

Learning Services Information Technology

Access 2010

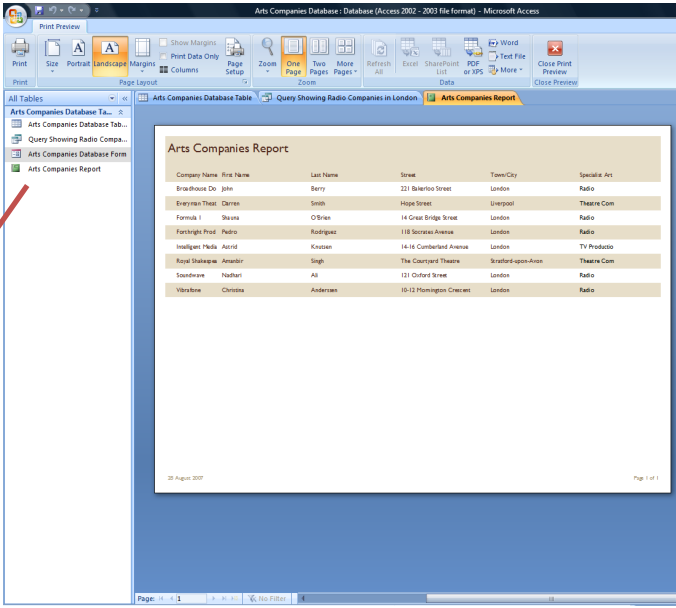
Microsoft Access is a programme which allows you to store a lot of information easily in the form of a database. For example you could create a database which stored all the names and addresses of your friends. You could search this information or organise it in a variety of ways.

What is a database?

When using Word and Excel, you have created one document at a time and the whole document is displayed on the screen at once. Access operates differently; one database is made up of a number of different parts, these are as follows:

Forms: A form is the part of the database where you enter or search for information, for example addresses. This is the part of the database that you would use most often. Each completed form is called a record;

Tables: A table is the part of the database where the information you have entered in the form is stored. It looks like a spreadsheet. The table provides the background structure of the database, but you would not enter information here, as it is not as user friendly as the form. Any changes you make to the records are automatically updated on the table too;



The screenshot shows the Microsoft Access 2010 interface. The title bar reads 'Arts Companies Database: Database (Access 2002 - 2003 file format) - Microsoft Access'. The ribbon includes 'Print Preview', 'Page Layout', 'Page Setup', 'Zoom', 'On Page', 'Two Pages', 'More Pages', 'Refresh All', 'Excel', 'SharePoint List', 'PDF or XPS', 'Word', 'Close Print Preview', and 'Close Print Preview'. The left-hand side navigation pane shows a tree view with 'All Tables' expanded, containing 'Arts Companies Database Table...', 'Arts Companies Database Table...', 'Query Showing Radio Compa...', 'Arts Companies Database Form', and 'Arts Companies Report'. A red box highlights the 'Arts Companies Database Form' and 'Arts Companies Report' items, with a callout text: 'You can move between the Form and Table here in the side navigation panel'. The main window displays the 'Arts Companies Report' as a table with the following data:

Company Name	First Name	Last Name	Street	Town/City	Specialist	Art
Broadhouse Do	John	Berry	221 Balfour Street	London	Radio	
Everyman Theat	Clarens	Smith	Hope Street	Liverpool	Theatre Com	
Formula 1	Seamus	O'Brien	14 Great Bridge Street	London	Radio	
Fortnight Prod	Radio	Rodriguez	118 Stroud Avenue	London	Radio	
Headgear Radio	Alexis	Shotton	14-18 Cornhill Avenue	London	TV Products	
Royal Shakespeare	Amendior	Singh	The Courtyard Theatre	Stratford-upon-Avon	Theatre Com	
Soundwaves	Nathan	All	121 Oxford Street	London	Radio	
Vibrations	Christine	Anderson	10-12 Harington Crescent	London	Radio	

Reports: A report is the easiest way to gather together information from your database. It is a list of information taken from the records stored on the table. For example you might have entered names, addresses and telephone numbers into your form, but you might only want to print off the names and telephone numbers. To do this you would create a report.

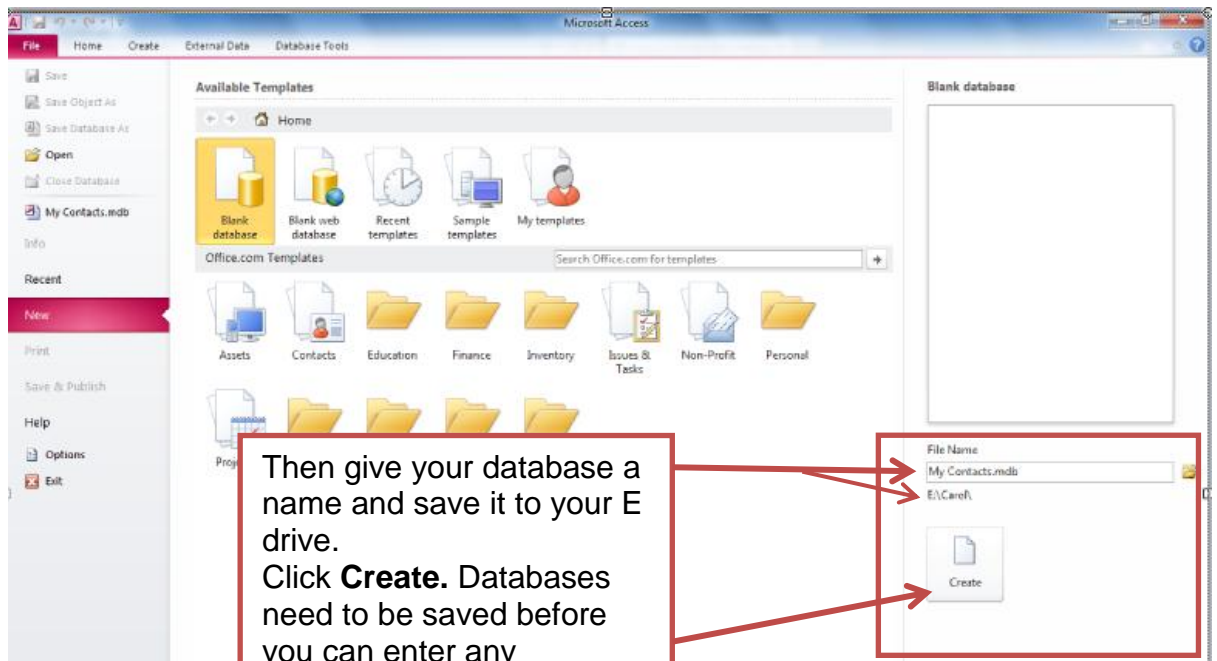
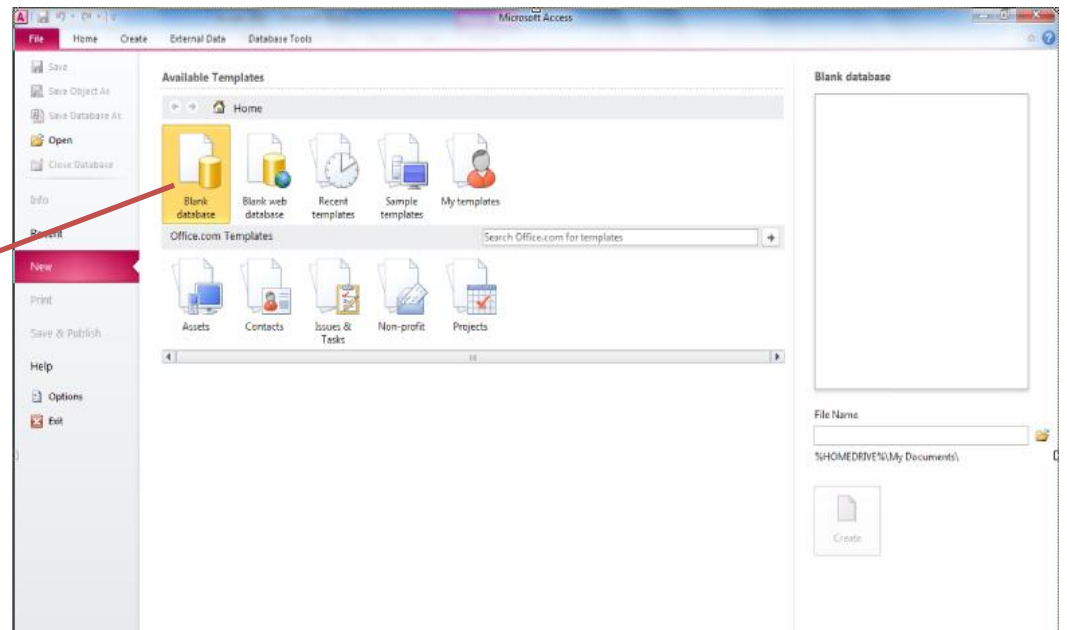
Using a database to search for information

