

Step by Step



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Microsoft Office Professional 2013

Beth Melton, Mark Dodge, Echo Swinford, Andrew Couch,
Eric Legault, Ben M. Schorr, and Ciprian Adrian Rusen

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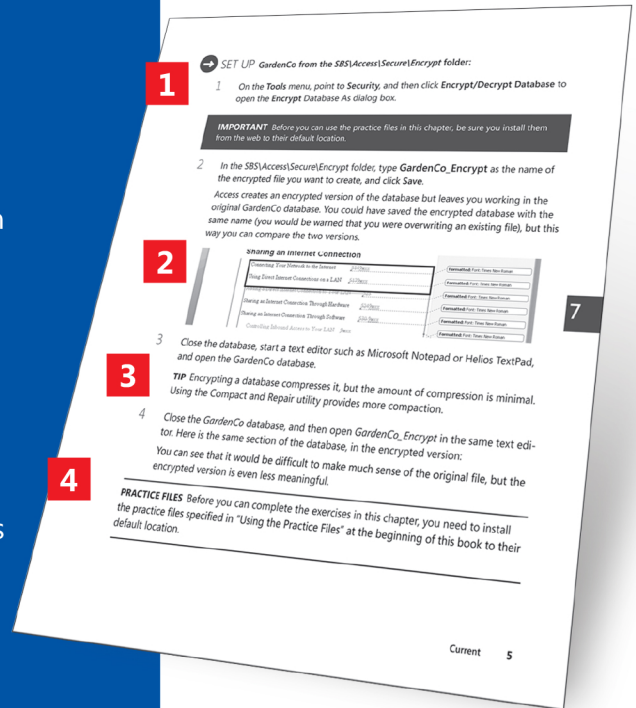
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For dad. And mom.

—Eric Legault

I would like to dedicate my contribution to this book to my Aunty Hazel and my late Uncle Victor. My memories of late evening suppers, warm fires, and great conversations have served as a great inspiration. Thank you.

—Andy Couch

For Shauna, an amazing and inspiring woman who dedicated her life to helping others and lived life to its fullest. You're greatly missed, my friend.

—Beth Melton

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Introduction

The Microsoft Office Professional 2013 suite of programs provides the tools you need for easy and efficient word processing, presentation planning, spreadsheet creation, database building, and desktop publishing, as well as programs to help you plan, organize your ideas, schedule, and communicate with your contacts. *Microsoft Office Professional 2013 Step by Step* offers a comprehensive look at the features of Office that most people will use most frequently, particularly those new to Office Professional 2013.

Who this book is for

Microsoft Office Professional 2013 Step by Step and other books in the *Step by Step* series are designed for beginning to intermediate level computer users. Examples shown in the book generally pertain to small and medium-sized businesses but teach skills that can be used in organizations of any size. Whether you are already comfortable working in Microsoft Office and want to learn about new features in Office Professional 2013 or are new to Office, this book provides invaluable hands-on experience so that you can work with Microsoft Word, PowerPoint, Excel, Outlook, Access, OneNote, and Publisher.

How this book is organized

This book is divided into 43 chapters. The first four chapters provide information about Office fundamentals, including how to work in the Office environment, how to avail yourself of shared Office features across applications, and how to share and collaborate with Office 365 services. Chapters 5–10 show you how to create, read, and navigate, format, organize, and share Word documents. Chapters 11–16 cover how to design and create impactful presentations in PowerPoint, including working with themes, masters, and layouts, incorporating multimedia, creating customized graphics, and finalizing and making your presentation. Chapters 17–23 take you through the steps of creating, editing, and formatting database worksheets and workbooks, manipulating and analyzing data in spreadsheets, and creating charts and graphics. Chapters 24–29 show you how to work with Outlook to create and send messages, add and manage contacts, and work with and manage tasks and schedule entries. Chapters 30–35 cover all the features of OneNote, and

show you how to work with notebooks, sections, and pages, and how to organize and share your notes. Chapters 36–40 walk you through creating and working with databases, including adding, manipulating, importing, and exporting data; creating basic tables and queries; and designing and generating forms reports. Finally, Chapters 41–43 show how to work with Publisher to create professional desktop designs and produce brochures, newsletters, and other publications.

The first chapter of each of the eight parts of the book contains introductory information that will primarily be of interest to readers who are new to a particular Office application or are upgrading from an earlier version. If you have worked with a more recent version of Office, you might want to skip past that material.

This book has been designed to lead you step by step through all the tasks you're most likely to want to perform with Office Professional 2013. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to work with all the Office Professional applications. However, each topic 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/OfficePro2013SbS/files>

IMPORTANT Office Professional 2013 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.

Chapter	File
Chapter 2: Using shared Office features	Fabrikam Management Team.pptx Sample Picture.jpg Simple to-do list.xlsx
Chapter 6: Navigating and reading documents	Fabrikam Rebrand Campaign.docx Newsletter_A.docx Newsletter_B.docx

Chapter	File
Chapter 7: Editing and composing documents	List Example.docx Newsletter_C.docx Sample Logo and Address.docx
Chapter 8: Formatting documents	Fabrikam Rebrand Campaign_A.docx Fabrikam Rebrand Campaign_B.docx Fabrikam Rebrand Campaign_C.docx Fabrikam Rebrand Campaign_D.docx Fabrikam Rebrand Campaign_final.docx
Chapter 9: Presenting information	Example Newsletter.docx List Example.docx List Example_B.docx List Example_C.docx
Chapter 10: Finalizing documents	Fabrikam Newsletter.pdf Newsletter_B.docx
Chapter 12: Designing and creating presentations	SampleContentA_Start.pptx SampleContentB_Start.pptx SamplePictureB.JPG
Chapter 13: Creating on-slide content	SampleContentA_start.pptx SampleContentB_start.pptx SampleContentC_start.pptx SampleContentD_start.pptx SampleContentE_start.pptx SampleContentF_start.pptx SampleContentG_start.pptx
Chapter 14: Creating Office graphics	SampleContentA_Start.pptx SampleContentB_Start.pptx SamplePictureB.JPG
Chapter 15: Adding animation and multimedia	Fabrikam Employee Excursion.wmv SampleContentA_start.pptx SampleContentA_end.pptx SampleContentB_start.pptx SampleContentC_start.pptx SampleContentD_start.pptx
Chapter 16: Finalizing and presenting	SampleContentA_Start.pptx SampleContentB_Start.pptx SampleContentC_Start.pptx

Chapter	File
Chapter 18: Creating and editing worksheets	Fabrikam-Employees_start.xlsx Fabrikam-Management_start.xlsx
Chapter 19: Manipulating numbers and text	Fabrikam-Management2_start.xlsx Fabrikam-Seven-Year-Summary_start.xlsx Fabrikam-Seven-Year-Summary2_start.xlsx Loan_start.xlsx Real-Estate-Transition_start.xlsx
Chapter 20: Analyzing data	2015Projections_start.xlsx Fabrikam-Jan-2013-Sales_start.xlsx FabrikamJanSales2013.txt FabrikamQ1SalesDetail_start.xlsx JanSales2_start.xlsx RealEstateTransition_start.xlsx
Chapter 21: Formatting worksheets	Custom Formats 2_start.xlsx Custom Formats 3_start.xlsx Custom Formats_start.xlsx FabrikamSummary_start.xlsx FabrikamSummary2_start.xlsx FabrikamSummaryTheme.xlsx FabrikamSummaryTheme_start.xlsx Real-Estate-Transition_start.xlsx
Chapter 22: Manipulating workbooks and worksheets	FabrikamQ1_start.xlsx FabrikamQ1-B_start.xlsx Q1-Summary_start.xlsx Q1-Transactions_start.xlsx Q1-Transactions2_start.xlsx UnitSales_start.xlsx UnitSales2_start.xlsx
Chapter 23: Creating charts and graphics	FabrikamLogo_start.xlsx FabrikamSalesTable_start.xlsx FabrikamSalesTable2_start.xlsx FabrikamSalesTable3_start.xlsx FabrikamSalesTable4_start.xlsx FabrikamSalesTable5_start.xlsx Logo_start.xlsx Report_start.xlsx

Chapter	File
Chapter 25: Using mail	Business flyer.docx Cornelius Ang.jpg
Chapter 35: Saving time with OneNote	35 Practice Image 1.jpg 35 Practice Spreadsheet 1.xlsx
Chapter 37: Understanding Access 2013 databases	CompanyNames.xlsx MSOfficeProBlankCompletedChapter37.accdb MSOfficeProData.accdb ReadMeChapter37.txt
Chapter 38: Creating basic tables and queries	MSOfficeProBlank.accdb MSOfficeProBlankCompletedChapter38.accdb ReadMeChapter38.txt
Chapter 39: Designing forms and reports	MSOfficeProBlank.accdb MSOfficeProBlankCompletedChapter39.accdb ReadMeChapter39.txt
Chapter 40: Creating and sharing a Web App	CompanyNames.xlsx MSOfficeProData.accdb ReadMeChapter40.txt
Chapter 42: Creating publications	Fabrikam Employee Newsletter A.pub Fabrikam Employee Newsletter_no video.docx fabrikam_logo.png FabrikamA.pub FabrikamAEnd.pub NewsletterEnd.pub NewsletterStart.pub PictureA.JPG PictureB.JPG PictureC.JPG PictureD.JPG PictureE.JPG Thumbs.db Travel.pub TravelA.pub TravelB.pub
Chapter 43: Saving, sharing, and exporting publications	FabrikamAEnd.pub Newsletter.pub

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Getting support and giving feedback

The following sections provide information about getting help with Office Professional 2013 or the contents of this book and contacting us to provide feedback or report errors.

Errata

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site:

<http://aka.ms/OfficePro2013SbS/errata>

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Part 1

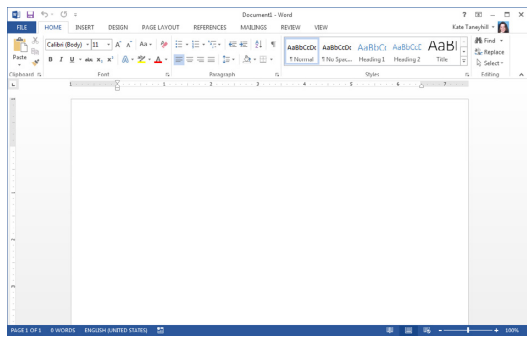
Office Professional 2013 fundamentals

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Chapter at a glance

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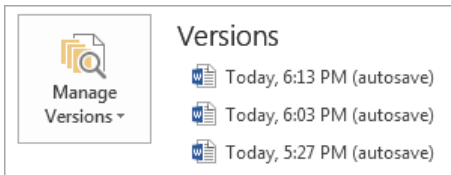
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Getting comfortable in Office Professional 2013

1

IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Explore the Office environment.
- Work with Office files.
- Recover unsaved files and versions.
- Customize the user interface.
- Customize the ribbon.
- Choose the right application for the task at hand.

One of the biggest advantages of using Microsoft Office Professional 2013 is the similarities across the applications. The most obvious is the user interface, which is the overall look and feel of the application and how you interact with it. If you've used previous versions of Office, you may notice that many commands and features are nearly identical to those in past releases of Office, if not exactly the same, such as the commands for copying and pasting information, formatting text, creating charts, or inserting pictures. All of these similarities greatly reduce the learning curve, which allows you to apply the functionality in one application across the entire Office suite.

As you apply that knowledge and learn more about each application, you'll likely discover similar functionality that may not be initially obvious. For example, you can create a company newsletter by using Microsoft Word, Publisher, or PowerPoint. You can document company meeting notes in Microsoft OneNote or Word. And you can store lists of data in both Microsoft Access and Excel.

In this chapter, you'll learn about the Office environment, which includes the user interface, application options, and Office settings, plus you'll learn about Office terminology, Help options, and other functionality available in Office. This chapter also covers basic instructions for starting an Office application and working with Office files. At the end of this chapter, you'll get an overview of each application and tips for choosing the right application for various tasks.

