chapter, you’ll discover how easy it is to create forms to view and enter information. You’ll also modify forms to suit your needs by changing their appearance and the arrangement of their controls.
Creating forms by using the Form tool

Before you begin creating a form for a desktop database, you need to know the following:

- Which table the form should be based on
- How the form will be used

After making these decisions, you can create a form in the following ways:

- Click the table you want in the Navigation pane, and then click the Form button in the Forms group on the Create tab. This method creates a simple form that uses all the fields in the table.
- Use a wizard. This method enables you to choose which of the table’s fields you want to use in the form.

SEE ALSO For information about using wizards to create forms, see “Modifying forms created by using a wizard” in Chapter 8, “Create custom forms.”

- Switch to Layout view, where you can create the form manually while viewing the underlying data, or switch to Design view, where you have more control over form elements.

SEE ALSO For information about manipulating forms in Layout view, see the other two topics in this chapter. For information about manually creating forms in Design view, see “Adding controls” in Chapter 8, “Create custom forms.”

TIP When you create an Access web app, you can view the data in tables in List view, which includes a mechanism for adding, deleting, and editing records in a pane that is much like a form.

You will usually want to start the process of creating forms that are based on tables by using the Form tool or a wizard—not because the manual process is especially difficult, but because it is simply more efficient to have the tool or a wizard create the basic form for you and then refine that form manually.
In this exercise, you’ll use the Form tool to create a form based on a table. You will then enter a couple of records by using the new form and refresh the table to reflect the new entries.

**SET UP** You need the GardenCompany03 database located in the Chapter03 practice file folder to complete this exercise. The practice file for this exercise contains tables that look similar to those in the practice file for Chapter 1. However, to simplify the steps, we have removed the relationships between the tables. Be sure to use the practice database for this chapter rather than continuing on with the database from an earlier chapter. Open the database, and if you want, save your own version to avoid overwriting the original. Then follow the steps.

1. **With All Access Objects** displayed in the Navigation pane, in the **Tables** group, double-click **Customers** to open the **Customers** table in **Datasheet** view.

![Customers table](image)

The record navigation bar shows that there are 108 records in this table.

**TIP** The CustomerID field contains an identifier for each customer and is the table’s primary key field. In this case, the identifier is not an autogenerated number, but the first three letters of the customer’s last name combined with the first two letters of his or her first name. For more information about this type of primary key, see “Allowing only values in other tables” in Chapter 6, “Maintain data integrity.”

2. On the **Create** tab, in the **Forms** group, click the **Form** button to create a simple form based on the active table and display the form in **Layout** view.
**TIP** You don’t have to open a table to create a form based on it. You can simply click the table in the Navigation pane to select it and then click the Form button in the Forms group on the Create tab. But it is sometimes useful to have the table open behind the form so that you can verify the form contents against the table contents.

The form displays the first record in the Customers table in Layout view. (We have closed the Navigation pane to show more of the form.)

The Form tool has configured all the field names in the table as label controls and all the fields as text box controls. In the header at the top of the form, the name of the table appears as a title, and the form icon appears to the left of the title as a placeholder for a logo. Because the form is displayed in Layout view, the Design, Arrange, and Format tool tabs appear on the ribbon so that you can modify selected controls.

Move the mouse pointer over the form, and click any label or text box control to select it for manipulation.
We won’t make any changes to the form right now. Instead let’s experiment with how the form looks and behaves in Form view.

4 Switch to Form view. Then move the mouse pointer over the form, and click the City label.

![Image of Form view](image)

*In Form view, the tool tabs are no longer displayed, and clicking a label selects the entry in the adjacent text box, ready for editing.*

5 In the record navigation bar at the bottom of the form, click the Next record button to display the second record in the table.

6 Use the record navigation bar to display a few more records.

**TIP** You can easily compare the information shown in the form to that in the table by alternately clicking the Customers table tab and the Customers form tab to switch back and forth between their pages.

Now let’s use the form to enter a couple of new records in the table.

7 At the right end of the record navigation bar, click the New (blank) record button to display a blank Customers form.
The record navigation bar shows that this will be record number 109.

8 Click the *CustomerID* label to position the cursor in the text box to the right.

9 Enter *ASHCH*, noticing that the icon that indicates a record is receiving data (two dots and a pencil) appears at the top of the bar to the left. Then press the *Tab* key, which moves the cursor to the next text box.

10 Enter the following information, pressing *Tab* after each entry except the last one to move to the next text box.

   **FirstName**  Chris  
   **LastName**  Ashton  
   **Address**  89 Cedar Way  
   **City**  Redmond  
   **Region**  WA  
   **PostalCode**  88052  
   **Country**  USA  
   **PhoneNumber**  (425) 555-0191

   **TIP** By the time you finish this book, you will know how to have Access create the *CustomerID* entry based on the *FirstName* and *LastName* entries, so that you don’t have to type it.

11 When you finish entering the phone number (the last field value in the record), press the *Enter* key to complete the record and display another blank form. Notice that the record navigation bar shows that this will be record number 110 in the table.
Enter the following information, pressing Tab after each entry except the last one to move from text box to text box.

CustomerID    BASSH  
FirstName      Shai    
LastName       Bassli  
Address        407 Sunny Way  
City           Kirkland  
Region         WA      
PostalCode     88053   
Country        USA     
PhoneNumber    (425) 555-0187

When you finish entering the phone number, press Enter. Then in the record navigation bar, click the Previous record button to cancel the new record and display the record you just created.

13

The information you entered for record number 110.

Let's verify that the two records you entered in the form also appear in the table.

Click the Customers table tab, and on the record navigation bar, click the Last record button. Notice that the two records you entered in the form do not appear at the bottom of the table, and the record navigator bar indicates that there are only 108 records in the table.
15. On the **Home** tab, in the **Records** group, click the **Refresh All** button to synchronize the table and the form data input.

![First new record](image1)

*The two new records have been added to the Customers table and appear in alphabetical order based on their CustomerID field values.*

16. Close the **Customers** table.

17. On the **Quick Access Toolbar**, click the **Save** button. Then in the **Save As** dialog box, click **OK** to accept **Customers** as the form name and add the form to the **Forms** group in the **Navigation** pane.

**CLEAN UP** Close the form. Keep the GardenCompany03 database open for use in later exercises.

**Formatting forms**

When you create a form by using the Form tool, as you did in the previous exercise, the form includes every field in the table on which it is based. Each field is represented on the form by a text box control and its associated label control. The form is linked, or **bound**, to the table, and each text box is bound to its corresponding field. The table is called the **record source**, and the field is called the **control source**.
Forms and their controls have properties that determine how they behave and look. A form inherits some of its properties from the table on which it is based. For example, each text box name on the form reflects the corresponding field name in the source table. The text box label also reflects the field name, unless the field has been assigned a Caption property, in which case it reflects the caption. The width of each text box is determined by the Field Size property in the table.

Even though a form is bound to its table, the properties of the form are not bound to the table’s properties. After you have created the form, you can change the properties of the form’s fields independently of those in the table. You might want to change these properties to improve the form’s appearance—for example, you can change the font, font size, alignment, fill color, and border.

One of the quickest ways to change the look of a form is to change the theme applied to the database. A theme is a combination of colors and fonts that controls the look of certain objects. In the case of a form, it controls the color and text of the header at the top of the form and the text of the labels and text boxes. By default, the Office theme is applied to all databases based on the Blank Desktop Database template and their objects, but you can easily change the theme by clicking the Themes button in the Themes group on the Design tool tab, and then making a selection from the Themes gallery. While the gallery is displayed, you can point to a theme to display a live preview of how the active database object will look with that theme’s colors and fonts applied.

