

Beginner Microsoft Access 2002

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Creating a Table

- 1/ Click "Blank Database".
- 2/ Change the file name to "My Business Database" and click the Create button.
- 3/ Double-click the "Create table in Design view" entry.
- 4/ Type the field name "Customer Number". Press the "Tab" key and you will see "Text" as the Data Type entry. Change this Data Type to "AutoNumber".
- 5/ Type the phrase "primary key field" as the Description entry.
- 6/ Click the Primary Key button towards the center of the toolbar. It is the one with the symbol of a key. It is recommended that you always designate one field of your table as that primary key field in this way. The primary key field should be a field for which no two records will share the same exact value. In our example, we will not allowed to have two customers with the same Customer Number.
- 7/ In the next row, type "Account Number" as the Field Name entry. Also, click in the Data Type area and change its entry to Number.
- 8/ In the next row, type "Social Security Number" as the Field Name entry. Should the Data Type for this field be "Text" or "Number"?
- 9/ In the next row, type "Last Name" as the Field Name entry.
- 10/ In the next row, type "First Name" as the Field Name entry.
- 11/ In the next row, type "Email Address" as the Field Name entry.
- 12/ Pretend that you no longer wish to save customers' social security numbers in your database table. Right-click your mouse over the "Social Security Number" row and then click Delete Rows.
- 13/ Right-click over the "Email Address" row and then click Insert Row.
- 14/ Click in the area for Field Name and type "Outstanding Balance".
- 15/ Choose "Currency" for the data type of this field.
- 16/ Click the File/Save menu command, type "Customers" as the name of the table and then click OK. Click the File/Close menu command.
- 17/ Why do you think I did not use Account Number as the primary key field for this table?

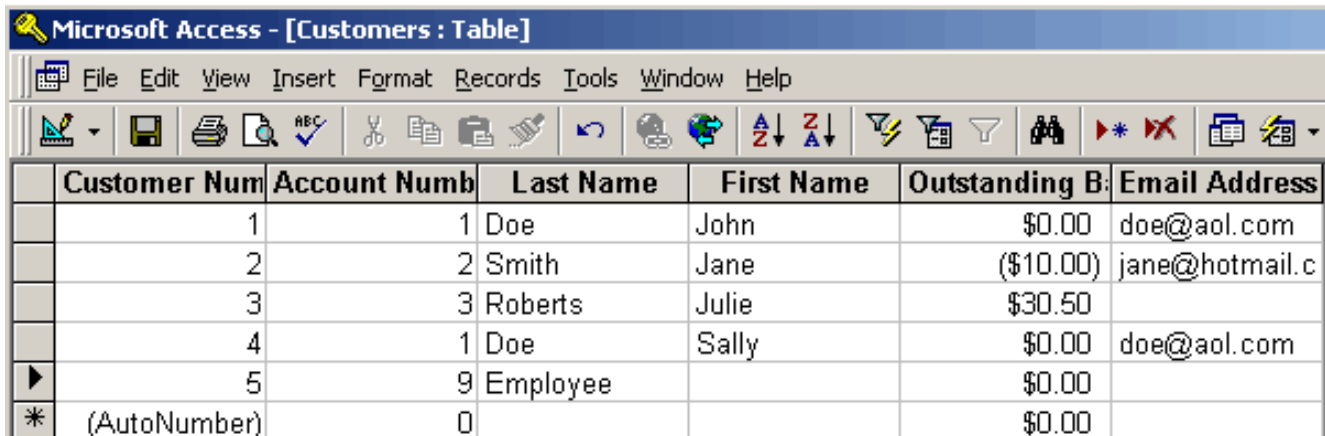
Creating Another Table

- 1/ Double-click the "Create table in Design view" entry.
- 2/ Type the field name "Transaction Number". Change the data type of this field to "AutoNumber" and click the "Primary Key" button on the toolbar to make this field the primary key.
- 3/ Type "Customer Number" as the next field name and choose "Number" as the data type.
- 4/ Type "Zip Code" as the next field name and choose "Text" as the data type. Why do you think I did not decide to use the Number data type for this field?
- 5/ Type "Purchase Amount" as the next field name and choose "Currency" as the data type.
- 6/ Type "Amount Paid" as the next field name and choose "Currency" as the data type.