Exploring the Office environment

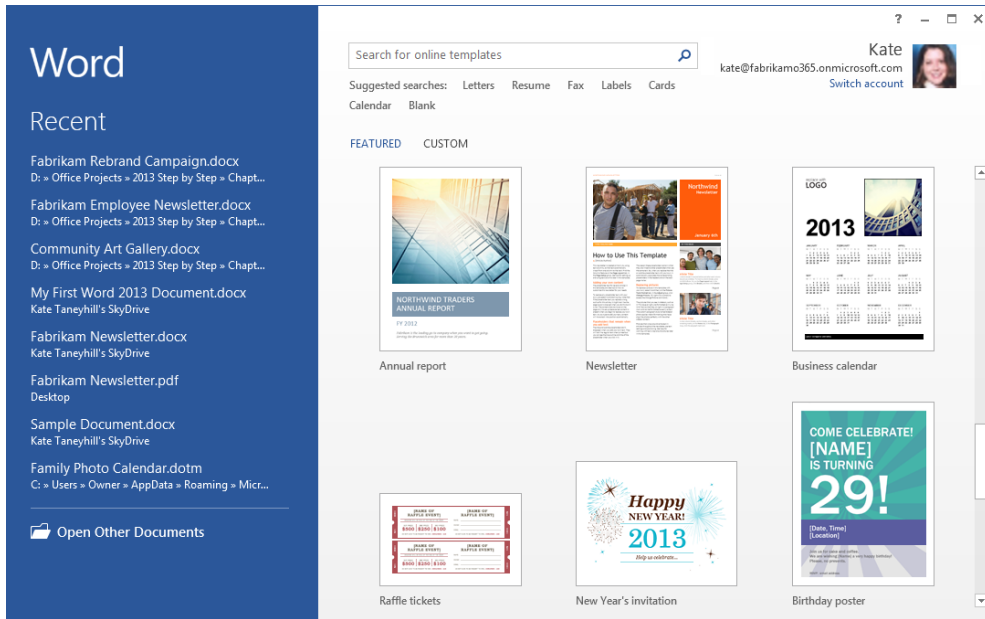
The first step in getting comfortable with Office Professional 2013 is to become familiar with your Office surroundings. In this section, you'll explore the user interface along with application options and settings that are shared across the Office applications.

TIP Even if you're already comfortable with this information from working with a previous version of Office, please read this section for tips that you may have not previously discovered.

You typically start an Office application from the Windows Start screen in Windows 8 or the Start menu in Windows 7. You can also start an application and open a file at the same time by opening a file sent to you as an email attachment or by double-clicking a file from somewhere in your computer environment, such as your Windows desktop.

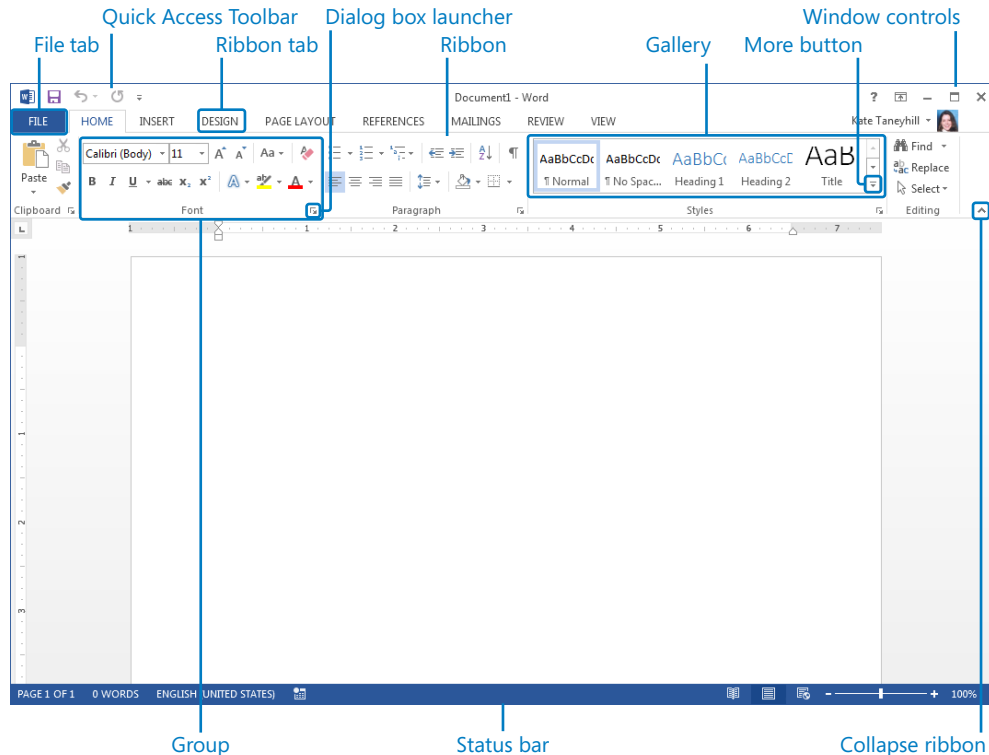
With the exception of OneNote and Outlook, when you start an application without opening a file, the new application Start screen appears.

TIP OneNote and Outlook do not have an application Start screen. When you start the application, the main window is displayed.



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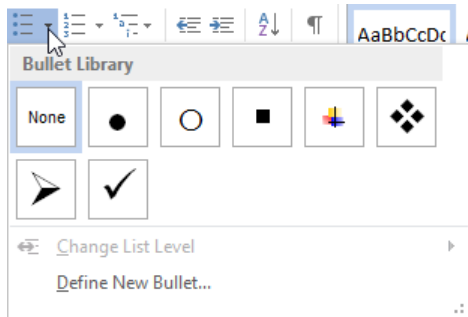
From the application Start screen, you can open a recently used file, open an existing file, or create a new file from a template. After you create a new file or open an existing one, the main window will be displayed.



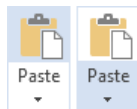
The application window has the following elements:

- Ribbon** The main component of the Office user interface and where you'll find the primary commands for working with the content of your Office files. The ribbon includes tabs that have commands associated with a specific task. For example, objects that you insert in an Office document; like a picture, chart, or shape; are located on the **Insert** tab. This task-oriented organization also extends to the commands themselves, which are placed in related groups. For example, frequently used commands for formatting text are all located in a group named *Font* in most applications.

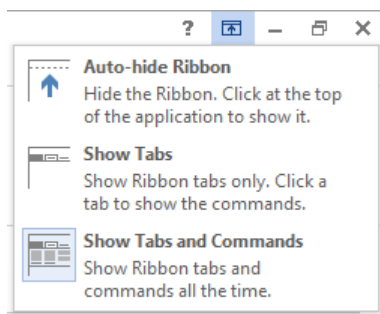
TIP Some commands on the ribbon have what's known as a split control, which is a combination of a button and an arrow. An example is the Bullets command, found in Word on the Home tab in the Paragraph group. If you click the button, the default option, or the last option you selected during your editing session, will automatically be applied. When you click the arrow next to the button, a list of options will display, such as a list of available bullets.



Note that for larger split controls, like the Paste button, the arrow will appear below the button instead of to the right. An easy way to determine if you're using a split control is to point to the button. If only the button or the arrow is highlighted rather than the entire button, then it's a split control.



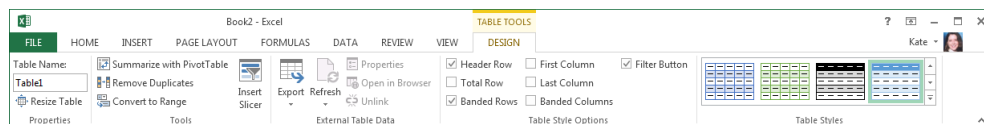
- **Title bar** Appears at the top of the application window and displays the name of the active file and application name. In most standard Windows applications, including the Office applications, the title bar also has the program icon on the far left.
- **Window controls** Located on the far right of the title bar. Along with the standard **Minimize**, **Restore Down/Maximize**, and **Close** buttons, there are two additional buttons:
 - **Help** Clicking this button displays help for the application.
 - **Ribbon Display Options** Clicking this button gives you a list of choices for viewing the ribbon.



The Auto-hide Ribbon option gives you nearly a full screen view because it also hides the status bar along with the ribbon. Show Tabs and Show Tabs And Commands toggle the ribbon between a collapsed or expanded state, displaying only the ribbon tabs or displaying both the ribbon tabs and commands.

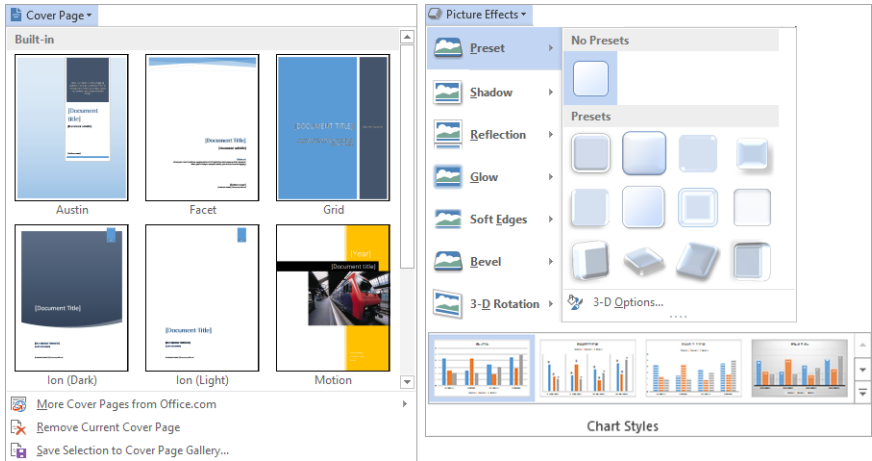
SEE ALSO For more information about how to hide, collapse, and expand the ribbon, see the “Customizing the user interface” section later in this chapter.

- **Quick Access Toolbar** Appears on the left end of the title bar by default. Each application has its own set of frequently used commands that are specific to the application. The most common commands are **Save**, **Undo**, and **Redo**.
- **Status bar** Located at the bottom of the application window; displays information about the application or current file. In most applications, view controls and the zoom slider are located on the right end of the status bar.
- **Dialog box launcher** Appears in the lower-right corner of a group when additional options for the related set of commands are available. Clicking the dialog box launcher opens a dialog box or pane.
- **Tool tabs** Appear in the ribbon when additional commands are available for a selected object, such as a table, picture, chart, or drawing object.



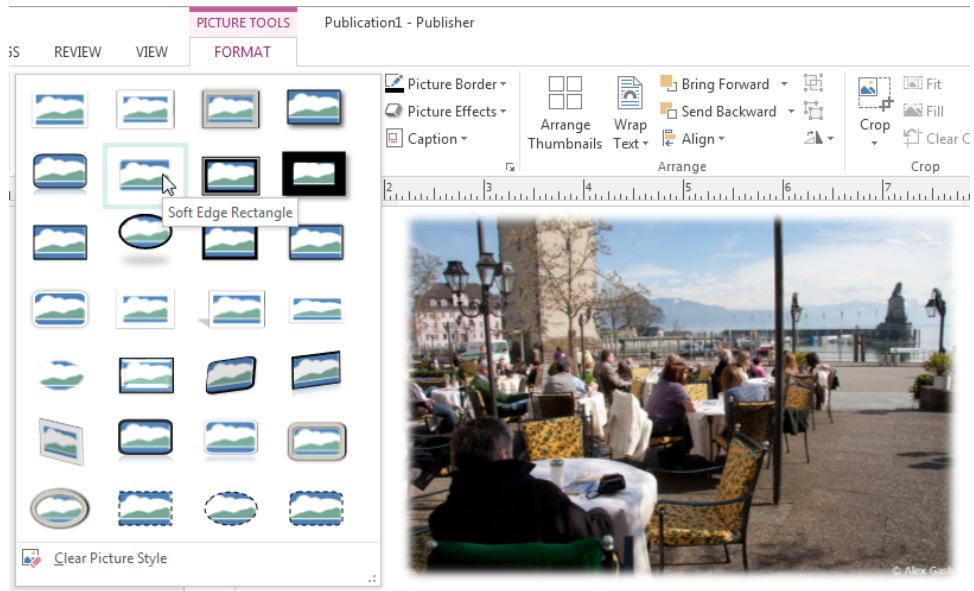
TIP You can quickly activate a tool tab for most objects by double-clicking the object.

- **Gallery** A visual list of choices, such as a collection of formats that offer multiple options. A gallery also refers to a set of related tools.



TIP Many galleries have additional options that may not appear in the ribbon. To view gallery options, right-click a gallery item. For example, to lock a shape for multiple uses, right-click a shape in the Shapes gallery and then click Lock Drawing Mode. To dismiss this mode, press the Esc key.

- **Live Preview** Enables you to view changes like pasted text or picture formatting prior to making a modification.



TIP Live Preview is available in all applications except OneNote.

- **Mini Toolbar** Appears on the screen in most applications when you have text or an object selected; provides quick access to the most-used formatting commands.

Leave house and car keys, and your complete itinerary, with a trusted friend.

Lock windows, garages, and

Calibri (Headin 12 A A Styles

3. PACKING FOR THE TRIP

Make a list of the specific items of clothing you'll need to pack for your trip to you'll attend.

TIP The Mini Toolbar may also appear when you right-click selected text or objects.

- **ScreenTips** ScreenTips provide descriptions of commands and are displayed when you point to a ribbon command. If the command has an associated keyboard shortcut, that shortcut will appear in parentheses next to the name of the command. Several ScreenTips also include detailed help or a feature preview. For instance, in Excel, the ScreenTip for the **Conditional Formatting** command on the **Home** tab in the **Styles** group includes a detailed explanation for how to use conditional formatting. It also includes a preview of how data bars and an icon set are displayed for a range of values.