If you like the colors of one theme and the fonts of another, you can mix and match theme elements. First apply the theme that most closely resembles the look you want, and then in the Themes group, change the colors by clicking the Colors button or the fonts by clicking the Fonts button.

**TIP** If you create a combination of colors and fonts that you would like to be able to use with other databases, you can save the combination as a new theme by clicking Save Current Theme at the bottom of the menu containing the Themes gallery.

If you like most of the formatting of a theme but you want to fine-tune some form elements, you can do so by changing properties in Layout view. In this view, you can view the records from the table to which the form is bound, so when you make formatting adjustments, you can assess the impact on the data. (Changes to the data can be made only in Form view.) You might also want to add your organization’s logo or a small graphic that represents the form’s contents.
In this exercise, you’ll first apply a theme to a form and add a logo to the form’s title. Then you’ll change the form properties that control its colors and text attributes.

**SET UP** You need the GardenCompany03 database you worked with in the preceding exercise and the Logo graphic located in the Chapter03 practice file folder to complete this exercise. If necessary, open the database. Then follow the steps.

1. In the Navigation pane, in the Forms group, right-click Customers, and then click Layout View.

2. On the Design tool tab, in the Themes group, click the Themes button to display a menu containing the Themes gallery.

   ![Themes Gallery]
   
   Each thumbnail represents a theme. By default, the Office theme is applied to this database.

3. Point to each thumbnail in turn, pausing until its name appears in a ScreenTip.

4. Click the Wisp thumbnail to apply that theme.

5. Now let’s replace the form icon to the left of the title in the form header with a logo.

6. On the Design tab, in the Header/Footer group, click the Logo button.
In the **Insert Picture** dialog box, navigate to the **Chapter03** practice file folder, and double-click the **Logo** picture.

![Image of the Customers form with inserted logo](image)

*You have inserted a custom logo in the form header.*

Next let's experiment with properties.

7. On the **Customers** form, click the **CustomerID** label control (not its text box) to select it for manipulation.

8. On the **Format** tool tab, in the **Font** group, click the **Font Size** arrow, and then in the list, click 8 to make the label text significantly smaller.

9. Click the **CustomerID** text box control (not its label), and then on the **Design** tool tab, in the **Tools** group, click the **Property Sheet** button to open the **Property Sheet** pane.

**KEYBOARD SHORTCUT** Press Alt+Enter to open and close the Property Sheet pane. For a list of keyboard shortcuts, see “Keyboard shortcuts” at the end of this book.
The properties of the CustomerID text box control are organized on four pages: Format, Data, Event, and Other. As its name suggests, the All page displays all the properties on one page.

**TIP** Don’t change the properties on the Data page until you know more about controls and their sources.

Notice that the **Property Sheet** pane displays the properties for the object whose name appears in the text box at the top of the pane, and that above the box, the type of object is identified.

In the **Property Sheet** pane, click the **Format** tab.
The Format page of the Property Sheet pane displays all the commands available in the Font group on the Format tab of the ribbon (plus a few more).

12 On the **Format** page, click **Font Size**, click the arrow to the right of the adjacent property, and in the list, click 8.

13 Set the **Font Weight** property to **Bold**.

**TIP** If the Property Sheet pane obscures your view of the controls on the form, change its width (or the width of any pane) by dragging its left border to the left or right. To change the width of the Property Sheet columns, drag the right border of the first column to the left or right. You can undock the Property Sheet pane from the edge of the window and move it elsewhere by dragging its title bar. Double-click the title bar to dock it again.
Let’s use the Property Sheet pane to display the properties of a different control and then change its properties.

14 At the right end of the box at the top of the Property Sheet pane, click the arrow, and then in the object list, click Label3 to select the FirstName label.

15 Repeat step 12 to change the font size of the FirstName label to 8 points. These different ways of selecting a control and changing its properties provide some flexibility and convenience, but using this technique to make changes to several controls in a form is tedious. Let’s use a faster method.

16 In the upper-left corner of the dotted frame surrounding all the controls on the form, click the Select All button (the four headed arrow) to surround all the controls with thick orange borders to indicate that they are selected.

17 In the Property Sheet pane, notice that the selection type is Multiple selection, and the box below is blank. Only the settings that are the same for all the selected controls are displayed. Because the changes you made in the previous steps are not shared by all the selected controls, the Font Size and Font Weight settings are now blank.

18 Repeat steps 12 and 13 to set the Font Size and Font Weight properties of the selected controls to 8 and Bold.

You have applied character formatting to all the label and text box controls in the form.
Although it’s not apparent, the background of the labels is transparent. Let’s change this property and then apply a theme color and effect.

19 With the controls still selected, set the Back Style property to **Normal**.

20 Click the Back Color property, and then click the Ellipsis button at the right end of the property to display a menu containing two color palettes.

![Color Palettes]

*The colors in the Theme Colors palette reflect the color scheme that is part of the Wisp theme.*

**TIP** The Ellipsis button has different names and serves different purposes for different properties.

21 In the top row of the Theme Colors palette, click the third swatch (**Light Green,** **Background 2**) to change the background of all the controls to light green.

**TIP** If the palettes on the Back Color menu don’t include a color you want to use, click More Colors at the bottom of the menu, select a color on the Standard or Custom page of the Colors dialog box, and then click OK to set the color and add it to the Recent Colors palette at the bottom of the menu.

22 Set the Special Effect property to **Shadowed**, and the Border Color property to the eighth swatch in the first row of the Theme Colors palette (**Olive Green,** **Accent 4**).

23 Close the Property Sheet pane, and in the form, click away from the selected controls to release the selection and display the results.
Applying a color and shadow effect to the labels and text boxes makes them stand out.

The label controls reflect the field names assigned to the table fields they are bound to. Let’s assign captions to some of the label controls so that their names include spaces.

24 In the form, click the FirstName label control. Then open the Property Sheet pane, click the Caption property, change FirstName to First Name, and press Enter.

25 Repeat step 24 to change LastName to Last Name and PhoneNumber to Phone.

TIP Changing the Caption property of the form does not affect the Caption property of the bound field in the table.

26 On the Quick Access Toolbar, click the Save button to save the design of the Customers form. Then close the form, which also closes the Property Sheet pane.

CLEAN UP Keep the GardenCompany03 database open for use in the last exercise.
Arranging the layout of forms

Forms generated with the Form tool are functional, not fancy. By default, they are arranged in the Stacked layout, which arranges all the label controls in a single column on the left and all their corresponding text box controls in a single column to their right. All the boxes of each type are the same size, and in the boxes, the text is left-aligned.

If it suits the needs of your data better to display records in a tabular layout much like that of a table in Datasheet view, click Tabular in the Table group on the Arrange tool tab.

SEE ALSO For more information about layouts, see the sidebar “Layouts” in Chapter 9, “Create custom reports.”

If the default layout doesn’t suit your needs or preferences, you can customize it. Most of the rearranging you are likely to want to do can be accomplished in Layout view, where you can view the impact on the underlying data. If you want to make more extensive changes to the layout of a database, you can switch to Design view.

SEE ALSO For information about customizing forms in Design view, see Chapter 8, “Create custom forms.”

In Layout view, you can do the following to improve the form’s layout and make it attractive and easy to use:

- Add and delete a variety of controls.
- Change the size of controls.
- Move controls.
- Change text alignment.
- Change the margins of controls.

TIP The order in which you make changes can have an impact on the results. If the results aren’t what you expect, click the Undo button on the Quick Access Toolbar to reverse your previous action, or click the Undo arrow, and click an action in the list to reverse more than one action.
In this exercise, you’ll align, size, and rearrange the label and text box controls in a form.