Databases are designed to make accessing your information easier. You can perform simple and more complex searches to find information, and also sort the information in different ways. All these actions are performed using the form.

Access

Creating a Blank Database

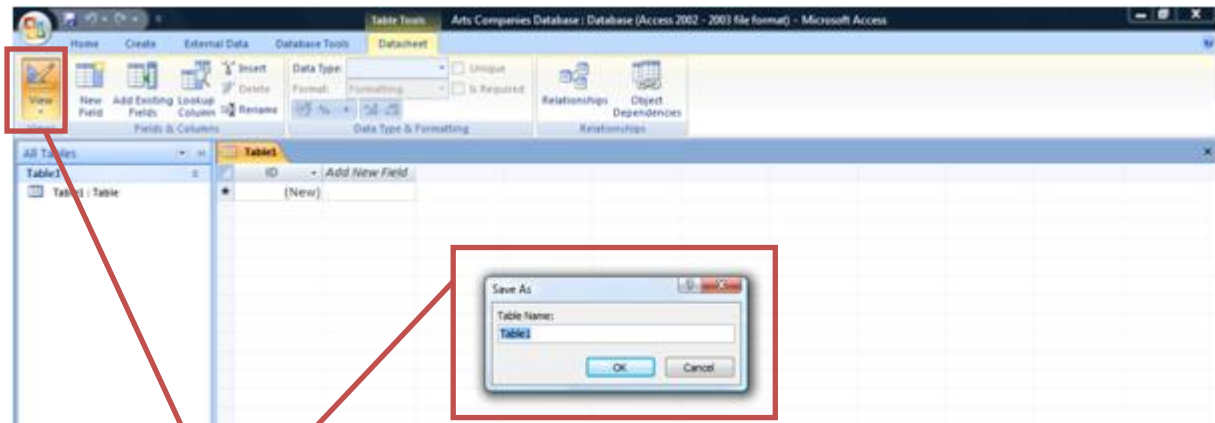
Firstly, open up Access and choose Blank Access Database.




Creating a Table

The first step is to create a table. This allows you to enter the fields you wish to include in your database, such as name and address, and how you want this information to be presented. Once you have created your table it is difficult to change it. So make sure you are clear about the information you want to include in it before you begin.

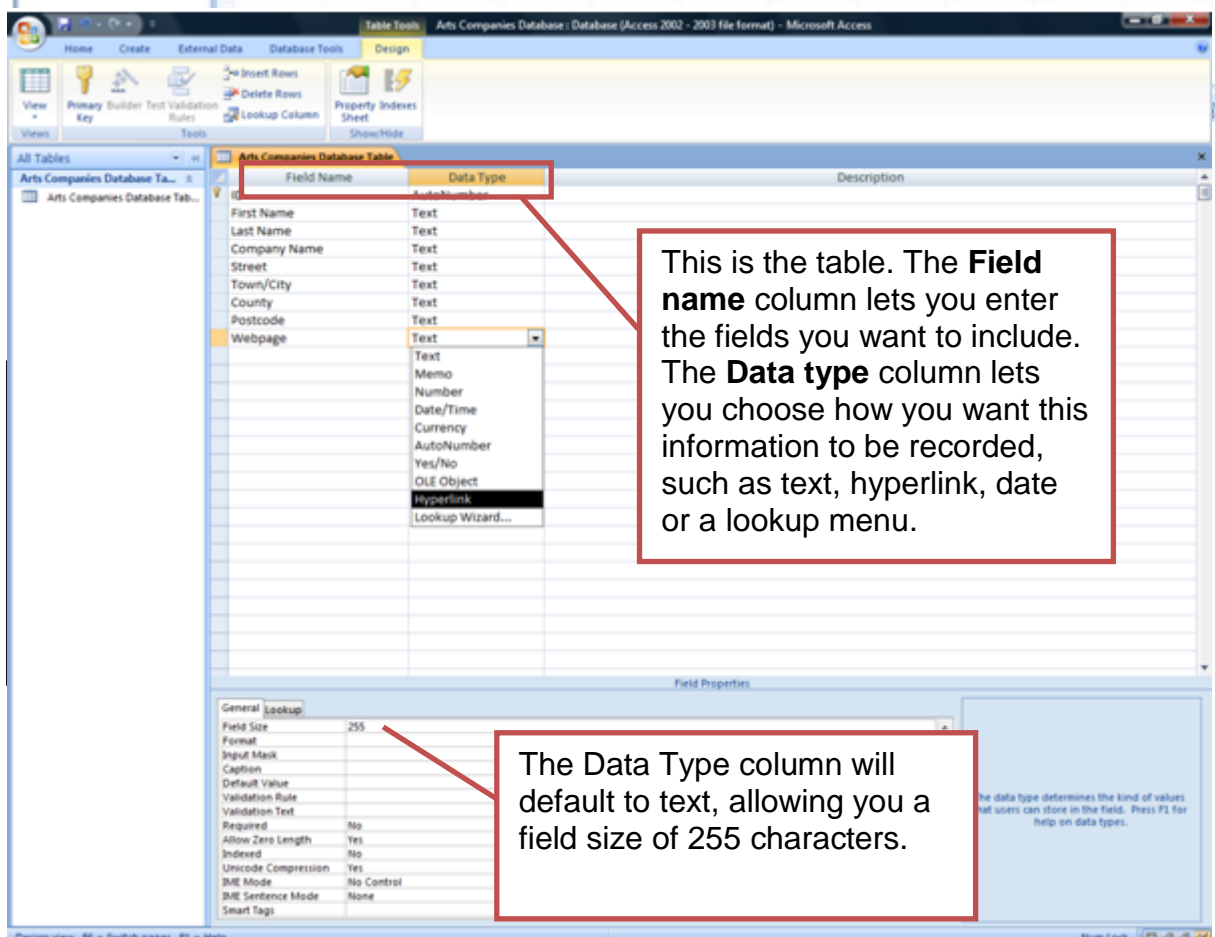
Once you have named your database the Tables section will automatically open up.



