

FIRST LOOK OFFICE 2010

Microsoft®

Chapter 11

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Katherine Murray

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Developmental Editor: Sandra Haynes

Project Editor: Lynn Finnel

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Chapter 11

Make Sense of Your Data with Access 2010

In this chapter:

- Starting Out with Access 2010
- Using Application Parts
- Applying Office Themes
- Adding New Fields
- Showing Data Bars and Conditional Formatting
- Creating Navigation Forms
- Designing Access 2010 Macros
- Working with Access 2010 and the Web

Whether you work daily with large, sophisticated databases or occasionally create small data tables to meet a specific need, Microsoft Access 2010 enables you to gather, organize, analyze, report on, and share your data easily and effectively. New and improved features in Access 2010 simplify the steps to creating a database by enabling you to add application parts that include ready-made tables and forms. You can also use Quick Start fields to insert commonly used fields and add calculated fields to build data analysis directly into your data tables.

On top of the simplified tasks involved in creating and analyzing your data, Access 2010 includes new data visualizations—including new data bars and improved conditional formatting—that can tell the story of your data at a glance. You'll also find plenty of Web support in Access 2010. With little effort, you can create a Web database and publish your data online so that it's always available at any point you have Web access.

Starting Out with Access 2010

The first thing you'll notice as you begin to work with Access 2010 is that the application has the friendly and familiar Office interface that is common to other Office applications you might use. The Ribbon includes five tabs—File, Home, Create, External Data, and Database Tools—that offer sets of tools organized according to the data tasks you'll be performing.

In addition to these five tabs, Access 2010 displays the Table Tools contextual tabs (Fields and Table) when you work with a data table. (See Figure 11-1.)

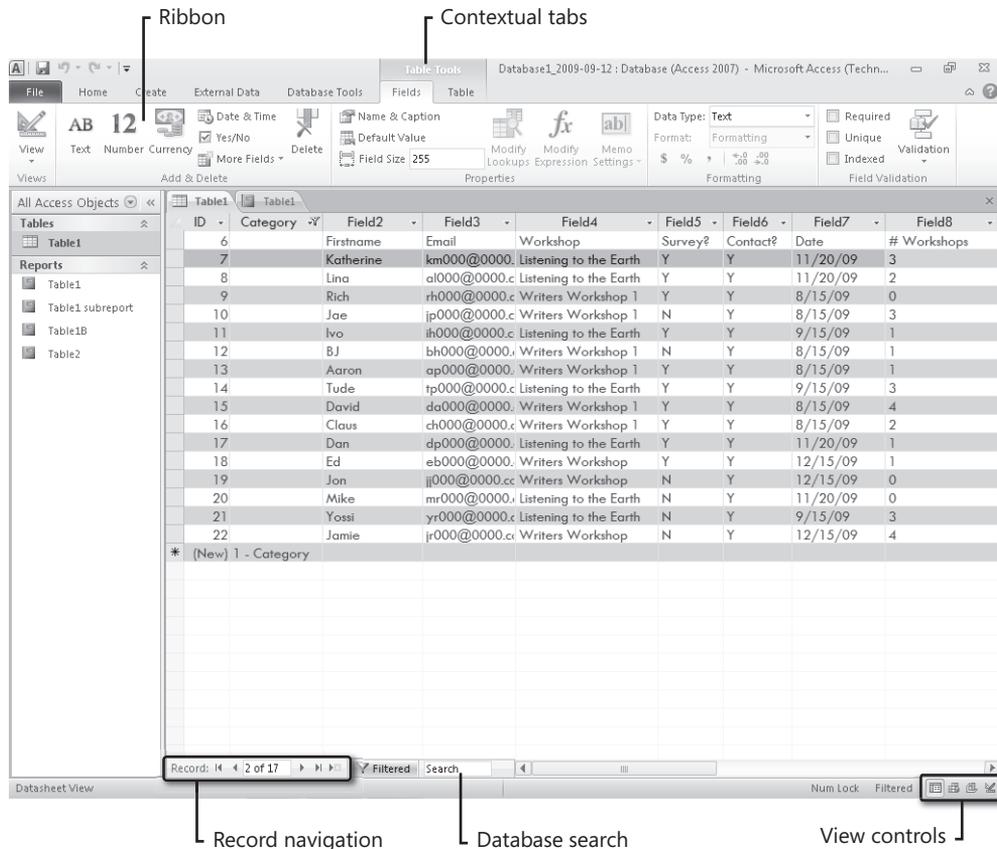


FIGURE 11-1 The Access window is designed to make it easy for you to work with the data objects and views you need.