Conditional Formatting

Format as Table

Cell Styles

Insert

Delete

Format

Conditional Formatting

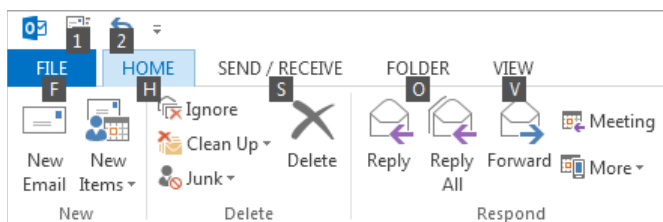
	6
	4
	9
	7
	3

Easily spot trends and patterns in your data using bars, colors, and icons to visually highlight important values.

[? Tell me more](#)

TIP If a command has an associated Help topic, Tell Me More is displayed at the bottom of the ScreenTip. Clicking the link displays the Help topic.

- **KeyTips** Enable you to navigate the ribbon by using the keyboard. To display KeyTips, press and release the **Alt** key. The KeyTips are the letters, numbers, or combinations of letters and numbers that appear on the ribbon. When you press only the **Alt** key, KeyTips for the ribbon tabs and **Quick Access Toolbar** are displayed. To view KeyTips for a specific ribbon tab, after you press the **Alt** key, press the corresponding KeyTip on the keyboard. For example, to navigate to the **Home** tab and view the KeyTips for that tab, press **Alt+H**. Or to view the KeyTips for the **Backstage** view, press **Alt+F**.



TIP Commands on the Quick Access Toolbar have sequential KeyTips associated with the position of the command. For example, your first command is automatically assigned **Alt+1**.

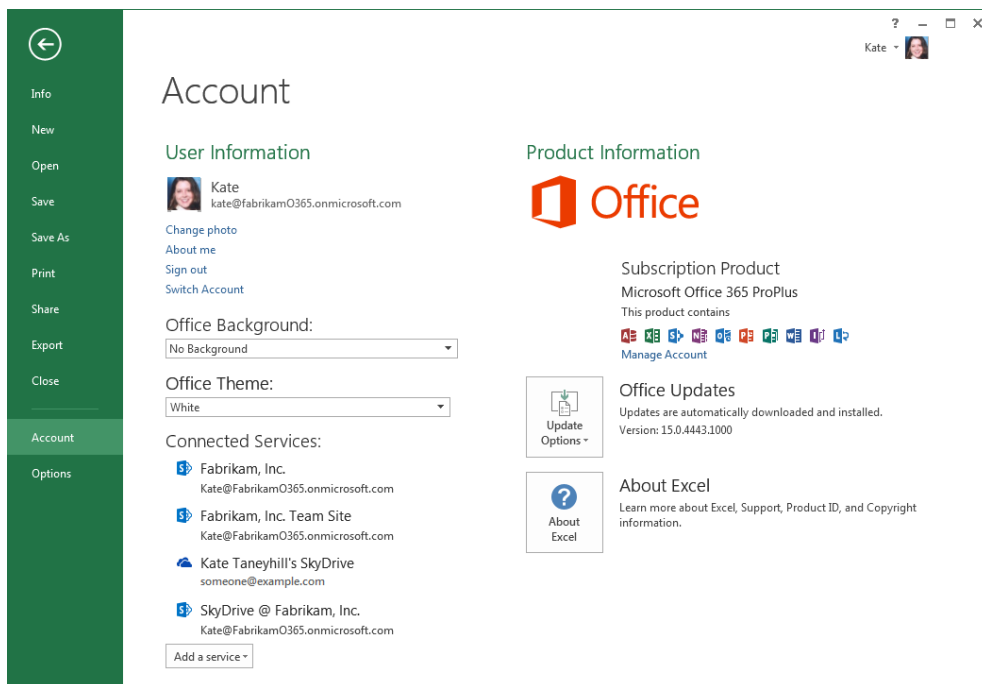
The Office environment also extends to an area called the Backstage view, which is displayed by clicking the File tab on the ribbon.

Whereas the ribbon and Quick Access Toolbar are used for working with the content inside a file, the Backstage view is used for working with the entire file and for changing application settings.

The commands in the Backstage view are separated into two groups. The first set is for file-related commands, such as Info, Open, Save As, and Print. These commands are covered in the next section of this chapter.

The last set, specifically the Account and Options commands, are related to the application and are considered part of the Office environment.

- **Account** This is where you manage a new feature in Office Professional 2013 called an Office cloud account and get information about your Office installation.

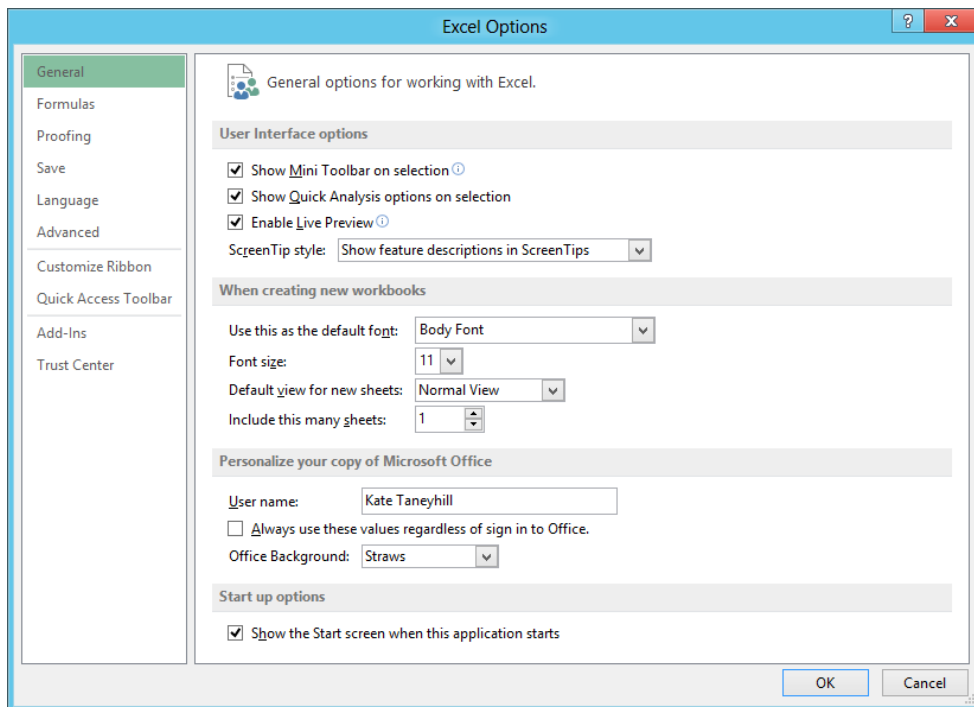


The User Information area has information about your Office cloud account, like your user name and your photo if you've elected to add one. This location is also where you can set a preferred Office background, with designs such as clouds or circles that appear in title bar of your Office applications, or where you can change the Office Theme.

SEE ALSO For more information about Office cloud accounts and connected services, see Chapter 3, "Sharing and collaborating."

The Product Information area is where you find information about your Office installation such as the Office suite you have installed and the applications that are included. This is also where you can choose how your Office installation is updated and view your update history.

- **Options** This is where you can change a variety of application preferences and customize certain behaviors that are specific to the application. In some applications, such as Excel and Access, there are also options specific to the active file.

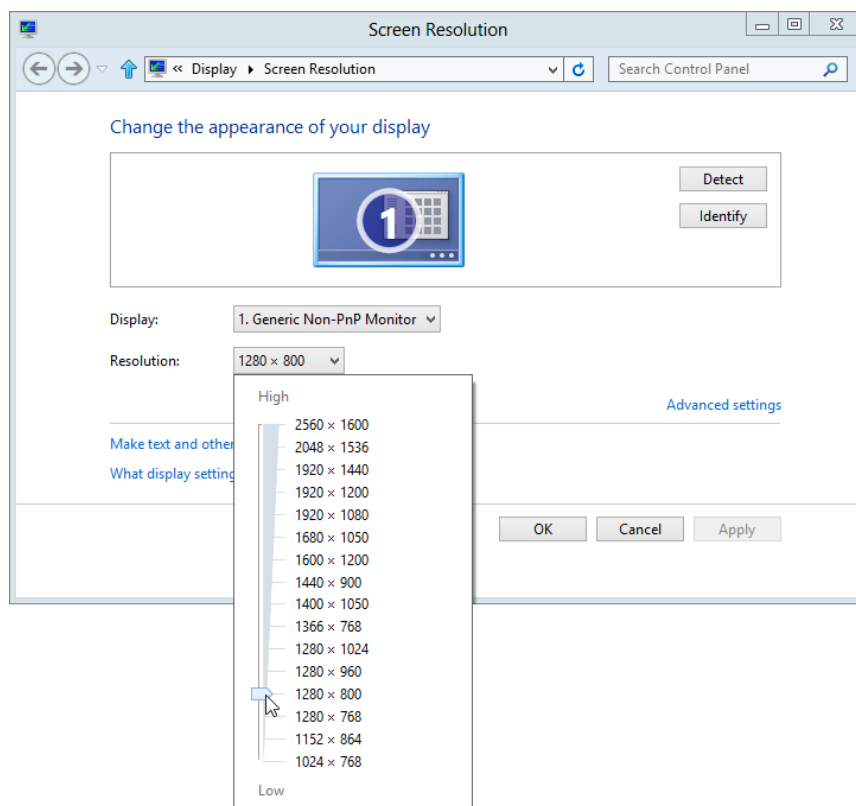


To close the Backstage view and return to the application window, click the arrow in the upper-left corner or press the Esc key.

Adjusting your ribbon display

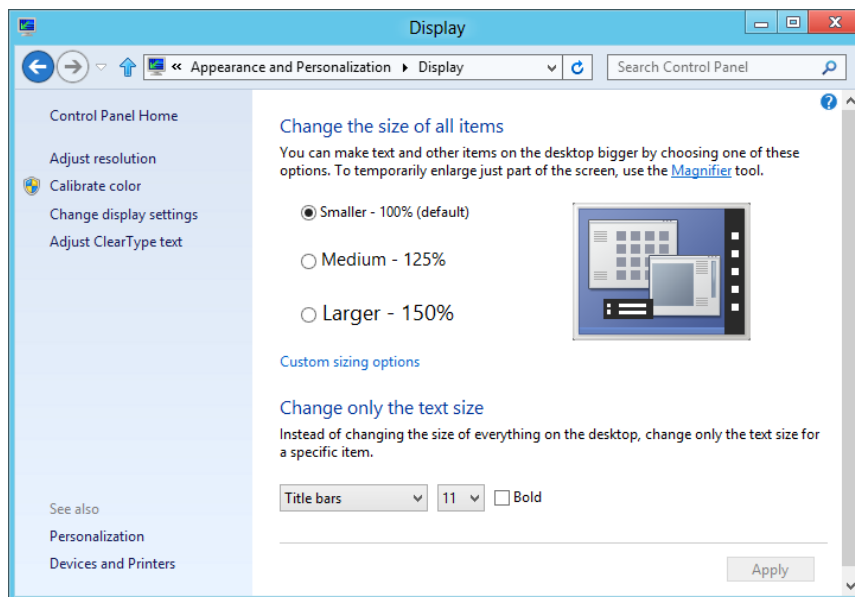
The ribbon is dynamic and adjusts to the size of the application window, your screen resolution, and your screen magnification. If you're using a low resolution, one that makes everything appear larger, a small application window, or a screen magnification of more than 100 percent, the appearance of groups and buttons may be affected. For example, a gallery or an entire group of commands may collapse to a single group button, or button images may appear without labels, or buttons may appear stacked vertically instead of horizontally. And when you are resizing an application window, if there isn't enough room to display the ribbon, it could disappear completely. You may want to take a few minutes to resize an application window to become more familiar with the dynamic ribbon changes.

To modify your screen resolution in both Windows 8 and Windows 7, right-click an empty area of your desktop and then click Screen Resolution. In the Screen Resolution dialog box, click Resolution and drag the slider to adjust your resolution.



TIP Screen resolution is expressed as pixels wide × pixels high, such as 1024 × 768. The greater the screen resolution, or the higher the numbers, the greater the amount of information that will fit on your screen. The greater the number of pixels wide (the first number), the greater the number of buttons that can be shown on the ribbon. Note that screen resolution options are dependent on your monitor, but they typically range from 800 × 600 to 2048 × 1152.

As previously noted, the ribbon also adjusts to your screen magnification. To modify your screen magnification in both Windows 8 and Windows 7, right-click an empty area of your desktop and then click Personalize. In the lower-left corner, click Display and then select your preferred screen magnification.