Begin by saving and naming your table.

Click on the Design View icon  Then name your table and click OK.

You might want to include the word 'Table' in the table name, it will make it easier to differentiate later.



This is the table. The **Field name** column lets you enter the fields you want to include. The **Data type** column lets you choose how you want this information to be recorded, such as text, hyperlink, date or a lookup menu.

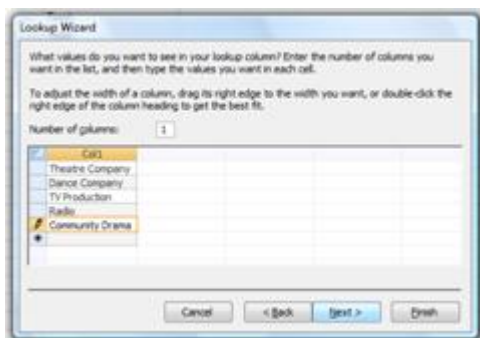
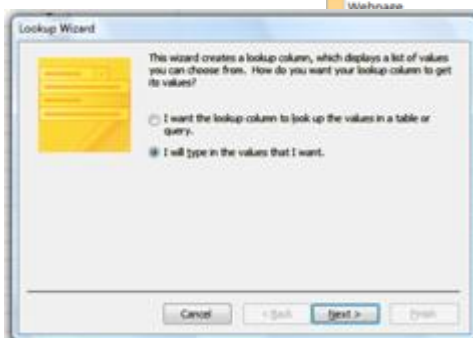
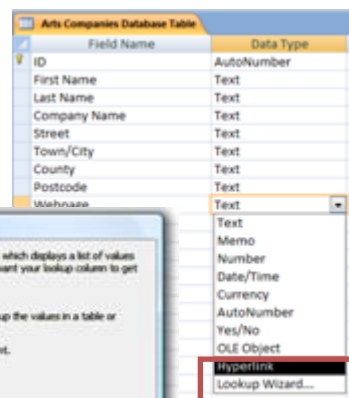
The Data Type column will default to text, allowing you a field size of 255 characters.

There are a variety of options available in the Data type pull down menu. One is the Lookup Wizard. This allows you to create a pull down menu of your own. Once included in your database a pull down menu makes entering information quicker and removes the possibility of typing errors.

To create a pull down menu

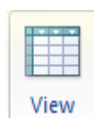
In the Data type column choose **Lookup Wizard**.

Choose **I will type in the values that I want** and then click **next**.



Enter the information you require and click **Next**. You can label the pull down menu or leave it as the field name. Click **Finish**.

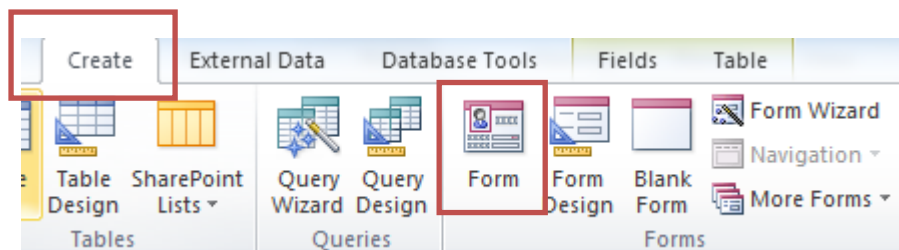
Despite entering a Lookup Wizard the Data Type will still be just shown as Text. This is a bit confusing, but your pull down menu will become visible later in the process.



Once you are happy with the fields you have chosen for your database choose **Datasheet View** from the top left of the screen. You will be asked to save your Table. You can now continue with creating a form.

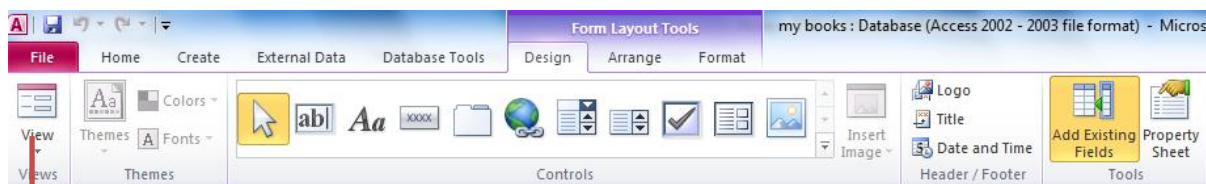
Creating a Form

Choose the **Create** tab. From the **Forms** area double click on **Form**

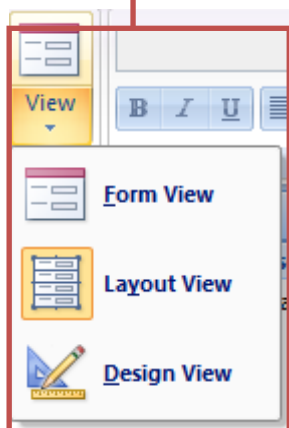


Changing the design of the form

Your new form will open up. The **Form Layout Tools** tab will be selected automatically.

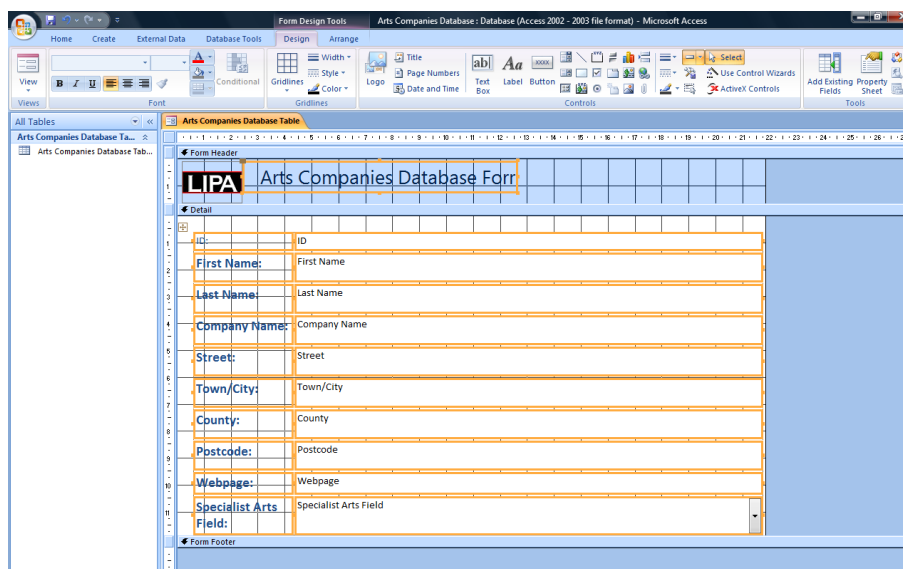


From this section you can format and customise your form to make it look more attractive