Below the Ribbon, the Access window is divided into two main windows. The All Access Objects pane on the left side of the screen lists the various elements—tables, reports, forms, and more—in your current database. To open an object, you double-click it in the All Access Objects pane; the item then opens in the work area on the right side of the window. You can have many open objects in Access at one time, and you can change the current display by clicking the tab of the object you want to see.



Tip You can change the elements displayed in the left pane by clicking the arrow to the right of the pane heading. You can choose to display objects by category or by group. Click the option you want to display and the pane changes accordingly.

Along the bottom of the Access window you find controls that enable you to move through records in the current data table, search for information in the database, or choose the view you want to use to work with your data.

In addition to the flexible, easy-to-navigate user interface, Access 2010 offers behind-the-scenes features that help you manage your data files. Backstage view pulls together all the tools you need to create, share, and set preferences for the various files you create. (See Figure 11-2.)

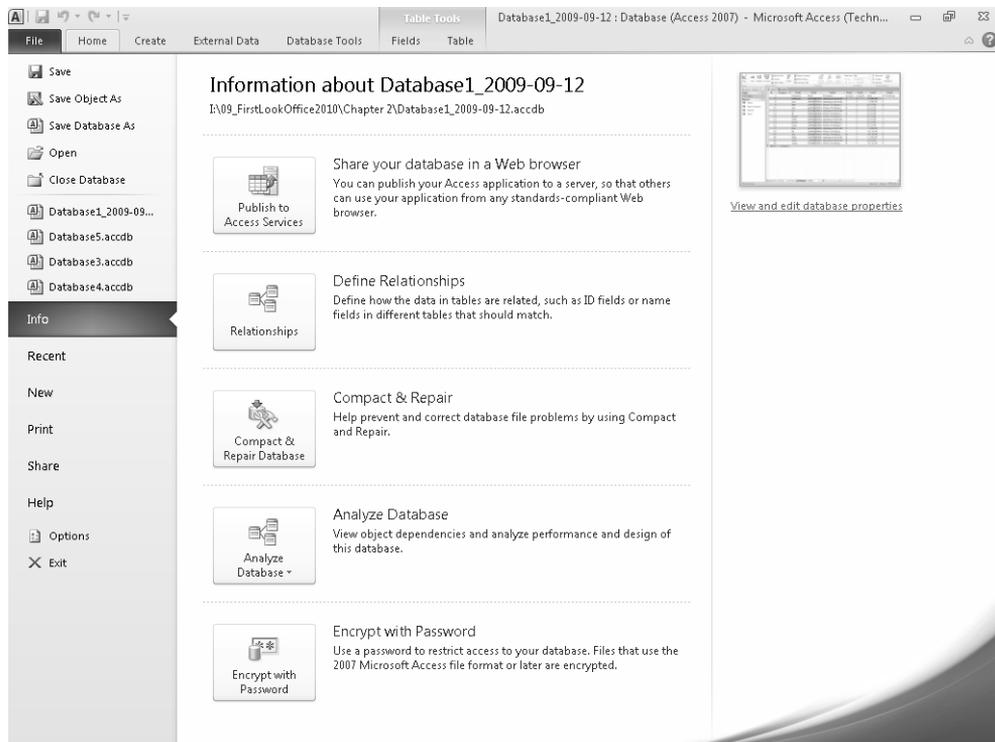


FIGURE 11-2 Use Backstage view to work with the files you create in Access 2010.