**SET UP** You need the GardenCompany03 database you worked with in the preceding exercise to complete this exercise. If necessary, open the database. Then follow the steps.

1. In the **Navigation** pane, in the **Forms** group, right-click **Customers**, click **Layout View**.
   **TIP** If the Property Sheet pane was open when you last closed the form, it is displayed with the form.

2. Click the **CustomerID** label control (not its text box), and on the **Arrange** tool tab, in the **Rows & Columns** group, click the **Select Column** button.
   **TIP** You can also point above the selected control, and when the pointer changes to a single downward-pointing arrow, click to select the column of controls.

3. With all the label controls selected, on the **Format** page of the **Property Sheet** pane, set the **Text Align** property to **Right** to right-align all the labels in their controls.

You can efficiently adjust the alignment of multiple selected controls by changing the **Text Align** property in the Property Sheet pane.
The Property Sheet pane indicates that the Width property of the label controls is 1.061". Let’s make them narrower.

**TIP** Throughout this book, we refer to measurements in inches. If your computer is set to display measurements in centimeters, substitute the equivalent metric measurement. As long as you are entering the default units, you don’t have to specify the unit type.

4. Point to the right border of the **CustomerID** label, and when the pointer changes to a two-headed horizontal arrow, drag to the left until **CustomerID** just fits in its box.

5. In the **Property Sheet** pane, adjust the **Width** property to **0.85”**, and press **Enter**.

**TIP** It is often easier to adjust the size of controls visually and then fine-tune them in the Property Sheet pane than it is to guess what property settings might work.

6. Select the **CustomerID** text box (not its label), change its **Width** property to **1.5”**, and press **Enter**. Notice that when you size one control in a **Stacked** layout, all the controls in the same column are adjusted, not just the selected control.

*In a Stacked layout, all the controls in each column are the same width.*
The controls are the same width but have different heights and interior margins. Let’s fix that next.

7. Above the upper-left corner of the dotted border that surrounds all the controls, click the Select All button to select all the controls within the border. Then in the Property Sheet pane, set the Height property to 0.25", and press Enter.

8. On the Arrange tool tab, in the Position group, click the Control Margins button, and then click Narrow.

You can control not only the size of the controls but also the distance from the control’s border to its text.

Now let’s rearrange some controls.

9. Click the Phone label (not its text box), and on the Arrange tool tab, in the Rows & Columns group, click the Select Row button.

**TIP** You can also point to the left of the selected control, and when the pointer changes to a single right-pointing arrow, click to select the row of controls.
Point anywhere in the selection, and drag upward, releasing the mouse button when the insertion line sits below the Last Name label or text box.

Click the Last Name label, and then press the Delete key.

Click the LastName text box, point to the A in Ackerman, and drag the four-headed arrow pointer up and to the right until the pointer sits slightly to the right of the FirstName text box. When the insertion bar appears, release the mouse button.

**TIP** The control snaps to an invisible grid that helps maintain consistent spacing on the form.

Repeat step 11 to delete the Region and PostalCode labels.

Repeat step 12 to move the Region and PostalCode text boxes to the right of the City text box.

Select the City controls row and move it down one grid space. Then do the same for the Address controls row.

Now that the controls are arranged, let’s remove the Stacked layout from the form so that we can make more extensive layout adjustments.

In the upper-left corner of the dotted layout border, click the Select All button. Then right-click the selection, click Layout, and click Remove Layout.

With the Stacked layout removed, let’s adjust the widths of individual controls.

Select the Region text box, and on the Format page of the Property Sheet pane, adjust the Width property to .5”.

Select the PostalCode text box. Then adjust the Width property to .5” and the Left property to 3.25”.

Click the First Name label, and change the label’s Caption property to Name. Then repeat the process to change the City label’s caption to City/State/ZIP.

Close the Property Sheet pane, and release the selection by clicking a blank area.
In Layout view, this kind of arrangement can be achieved only if you remove the default layout, which constrains sizing and positioning of individual controls.

**TIP** If you rearrange controls or add new controls to a form and then find that pressing Tab jumps around erratically instead of sequentially from one control to the next, you can change the tab order. When working in Layout view, click the Other tab in the Property Sheet pane, and set the Tab Index property for each control in the tab order you want. When working in Design view, click the Tab Order button in the Tools group on the Design tool tab to display the Tab Order dialog box, where you can drag fields into the correct order. For more information about working with forms in Design view, see Chapter 8, “Create custom forms.”

21 Close the Customers form, clicking Yes when prompted to save its layout.

**CLEAN UP** Close the GardenCompany03 database.
Key points

- The quickest way to create a form that includes all the fields from one table is by using the Form tool. You can then use the form to view and enter records.

- A form that is based on a table is bound to that table. The table is called the *record source*.

- By default, the form displays one text box control and its associated label control for each field in the table.

- Each text box control is bound to its field, which is called the *control source*.

- Each control has several properties that you can change in Layout view or Design view to improve the look and layout of the form.
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Symbols
& (text concatenation) operator, 269
* (asterisk)
  icon, 66
  in query field lists, 205, 223
  wildcard character, 126, 129
  wildcard character, in validation rules, 178
# (number sign) wildcard character, 129

A
.accd files, 19
.acd files, 341
.acde files, 338, 339
Access
  exiting, 10, 22
  getting help, 23
  starting, 8, 18
Access 2003, upgrading from, 6
Access 2007, upgrading from, 5
Access 2010, upgrading from, 4
Access add-ins, 362
Access Database Executable (.accde) files, 377
Access Deployment (.accd) files, 377
Access program icon, 10
Access Options dialog box, 350
  Add-Ins page, 359
  Client Settings page, 358
  Current Database page, 323, 352
  Customize Ribbon page, 363
  Datasheet page, 354
  General page, 350
  Language page, 357
  Object Designers page, 355

  Quick Access Toolbar page, 371
  Trust Center page, 360
Access web apps, 54, 55, 61
action queries, 197, 218
  defined, 377
  converting to select queries, 225
  creating, 219
activating Control Wizards, 246
adding
  application parts to databases, 59
  charts to forms/reports, 258
  combo box controls to forms, 240
  command buttons to forms/reports, 258
  dates/times to reports, 265
  fields to forms, 234
  fields to reports, 259
  fields to tables, 78, 79, 80, 82, 159, 167
  forms/reports to navigation forms, 316
  groups to ribbon tabs, 364, 365
  headers/footers to reports, 259
  hyperlinks to forms/reports, 258
  icons to database applications, 324
  logos to forms, 100, 315
  page numbers to reports, 268
  pictures to forms, 238
  subforms to forms, 246
  subreports to reports, 270
  tables to query design grid, 205
  tables to Relationships page, 88
  tabs to ribbon, 364
  titles to forms, 239
  titles to reports, 263
  Total row to query design grid, 209
  Total row to tables, 209
add-ins, 362
   defined, 377
   options, setting, 359
Add-Ins page (Access Options dialog box), 359
advanced filtering criteria, 129, 130
   saving as queries, 133
aggregate functions
   defined, 377
   in queries, 208
   in reports, 273
aliases, field, 217, 379
aligning
   controls in forms, 108, 235
   controls in reports, 146, 267
alternate row colors, 147
Analyze Performance utility, 342, 343
Analyze Table utility, 342
Anchoring gallery, 243
And operator, 174
append queries, 218
   defined, 377
appending table data, 71
application parts, 53
   defined, 377
   adding to databases, 59
Application Parts gallery, 59
arithmetic operators, 175
   defined, 377
asterisk (*)
   icon, 66
   in query field lists, 205, 223
   wildcard character, 126, 129
   wildcard character, in validation rules, 178
Attachment data type, 159
AutoCorrect options, setting, 356
automatic error checking, 143
AutoNumber data type, 66, 158
   size, 164
averaging field values, 208
Avg function, 208