If you need to move the boxes around you need to look at the **Form in Design View**

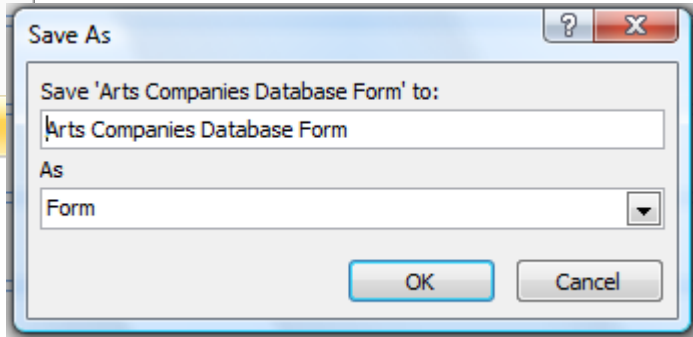
Once you are in design view you can move the boxes around by clicking and dragging, or change the size of boxes by clicking and dragging on their corners. The appearance of the text can also be changed by highlighting boxes and changing the fonts and colours on the tool bar.



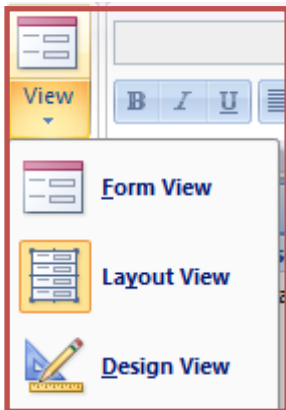


Save any changes you make by going to the Office Button and clicking Save As. The Save As window will pop up.

You might want to include the word 'Form' in the form name, it will make it easier to differentiate later.




Adding Records to your Form



To add records, look at the form in **Form View**.

You can now add records, using the **tab** key to jump from one field to the next. You should now be able to see the pull down menu you created earlier.

ID:	1
First Name:	Amanbir
Last Name:	Singh
Company Name:	Royal Shakespeare Company
Street:	The Courtyard Theatre
Town/City:	Stratford-upon-Avon
County:	Warwickshire
Postcode:	CV37 6BH
Webpage:	www.rsc.org.uk
Specialist Arts Field:	Theatre Company

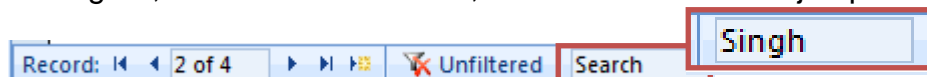
Once you have entered some information into the database the scroll bar at the bottom left side of the form will help you to find your way through your records. To create a new record click on this button .

Searching the Database

Searching for Information in a Form

Databases are designed to make accessing information easier. You can perform simple or more complex searches, and sort the information in your database in different ways. All these actions are carried out using the Form.

There is a handy search box at the bottom of the Form. Type in the term you are looking for, such as a Last Name, and the database will jump to the record.



Searching for a specific record

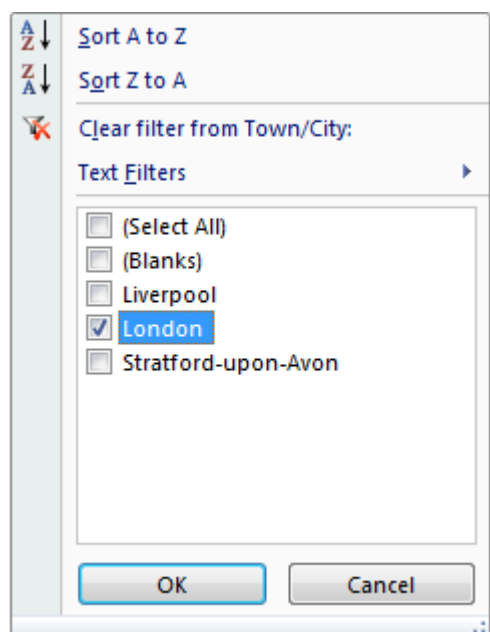
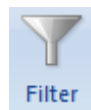
- To search for a particular record, such as someone's Last Name, click on the **Last Name** field, then click the find button on the toolbar.
- The **Find** screen will appear. Enter the name you are looking for and press return.
- The database will go to the record which contains the name you have searched for.



Filtering

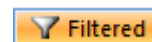
Filtering is another way that you can search within your database. It is a good way of identifying and separating more than one record which contains the same information. For example you could filter your database to identify everyone you have marked as contacted, or everyone whose organisation field contains LIPA.

- First, click in the field that you wish to search in e.g. City
- To Filter click on the **Filter by Form** icon.



The filter window will appear. Tick the entry you wish to search for and click OK. The database will then search for records containing your search term.

To take off the filter click on the 'filtered' icon at the bottom of the screen.

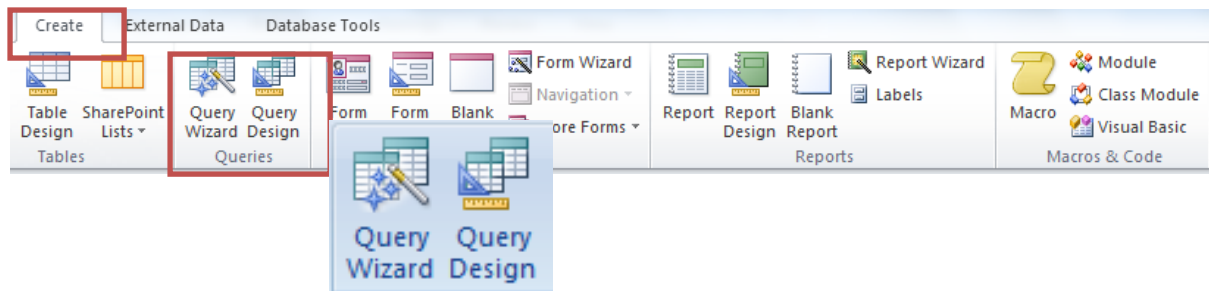


You can also sort your database alphabetically using the sort buttons.