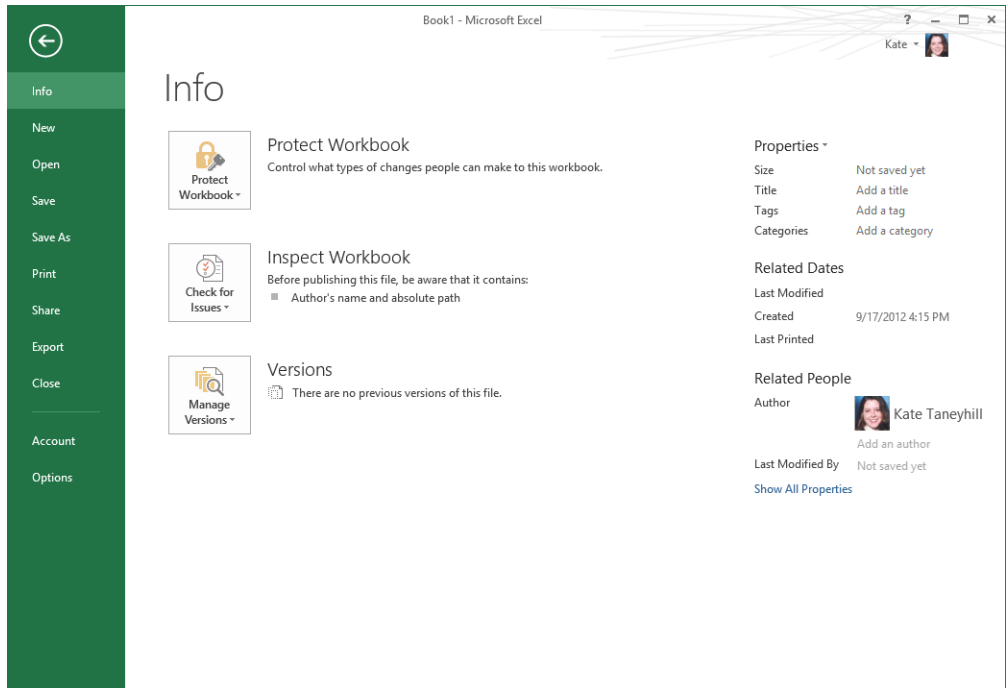
Working with Office files

In the previous section you learned about the Backstage view and how this area of the application is used for file-oriented tasks. In this section, you'll explore the primary file options that are available across the Office applications.

IMPORTANT The images and content provided in this section are from Excel. The other Office applications have similar options, and major differences between the applications are described in tips.

The pages in the Backstage view that contain commands for working with files are described in the following list:

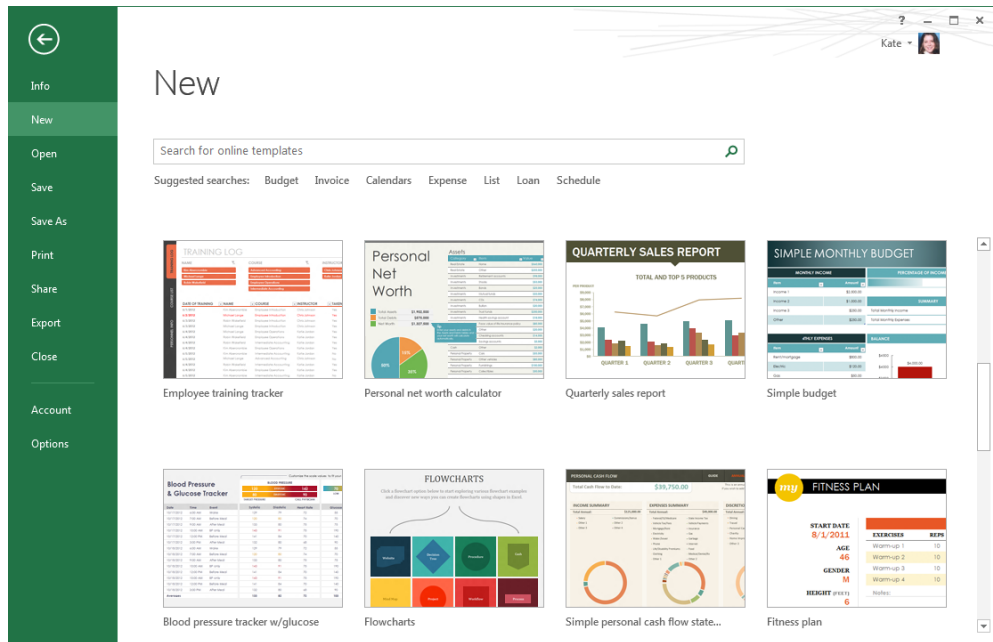
- **Info** In most applications, the **Info** page displays information about the active file, such as the name and location of the file, the author, and the date the file was last modified. In all of the applications, you'll find specialized file management tools that are specific to the file and application. The following list provides an overview of some of the management tools and features you'll learn about in other chapters and sections of this book.
 - In Excel, PowerPoint, and Word, you'll find tools for opening previous versions of your current document and recovering files you forgot to save.
 - In Access, the management tools vary depending on whether you are working with a desktop database or a Web App.
 - In OneNote you use the **Info** page to manage your open notebooks, by using tools such as syncing and sharing options.
 - In Outlook, you'll find tools for managing your mailbox accounts, such as those with which you can archive your Outlook data and set Out of Office notifications.
 - In Publisher, there are tools for checking your publication design and embedding fonts.



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SEE ALSO For more information about versions and recovering unsaved documents, see the “Recovering unsaved files and versions” section later in this chapter.

- **New** The New page is available in most applications and provides access to templates that enable you to create new files in the application. You can choose to start from scratch and select a blank template, or you can select one that already has content to help you get started on a specific type of task. For example, across the applications you’ll find templates that range from newsletters, budgets, and sales reports, to contact information and asset tracking.

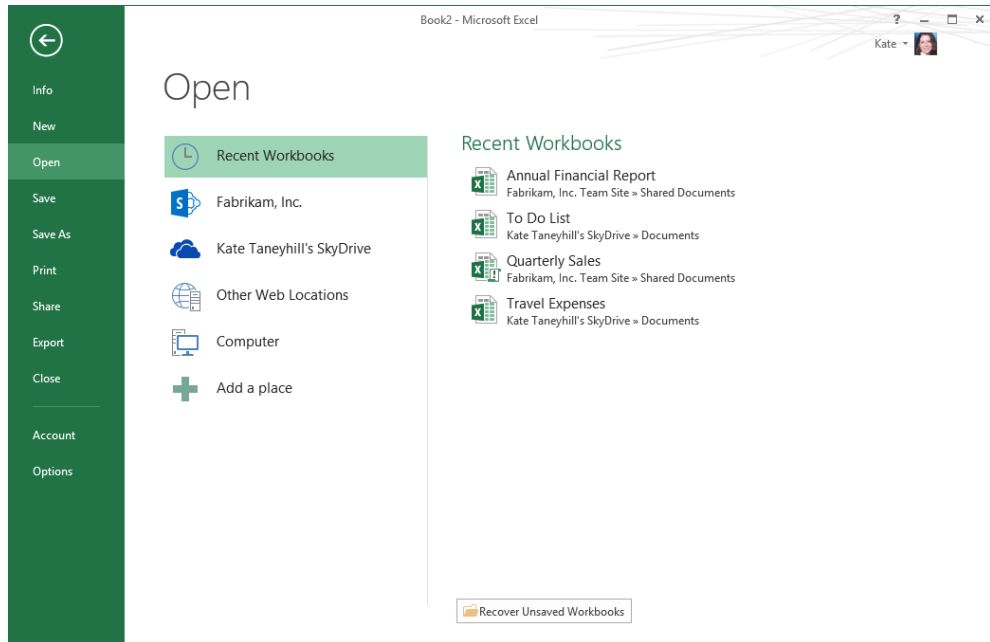


NOTE The templates shown in this book may not be the same as those that appear on your screen. New templates are added regularly, which may alter the results.

To create a new file in the applications that offer templates, simply double-click the template you want. Depending on the application and template, you may need to provide additional information before a new file is displayed in the application window. For example, in Access and OneNote, you need to provide a location and file name and then save the file before it's created. This is because both Access and OneNote automatically save certain changes.

TIP Outlook does not have a New page in the Backstage view. You can create new Outlook items from the Home tab of the main application window. You can also find email, business card, and signature templates in the Templates gallery on Office.com. In OneNote, there are page templates available in the application, and you can find entire notebook templates on Office.com. PowerPoint templates include designs and layout templates along with task-oriented templates.

- **Open** In all of the applications except Outlook, the **Open** page lists the recent files you previously opened and displays a list of available places from which you can open files.



Pinning the files you use the most

To pin the files you use the most to the recent file list, point to the file and then click the pushpin to the right of the file name. Pinned files are placed at the top of the list.



To unpin the file, click the pushpin a second time. You can pin and unpin frequently used folders to the Recent Folders list on the Open and Save As pages as well. You can also right-click a recently used file for additional options such as the ability to remove a file from the list and clear all pinned files.

TIP Your recent files list can also be accessed from the main list of tabs in the Backstage view. To make this change, click Options, and then click Advanced. Locate the Display options and then click Quickly Access This Number Of Recent Workbooks. Note that in other applications the option text reflects the type of Office document you use for that application. Also in the Display area are options to change the number of recent files and unpinned folders that appear on the Open and Save As pages.

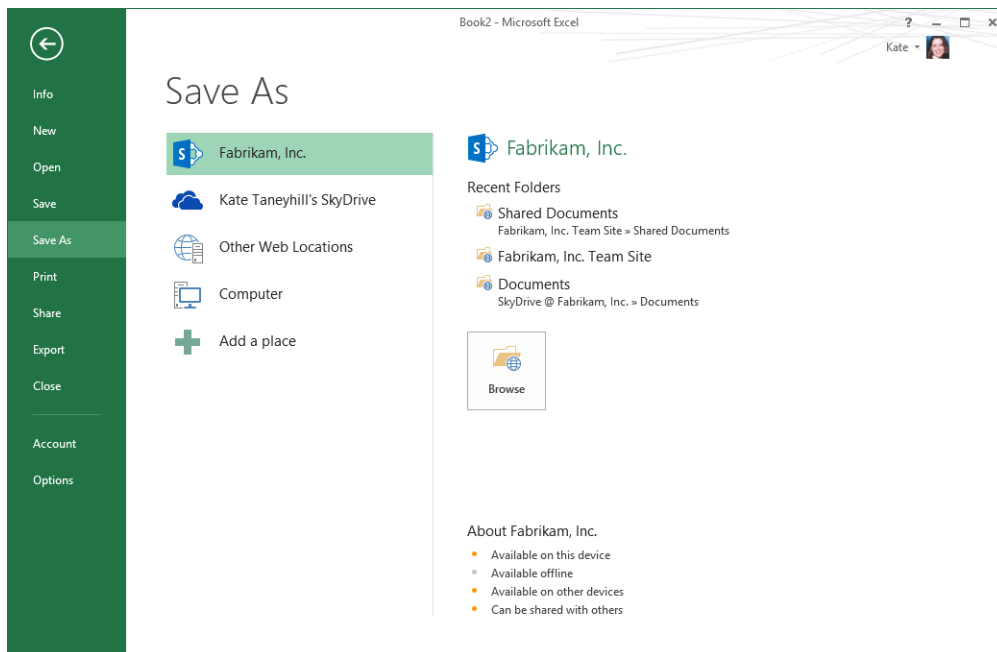
SEE ALSO For more information about opening files from Microsoft SkyDrive, Microsoft SharePoint Online, or other web locations, see Chapter 3, “Sharing and collaborating.”

To view your recent files, click the Recent option near the top of the view, such as Recent Workbooks in Excel.

To open a file, if it’s in the recent file list, you can click the file to open it in the application. If the file you need isn’t in the list, first click the location where the file is stored, such as Computer, and then to the right of the location, click a recent folder. Or, if the folder you need isn’t in the recent list, click the Browse button at the bottom. Either action displays the Open dialog box. After you select a file to open, click the Open button to open the file in the application.

TIP You can also double-click a location, like Computer, to quickly display the Open dialog box.