B
back-end databases, 334
   defined, 377
background color of controls, 105
backing up, 342, 343
Backstage view, 11
   displaying, 18
   Info page, 332
   Print page, 47
binary files, 377
blank databases, creating, 68
blank forms, 230
boolean, defined, 377
Boolean data type, 158
border color of controls, 105
borders, subreport, making transparent, 275
bound controls, 237
   defined, 377
button controls, 258
buttons, 12
   Quick Access Toolbar, adding/removing, 370, 372
   ribbon group, adding/removing, 365
   ScreenTips, 12
Byte size (Number data type), 163, 164

C
calculated controls, 273
Calculated data type, 159
calculating
   with queries, 212, 213
   in reports, 270, 273
   vs. storing data, 212
calendars, using to enter date, 162
Caption property, 82
captions
   assigning to fields, 82
   assigning to label controls, 106, 242
Cascade Delete Related Records option, 222
  defined, 377
case of characters, forcing, 170
categories, Navigation pane, assigning objects, 321
Ccur function, 215
centering controls, 146
characters, forcing case, 170
chart controls, 258
charts, adding to forms/reports, 258
checking spelling, options, setting, 356
Client Settings page (Access Options dialog box), 358
closing
database objects, 22
database objects, all, 38
databases, 22
  Navigation pane, 12, 29
tables, 31, 70
collapsing subdatasheets, 31
color
do not include
  of control background, 105
  of control borders, 105
  of form sections, 233, 315
  of group headers, 147
  of report sections, 263
columns, 25, 28
deleting from query design grid, 206
freezing, 76
hiding, 75
moving, 77
selecting adjacent, 75, 119
selecting in forms, 108
selecting in query design grid, 206
sizing, 30, 74
sizing to fit contents, 30, 74
unfreezing, 77
unhiding, 75
COM add-ins, 362
combo box controls, 377
  adding to forms, 240
combo boxes, 184
comma-delimited text files, 377
command button controls, 377
command buttons, adding to forms/reports, 258
commands
  Quick Access Toolbar, adding/removing, 370, 372
  ribbon group, adding/removing, 365
Compact And Repair Database utility, 342, 343
compacting databases, 342, 343
comparison operators, 174
  defined, 377
Concatenate operator, 175, 269
conditional formatting, 148
constants, 378
continuous forms, 230
control properties, 378
controlling database feature availability, 323, 325, 352
controls, 142
  defined, 378
  aligning in forms, 108, 235
  aligning in reports, 146, 267
  background color, 105
  bold text, 103
  border color, 105
  bound, 237, 377
  combo box, 377
  command button, 377
  copying formatting, 241
  deleting, 238
  disabling, 234
  font size, 101, 148, 265
  font weight, 103
  formatting, 142, 145
  on forms, 33, 37, 91
  grouping, 267
  height, 110
  keyboard shortcuts for moving, 145
  label, 380
  margins, 110
  moving, 110, 145, 235, 261
controls (continued)

navigation, 380
option button, 381
properties, 99, 101
Quick Styles, applying, 318
on reports, 259
selecting, 94
selecting all, 104, 110, 148
selecting multiple, 145
selecting in Property Sheet pane, 104
shadow effects, 105
sizing, 109, 145, 233, 265
snapping to grid, 266
tab order, 112
text box, 383
unbound, 237, 383
validating, 174
control sources, 98, 242
defined, 378
Control Wizards
activating, 246
deactivating, 240
Controls gallery, 37, 238
converting currency, 215
copying
control formatting, 241
to Excel worksheets, 307
to export data, 306
to import data, 306, 308
keyboard shortcut for, 306
tables, 306
table structure, 67, 71
Count function, 208
counting fields, 208
criteria, filter, 122
criteria, query, 204
entering, 206, 220, 223
crosstab queries, 198, 378
currency
converting with function, 215
format, 162
Currency data type, 158, 161
Current Database page (Access Options dialog box), 323, 352
custom
filters, 122
form layouts, 107, 111, 232
formats, 172
group headers in reports, 144
input masks, 171
navigation forms, 315
Navigation pane categories/groups, 319, 320
Quick Access Toolbar, 370, 372
Quick Access Toolbar, resetting, 374
report layouts, 143, 144, 261, 266
ribbon, 363, 365
ribbon groups, 364, 365
ribbon, resetting, 369
ribbon tabs, 364, 367
status bar, 369
subform layouts, 250
Custom Filter dialog box, 123
Customize Ribbon page (Access Options dialog box), 363
customizing status bar, 369

data types, 79, 80
defined, 378
Attachment, 159
AutoNumber, 66, 158
AutoNumber, size, 164
Boolean, 158
Calculated, 159
changing, 191
Currency, 158, 161
Date/Time, 158, 162
Hyperlink, 158
Long Text, 158
Number, 158, 162
Number, size, 163
OLE Object, 158
Rich Text, 158
Short Text, 158, 161
specifying, 79, 158, 159
Yes/No, 158, 162, 183
Yes/No, specifying display, 163
for ZIP codes, 81
database applications
  defined, 378
  assigning icons, 324
database design, 73, 212
  analyzing tables, 342
Database Documenter utility, 342, 345
database objects, 3, 24. See also tables; forms; queries; reports
  defined, 378
  assigning to Navigation pane categories/groups, 319, 321
closing, 22
closing all, 38
Design view options, setting, 355
exporting, 295, 300, 379
identifying with square brackets, 221
importing, 281
printing, 46
database properties, 332
database security, 329
  defined, 378
  .accdc files, 341
  .accde files, 338
  passwords, 330
  splitting databases, 334
Database Splitter wizard, 335
database structure, documenting, 342, 345
databases
  adding application parts, 59
  analyzing performance, 342, 343
  applying themes, 99, 100, 233
  assigning icons, 324
  assigning titles, 324
  back-end, 377
  backing up, 342, 343
  basing on templates, 54, 55
  blank, 68
  closing, 22
  compacting/repairing, 342, 343
  controlling feature availability, 323, 325, 352
  creating based on templates, 54, 55
  creating blank, 68
  creating manually, 64
  default file format, 350
  default location, 57, 350
designing, 73, 212
desktop, 54
  distributing as .accde files, 338
  exporting to, 297, 300
  file format, 350
  flat, 379
  flat vs. relational, 24
  front-end, 379
  icons, 324
  importing, 281, 287
  importing non-Access, 283
  linking, 295
  linking to SharePoint lists, 283
  maintaining, 329, 342
  naming, 56
  non-Access, importing, 283
  opening, 18
  opening for exclusive use, 330, 331
  opening multiple, 301
  opening password-protected, 333
  populating, 53, 381
  relational, 381
  saving, 18
  SharePoint lists, linking to, 283
  split, 382
  splitting, 334, 335
  SQL, 382
templates, 54, 55
  themes, 99, 100, 233
titles, 324
Datasheet Formatting dialog box, 20
datasheet forms, 230, 314
Datasheet page (Access Options dialog box), 354
Datasheet view, 378
Datasheet view (delete queries), 224
Datasheet view (queries), 39
Datasheet view (tables), 28
Datasheet view (update queries), 221
datasheets, 28. See also tables
  defined, 378
  default gridlines/cell effects/font, 354
  embedded, 29
  results, 382
Date And Time dialog box, 265
date format, 162
date/time controls, 265
Date/Time data type, 158, 162
dates
  adding to reports, 265
  checking validity, 181
  entering with calendar, 162
  entering manually, 162
  filtering in tables, 124
  in parameter queries, 207
deactivating Control Wizards, 240
Decimal size (Number data type), 163
default
  field values, 183, 186
  file format, 350
  file location, 57, 350
  gridlines/cell effects/font in datasheets, 354
  startup page, 313, 325
Default Value property, 183, 186
delete queries, 218, 222, 223
  defined, 378
deleting
  columns from query design grid, 206
  controls, 238
  fields from subforms, 252
  fields from tables, 78, 80, 189
  layouts, 264
  records, with queries, 222
  relationships, 189
  tables, 70
  tables from query design grid, 205
  tables from Relationships page, 189
delimited text files
  defined, 378
  importing, 282, 290
delimiters, 378
design grid, form, 228
design grid, query, 39
  defined, 378
  adding Total row, 209
  height, adjusting, 210
design grid, report, 256
  adding headers/footers, 259
  controlling snapping, 266
  setting, 263
  turning on/off, 263
Design view (all objects)
  defined, 378
  options, setting, 355
Design view (forms), 33, 36, 228
Design view (queries), 39, 41, 201
Design view (reports), 43, 45, 256, 263
Design view (tables), 28, 32
  opening tables in, 80
designing
  databases, 73
  forms, 228
  reports, 256
desktop databases, 54, 55
Detail section (forms), 229
Detail section (reports), 257
dialog box launchers, 12
  defined, 378
digital signatures, 341
disabling controls, 234
displaying report sections, 257
distributing databases as .accde files, 338
documenting database structure, 342, 345
documents, Word, exporting to, 297
Double size (Number data type), 163
drawing lines on forms, 243
duplicate queries, 378
duplicate records, finding, 198
duplicating ribbon groups, 364

