

# Introduction

Microsoft Access is a large, intimidating program. Unlike Word or Excel, where you can perform basic tasks without much in the way of training, Access presents challenges from the outset. Most users never progress beyond creating simple tables and using wizards to create basic forms and reports. At the same time, all users—from managers to researchers to administrative assistants—need information and know that what they seek is embedded *somewhere* in their Access tables. Without a more sophisticated knowledge of how to extract and present that data, they are forced to rely on office gurus and overworked IT people to provide canned reports or one-size-fits-all solutions.

This book will change all that by giving you the skills required to extract the data you need (queries), build efficient front ends for that data (forms), and publish the results in an attractive and easy-to-read format (reports). To that end, this book shuns the big Access picture and instead focuses intently on queries, forms, and reports. This in-depth approach gives you the skills and understanding you need to get at the data and prove the old saying that knowledge is indeed power. And this book does all that with no-nonsense, step-by-step tutorials and lots of practical, useful examples aimed directly at business users.

Even if you've never been able to get Access to do much beyond storing data in simple tables, you'll still find this book to your liking. I show you how to build useful, powerful queries, forms, and reports from the ground up, so no experience with these aspects of Access is necessary.

## INTRODUCTION

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## What's in the Book

This book isn't meant to be read from cover to cover, although you're certainly free to do just that if the mood strikes you. Instead, most of the chapters are set up as self-contained units that you can dip into at will to extract whatever nuggets of information you need. However, if you're a relatively new Access user, I suggest starting the first one or two chapters in each of the book's three main sections to ensure you have a thorough grounding in the fundamentals of Access queries, forms, and reports.

The book is divided into three main parts. To give you the big picture before diving in, here's a summary of what you'll find in each part:

**Part I, Creating Forms:** The five chapters in Part I show you how to build efficient and useful forms for inputting and editing data. Chapter 1, "Creating and Using a Form," and Chapter 2, "Working with Form Controls," give you the basic form know-how you need. From there, you learn about using data validation to ensure data entry accuracy, learn how to design forms for the business environment, and learn how to create specialized forms such as switchboards, dialog boxes, and startup screens.

**Part II, Designing and Customizing Reports:** The four chapters in Part II tell you everything you need to know to create attractive and practical reports. Chapter 6, "Creating and Publishing a Report," gives you the basics, and the subsequent chapters add to your knowledge by showing you the fundamentals of good report design and how to build advanced reports.

**Part III, Creating Powerful Queries:** The six chapters in Part III give you a thorough grounding in the features and uses of Access queries. After learning some query fundamentals in Chapter 10, "Creating a Basic Query," you move on to understanding criteria expressions; multiple-table queries; totals, parameter, and action queries; PivotTable queries; and SQL statements.

## This Book's Special Features

*Microsoft Office Access 2007 Forms, Reports, and Queries* is designed to give you the information you need without making you wade through ponderous explanations and interminable technical background. To make your life easier, this book includes various features and conventions that help you get the most out of the book and Access itself.

**Steps**—Throughout the book, each Access task is summarized in step-by-step procedures.

**Things you type**—Whenever I suggest that you type something, what you type appears in a **bold** font.

**Commands**—I use the following style for Access Ribbon commands: Create, Form. This means that you click the Ribbon’s Create tab and then click the Form button. For the Office menu, I use the form Office, Open. This means that you pull down the Office menu and select the Open command.

**Dialog box controls**—Dialog box controls have underlined accelerator keys: Close.

This book also uses the following boxes to draw your attention to important (or merely interesting) information.

**NOTE**

The Note box presents asides that give you more information about the topic under discussion. These tidbits provide extra insights that give you a better understanding of the task at hand.

**TIP**

The Tip box tells you about Access methods that are easier, faster, or more efficient than the standard methods.

**CAUTION**

The all-important Caution box tells you about potential accidents waiting to happen. There are always ways to mess things up when you’re working with computers. These boxes help you avoid at least some of the pitfalls.

→ These cross-reference elements point you to related material elsewhere in the book.

## CASE STUDY

You’ll find these case studies throughout the book, and they’re designed to take what you’ve learned and apply it to projects and real-world examples.

## The Examples Used in the Book

An old saw tells us that “a good example has twice the value of good advice.” I tried to cram this book with as much good advice as I could think of, but just to make sure you get your money’s worth, I’ve also included tons of examples. I’ve found over the years that examples do the most good if the reader can follow along when the mood strikes. To that end, all the examples I use in this book are based on the sample database that comes with Access 2007: Northwind 2007, a database of products, employees, invoices, and much more

from Northwind Traders, a fictitious food company. If you want to use this database while learning about Access forms, reports, and queries, here's how to load it:

1. Launch Access 2007 and, in the list of template categories that appears, click **S**ample. (If you already have Access 2007 started, choose **O**ffice, **N**ew to see the list of template categories.)
2. Click the Northwind 2007 icon.
3. Adjust the File **N**ame, if desired.
4. Click **D**ownload.
5. If you see the Microsoft Office Genuine Advantage dialog box, click **C**ontinue. Access 2007 downloads and installs the database.
6. If you see the Security Warning message bar, click **O**ptions, click **E**nable This Content, and then click **O**K.
7. In the Login Dialog, click **L**ogin.