- 7/ Click the File/Save menu command and name the table "Transactions".
- 8/ Click the File/Close menu command.
- 9/ You should now see two tables, Customers and Transactions, in your Tables view.

Entering Data into a Table

- 1/ Double-click on the Customers table to open the table in the Datasheet View (rather than the Design View).
- 2/ Press the Tab key and type 1 for Account Number, Doe for Last Name, John for First Name, 0 for Outstanding Balance, and doe@aol.com for Email Address.
- 3/ Press the tab key twice. In the next row (i.e. record) in this database table, type 2 for Account Number, Smith for Last Name, Jane for First Name, -10 for Account Balance, and jane@hotmail.com for Email Address.
- 4/ Type the following records in the next few rows so that your table's DataSheet view looks like this. Note that Access will fill in the Customer Number field due to Autonumbering.



Customer Num	Account Num	Last Name	First Name	Outstanding B	Email Address
1	1	Doe	John	\$0.00	doe@aol.com
2	2	Smith	Jane	(\$10.00)	jane@hotmail.c
3	3	Roberts	Julie	\$30.50	
4	1	Doe	Sally	\$0.00	doe@aol.com
5	9	Employee		\$0.00	
(AutoNumber)	0			\$0.00	

- 5/ Click the File/Print menu command and then OK button to print this table.
- 6/ Click the File/Save menu command and then the File/Close menu command.

Creating a Simple Report

- 1/ Single click on the Customers Table in the Tables view.
- 2/ Click the Insert/AutoReport menu command.
- 3/ Look closely at the format of this report to see how it contains all of your customer records. Realize that if you clicked the File/Print menu command you would be able to print this report.
- 4/ Click the File/Close menu command and click No since we don't wish to save this unformatted report.
- 5/ Now click the Insert/Report menu command.
- 6/ Select Report Wizard and click OK.
- 7/ Click the Last Name entry on the left and then click the single right arrow in the middle of the screen.
- 8/ Do the same with the Outstanding Balance and the Email Address fields.

- 9/ Click the Next button two times.
- 10/ Click the arrow next to the white combo box at the top of the screen and select Last Name from the set of choices.
- 11/ Click Outstanding Balance next to the second white combo box.
- 12/ Click the Next button.
- 13/ Click the Landscape option.
- 14/ Click the Next button two times.
- 15/ Change the title of the report from "Customers" to "Customer Outstanding Balances"
- 16/ Click the Finish button.
- 17/ Click the File/Save menu command and then the File/Close menu command.
- 18/ In the main database window, click the Reports tab and double-click the "Customer Outstanding Balances" entry to see your report at any time in the future. Notice that Roberts has an Outstanding Balance of \$30.50. Click the File/Close menu command again.

Updating Data in a Database Table

- 1/ Under the Tables view in the main database window, double-click on the Customers table.
- 2/ Change Julie Robert's Outstanding Balance entry to 40. Then, click the File/Save menu command and then the File/Close menu command.
- 3/ Click the Reports tab and double-click the Customer Outstanding Balances entry. Now, what do you see for Roberts' Outstanding Balance?
- 4/ Click the File/Close menu command.

Creating a Simple Query

- 1/ Click the Queries tab.
- 2/ Double-click the "Create query in Design view" entry.
- 3/ Click the Add button and then the Close button. This adds the Customers table to your query. Resize the Customers table window so that you can see all of its fields.
- 4/ Double click the "Last Name" entry in the Customers table window.
- 5/ Double click the "Outstanding Balance" entry in the Customers table window.
- 6/ Type >20 in the Criteria entry under Outstanding Balance in the query window at the bottom of the screen.
- 7/ Click the Query/Run menu command or simply click the red exclamation mark icon on the toolbar.
- 8/ You can now view the last name and outstanding balance amount for all customers who have an outstanding balance that is greater than \$20.
- 9/ Click the View/Design View menu command and experiment with different numbers in place of the 20.
- 10/ Click the File/Save menu command and type "Warning Notices" as the name of the query.
- 11/ Click the File/Close menu command.

Entering More Data into a Table

- 1/ Double click the Transactions table entry in the Tables tab of the main database window.
- 2/ Pretend that you are a store cashier and would like to process customer transactions throughout the day as customers make orders. You simply type the transaction information as a new record in this table's data sheet view as you go.
- 3/ Type 2 for Customer Number, 19610 for Zip Code, 23.45 for Transaction Amount, and 23.45 for Amount Paid. (You do not have to specify a value for the Transaction field since it has AutoNumber as its data type.)
- 4/ Pretend that 20 minutes later you must add another transaction record. Enter this information,

4	19607	14.25	10.00
3	19610	100	5

for the four fields.