Edit Relationships dialog box, 87
editing of lookup lists, disabling, 187
effects, adding to controls, 105
eMBEDDED DATASHEETS, 29
empty fields vs. Null fields, 176
empty strings, 378
enabling/disabling macros, 26
encryption
    defined, 378
    password-generated, 331
enforcing referential integrity, 87, 191
Enter Parameter Value dialog box, 207
Enter Validation Message dialog box, 180
entering
    dates, 162
    field values from lists, 183, 184
    records in forms, 95
    records in tables, 65, 68
Equal to operator, 174
error checking, 143
error messages for validation rules, 175, 180
Excel worksheets
    copying to, 307
    exporting to, 297, 301
    importing, 282, 293
exclusive use, opening databases for, 330, 331
    defined, 378
exiting Access, 10, 22
expanding subdatasheets, 30
Export dialog box, 300
exporting, 296
    by copying, 306
database objects, 295, 300, 379
to Excel worksheets, 297, 301
to .html files, 299
to other databases, 297, 300
to .pdf files, 298
to SharePoint lists, 298
tables, 300
to text files, 297, 302
to Word documents, 297
to .xml files, 299
to .xps files, 298
Expression Builder, 379
Expression Builder dialog box, 175, 177, 214
sizing, 217
expressions
    defined, 379
    operators, 174
    in queries, 213
    in reports, 273
    in validation rules, 174
extensions, file name, 290
extracting unique values from field, 241

Field aliases, 217
    defined, 379
Field List pane
    displaying, 234, 259
    keyboard shortcut for, 235, 259
field lists, query, asterisk (*) in, 205, 223
field names, 28, 67, 69
    defined, 379
    avoiding spaces in, 69
field properties, 79, 81, 379. See also properties
field selectors, 78
    primary key icon, 78
field size, 163
Field Size property, 81, 163
field values
  averaging, 208
  calculating standard deviation, 208
  calculating variance, 208
  default, 183, 186
  finding, 124
  finding highest, 208
  finding lowest, 208
  restricting to lists, 183, 184
  totaling, 208, 273
fields, 25, 28. See also columns
defined, 379
adding to forms, 234
adding to reports, 259
adding to tables, 78, 79, 80, 82, 159, 167
captions, assigning, 82
counting, 208
data type, 79, 80
data type, changing, 191
data type, specifying, 79, 158, 159
default value, 183, 186
deleting, 78, 80, 189
deleting from subforms, 252
descriptions, 79
empty, 176
format, 172
hiding in query results, 202
indexing, 176
linking to tables, 185
moving among in tables, 66
multivalued, 194
naming, 79, 80
Null, 176, 380
numeric, summarizing in reports, 140, 273
numeric, summarizing in tables, 209
numeric, summarizing with queries, 208, 210
properties, 81
properties, restricting data with, 157
properties, viewing, 79
Quick Start, 68, 72, 160
requiring, 176
selecting contents, 177
selecting in Design view, 78
size, specifying maximum, 81, 163, 164
unique, 176
validating, 173, 177
Fields gallery, 72
file format, default, 350
file location, default, 57
file name extensions, 290
File New Database dialog box, 56
files
Access Database Executable (.accde), 377
Access Deployment (.accdc), 377
attaching to records, 159
binary, 377
c comma-delimited text, 377
delimited text, 378
fixed-width text, 379
Microsoft Database Executable (.mde), 380
filter forms, 125, 127
filtered records, moving among, 127
filtering
  Navigation pane, 12, 19
  records with advanced criteria, 129, 130
  records by date, 124
  records in forms, 121
  records with forms, 125, 127
  records in tables, 121
  wildcard characters, 126, 129
filters
defined, 379
custom, 122
saving as queries, 133
toggling, 122
finding
duplicate records, 198
field values, 124
text, 218
unmatched records, 198
fixed-width text files
  defined, 379
importing, 282
flat databases, 24
  defined, 379
font size of controls, 101, 148, 265
font weight of controls, 103
forcing case, 170
foreign keys, 83
  defined, 379
Form Footer section (forms), 229
Form Header section (forms), 229
form layouts, 264
custom, 107, 111, 232
  removing, 111
  Stacked, 107
  Tabular, 107
undoing changes, 107
form selectors, 379
form structure, 33, 36, 228
Form view, 33
Form wizard, 231
format
  of fields, 172
  of files, default, 350
Format Painter, 241
Format property, 172
formats, custom, 172
formatting
  conditional, 148
  controls, 142, 145
  copying, 241
  forms, 99
navigation form buttons, 318
navigation forms, 315
reports, 263, 272
forms, 33, 91
  defined, 379
adding charts, 258
adding combo box controls, 240
adding command buttons, 258
adding fields, 234
adding hyperlinks, 258
adding lines, 243
adding logos, 315
adding to navigation forms, 316
adding pictures, 238
adding titles, 239
automatic error checking, 143
charts, 258
combo box controls, 240
command buttons, 258
continuous, 230
customizing layout, 107, 111, 232
datasheet, 230, 314
designing, 228
Design view options, setting, 355
drawing lines, 243
entering records, 95
Field List pane, displaying, 234
fields, 234
filter, 125
filtering records, 121, 127
formatting, 99
hyperlinks, 258
layout, 107, 111, 232
lines, 243
logos, 100
main, 380
modal dialog, 230
moving among filtered records, 127
moving among records, 36, 95
multiple items, 230
navigation, 230, 380
opening, 34
opening in Layout view, 100
properties, 99, 101
forms (continued)
   Property Sheet pane, displaying, 101, 234
   record selector, hiding, 236
   record sources, 98
   vs. reports, 135, 262
   restricting changes, 314
   saving, 98, 106
   sections. See sections, form
   sorting records, 116
   split, 230
   subforms, 33, 35
   synchronizing with tables, 97
   validating controls, 174
   viewing, 33
   viewing design, 36, 100, 232
freezing columns, 76
front-end databases, 334
   defined, 379
functions
   defined, 379
   aggregate, in queries, 208
   aggregate, in reports, 273