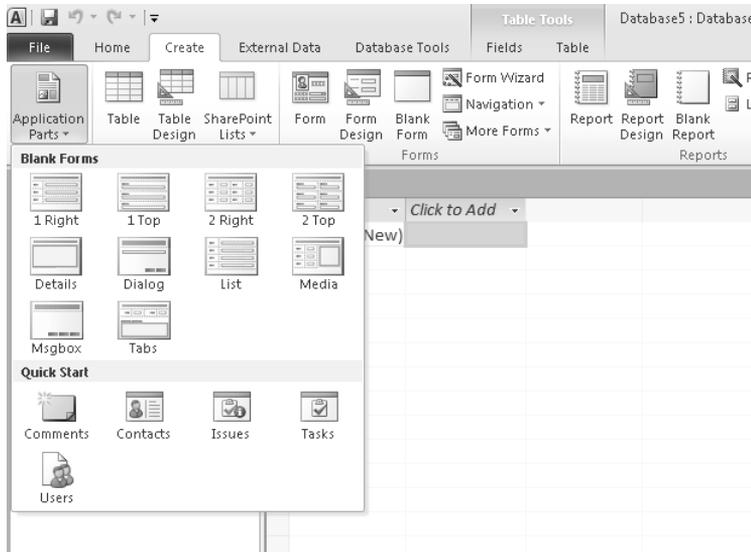
Using Application Parts

Designing every database you create from scratch takes a lot of time and effort, and now with Access 2010 there's no need to reinvent the wheel every time you create a new data table. Using the application parts in Access 2010, you can add ready-made forms and tables to your Access database. By default, Access 2010 includes a number of blank, predesigned forms as well as Quick Start tables (Comments, Contacts, Issues, Tasks, and Users) you can add to your database.

Step by Step: Adding an Application Part

Follow these steps to add an application part to your Access database:

1. Open the database you want to use.
2. Click the Create tab.
3. Click Application Parts. The gallery appears, as shown here:



4. Click the application part you want to add to your database, and the form or table you selected is inserted in the All Access Objects pane on the left side of the work area.



Tip You can easily search for Access templates to use as the basis for a new database from Backstage view. Click File to display Backstage view and then click New. Click in the Office.com Templates box, and type a word or phrase indicating the type of template you'd like to find.

Applying Office Themes

Now you can apply the professionally designed Office themes—which include color scheme, font selections, and styles—to your forms and reports in Access 2010. (See Figure 11-3.) This level of consistency enables you to create a similar design for all the documents you create

in Office 2010. For example, suppose you're putting together a lengthy sales report that spotlights key products, provides sales data by region, and includes case studies showing the ways in which your products are being used by your customers. Using the same Office theme, you can prepare the case studies in Word 2010, the financial data in Excel 2010, and the sales reports by region in Access 2010.

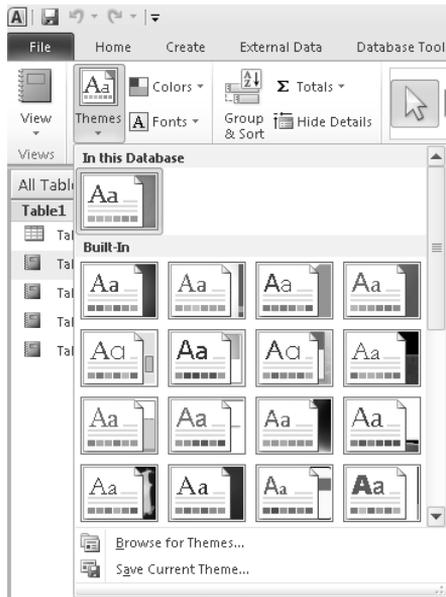
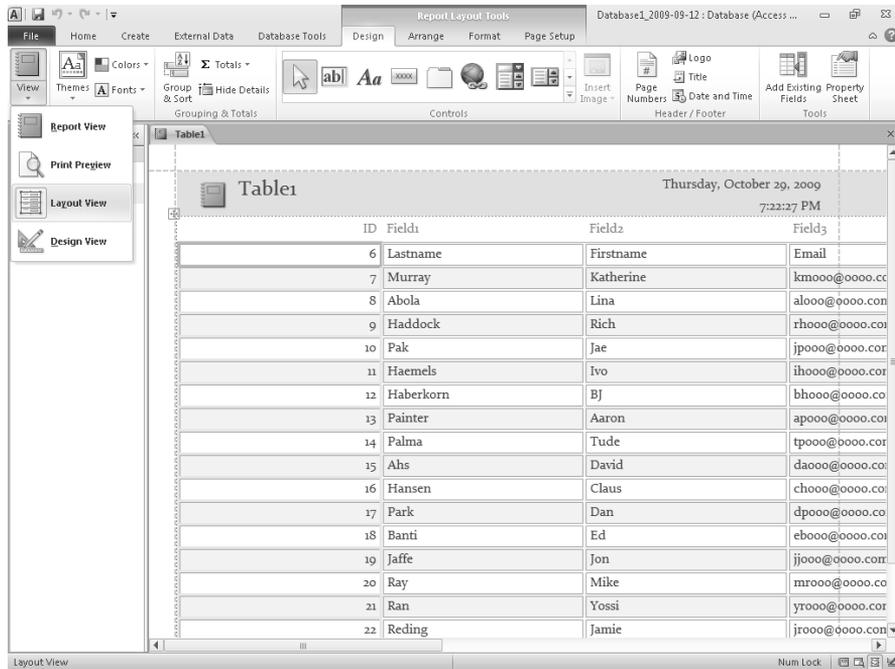


FIGURE 11-3 Office themes in Access 2010.