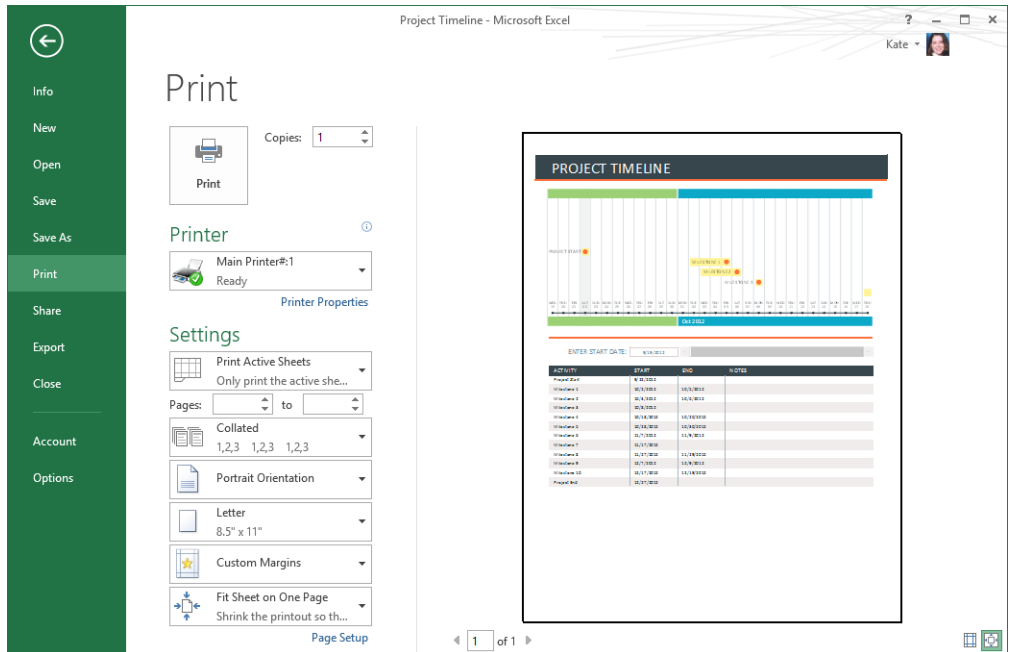
- **Save** When you save a file for the first time and click **Save**, the **Save As** page is displayed. After a file has been saved, clicking **Save** in the Backstage view will update the file and return you to the application window.
- **Save As** Except in Access and Outlook, the options on the **Save As** page are similar to those on the **Open** page. The main difference is that there isn't a recent file list.



To save a file, select the location you want, and if the folder you want isn't in the recent folders list, click the Browse button. Either action displays the Save As dialog box. After you provide a file name, and if necessary, a different location in the Save As dialog box, click the Save button to save the file.

TIP In Outlook, clicking **Save As** displays the **Save As** dialog box. In Access, the **Save As** page has options for saving the current database or selected object. In addition, as with the **Open** page, you can double-click a location to quickly display the **Save As** dialog box.

- **Print** In all Office applications except Access and OneNote, the **Print** page provides printing and page layout options along with a preview of your file. In the **Printer** area, you can choose a different printer and set printer options. In the **Settings** section, you can specify various print and page settings prior to printing your file.



To print your file, click the **Print** button at the top of the view.

TIP Access and OneNote have similar print and preview options, but they aren't combined in the same view.

There are also additional file options available on the Share and Export pages. The Share page gives you ways to share your file with others, such as sending your file as an email attachment or sharing it with others online in a web location or through a web browser.

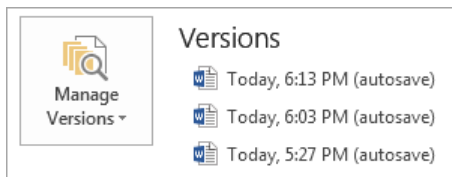
On the Export page, you'll find the ability to save your file in a Portable Document Format (PDF) or XML Paper Specification (XPS) format. And in PowerPoint and Publisher, you have options for converting your presentation to a video or packaging your publication for photo printing or commercial printing.

Because the majority of these options vary across Office applications or depend on additional components, you'll learn more about them and get step-by-step instructions in other chapters.

Recovering unsaved files and versions

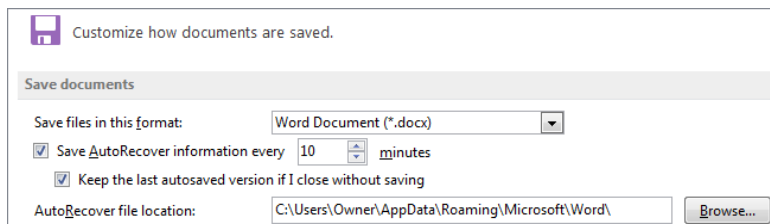
There's a very good chance you will accidentally close a file without saving it, if you haven't already made such a mistake. The good news is that in Excel, PowerPoint, and Word, you may be able to recover your unsaved changes. And if you've spent some time working on an Office document and discover you'd like to return to a previous version of it, you may be able to do that too. File management tools for both of these situations are located in the Backstage view, on the Info page.

In the Versions area, a list of autosave files of your current document might be displayed.



These versions are automatically created while you're working and are deleted when you save and close your Office document. There are a couple of requirements that need to be met before an autosave version is created.

- You must choose to save AutoRecover information, which is turned on on the **Save** page of the **Options** dialog box by default.
- An AutoRecover save must be made. This save is based on the time interval next to the AutoRecover information option and depends on whether you've made changes that need to be saved.



When these conditions are met, you can recover up to your last five autosave versions of your current file.

To open a previous version, click the file you want to open in the list and the autosave version will open in a separate window. You can then choose to restore your file, save the version as a new file, or close it without saving changes.

TIP If you only need to recover a portion of an autosave version, you don't need to restore your file to the earlier version. Simply copy the information you need and paste it in your main document.

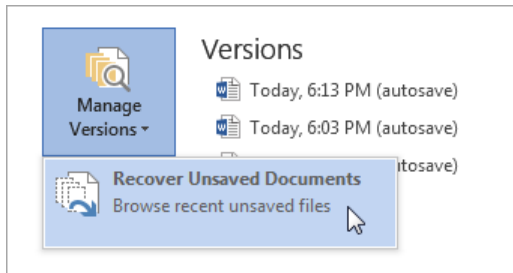
The Versions area is also where you can recover a file you closed without saving. There are two types of unsaved files: those you never saved and unsaved autosave versions. The latter applies to files that were previously saved. It's the last autosave version of a file you closed without saving current changes.

IMPORTANT Files you never previously saved are automatically deleted after four days. Unsaved autosave versions are automatically deleted the next time you edit the file and save changes.

As with the autosave version requirements, in order to recover an unsaved file, you must elect to save AutoRecover information. And to recover an unsaved autosave version, you must also elect to keep the last autosaved version when you close without saving. The latter option is also found in the Options dialog box near the top of the Save options.

To recover unsaved files, click Manage Versions and then do one of the following.

- In Excel, click **Recover Unsaved Workbooks**.
- In PowerPoint, click **Recover Unsaved Presentations**.
- In Word, click **Recover Unsaved Documents**.



The Open dialog box appears and lists the files you can recover for the application you are using. Select the file you want and then click Open to open it in the application. And if you to want to keep that file, make sure you save your changes.

Customizing the user interface

In the first section of this chapter, you explored the user interface and became familiar with terminology and product-specific functionality. The next step is to personalize your Office surroundings to help you settle in and begin making yourself at home.

Here are some of the ways you can customize your user interface:

- To free up space on your screen, you can set the ribbon to auto-hide or you can toggle the ribbon between a collapsed and expanded state. A ribbon set to auto-hide is hidden from view. A collapsed state shows only the tabs, and the expanded state shows both the tabs and the commands.
- Set the Quick Access Toolbar to appear above or below the ribbon.
- Add additional commands to the Quick Access Toolbar or remove commands you don't need.
- Choose the information you prefer to display in the status bar, if applicable to the application.

Adapting exercise steps

The screen shots of the ribbon were captured with the author's preferred settings for screen resolution and magnification. If your display settings are different, the ribbon will appear differently on your screen due to its dynamic capabilities. For example, buttons may appear stacked vertically instead of horizontally. If you notice these differences, you can either adapt the exercise instructions to your screen or modify your display settings so that your screens match ours. Our instructions use this format:

- On the **Insert** tab, in the **Illustrations** group, click the **Chart** button.

If the command is in a list, our instructions use this format:

- On the **Home** tab, in the **Editing** group, click the **Find** arrow and then, in the **Find** list, click **Go To**.

If differences between your display settings and ours cause a button to appear differently on your screen than it does in this book, you can easily adapt the steps to locate the command. First click the specified tab, and then locate the specified group. If a group has been collapsed into a group list or under a group button, click the list or button to display the group's commands. If you can't immediately identify the button you want, point to likely candidates to display their names in ScreenTips.

In this book, we provide instructions based on traditional keyboard and mouse input methods. If you're using Office on a touch-enabled device, you might be giving commands by tapping with your finger or with a stylus. If so, substitute a tapping action any time we instruct you to click a user interface element. Also note that when we tell you to enter information in Office, you can do so by typing on a keyboard, tapping in the entry field under discussion to display and use the onscreen keyboard, or even speaking aloud, depending on your computer setup and your personal preferences.

Customizing the Office environment

In this exercise, you'll customize your Office environment by collapsing and expanding the ribbon, setting it to an auto-hide state, and moving the Quick Access Toolbar below the ribbon.

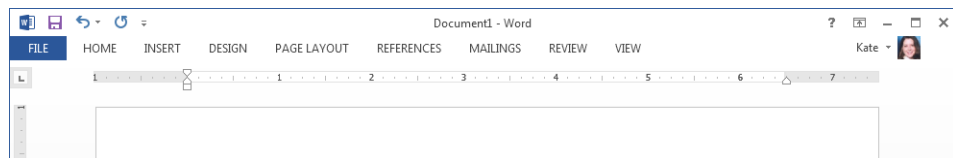
1

➔ **SET UP** You don't need any practice files to complete this exercise. Start Word and follow the steps.

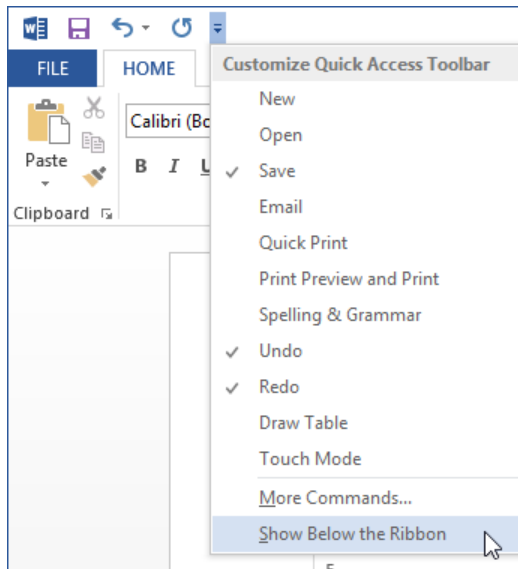
IMPORTANT Unless otherwise noted, the customizations in this section are not application specific.

- 1 On the Word Start screen, click **Blank document**.
- 2 Double-click the active ribbon tab to collapse it.

KEYBOARD SHORTCUT Press **Ctrl+F1** to toggle the ribbon between a collapsed and expanded state.



- 3 Click the **Home** tab to expand the ribbon, and in the **Font** group, click the **Bold** button.
- 4 Click in the document to return the ribbon to a collapsed state.
- 5 In the window controls at the right end of the title bar, click the **Ribbon Display Options** button and then from the list, click **Auto-hide Ribbon**.
- 6 Click the top of the application window to display the ribbon.
- 7 On the **Home** tab, in the **Font** group, click the **Bold** button.
- 8 Click in the document to return the ribbon to an auto-hide state.
- 9 Click the arrow at the end of the **Quick Access Toolbar** and then near the bottom of the list, click **Show Below the Ribbon**.



- ✘ CLEAN UP** Set the ribbon to your preferred auto-hide, expanded, or collapsed state. Set the position of the Quick Access Toolbar to your preference, either shown above or below the ribbon. If you're continuing to the next exercise, leave Word and your document open. Otherwise, exit Word without saving changes to the document you created.

Customizing the Quick Access toolbar

As noted in the introduction of this section, you can also customize the Quick Access Toolbar by adding frequently used commands, such as New or Open, or by adding commands directly from the ribbon. Here are two ways you can add additional commands:

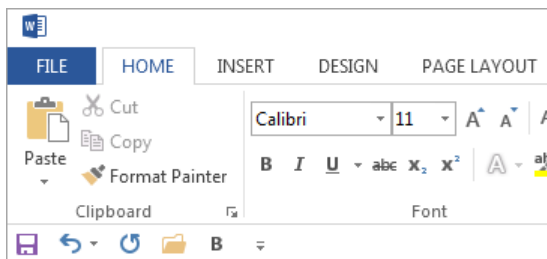
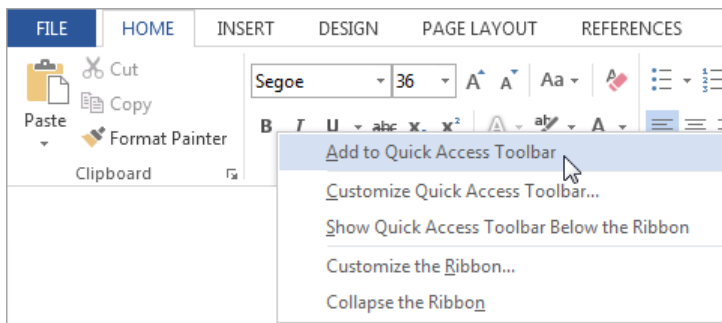
- Click the arrow at the end of the **Quick Access Toolbar** and then select a command from the **Customize Quick Access Toolbar** list.
- Right-click a command on the ribbon and then click **Add to Quick Access Toolbar**.