G
General page (Access Options dialog box), 350
Get External Data wizard, 287
getting help, 23
Greater than operator, 174
Group Header section (reports), 257
   group headers
      color, 147
      customizing, 144
Group, Sort, And Total pane, 151
   grouping
      controls, 267
      records in reports, 136, 138, 257, 260
      records in tables, 116
   Grouping Intervals dialog box, 139
   grouping levels, 379
   groups, Navigation pane, 379
      assigning objects, 321
      hiding, 322
      removing, 323
   groups, ribbon, 12, 379
      buttons (commands), adding/removing, 365
      creating custom, 364, 365
      duplicating, 364
      moving, 364
      removing from tabs, 364, 365
headers/footers, adding to reports, 259
height
   of controls, 110
   of query design grid, 210
   of rows, 74
help with Access, 10, 23
hidden columns, 75
hiding
   columns, 75
   fields in query results, 202
   Navigation pane groups, 322
   record selectors in forms, 236
   report sections, 257
   ribbon, 12, 21, 372
   subdatasheets, 31
highest field value, 208
home pages, navigation forms as, 313, 325
   Horizontal Tabs layouts (navigation forms), 312
.html files
   exporting to, 299
   importing, 285
HTML, 379
HTML tags, 380
hyperlink controls, 258
Hyperlink data type, 158

414 freezing columns
icons
Access program, 10
assigning to current database, 324
asterisk, 66
pencil, 66
primary key, 78
image controls, 238
effect of Size Mode property, 239
Import Objects dialog box, 288
import process, saving, 280
Import Specification dialog box, 291
Import Spreadsheet wizard, 293
Import Text wizard, 290
importing, 280
by copying, 306, 308
database objects, 281
delimited text files, 282, 290
Excel worksheets, 282, 293
fixed-width text files, 282
.html files, 285
vs. linking, 295
non-Access databases, 281, 283, 287
Outlook folders, 283
queries, 281
with saved process, 281
SharePoint lists, 283
tables, 281, 380
text files, 282
.xml files, 286
inconsistent field values, avoiding, 183, 184
Indexed property, 176
indexing fields, 176
Info page (Backstage view), 332
Input Mask property, 165
Input Mask wizard, 168
input masks, 165
defined, 380
common characters, 166
creating, 167
custom, saving, 171
for forcing case, 170
literal characters, 166
for phone numbers, 166, 167
text, 167
Integer size (Number data type), 163
keyboard shortcuts
for copying text, 306
for Field List pane, 235, 259
for moving controls, 145
for navigating, 32
for Navigation pane, 325
for pasting text, 307
for Property Sheet pane, 101, 234, 261
for Save As dialog box, 161
for selecting all controls, 148
keys
foreign, 379
primary, 381
label controls, 91, 142
defined, 380
captions, 106, 242
as form titles, 239
moving without text box controls, 236
labels, creating, 44
.laccdb files, 338
Language page (Access Options dialog box), 357
languages, making available, 357
Layout view (forms), 33, 228
opening forms in, 100
Layout view (reports), 43, 144, 263
layouts. See form layouts; report layouts
Less than operator, 174
levels, grouping, 379
Like operator, 175, 178
lines, drawing on forms, 243
linked tables, 283, 295
linking
defined, 380
fields to tables, 185, 190
vs. importing, 295
SharePoint lists to databases, 283
lists of field values, 183, 184
literal characters in input masks, 166
Live Preview options, setting, 350
location of files, default, 350
logical operators, 174
defined, 380
logos, adding to forms, 100, 315
Long Integer size (Number data type), 163
Long Text data type, 158
lookup lists, 183, 184
creating, 184, 192
disabling editing, 187
linking to tables, 190
multicolumn, 188
Quick Start, 184
Lookup wizard, 184, 380
lowest field value, 208

M
cmacros, enabling/disabling, 26
magnification of screen, 15
mailing label reports, 44
main forms, 380
main reports, 380
maintaining databases, 329, 342
make-table queries, 218
defined, 380
many-to-many relationships, 84
defined, 380
margins
of controls, 110
of reports, 152
of tables, 48
masks, input, 380
Max function, 208
maximum field size, 81, 163, 164
.mdb files, 19
Microsoft Database Executable (.mde) files, 380
Min function, 208
minimizing program window, 10
modal dialog forms, 230
modifying queries, 201
moving
columns, 77
controls, 110, 145, 235, 261
among fields in tables, 66
among filtered records, 127
among pages in reports, 45, 151
panes, 103
Quick Access Toolbar, below ribbon, 370
among records in forms, 36, 95
among records in tables, 31
ribbon groups, 364
text box/label controls, independently, 236
multiple items forms, 230
multiplying with queries, 215
multivalued fields, 194

N
named ranges, 380
names, field, 379
naming
databases, 56
fields, 79, 80
navigating
fields in tables, 66
filtered records, 127
keyboard shortcuts for, 32
pages in reports, 45, 151
records in forms, 36, 95
records in tables, 31
navigation controls, 380
navigation form structure, 313
navigation forms, 230, 312
defined, 380
adding forms/reports, 316
creating, 313, 314
formatting, 315
formatting buttons, 318
as home pages, 313, 325
layouts, 312
tables/queries in, 312
Navigation Options dialog box, 320, 354
Navigation pane
defined, 380
custom categories/groups, 319, 320, 379
customizing, 319, 354
filtering, 12, 19
keyboard shortcut for, 325
opening/closing, 12, 29, 30
nested queries, 212
New Formatting Rule dialog box, 149
New Query dialog box, 199
normalization, 73
defined, 380
Not operator, 174
Null, 176, 380
Null fields vs. empty fields, 176
Number data type, 158, 162
size, 163
number format, 162
number sign (#) wildcard character, 129
numbers
sorting, 120
summarizing in reports, 140, 273
summarizing with queries, 208, 210
summarizing in tables, 209

Object Designers page (Access Options
dialog box), 355
object shortcuts, 319, 321
Office 365, 8
OLE Object data type, 158
one-to-many relationships, 83
defined, 380
one-to-one relationships, 84
defined, 381
On/Off data type display, 163
opening
.accdc files, 341
.accde files, 339
databases, 18
databases, for exclusive use, 330, 331
forms, 34
forms, in Layout view, 100
multiple databases, 301
Navigation pane, 12, 30
password-protected databases, 333
reports, 43
tables, 19, 28, 29, 74
tables, in Design view, 77, 80
operators, 174
arithmetic, 175, 377
comparison, 174, 377
logical, 174, 380
text concatenation (&), 269
option button controls, 381
orientation
of reports, 140
of tables, 48
Or operator, 174, 179
Outlook folders, importing, 283
overlapping windows vs. tabbed pages, 20