Step by Step: Applying an Office Theme

Here's how to apply an Office theme in Access 2010:

1. Open the database you want to use in Access.
2. Open the form or report to which you want to apply the theme.
3. Click the Home tab.
4. Click Views, and choose either Design View or Layout View.



5. In the contextual Design tab, click Themes in the Themes group.
6. Preview a theme by pointing to it; the report or form display shows you how the theme will look when it is applied to your data.
7. Click the theme you want to use, and it is applied to the form or report.

Adding New Fields

New field features in Access 2010 enable you to reduce the amount of time you spend setting common fields in your databases by using Quick Start fields, and they help you expand your data processing power by adding calculated fields to your tables.

Adding Quick Start Fields

New Quick Start fields in Access 2010 enable you to add fields you use regularly to your data tables with a simple click of the mouse. Instead of adding Address, City, State, ZIP, and Country codes one by one, for example, you can click the Address Quick Start field to add all the fields in one click. Access 2010 includes nine Quick Start fields by default: Address, Category, Name, Payment Type, Phone, Priority, Start And End Dates, Status, and Tag.

To add a Quick Start field to your data table, open the data table you want to use and click to select the field to the right of the place you want to add the field. In the Table Tools Fields tab, click More Fields in the Add & Delete group. Scroll down to the bottom of the list to find the Quick Start fields, and click the one you want to add to the data table. (See Figure 11-4.)

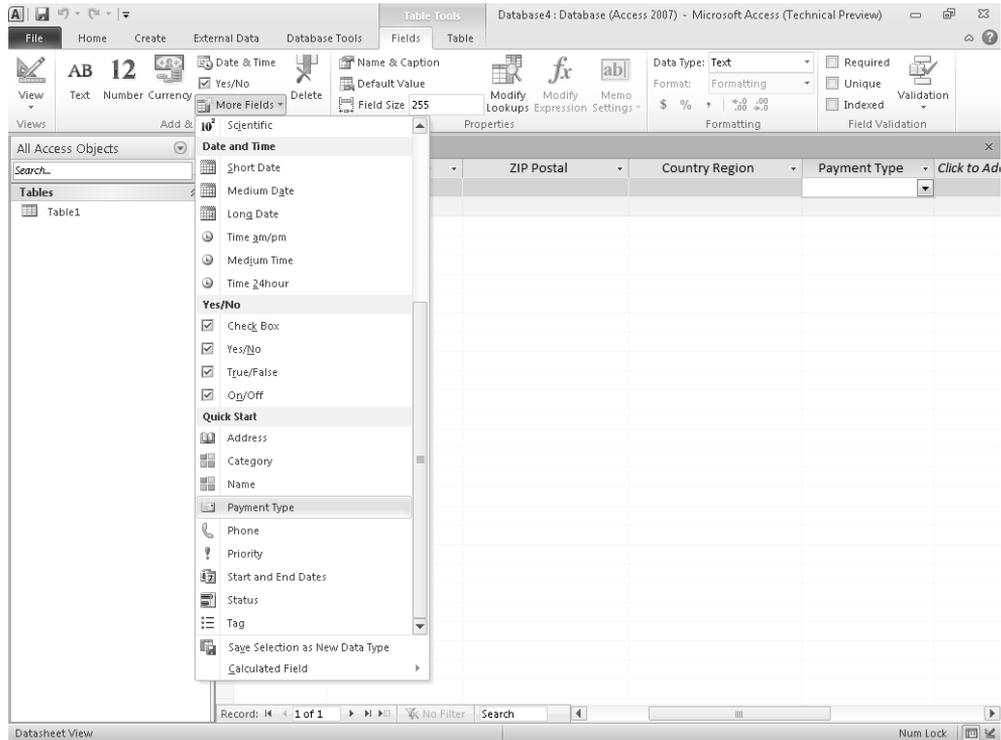


FIGURE 11-4 Find the Quick Start fields in the More Fields list.

Each Quick Start field you add has preset field options already included. For example, when you add the Payment Type Quick Start field, the added field includes Cash, Credit Card, Check, In Kind, and Debit selections as part of the field. You can customize the field to include the selections you want by right-clicking the field and choosing Edit List Items. In the Edit List Items dialog box (shown in Figure 11-5), you can modify, remove, or add values to the list by clicking and typing the new entry. Click OK to save your changes.