To remove a command from the Quick Access Toolbar, right-click the command and then click **Remove From Quick Access Toolbar**.

In this exercise, you'll customize the Quick Access Toolbar by adding and removing commands.

→ SET UP You don't need any practice files to complete this exercise. If Word and your blank document are still open from the previous exercise, follow the steps. Otherwise, start Word, create a new document, and follow the steps.

- 1 Click the arrow at the end of the **Quick Access Toolbar** and then in the list, click **Open**.
- 2 On the **Home** tab, in the **Font** group, right-click the **Bold** button, and then click **Add to Quick Access Toolbar**.



TIP You can also add dialog boxes or a group on the ribbon, such as the Font group, to your Quick Access Toolbar for faster access. To do so, right-click a dialog box launcher or right-click a group name and then click **Add To Quick Access Toolbar**.

- 3 On the **Quick Access Toolbar**, right-click the **Open** button and then click **Remove from Quick Access Toolbar**.
- 4 Remove the **Bold** button from the **Quick Access Toolbar**.

✕ CLEAN UP If you're continuing to the next exercise, leave Word and your document open. Otherwise, exit Word without saving changes to the document you created.

TIP For more information about how to rearrange the commands on your Quick Access Toolbar or to add commands that don't appear on the ribbon, see "Customizing the ribbon" later in this chapter.

Customizing the status bar

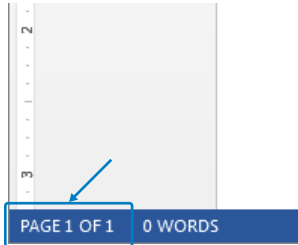
You can also customize the status bar by choosing what you prefer to display. Similar to how you customize the Quick Access Toolbar, you can right-click the status bar to customize it. The Customize Status Bar list shows the available status bar items, and a check mark will appear next to those that are currently displayed. You then select or deselect items in the list to add or remove them. Note that some items only appear in the status bar when a feature is turned on, to help reduce status bar clutter. For example, if you choose to show Caps Lock, it will only display in the status bar if you've turned caps lock on and are typing in all caps.

Customize Status Bar	
<input type="checkbox"/> Formatted Page Number	1
<input type="checkbox"/> Section	1
<input checked="" type="checkbox"/> Page Number	Page 1 of 1
<input type="checkbox"/> Vertical Page Position	1"
<input type="checkbox"/> Line Number	1
<input type="checkbox"/> Column	1
<input checked="" type="checkbox"/> Word Count	0 words
<input checked="" type="checkbox"/> Number of Authors Editing	
<input checked="" type="checkbox"/> Spelling and Grammar Check	
<input checked="" type="checkbox"/> Language	English (United States)
<input checked="" type="checkbox"/> Signatures	Off
<input type="checkbox"/> Information Management Policy	Off
<input type="checkbox"/> Permissions	Off
<input type="checkbox"/> Track Changes	Off
<input checked="" type="checkbox"/> Caps Lock	Off
<input type="checkbox"/> Overtype	Insert
<input type="checkbox"/> Selection Mode	

In this exercise, you'll customize the status bar in Word.

→ **SET UP** You don't need any practice files to complete this exercise. If Word and your blank document are still open from the previous exercise, follow the steps. Otherwise, start Word, create a new document, and follow the steps.

- 1 At the bottom of the Word window, note **Page 1 of 1** on the left end of the status bar.



- 2 Right-click the status bar and then in the **Customize Status Bar** list, click **Page Number** to turn it off.
- 3 In the **Customize Status Bar** list, click **Page Number** again to turn it back on.
- 4 Click in the application window to close the **Customize Status Bar** options.

✕ **CLEAN UP** Exit Word without saving changes in the document you created.

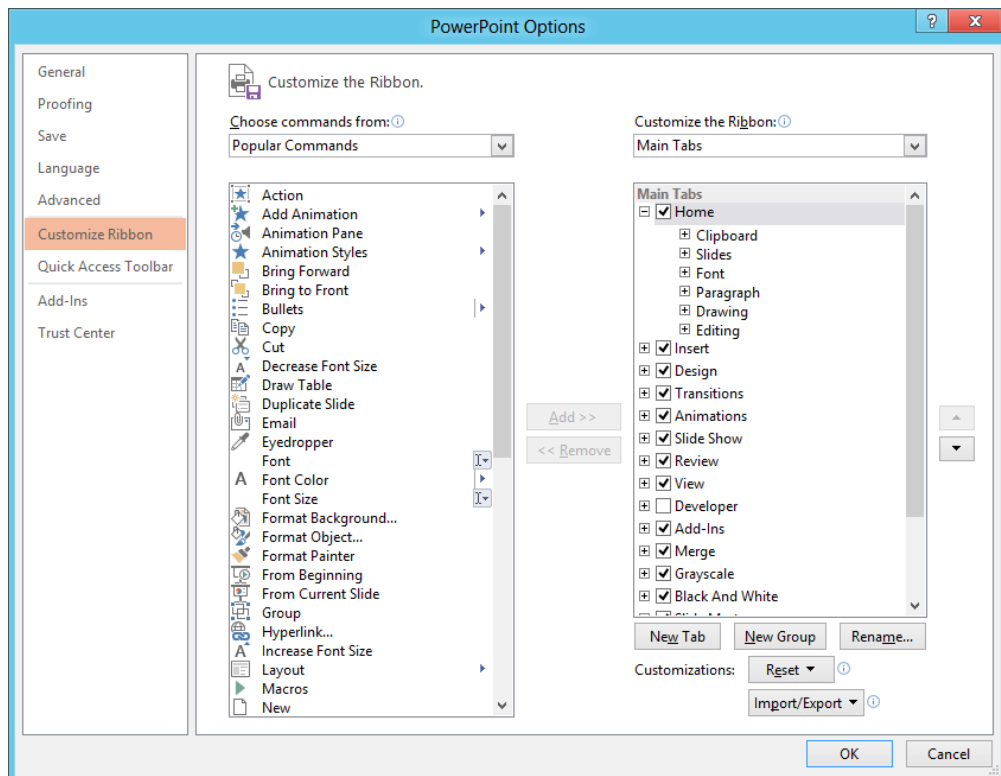
TIP You can also customize the behavior of the Mini Toolbar, Live Preview, or ScreenTips. To access these settings, display the Backstage view and then click Options. These user interface options are located at the top of the General section. Note that the user interface options vary across the applications. For example, Access does not have a Mini Toolbar and OneNote does not support Live Preview.

Customizing the ribbon

As noted at the beginning of this chapter, one of the biggest advantages of Office is the similarities across the applications. In this section, you'll start applying what you learn about one feature to other components that are similar, like the Quick Access Toolbar and ribbon.

In comparison, both the Quick Access Toolbar and ribbon contain the primary commands for an application and can be customized. The main difference between them, other than appearance, is that the Quick Access Toolbar holds your most frequently used commands, whereas the ribbon provides a more standardized set of commands. However, there may be times when you want to make modifications to the ribbon. For instance, there are more advanced commands that aren't in the ribbon by default that you may find beneficial. Or you might find you can work more efficiently by moving a command or group to another location or tab.

To customize the ribbon, you display the Backstage view, click Options, and then click Customize Ribbon.



The left side of the ribbon customization settings area lists commands that can be added to the ribbon, and the right side lists the ribbon tabs. You can add commands from the list of available commands to any existing group on the ribbon, or you can create a new group and add commands to it.

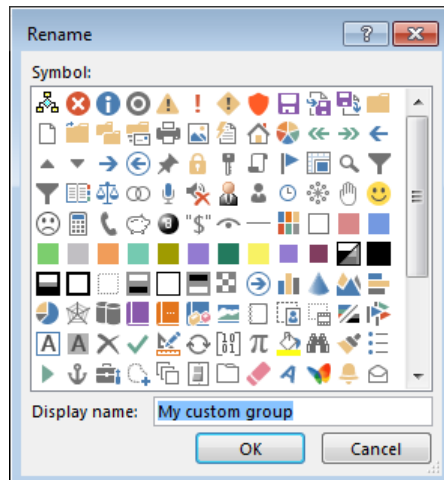
You can also create a new ribbon tab and add new groups and commands or modify the tool tabs that appear when a specific object is selected, like a picture. To access all available ribbon tabs, in the Customize The Ribbon area, click the arrow next to Main Tabs and then click All Tabs.

Additionally, you can reorder built-in tabs, groups, and commands using the Move Up and Move Down arrows on the right side of the dialog box.

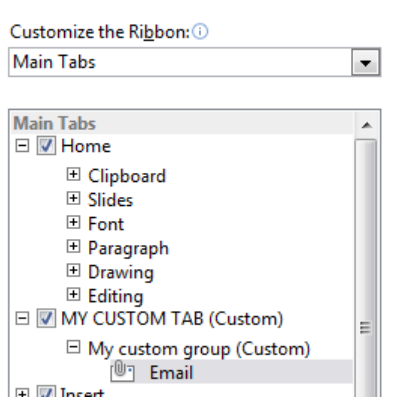
In this exercise, you'll customize the ribbon by adding a new tab, group, and command to the ribbon in PowerPoint. You'll then delete your customizations. At the end of this exercise, you'll apply what you learned about ribbon customization to the Quick Access Toolbar.

→ SET UP You don't need any practice files to complete this exercise. Start PowerPoint, create a blank presentation, and follow the steps.

- 1 In the **Backstage** view, click **Options**, and then click **Customize Ribbon**. Below the ribbon tab list, click **New Tab**.
- 2 Click **New Tab (Custom)** to select it, and then click the **Rename** button near the bottom.
- 3 Enter **MY CUSTOM TAB** and then click **OK**.
- 4 Click **New Group (Custom)** and rename it to **My custom group**.

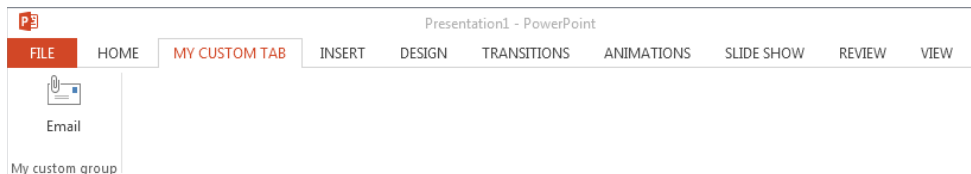


- 5 From the **Popular Commands** list, select any command. For instance, select **Email**. Click **My custom group** and then click the **Add** button near the middle of the **Options** dialog box.



IMPORTANT Commands can only be added to groups on the ribbon. If you don't select a group prior to adding a command, you will encounter an error message.

- 6 To review your customizations, click **OK** at the bottom of the **Options** dialog box.
- 7 On the ribbon, click **MY CUSTOM TAB** and note your custom group and newly added command.



- 8 Reopen the **Options** dialog box and display the ribbon customization options.
- 9 If necessary, select **MY CUSTOM TAB**.
- 10 Near the middle of the **Options** dialog box, click the **Remove** button to delete your custom tab and custom group.

- 11 Experiment with other ribbon customizations. For example, to reorder tabs, groups, or individual commands, make a selection, and then on the right side of the dialog box, click the **Move Up** and **Move Down** buttons.
- 12 After you're comfortable customizing the ribbon, in the **Options** dialog box, click **Customize Quick Access Toolbar** and apply what you learned in the previous steps. For example, reorder the commands or add new ones.
- 13 To reset all of your ribbon and **Quick Access Toolbar** customizations, click the **Reset** button near the bottom of the **Options** dialog box, and then click **Reset all customizations**.
- 14 Click **Yes** to confirm the deletion of your customizations.

TIP To back up your ribbon and Quick Access Toolbar customizations or to share them with others, use the Import/Export options at the bottom of the dialog box.



CLEAN UP Close the Options dialog box and exit PowerPoint without saving the presentation.

Choosing the right application for the task at hand

Out of all of the Office suites, Microsoft Office Professional Plus 2013 includes the widest range of applications. As noted at the beginning of this chapter, many of the applications have similar functionality. In the next chapter, you'll learn about shared features that are available to most of the Office applications. With so many overlapping capabilities, you may be wondering how to determine the application you need to use for your various work projects.

In this section, you'll get an overview of various tasks you can perform in each application that's available in the Office Professional Plus 2013 suite. This overview also extends to applications that aren't covered in this book. For the applications that have similar functionalities, you'll receive more information at the end of this section on how to choose an application to perform a specific task.