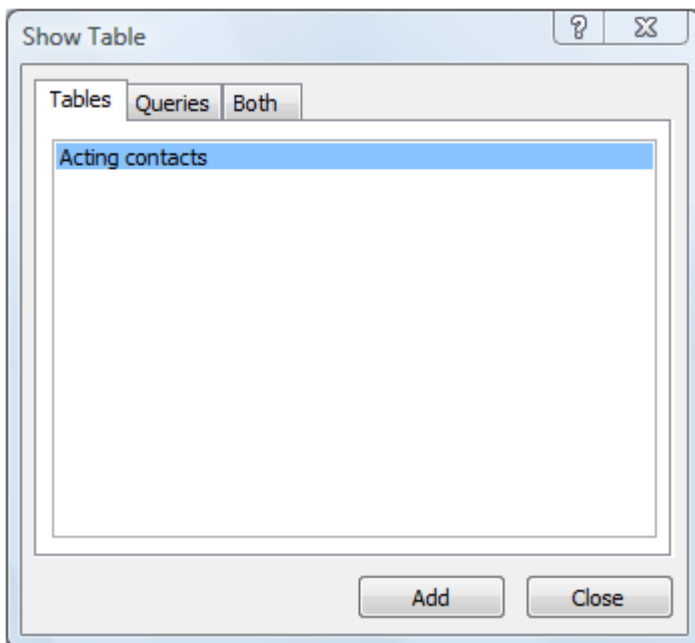


Queries

Although you are able to carry out searches using the filter buttons it is not possible to then save, print or create a report from your search results. To do this you will need to create a query.

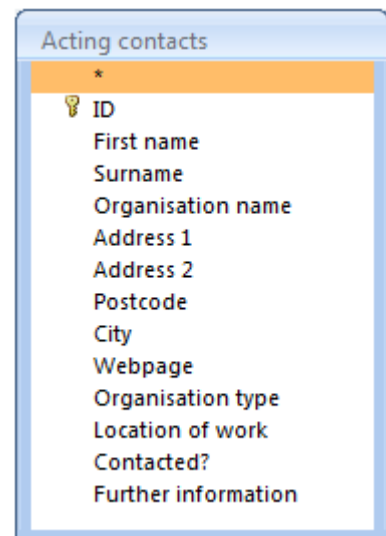


The Query wizard will enable you to create quick Queries easily. Query Design enables you to create more complex Queries, for example, by combining information from more than one database



- Click on the Query Design button, the layout of the screen will change and the Show Table window will open.
- Choose the Table you would like to take the Query information from, click Add and then Close

- Another window will open listing all the fields available in your table.



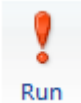
Acting contacts

- * ID
- First name
- Surname
- Organisation name
- Address 1
- Address 2
- Postcode
- City
- Webpage
- Organisation type
- Location of work
- Contacted?
- Further information

Click and drag the fields you would like to include into grid below.

Field:	First name	Surname	Organisation name		
Table:	Acting contacts	Acting contacts	Acting contacts		
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Criteria:					
or:					

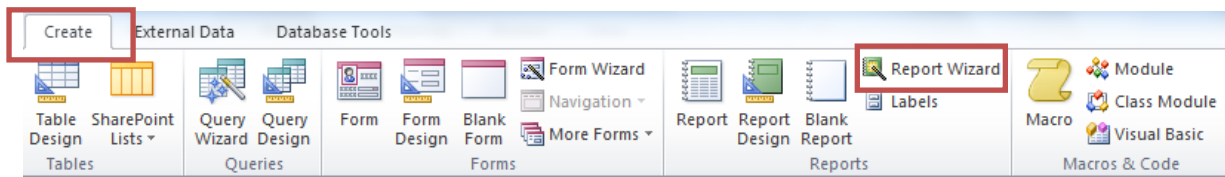
Field:	First name	Surname	Organisation name	City	Organisation type
Table:	Acting contacts	Acting contacts	Acting contacts	Acting contacts	Acting contacts
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				"London"	Agency
or:					

- Type in the criteria you would like to use. For example this Query will filter out all the Agencies in London.
- Once you have decided on your criteria, click Run 
- The results of your Query will be displayed. These can now be saved and used to create a Report or a Mail Merge

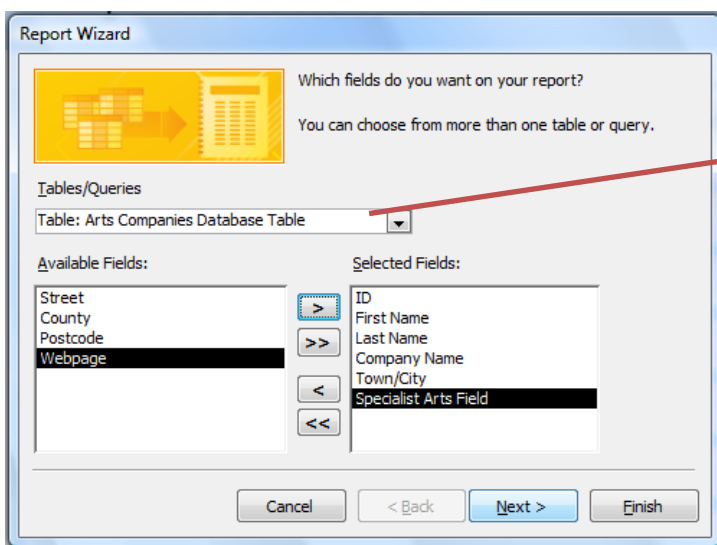
	First name	Surname	Organisation name	City	Organisation type
	Nick	Smith	K,T&L	London	Agency
	Shauna	Henry	Best Agencies	London	Agency
	Andrew	Holmes	Holmes & Holmes	London	Agency
	John	Brown	The Spotlight	London	Agency
	Geoff	Watson	Watson Associates	London	Agency
	Honey	Teslim	Teslim and Brown	London	Agency
*					

Creating Reports

Reports offer another way of displaying the information in your database. They allow you to present more than one record on a page in a list format, and are particularly useful for printing out records.



Click on the **Create** tab, then **Report Wizard**.



The Report Wizard window will open up

- If you have created more than one table check the Report is taking information from the correct one
- Select the fields you wish to include in your Report. Move them from left to right using the arrow buttons. The single arrow > will move one field at a time, the double arrow >> will move them all.
- Click Next