Tip What should you try first in Access 2010? Jeff Conrad, author of *Microsoft Access 2010 Inside Out* (Microsoft Press, 2010), recommends these three things:

- Publish and share your database to Access Services, and view your forms and reports in a Web browser.
- Try the new navigation form to see how simple it makes creating a navigation system.
- Attach data macros to table events, and create named data macros to incorporate more business logic in your data tables.

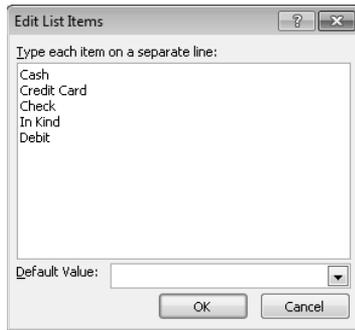


FIGURE 11-5 You can easily edit the list items included in a Quick Start field.

Inserting Calculated Fields

Another new field feature in Access 2010 enables you to easily create and store calculations that enable you to analyze your data. You can then apply the calculated field throughout your database as needed. To add a calculated field to your data table, click **More Fields** in the **Add & Delete** group of the **Table Tools Fields** tab. Then choose the field type for the type of calculated field you want to create, and Access 2010 displays the **Expression Builder** dialog box so that you can choose the elements, categories, and values to use in the calculation. (See Figure 11-6.)

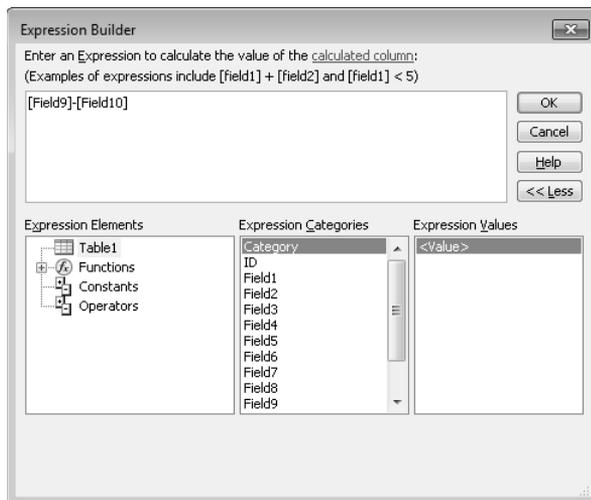


FIGURE 11-6 Add calculated fields to your data table.



Tip You can change the expression you've used to create a calculated field by right-clicking the field label in the data table and choosing **Modify Expression**. In the **Expression Builder** dialog box, modify the calculation as needed and click **OK**.

Showing Data Bars and Conditional Formatting

Not everyone can look at a table full of data and know instantly what it means. Some of us need a little help interpreting facts and figures in a table or on a report. For this reason, Access 2010 includes data visualization features that enable you to include data visualizations in your tables and reports that will help your readers understand what your data means.

Data bar visualizations are helpful when you want to compare data among the records in your report. For example, if you want to compare the projected workshop with the actual attendance data, you can let data bars show you where your marketing efforts were successful and where they fell short. (See Figure 11-7.)

	Workshop_title	Survey	Contact	Last_contact	Projected_wkshps	Attended_wkshps	Field1
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	11/25/2009	3	3	1.0
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/21/2009	4	2	0.5
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	9/29/2009	4	1	0.3
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	10/20/2009	3	2	0.7
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/22/2009	4	4	1.0
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	9/18/2009	4	4	1.0
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/7/2009	4	4	1.0
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	10/11/2009	3	3	1.0
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	10/19/2009	3	4	1.3
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/19/2009	4	4	1.0
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/19/2009	4	2	0.5
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	10/15/2009	3	2	0.7
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	10/8/2009	4	2	0.5
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	9/30/2009	3	2	0.7
0000.com	Writers Workshop 1	<input type="checkbox"/>	<input type="checkbox"/>	9/29/2009	4	1	0.3
0000.com	Listening to the Earth	<input type="checkbox"/>	<input type="checkbox"/>	9/27/2009	3	4	1.3

FIGURE 11-7 Data bars work with numeric fields, enabling you to visually contrast the data you're reporting.



Tip Conditional formatting is easier in Access 2010, thanks to the addition of the Conditional Formatting Rules Manager. Now you can create new rules that specify conditions for the conditional formats and preview the effects of your changes before you apply them.