- 5/ Click the File/Save and then the File/Close menu commands.

Creating Another Query with a Calculated Field

- 1/ Click the Queries tab in the main database window. Double-click the "Create query in Design view" entry.
- 2/ Double click the Design View entry.
- 3/ Add both tables (Customers & Transactions) to the query and then close the "Show Table" window.
- 4/ Resize the two table windows in the top half of the screen so that you can see all of the field entries.
- 5/ You may notice a "join line" that connects the Customer Number field in the Customers table with the Customer Number field in the Transactions table. If Access wasn't smart enough to make this join for you, you can apply it yourself by clicking on the Customer Number entry in the Customers Table and dragging it over top of the Customer Number entry in the Transactions Table.
- 6/ Double click the Zip Code field entry from the Transactions table window.
- 7/ Double click the Outstanding Balance entry from the Customers table window.
- 8/ Right click in the grid area in the bottom half of the screen. Click the Totals entry on the shortcut menu.
- 9/ Make sure that "Group By" appears in the Totals row under the Zip Code column in the bottom half of the screen.
- 10/ Click in the Total row under the Outstanding Balance column and change the entry from "Group By" to "Sum".
- 11/ Click the Query/Run menu command.
- 12/ You should see that the query results

	Zip Code	SumOfOutstan
▶	19607	\$0.00
	19610	\$20.50

You should interpret these results to understand that customers from the 19607 area code have no cumulative outstanding balance. However, customer accounts from the 19610 zip code have a net \$30.00 outstanding balance. Maybe you should no longer offer credit to customers from that zip code!

13/ Click the File/Save menu command and save this query as Zip Code Outstanding Balances. Then click the File/Close menu command.

Using a Form to Input Data

1/ Click the Forms tab in the main database window.

2/ Click the Insert/Form menu command.

3/ Select the AutoForm: Columnar entry at the top of the screen and then click the black triangle towards the bottom of the window and select the Transactions entry.

4/ Click OK.

5/ Click the "Next Record" (right arrow) and "Previous Record" (left arrow) buttons at the very bottom of the screen to cycle through the current Transaction table records.

6/ To add a new record through this form, click the "Add New Record" button (right arrow with an asterisk) at the bottom of the form. Type 2 for the Customer Number, 19610 for the Zip Code, 50 for Purchase Amount, and 45 for Amount Paid.

7/ Click the File/Save menu command and type "Transactions Form" as the name of this form. Then click the File/Close menu command.

8/ Forms are used to provide a nicer format for entering data than entering data into the datasheet view of the table itself. Double click the Transactions table under the Tables tab of the main database window to open the Transactions table. You will see this new record in the actual Transactions table. Click the File/Close menu command to close this table.

Creating an Advanced Report

1/ Click the Reports tab in the main database window.

2/ Double-click the "Create report by using wizard" entry item.

3/ Choose the Warning Notices entry in the white combo box .

4/ Click the double arrow in the center of the screen and then click the Next button.

5/ Click the Next button again.

6/ Select "Last Name" in the first combo box.

7/ Click the Finish button.

8/ Click the View/Design view menu command.

9/ Click near the border of the large "Warning Notices" label towards the top of the window and drag this label horizontally towards the center of the window.

10/ Click two times slowly in the "Last Name" label and use your backspace and arrow keys to change it to "Customer Last Name".

11/ Click the File/Save menu command.

12/ Click the View/Print Preview menu command.

13/ If you wish, you can print this report by clicking the File/Print menu command and then the OK button.

14/ Click the File/Close menu command.

Creating a Web Page from a Database

- 1/ Click the Reports tab & then click the Warning Notices report.
- 2/ Click the File/Export menu command.
- 3/ Type the file name "Warning Notices Web Page"
- 2/ Change the entry for "Save as type" to "HTML Documents".
- 3/ Click the Export button.
- 4/ Click OK.
- 5/ Open a web browser such as Internet Explorer.
- 6/ Click the File/Open menu command.
- 7/ Click the Browse button and navigate to your My Documents folder.
- 8/ Look for and double-click the web page that you created. The file should be named "Warning Notices Web Page".