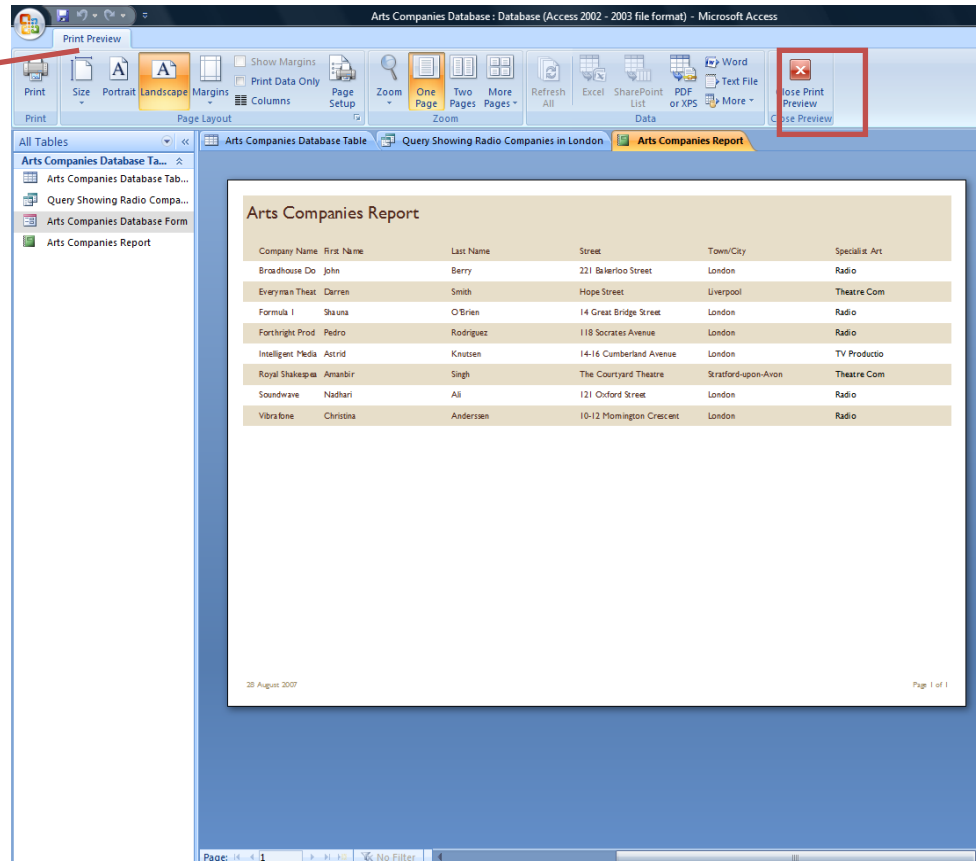
Move through the next five Report Wizard windows. They will ask:

- Do you want to add any grouping levels?
- What sort order do you want for your records? *You could order them alphabetically by company name*
- How would you like to layout your report? *The Tabular layout will fit the most records on the page. Changing the paper ratio to Landscape would also provide more space.*
- What style would you like?
- What title do you want for your report? Preview the report
- Click Finish

The **Print Preview** ribbon will automatically be shown at the top of the screen.

From here you can zoom the report, change the paper ratio or margins, or just print out your report.

Click **Close Print Preview** when you're done.

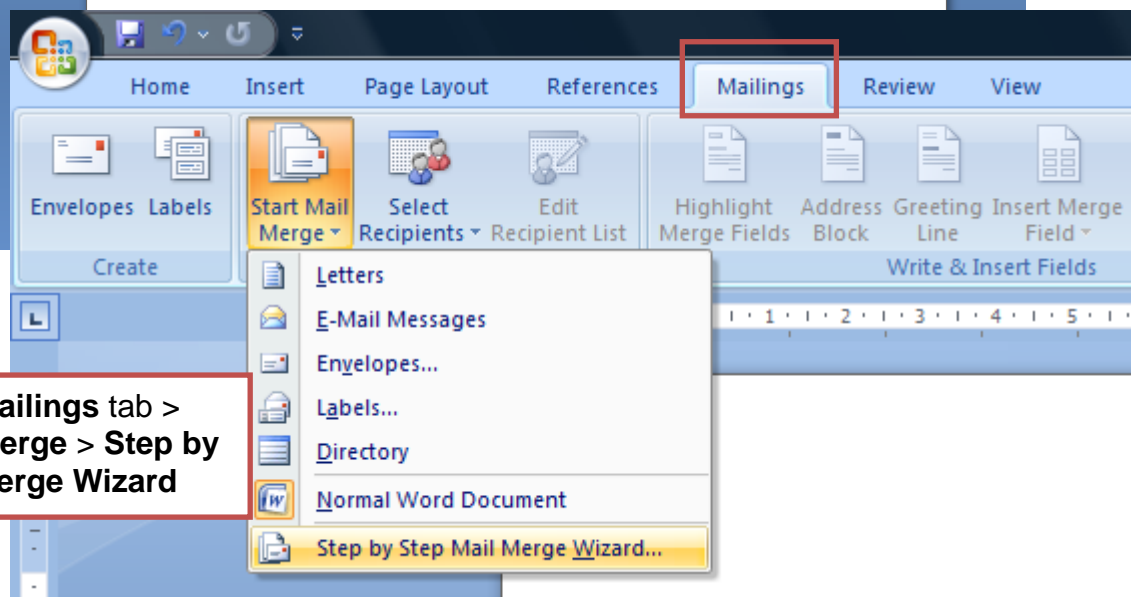
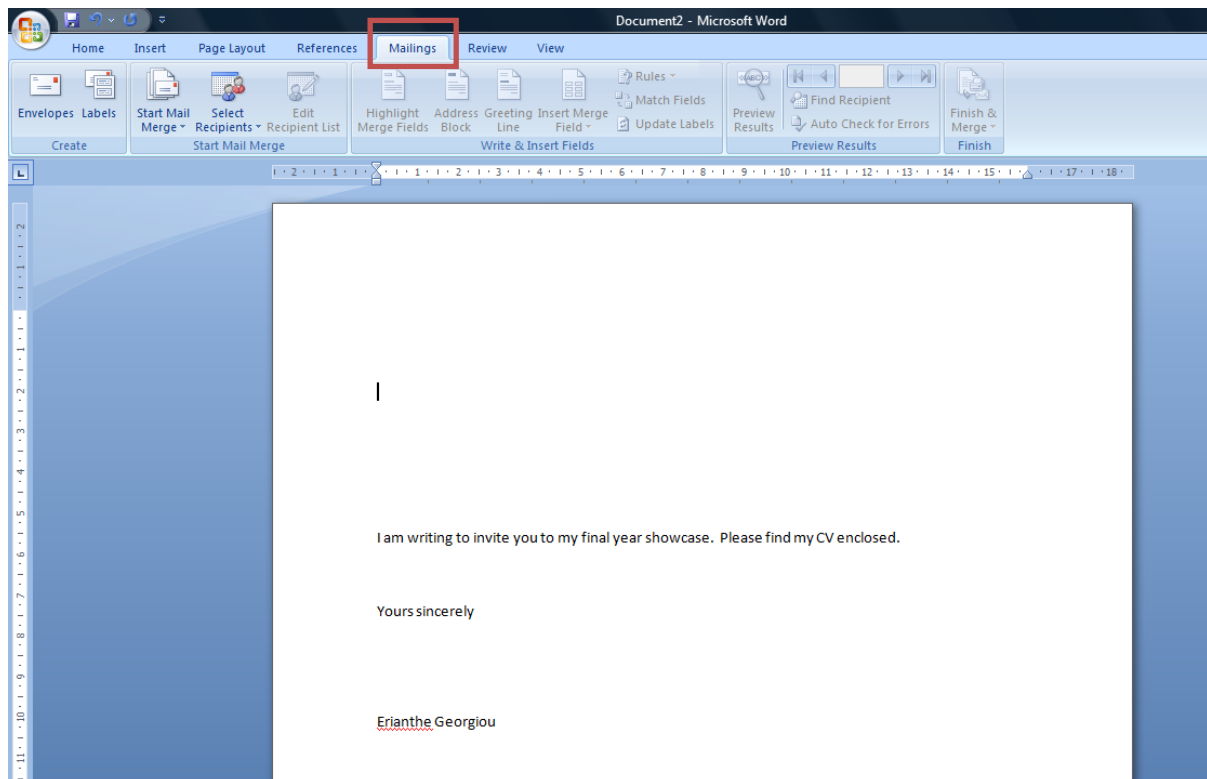


Mail Merge from Access

Mail merge is a facility available in Word which allows you to create a letter and insert records, such as addresses, from your database. This means that you do not need to retype all the records into the Word document, when you already have them stored in a database.