overlapping windows vs. tabbed pages 417
Package And Sign tool, 341
packaging databases as .accdc files, 341
page breaks in reports, 150, 151
Page Footer section (reports), 257
Page Header section (reports), 257
page number controls, 153, 268
Page Numbers dialog box, 268
page setup, 48, 150, 152
Page Setup dialog box, 152
pages, moving among in reports, 45, 151
    moving, 103
    sizing, 103
parameter queries, 204, 207
    defined, 381
    supplying values, 207
Password Required dialog box, 333
passwords, 330
    defined, 381
    removing, 334
    secure, 382
    setting, 331
Paste Table As dialog box, 71
.pdf files, 298
pencil icon, 66
Performance Analyzer dialog box, 343
performance of databases, analyzing, 342, 343
phone number input masks, 166, 167
pictures
    adding to forms, 238
    effect of Size Mode property, 239
populating databases, 53, 381
previewing
    reports, 43, 50, 143, 150, 151
    tables, 47
    themes, 99, 100
primary key icon, 78
primary keys, 66, 83
    defined, 381
    designating, 78, 191
manual vs. autogenerated, 189
    removing, 78, 191
Print dialog box, 49
Print page (Backstage), 47
Print Preview (reports), 43, 151, 263
Print Table Definition dialog box, 345
printing
    database objects, 46
    help topics, 23
    reports, 150
    tables, 47
program icon, 10
Proofing page (Access Options dialog box), 355
propagating properties, 171
properties
    defined, 381
    Caption, 82
    control, 99, 101, 378
    database, 332
    Default Value, 183, 186
    field, 79, 81, 379
    field, restricting data with, 157
    Field Size, 81, 163
    form, 99, 101
    Format, 172
    Indexed, 176
    Input Mask, 165
    propagating, 171
    query, 40
    report, 145
    Required, 176
    Size Mode, 239
Property Sheet pane
    displaying, 145, 234, 261
    keyboard shortcut for, 101, 234, 261
    moving, 103
    opening/closing, 101
    selecting controls, 104
    sizing, 103
publishers, of databases, 381
queries, 38

defined, 381
action, 197, 218, 219, 377
adding/deleting tables, 205
adding Total row, 209
append, 218
calculating with, 212, 213
columns, deleting from design grid, 206
columns, selecting in design grid, 206
converting action to select, 225
converting select to action, 219, 220, 223
creating manually, 203, 204
creating with wizards, 198, 199
criteria, 204, 206, 220, 223
crosstab, 198, 378
delete, 218, 222, 223, 378
Design view options, 355
duplicate, 378
expressions, 213
finding duplicate records, 198
finding unmatched records, 198
hiding fields in results, 202
importing, 281
make-table, 218, 380
modifying, 201
multiplying with, 215
in navigation forms, 312
nested, 212
operator list, 206
parameter, 204, 207, 381
parameter, supplying values, 207
properties, 40
running, 39, 40, 202, 206
saving, 39
saving from filters, 133
select, 197, 382
sorting results, 202
SQL, 218
summarizing numeric data, 208, 210
summary, 208
update, 218, 219, 383
viewing design, 41, 201
Query Designer, 39, 41, 201, 203
filtering with, 130
query field lists, asterisk (*) in, 205, 223
query structure, 39, 41, 201
question mark wildcard character, 129
Quick Access Toolbar, 10, 381
customizing, 10, 370, 372
moving below ribbon, 370
restoring original configuration, 374
Quick Access Toolbar page (Access Options dialog box), 371
Quick Start fields, 68, 72, 160
Quick Start lookup lists, 184
Quick Styles, control, 318

read-only forms, 314
rearranging report layouts, 144
record selectors
defined, 381
asterisk icon, 66
in forms, turning off, 236
pencil icon, 66
record sources, 98
defined, 381
selecting for reports, 270
records, 25, 28. See also rows
defined, 381
attaching files to, 159
completing, 67
deleting with queries, 222
duplicate, finding, 198
entering, 65, 68
entering in forms, 95
filtering with advanced criteria, 129, 130
filtering in forms, 121
records (continued)
filtering with forms, 125, 127
filtering in tables, 121
grouping in reports, 136, 138, 257, 260
grouping in tables, 116
keeping up to date, 218
moving among in forms, 36, 95
moving among in tables, 31
removing sort, 118
saving, 68
saving first, 67
sorting, 382
sorting in forms, 116
sorting in reports, 257
sorting in tables, 116, 117
unmatched, finding, 198
validating, 173, 181
referential integrity, 84
  defined, 381
  enforcing, 87, 191
refreshing table data, 97
region and language settings, 162
relational databases, 24
  defined, 381
relationships, 39, 83
  defined, 382
  Cascade Delete Related Records option, 222
  creating, 84, 85
  deleting, 189
  enforcing referential integrity, 87, 191
  many-to-many, 84, 380
  one-to-many, 83, 380
  one-to-one, 84, 381
  restricting data with, 189
Relationships page
tables, deleting, 189
viewing, 222
removing
  form layouts, 111
report layouts, 264
  Navigation pane groups, 323
passwords, 334
Quick Access Toolbar customization, 374
ribbon customization, 369
sort from tables, 118
tabs/groups from ribbon, 364, 365
renaming
  fields, 67, 69
  tables, 70
repairing databases, 342, 343
replacing text, 218
Replication ID size (Number data type), 163
Report Footer section (reports), 257
Report Header section (reports), 257
report layouts, 140, 264
  custom, 143, 144, 261, 266
  rearranging, 144
  removing, 264
  Stacked, 264
  Tabular, 264
  undoing changes, 272
report selectors, 263
  defined, 382
report structure, 45, 136, 256
Report view, 43
reports, 43
  defined, 382
  adding charts, 258
  adding command buttons, 258
  adding date/time, 265
  adding fields, 259
  adding hyperlinks, 258
  adding to navigation forms, 316
  adding subreports, 270
  adding titles, 263
  aligning controls, 146, 267
  applying themes, 147
  automatic error checking, 143
calculating in, 270, 273
charts, 258
command buttons, 258
conditional formatting, 148
customizing controls. See controls
creating manually, 256, 259
creating with all fields, 136, 137
creating with wizards, 136, 137, 256
customizing layout, 143, 144, 261
date/time, 265
design grid, setting, 263
designing, 256
Design view options, setting, 355
Field List pane, displaying, 259
fields, 259
formatting, 263, 272
vs. forms, 135, 262
group headers, 144
grouping records, 136, 138, 257, 260
hyperlinks, 258
magnifying, 44, 144
main, 380
margins, 152
modifying, 263
moving among pages, 45, 151
opening, 43
orientation, 140
page breaks, 150, 151
page numbers, 268
page setup, 150, 152
previewing, 43, 50, 143, 150, 151
printing, 150
Property Sheet pane, displaying, 145, 261
query-based, 256
rearranging, 144
record sources, selecting, 270
sections. See sections, report
sorting records, 257
subreports, 270
summarizing numeric data, 140, 273
viewing, 43
viewing design, 45, 144
required fields, 176
Required property, 176
restricting
data via data types, 158
data via default values, 183, 186
data via field format, 172
data via field properties, 157
data via field size, 163
data via input masks, 165
data via lookup lists, 183, 184
data via relationships, 189
data via validation rules, 173
data via Yes/No data type, 183
database use, 323, 325, 338
form changes, 314
results datasheets, 382
ribbon, 10
defined, 382
buttons, 12
customizing, 363, 365
groups, 12, 379
hiding/displaying, 12, 21, 372
restoring original configuration, 369
tabs, 11
tool tabs, 11
ribbon tabs, 382
Rich Text data type, 158
Row Height dialog box, 75
row selectors, 382
rows, 25, 28
alternate colors, 147
selecting in forms, 110
sizing, 74
rulers, turning on/off, 263
running queries, 39, 40, 202, 206
Save As dialog box, 70
saving
.accdc files, 341
.accde files, 338, 339
databases, 18
first record, 67
forms, 98, 106
import process, 280
input masks, custom, 171
keyboard shortcut for, 161
.pdf files, 298
queries, 39
records, 68
tables, 67, 70
themes, 99
.pdf files, 298
screen magnification, 15
screen resolution, 13
ScreenTips, 12
searching text, 218
sections, form, 229
color, 233, 315
selecting, 233
sizing, 233
sections, report, 257
color, 263
hiding/displaying, 257
sizing, 261
secure passwords, 382
security warning for macros, 26, 382
select queries, 39, 197
defined, 382
converting to action queries, 219, 220, 223
creating manually, 203, 204
creating with wizards, 198, 199
selecting
adjacent columns, 75, 119
all controls, 104, 110, 148
all controls, keyboard shortcut for, 148
columns in forms, 108
columns in query design grid, 206
controls, 94
field contents, 177
fields in Design view, 78
form sections, 233
multiple controls, 145
rows in forms, 110
selectors
form, 379
record, 381
report, 382
row, 382
Set Database Password dialog box, 332
shadow effects, 105
SharePoint lists
exporting to, 298
importing, 283
linking to, 283
Short Text data type, 158, 161
Show Table dialog box, 85, 204
signing database packages, 382
Simple Query wizard, 199
Single size (Number data type), 163
size
of fields, 163, 164
of fields, specifying maximum, 81
of font, controls, 265
Size Mode property, 101, 148, 239
sizing
columns, 30, 74
columns, to fit contents, 30, 74
controls, 109, 145, 233, 265
Expression Builder dialog box, 217
form sections, 233
Navigation pane, 12
panes, 103
program window, 10
report sections, 261
rows, 74
subreports, 271
snapping to grid, controlling, 266