Creating Navigation Forms

When you're working with forms and reports in Access 2010, you can simply drag fields to where you want them to create just the type of layout you want. Access 2010 also includes a new Navigation Forms gallery, with a number of layouts you can customize to make it easy for others to find the forms and reports they want to view in your database.

To create a navigation form, click the Create tab and choose Navigation in the Forms group. (See Figure 11-8.) Click the navigation form layout you want to use, and then drag the reports and forms you want to include from the All Access Objects pane to the navigation area of the new form. Those reviewing your information will be able to click the name of the form or report to display the data in the Access 2010 window.

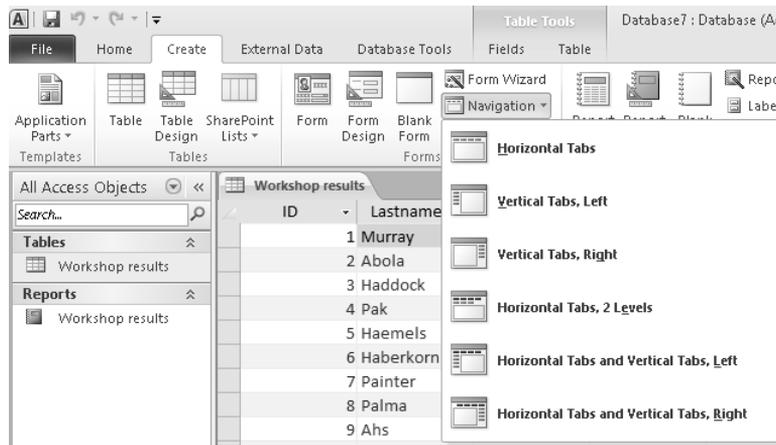


FIGURE 11-8 Use the Navigation gallery to choose the layout of the navigation form you want to create.

Designing Access 2010 Macros

Although the word *macros* might make your eyes glaze over if you're not interested in automating the data logic and processing in your database, two improvements in Access 2010 offer good news to macro aficionados. First, new data macros enable you to add data logic to the actual table of data rather than requiring you to work at a form level. And the enhanced Macro Designer is now more intuitive than ever, providing a look and feel that enables you to build macros easily by dragging items where you want them to appear and arranging them in the proper sequence. (See Figure 11-9.)

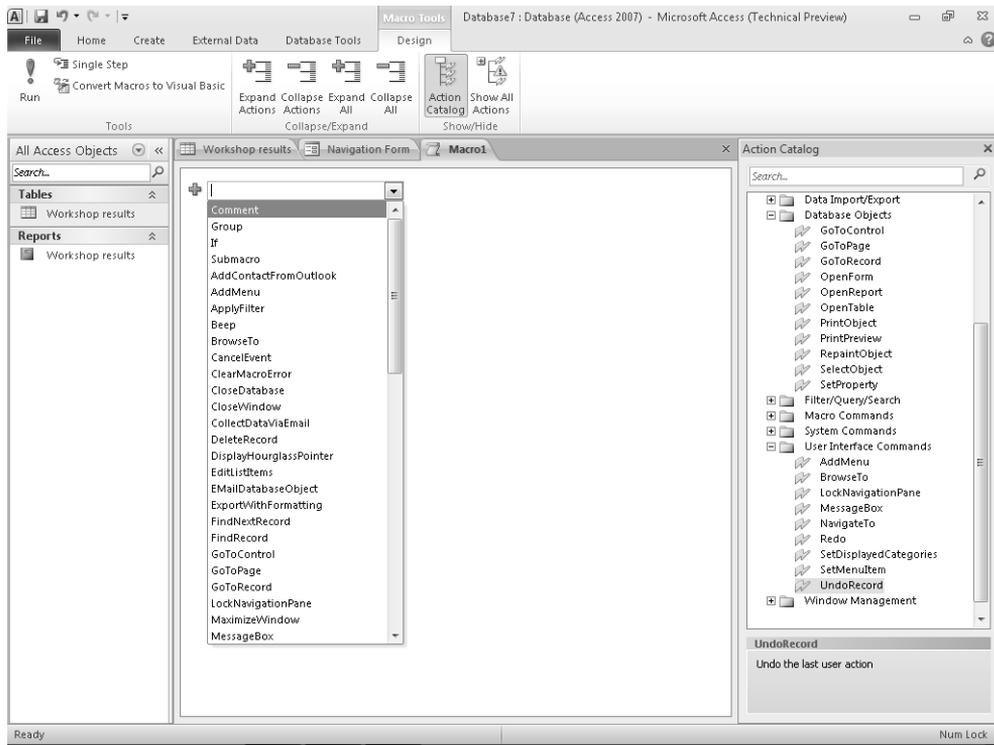


FIGURE 11-9 The improved Macro Designer in Access 2010 makes it easy for you to build macros by selecting and dragging the items you need to the location you choose.