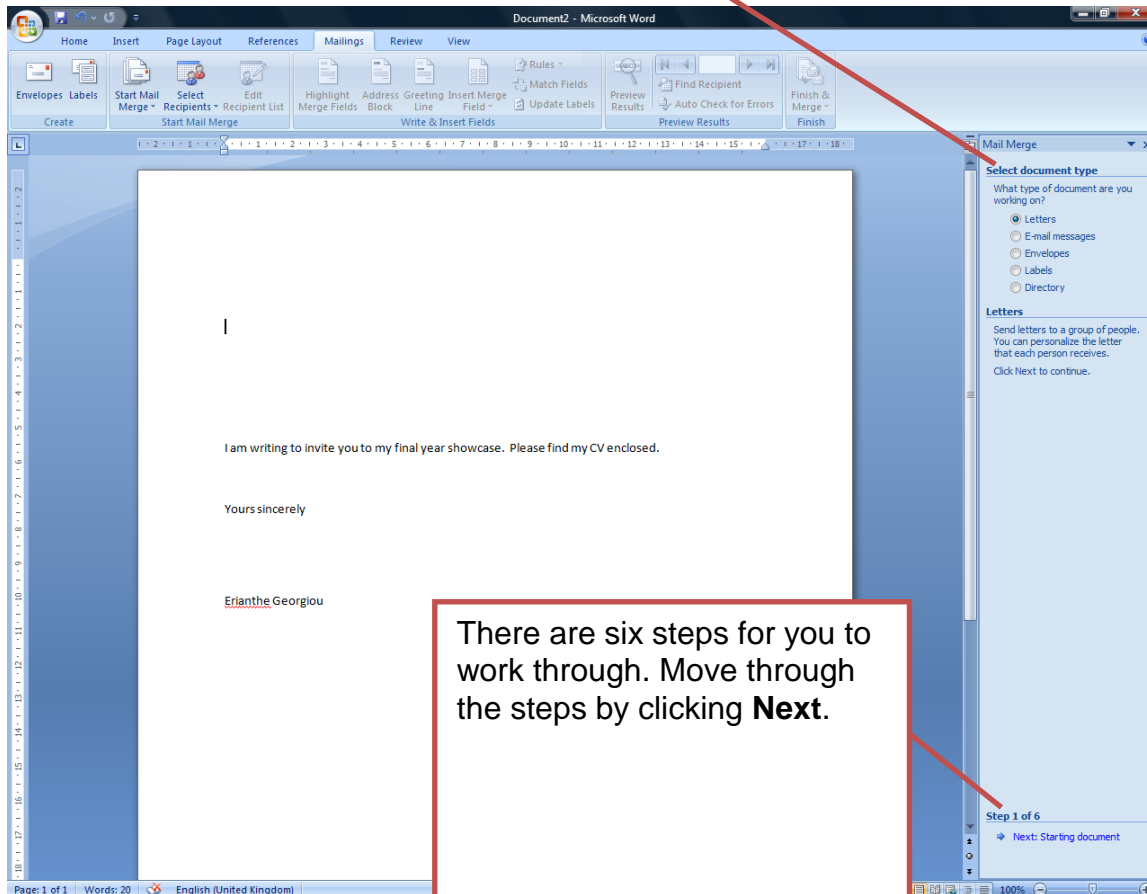
Creating a mail merge document

The first step is to create a letter into which you can insert your Access records. You need to leave spaces in your letter for this information, for example a space at the top for the address.

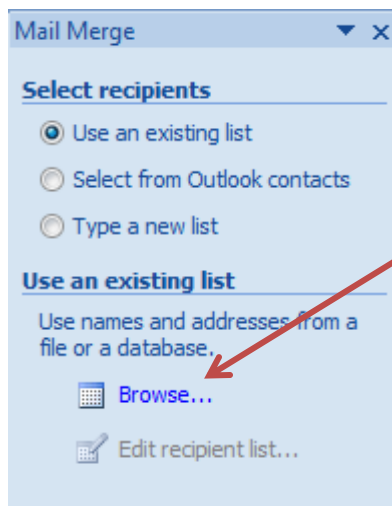


Select the **Mailings** tab >
Start Mail Merge > **Step by
Step Mail Merge Wizard**

The **Step by Step Mail Merge Wizard** will open up to the right of the screen.



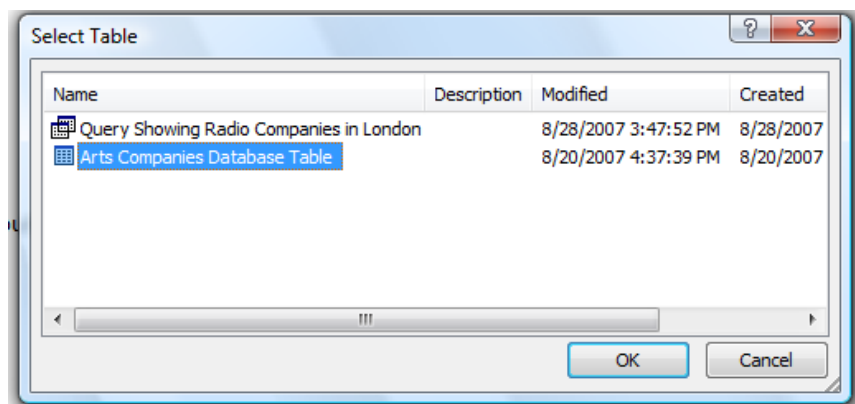
There are six steps for you to work through. Move through the steps by clicking **Next**.



In Step 3 you will be using the information you added to your database earlier – so choose **Use an existing list**.

Click **Browse** and locate your saved database.

You will be able to use your whole database, or just the Queries you have saved, see below.



In Step 4 you have the opportunity to write your letter, if you haven't already done so. You can then indicate where you would like the information from your database to sit in your letter.

Mail Merge Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block...
- Greeting line...
- Electronic postage...
- More items...

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

The **Insert Address Block** will let you choose how you would like the recipient's address displayed. You can choose the form of their name, whether their company name will be included etc.

Insert Address Block

Specify address elements

- Insert recipient's name in this format:
 - Josh
 - Josh Randall Jr.
 - Josh Q. Randall Jr.
 - Joshua
 - Joshua Randall Jr.
 - Joshua Q. Randall Jr.
- Insert company name
- Insert postal address:
 - Never include the country/region in the address
 - Always include the country/region in the address
 - Only include the country/region if different than:
 - United Kingdom
- Format address according to the destination country/region

Preview

Here is a preview from your recipient list:

1

Amanbir Singh
Royal Shakespeare Company
CV37 6BH

Correct Problems

If items in your address block are missing or out of order, use Match Fields to identify the correct address elements from your mailing list.