Application	Tasks
Access	<ul style="list-style-type: none"> ■ Store, organize, and manage simple data or complex relational data. ■ Make your data available on your company network or in a web browser by using Access Services, a component of SharePoint. ■ Create forms for data entry and reports to present your information. ■ Export data to other applications, such as Excel or Word, as well as other database formats.
Excel	<ul style="list-style-type: none"> ■ Calculate and analyze numeric information such as budgets, income, expenses, loans, and scientific or statistical data. ■ Organize and track information, such as inventory, work schedules, projects, invoices, and address lists. ■ Summarize numeric and other data and display results in charts and PivotTables. ■ Create forms that include controls, such as check boxes, drop-down lists, and option groups, to be filled in by other users.
OneNote	<ul style="list-style-type: none"> ■ Organize and keep track of your notes and other information in searchable notebooks. ■ Collect information from other Office applications or Windows Internet Explorer. ■ Capture your notes in text, ink, drawings, images, audio, and video. ■ Insert pictures, tables, files, spreadsheets, or diagrams. ■ Collaborate in real time with members of your team.
Outlook	<ul style="list-style-type: none"> ■ Send, receive, and store email messages and meeting requests. ■ Use a calendar and tasks to keep track of your schedule and set reminders. ■ Store contact information for your business connections. ■ Share your Outlook information, such as your calendar, inbox, or contacts, with members of your team.
PowerPoint	<ul style="list-style-type: none"> ■ Create presentations for a sales pitch, conference, meeting, class, or demonstration. ■ Create photo albums to share with friends and family or for personal use. ■ Add multimedia such as graphics, video, and audio along with animations. ■ Present your presentation to a live audience or in an online meeting, or transform it into a video.

Application	Tasks
Publisher	<ul style="list-style-type: none">■ Create flyers, cards, calendars, brochures, certificates, catalogs, advertisements, and photo albums.■ Include graphics, tables, and other visual elements.■ Use built-in tools to save your publication for commercial or photo printing.■ Create personalized publications for mass mailings for print and email distribution.
Word	<ul style="list-style-type: none">■ Create general documents such as letters, memos, reports, manuals, contracts, and proposals.■ Create documents that contain graphics, such as newsletters, cards, flyers, invitations, and photo calendars.■ Create advanced documents, such as mass mailings that can be printed and mailed or sent by email. Create a book or report with a table of contents, indexes, and cross references.■ Create forms that include controls such as check boxes, drop-down lists, and date pickers, to be filled in by other users.■ Generate other documents, such as envelopes, labels, blog posts, and webpages.
Microsoft InfoPath	<ul style="list-style-type: none">■ Create structured fill-in-the-blank forms that can be connected to a data source, such as an Access or SharePoint database.■ Store forms on your company network or in a SharePoint library, or distribute them by email.■ Add calculations, rules, data validation, and conditional formatting.
Microsoft Lync	<ul style="list-style-type: none">■ Quickly communicate with other people in your company by instant message, audio, or video.■ View presence information, such as Available, Busy, Away, Off Work, and Do Not Disturb for members of your team in Lync and across the applications.■ Share your desktop or an application with people both inside and outside your company.

As previously discussed, several of the Office applications provide similar functionality. For instance, you can use Word, Publisher, or PowerPoint to create Office documents that include graphics, such as newsletters, flyers, or photo albums. You can create forms in Access, Excel, InfoPath, and Word. And you can use both Access and Excel to manage lists of information.

More often than not, you'll likely choose the application you're most comfortable with and forgo learning something new. Before you do, keep in mind that each application specializes in specific capabilities and can produce better results when selected for certain tasks. Think of it as going to a restaurant—if you go to one that specializes in seafood, you might find steak on the menu, but it may not be as good as a steak you get from a steak house.

Also keep in mind that what you learn in one application can be applied to another, so the learning curve may be easier than you think. Here are a few tips to help you determine the right application for specific tasks.

- For files that include graphics, consider the type of content you want to include, the amount of text, and the complexity of the layout. If you don't need to use cross-references, fields, or other advanced text features, then use Publisher. In Publisher, it's easier to move your content and visually align objects. Plus, you can add vertical and horizontal guides for precision placement.
- For photo albums, think about the end result you want. If you want to display the album electronically on a computer or projection screen, use PowerPoint. It also enables you to add transitions and animations for a professional-looking result. Plus, you can convert your presentation to a video that can be published on websites like YouTube. If you want to print the album, use Publisher. It has a variety of photo borders to add a professional flair and tools to assist you with photo and commercial printing.
- For simple lists of data, such as an inventory or mailing list, consider using Excel. It has tools for sorting, filtering, and managing your lists. Plus, if you find you need more database management tools, you can easily import your list in Access.
- For lists of related data, such as those for tracking employees, projects, or department inventory, use Access. It has tools for working with information that's related and enables you to display and report information in various views. For example, you can create an employee directory sorted alphabetically and another grouped and sorted by department.

- For forms, if you want the data entered in a form to be automatically collected, use InfoPath or Access. There are several deciding factors in choosing which application to use. The primary factor is whether the people using the form will have access to the tools they need to fill it out. For InfoPath forms, either the users must have Microsoft InfoPath Filler, or you must have InfoPath Form Services technology so that your intended audience can use a web browser to fill out the form. For Access, either the users must have the Access application, or you must have Access Services for web browser-based forms, which is a component of SharePoint.

Other form considerations are whether the form contains calculations. If you don't need to automatically collect your data, then use Excel. Although Word supports calculations, creating formulas in Excel is easier and more reliable. However, if your form needs to contain advanced text features or needs the page flexibility of a word processor, then create your form in Word.

This list is certainly not an exhaustive list of all of the different types of files you can create or tasks you'll perform in your work projects. This is a vast topic that could easily warrant its own book. But the information provided here should be enough to give you a good start in choosing the right application.

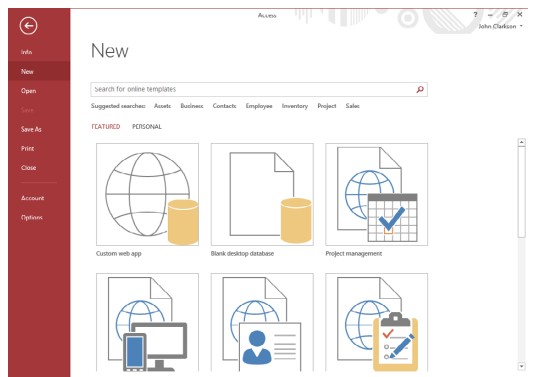
Key points

- The ribbon and Quick Access Toolbar have commands for working with the content of a file.
- The Backstage view has commands for working with the entire file or the application.
- You can create new documents, workbooks, presentations, publications, notebooks, and databases on the New page in the Backstage view.
- You can open, save, print, share, and export documents in the Backstage view.
- You can customize the Office user interface and modify application settings to fit your workflow.
- Choosing the right application for specific tasks can help you be more productive and get better results.

Chapter at a glance

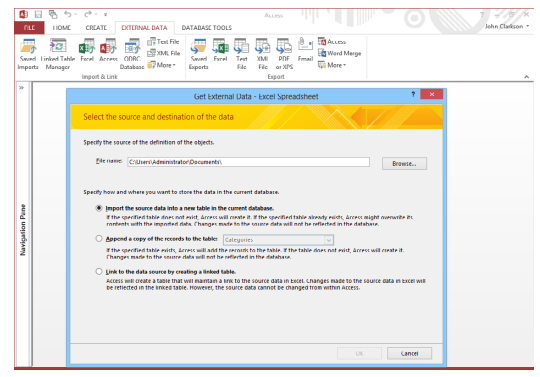
Create

Create a desktop database, page 911



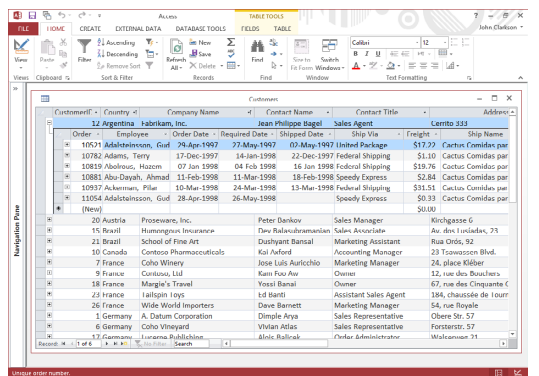
Import

Import and export data, page 915



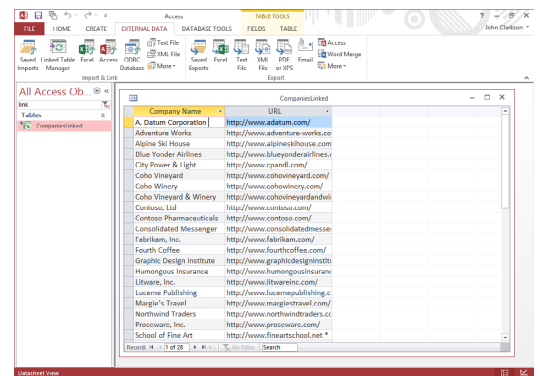
Work

Work with data in a datasheet, page 924



Link

Link Access to external data, page 936



IN THIS CHAPTER, YOU WILL LEARN HOW TO

- Create a desktop database.
- Import and export data.
- Navigate the user interface.
- Work with data in a datasheet.
- Configure Access options.
- Link Access to external data.
- Compact, repair, and encrypt a database.

Microsoft Access allows you to structure and store your information in a set of database tables and can efficiently manage and share large amounts of data. In addition to quickly locating information, the database ensures consistency in the information by linking together the data in different tables. The product allows you to present the data through both professional-looking forms and reports.

If you are moving from Microsoft Office 2003 to Office Professional 2013, then you will notice a big difference in the user interface. Introduced in Office 2007, the ribbon provides a tabbed interface for working in the product. Depending on what you are doing, the ribbon will display additional tool tabs to assist you in a particular task. The database window of Access 2003 has been replaced with a searchable Navigation pane on the left side of the interface that allows you to filter objects of one or more types.

If you are already familiar with Access 2010, then you will find that the desktop database has improved productivity, but the major revision in the product has been the introduction of the Web App.

Access 2013 enables you to create two distinct but related types of databases. The first is a desktop database; this is a database where the components are held in one or more files on your computer or network. The second type of database is called a Web App; this is a new

feature in Access and means that the database is stored in Office 365, and the user interface is displayed in a browser window. When developing a Web App, you use a design interface on your computer that is similar to the familiar desktop database interface.

We will leave a discussion of Web App databases until Chapter 40, “Creating and sharing a Web App.” In this chapter, we provide detailed steps so that you can perform activities and at the same time familiarize yourself with how to productively work with the Access desktop database interface.

PRACTICE FILES To complete the exercises in this chapter, you need the practice files contained in the Chapter37 practice file folder. For more information, see “Download the practice files” in this book’s Introduction. Note that the MSOfficeProBlank.accdb practice file is created in this chapter, so it is not included in the practice files.

An Access desktop database contains different types of objects:

- **Tables** Your data is held in a number of tables. The data in most of the tables will be linked to data in other tables. Using this approach of linking or relating data between tables is a key feature of the database and reduces the need to duplicate information.
- **Queries** These bring together the data from one or more tables and present the data either through a datasheet, form, or report. Note that a datasheet is not a separate object, but the interface when displaying data from either a table or query.
- **Forms** These allow more flexibility in presenting data than that allowed in a datasheet. They are the most popular method for viewing and managing data. Of particular note are parent/child forms and subforms, where the subforms display related data from other tables.
- **Reports** Allow you to create a paper-based presentation of your data for printing or previewing on the screen. One unique presentation feature of reports is the ability to have multiple layers of grouping when presenting data.
- **Macros** This is a programming feature for automating operations. Macros can be found in several places in the database; a discussion of macros is beyond the scope of this chapter.
- **Modules** These are used for advanced programming, using the Microsoft Visual Basic for Applications (VBA) programming language common to the other Office products. This topic is also beyond the scope of this chapter.

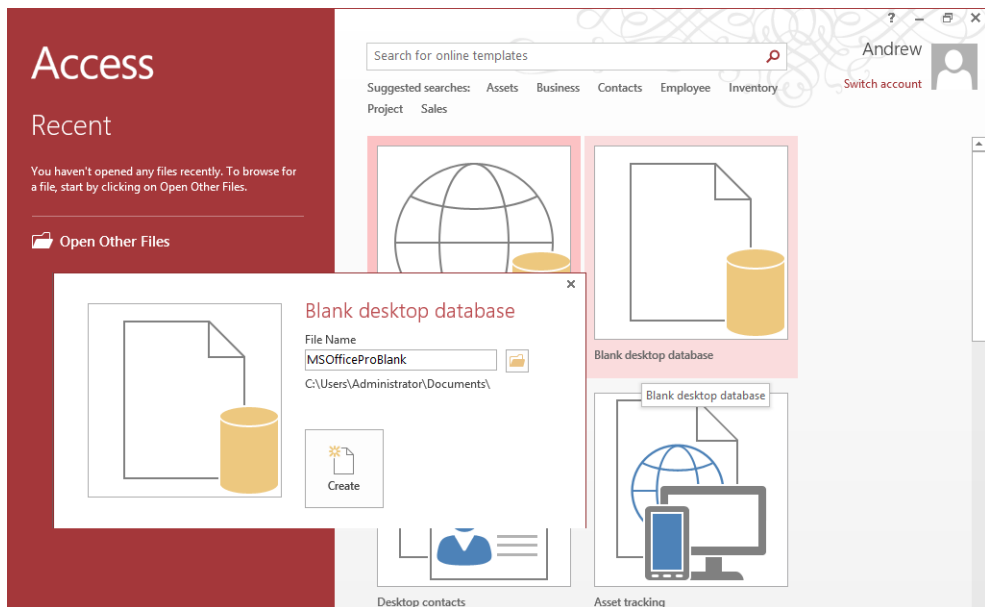
Creating a desktop database

Your Access desktop database consists of a single file, which you will create and save on your computer. There are two different methods to get started with a database. You can either choose to create a database by using a predefined template database, or you can start by creating an empty database.