Working with Access 2010 and the Web

One of the major stories in Office 2010 is the ability to access your files—documents, presentations, worksheets, notebooks, and databases—anywhere you have access to the Web. Access 2010 enables you to create a Web database so that you can use it with SharePoint Server 2010 to publish your entire database—including tables, forms, and reports—and view it in a browser window.

Create a Web database by starting in Backstage view. Simply click File, choose New, click Blank Web Database, and click Create. You can then create the database as usual, adding data tables, forms, and reports. When you are ready to publish your database to the Web, return to Backstage view by clicking File and then click Share. Choose Publish To Access Services, and type the necessary information for the SharePoint site that will post the file.



Tip Before you post your database to the Web, be sure to run the Compatibility Checker to look for any data items or settings that won't function properly online. The Compatibility Checker is found in the Share page of Backstage view.

Adding Web Controls

Another great Web feature included in Access 2010 makes it possible for you to incorporate Web content in the database you are creating. This might enable you, for example, to provide live access to Web 2.0 content from within your database.

Display the form on which you want to add the Web Browser control, and then, in the Home tab, click View and then Layout View or Design View in the Views group. In the Controls group, choose Web Browser, and then click and drag at the point you want the control to appear. When you release the mouse button, the Insert Hyperlink dialog box appears so that you can enter the Web page or choose the item you want to include in the Web Browser control. After the element is added, you can resize the object as needed in the Access window by simply dragging the corner or side of the object. (See Figure 11-10.)



Tip Now it is easier to add databases to your Trusted Documents list. When you open a database created by someone else, a Message Bar appears at the top of the Access 2010 window. Macros are automatically disabled until you indicate that the database is a Trusted Document. To enable the full functionality of the database, click Enable Content.

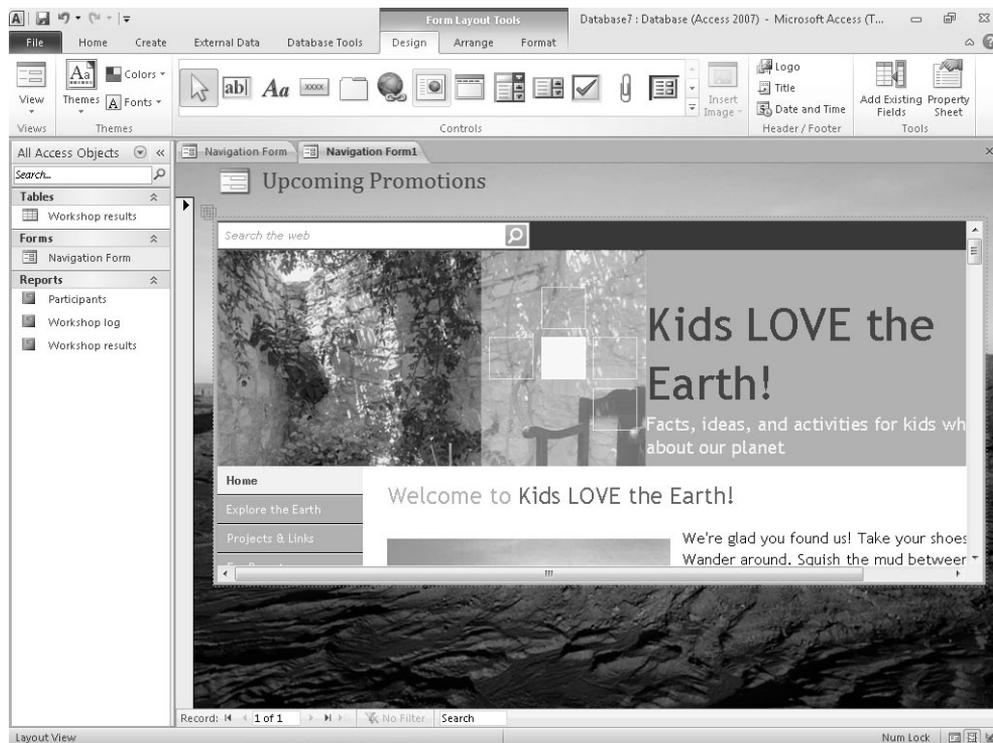


FIGURE 11-10 Incorporate Web content in your database using the Web Browser control in Access 2010.