Match Fields... OK Cancel

Match Fields

In order to use special features, Mail Merge needs to know which fields in your recipient list match to the required fields. Use the drop-down list to select the appropriate recipient list field for each address field component

Required for Address Block

- First Name: First Name
- Last Name: Last Name
- Suffix: (not matched)
- Company: Company Name
- Address 1: Street
- Address 2: (not matched)
- City: (not matched)
- State: ID
- Postal Code: First Name
- Country or Region: Last Name
- Unique Identifier: Company Name

Optional information

- Street: Street
- Town/City: Town/City
- County: County
- Postcode: Postcode
- Webpage: Webpage
- Specialist Arts Field: Specialist Arts Field
- (not matched): (not matched)

Use the drop-down lists to choose that corresponds to the address in (listed on the left.)

Remember this matching for this computer

OK Cancel

This window shows you how your addresses will look when inserted into your letter.

You may notice that some information is missing, for example this record has no street or City information, even though it was included in the database. If this is the case you need to go to **Match Fields**.

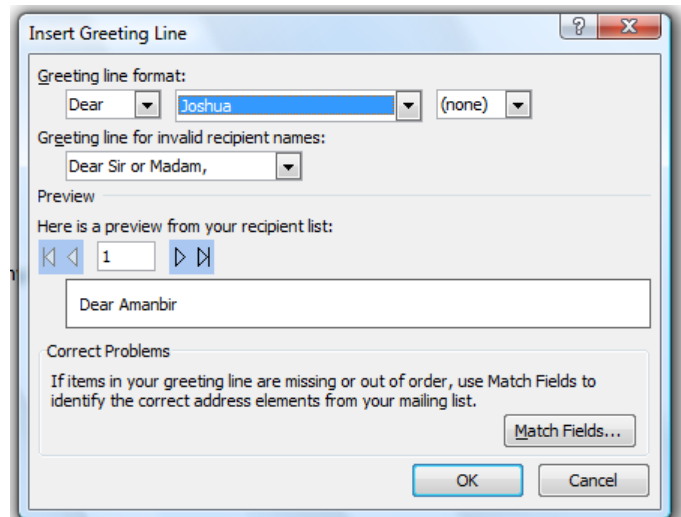
The **Match Fields** window will allow you to tell Access which of your database fields correspond to the fields of the Address Block.

Click **OK**.

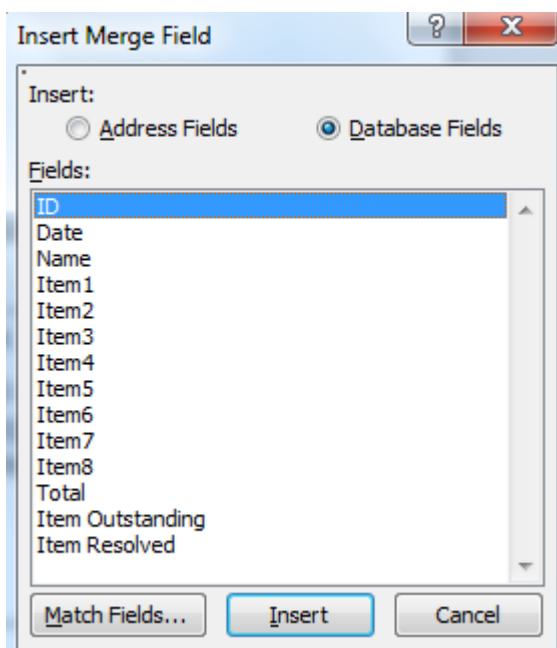
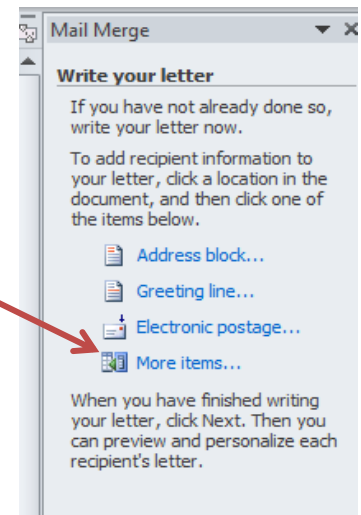
Next you can add in a Greeting Line, this is the text which starts your letter 'Dear Amanbir'

You can choose how you would like the greeting line to look – for example, do you want to use the recipient's full name, or just their first name?

Click **OK**



To add fields straight from your database table or query into a template document click on **More Items**

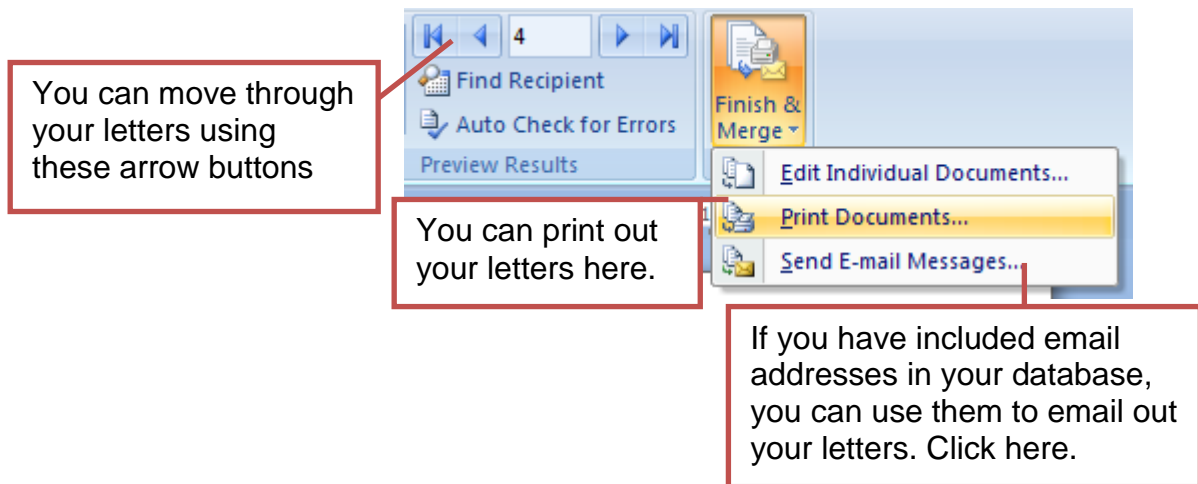


A window will now open listing all the fields in your table/query.

In your document place the cursor where you would like the information from the database to be inserted.

Then click on the appropriate fields from the **Insert Merge Field** box and click **Insert**

In **Step 5** you will be able to preview your letters, in **Step 6** you can complete the **Mail Merge** and print off your letters or edit individual letters. Once finished you can close the **Mail Merge Wizard** panel.



For further help and advice on using Access ask at the LRC, staff will be happy to help you!

LRC@lipa.ac.uk 0151 330 3111