sorting

defined, 382

numbers, 120

query results, 202

records in forms, 116

records in reports, 257

records in tables, 116, 117

removing sort, 118

spaces in field names, avoiding, 69

speeding up performance, 334, 342

spelling, checking, 356

split forms, 230

splitting databases, 334, 335
defined, 382

SQL databases, 382

SQL queries, 218

square brackets, 221

Stacked layout, 107, 264

standard deviation, calculating, 208

starting Access, 8, 18

startup pages, navigation forms as, 313, 325

status bar, 13
defining, 369

StDev function, 208

strings, empty, entering, 176

structure
database, documenting, 342, 345
defined, 33, 36, 228

form, 33, 36, 228

navigation form, 313

query, 39, 41, 201

report, 45, 136, 256

table, 24, 32, 77, 80

table, copying, 67, 71

subdatasheets, 29
defined, 382
collapsing, 31
expanding, 30
exporting, 297
hiding, 31

SubForm wizard, 246

subform/subreport controls, 246

subforms, 33, 35, 245
defined, 382
creating, 246
customizing, 250

deleting fields, 252
exporting, 297

subqueries, 212, 382

subreport controls, 270

SubReport wizard, 270

subreports
defined, 382
adding to reports, 270
border, making transparent, 275
sizing, 271

Sum function, 208, 273

summarizing numeric data
with queries, 208, 210
in reports, 140, 273
in tables, 209

summary queries, 208

synchronizing forms and tables, 97

syntax, 382

tab order of controls, 112

tabbed pages, 382

vs. overlapping windows, 20

table data, appending, 71

table structure, 24, 32, 77, 80
copying, 67, 71

tables, 24, 28
defined, 383
adding fields, 78, 79, 80, 82, 159, 167
adding to query design grid, 205
adding to Relationships page, 88
adding Total row, 209
analyzing, 342
appending data, 71
tables (continued)
closing, 31, 70
copying, 306
copying structure, 67, 71
creating, 67, 159
deleting, 70
deleting fields, 78, 80, 189
deleting from query design grid, 205
deleting from Relationships page, 189
Design view options, setting, 355
exporting, 300
field names, 67, 69
filtering, 121
filtering with advanced criteria, 129, 130
filtering by date, 124
filtering with forms, 125
grouping records, 116
importing, 281
margins, 48
moving among fields, 66
moving among records, 31
in navigation forms, 312
opening, 19, 28, 29, 74
opening in Design view, 77, 80
orientation, 48
page setup, 48
previewing, 47
primary key field, 66, 78, 191
printing, 47
refreshing data, 97
removing sort, 118
renaming, 70
saving, 67, 70
sorting, 116, 117
summarizing numeric data, 209
viewing, 28
viewing design, 32, 77, 80	
tabs, ribbon, 11
defined, 382
creating custom, 364, 367
removing, 364, 365
removing groups, 364, 365
Tabular layout, 107, 264

tags, HTML, 380, 383
templates, 53
defined, 383
basing databases on, 54, 55
text
catenation operator (&), 269
finding/replacing, 218
text box controls, 91, 142
defined, 383
moving without label controls, 236
text files
exporting to, 297, 302
importing, 282
themes, 99
applying, 100, 233
applying to reports, 147
previewing, 99, 100
saving, 99
Themes gallery, 100
time, adding to reports, 265
time format, 162
title bar, 9
titles
adding to forms, 239
adding to reports, 263
assigning to current database, 324
toggling filters, 122
tool tabs, ribbon, 11
Total row
adding to query design grid, 209
adding to tables, 209
totaling field values, 208, 273
transparent borders, 275
True/False data type display, 163
Trust Center page (Access Options dialog box), 360
trusted locations, 26
trusted publishers, 26, 341
unbound controls, 237
defined, 383
undocking, 383
undoing layout changes, 107, 272
unfreezing columns, 77
Unhide Columns dialog box, 75
unhiding
columns, 75
ribbon, 372
unique fields, 176
unique values, extracting from field, 241
Universal Naming Convention (UNC), 383
unmatched queries, 383
unmatched records, finding, 198
update queries, 218, 219
defined, 383
updating records, 218
upgrading
from Access 2003, 6
from Access 2007, 5
from Access 2010, 4
user ID, 350
user interface options, setting, 350

valid dates, checking for, 181
validation rules, 173, 176

defined, 383
control, 174
creating, 175
ingoing messages, 175, 180
field, 173, 177
record, 173, 181
required fields, 176
unique fields, 176
wildcard characters, 178
values
extracting unique from field, 241
finding, 124

Var function, 208
variance, calculating, 208
Vertical Tabs layouts (navigation forms), 312
viewing
form design, 36, 100, 232
forms, 33
query design, 41, 201
Relationships page, 222
report design, 45, 144
reports, 43
table design, 32, 77, 80
tables, 28
views
defined, 383
Backstage, 11
Datasheet, 378
Datasheet (delete queries), 224
Datasheet (queries), 39
Datasheet (tables), 28
Datasheet (update queries), 221
Design, 378
Design (forms), 33, 36, 228
Design (queries), 39, 41, 201
Design (reports), 43, 45, 256, 263
Design (tables), 28, 32
Form, 33
Layout (forms), 33, 100, 228
Layout (reports), 43, 144, 263
Print Preview (reports), 43, 263
Report, 43
switching, 28
View Shortcuts toolbar, 13
defined, 383

web apps, 54, 55, 61
web browser controls, 258
weight of control font, 103
width of columns, 30
adjusting, 74
wildcard characters, 126, 129
   defined, 383
   in validation rules, 178
windows, overlapping, vs. tabbed pages, 20
wizards
   control wizards, activating, 246
   control wizards, deactivating, 240
Database Splitter, 335
Form, 231
Get External Data, 287
Import Spreadsheet, 293
Import Text, 290
Input Mask, 168
Lookup, 184, 380
Simple Query, 199
SubForm, 246
SubReport, 270
Word documents, exporting to, 297
worksheets, Excel
   copying to, 307
   exporting to, 297, 301
   importing, 282, 293

X
   .xml files
      exporting to, 299
      importing, 286
XML, 383
   .xps files, 298

Y
   years in dates, 162
   Yes/No data type, 158, 162, 183
      specifying display, 163

Z
   ZIP codes, data type for, 81
   zooming in/out, 44, 144
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