Using Access 2010 with SharePoint

If you work with SharePoint Server 2010, additional Web features are also available to you in Access 2010. First, you can take a Web database into offline mode so that you can continue to work on the data as needed; the next time you connect to the Web, any changes you made to the offline data are automatically synchronized with the database on the server. You can also synchronize your data manually by clicking File to display Backstage view, and in the Info page, clicking Sync All.

You also have the ability to save your database to SharePoint Workspaces 2010 so that you can access your data using your Web browser or smartphone.

Gathering Data with InfoPath 2010

Microsoft InfoPath is a forms-creation and data-gathering tool included with Office 2010 that helps you collect and consolidate the data you need and then share that data with colleagues in a variety of ways. (See Figure 11-11.)

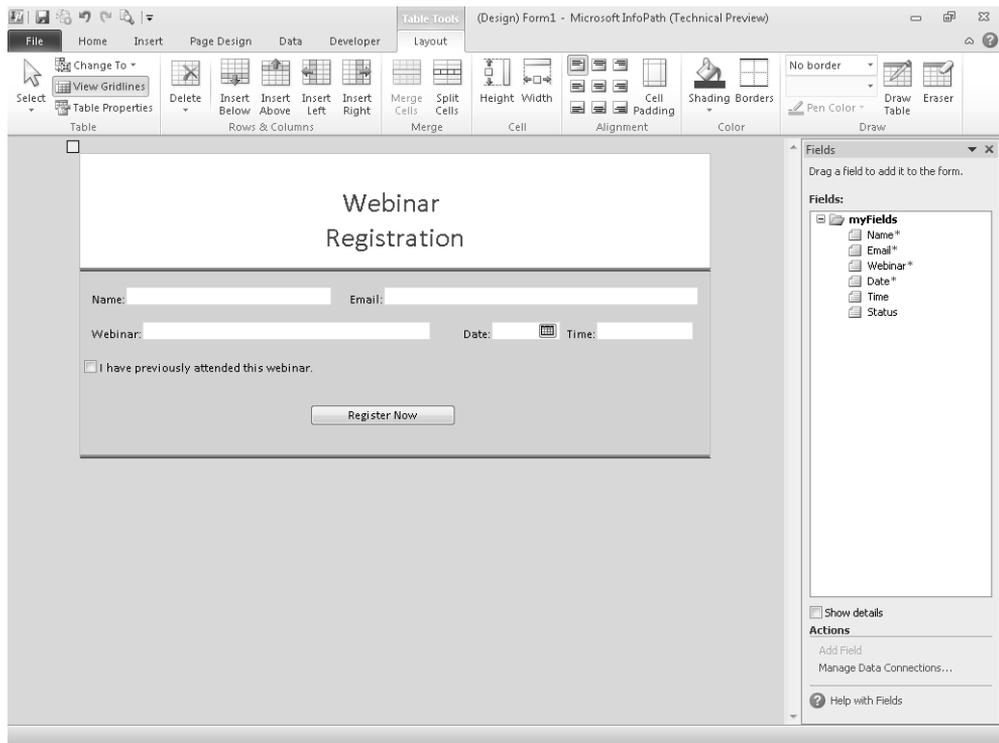


FIGURE 11-11 InfoPath offers a collection of templates you can use as the basis for your forms, or you can begin with a blank form and create your own.

InfoPath includes a variety of form templates you can use as the basis of the new forms you create, or you can choose to start with a blank form and add the fields yourself. InfoPath 2010 enables you to create professional forms by dragging fields where you want them to be and arranging them in a way that makes sense for your data. You can also add pictures and buttons to your forms, guarantee accuracy by running the Spell Checker, include ScreenTips to prompt people filling out your forms, and share forms easily using SharePoint Server 2010 and SharePoint Workspace 2010. Also, thanks to integration with SharePoint Workspace 2010, users can complete the forms you create online or offline.

InfoPath Filler makes it easy for users to open and complete the forms you create. You set up the way you want users to submit completed forms by choosing to receive the form by e-mail, have the data sent to a SharePoint library or SharePoint server, or use Web services to gather the information. You can also include your InfoPath 2010 forms in Outlook 2010 messages, which makes it possible for you to collect information by e-mail and store it in the database or SharePoint library you specify.

More Resources For Office 2010

Microsoft Learning provides a wealth of resources for every learning style—whether self-study, interactive, or classroom. As we get closer and closer to the release of Microsoft® Office 2010, we will continue adding learning resources to our site to help you get ready:

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