In this exercise, you'll create a desktop database.

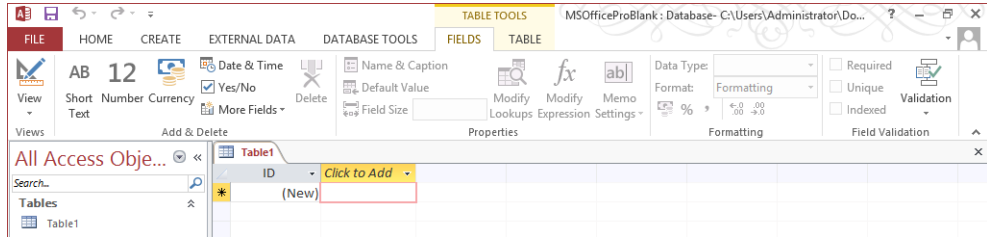
→ SET UP You don't need any practice files to complete this exercise, but the **MSOfficeProBlank.accdb** database you create here will be used in further exercises in this chapter. Start Access from the Start screen (Windows 8), or from the Start menu (Windows 7) that is displayed when you click at the left end of the Windows taskbar.

- 1 Click **Blank desktop database**.
- 2 Enter the file name **MSOfficeProBlank**.
- 3 Click **Create**.



TIP When starting Access, you will notice a list of template databases; for example, Asset tracking (Web App) and the templates prefixed with the name *Desktop*. Desktop asset tracking will create a desktop database. It is worth taking the time to look at a few of these to get some ideas for creating your own applications.

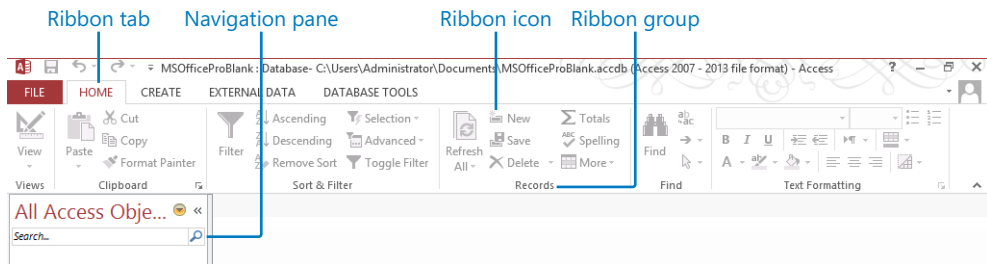
Your database will look similar to the following.



When you create a blank database, Access will open to display a new table called *Table1*. This feature allows you to start using one of several techniques for creating blank tables, which we will look at in the next chapter.

- 4 Click on the **X** to close the **Table1** object.

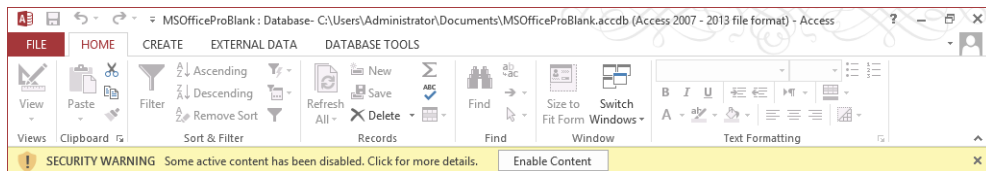
The main ribbon will be displayed without any design objects in the database. The Navigation pane displaying All Access Objects is empty.



 **CLEAN UP** Close the MSOfficeProBlank database. This will close Access.

Managing trust locations and macro security

Sooner or later, you will come across the following when opening a database.



Because we live in a world where some people will try and hack or subvert systems, and because Office files can be sent by email from unknown sources, Microsoft, by default, switches off features, and it is up to you to decide what to enable.

If you click the Enable Content button, then the next time that you open the database, you will not need to again answer this question, because you previously enabled content in the file. However, if you use the file system to copy the file, rename the file, or move the file to a different location, then you will again be challenged to enable the content.

There are two aspects of trust that you can manage. The first is the location of a file. Trust locations allow you to establish folders where you can place files that will be trusted. This means that you will not need to enable content for files placed in these folders (this feature can also be switched off, allowing files to be opened from any location). The second aspect of trust is whether the application should be allowed to execute certain macro commands or VBA programming code. Although we will not cover these topics in this book, you should be aware of this capability.

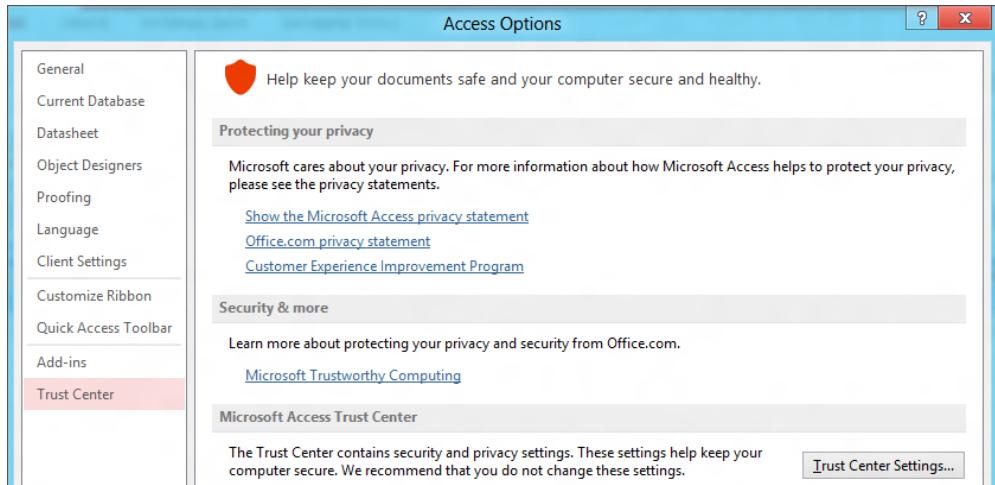
If you are working with your own databases or databases from a trusted source, then managing the trust locations and macro security should not pose a problem. But if you are downloading content from the Internet and macro security is fully enabled and trusted locations disabled, then it is possible that when you open a database, malicious code could be executed without any warning. The final decision is your responsibility, but in this section, we will show you how to enable macros and how you can manage your trusted locations.

In this exercise, you'll set security parameters for a database.

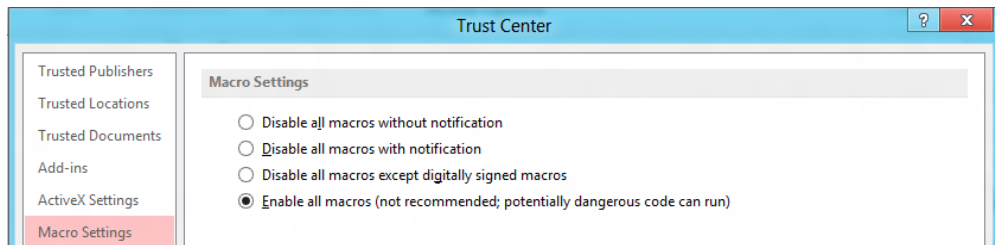


SET UP You need the `MSOfficeProBlank.accdb` database from the previous exercise to complete this exercise. If you have not already closed the `MSOfficeProBlank.accdb` database, then close the database and reopen to display the security warning shown at the beginning of this section. If the security warning does not appear, then continue to follow through the exercise, and you should find that your trust settings have already been altered.

- 1 From the **File** tab, select **Options** at the bottom of the page.
- 2 Select the **Trust Center** option.



- 3 Click **Trust Center Settings**.
- 4 Select **Macro Settings** and **Enable all Macros**.



- 5 Click **Trust Locations**.
The next choice is a bit more complicated, because you can either decide to add specific folders where you will trust files, or you can disable the trust locations; trusting files on any location. To enable content at all locations, proceed as follows:
- 6 Click the check box to **Disable All trust Locations**, or add specific folders to be trusted. Then click **OK**.



CLEAN UP Leave the **MSOfficeProCompleted** database open for use in later exercises.

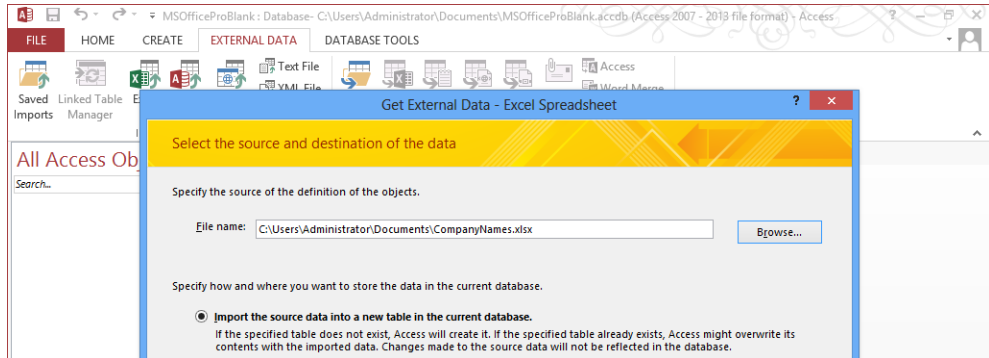
Importing and exporting data

Access has wizards to guide you through specific operations; these are particularly useful when it comes to importing or exporting data. When you import data, you are making a copy of the original data and storing that data in your database file.

In this exercise, you'll import data into a database.

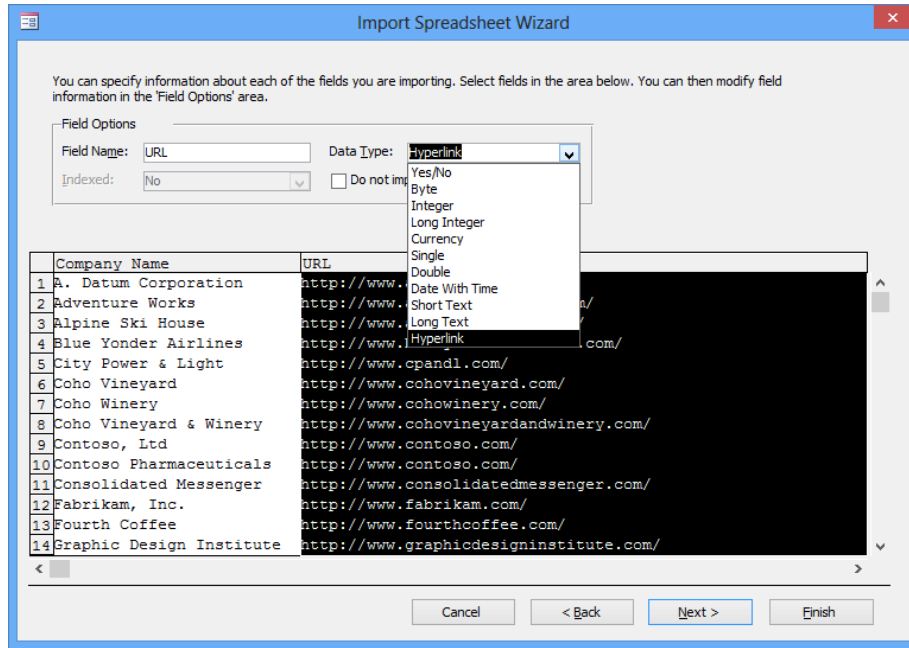
➔ **SET UP** You need the **MSOfficeProBlank.accdb** database from the previous exercise, and the **MSOfficeProData.accdb** database and **CompanyNames.xlsx** spreadsheet located in the **Chapter37** practice file folder to complete this exercise. Open the **MSOfficeProBlank.accdb** database if it is not already open. The **CompanyNames.xlsx** sample spreadsheet contains a list of company names and URLs. You will import this list into your database.

- 1 Click the **External Data** tab.
- 2 Click **Excel** in the **Import & Export** group.
- 3 Browse in the **File Name** box to locate the **CompanyNames.xlsx** spreadsheet.



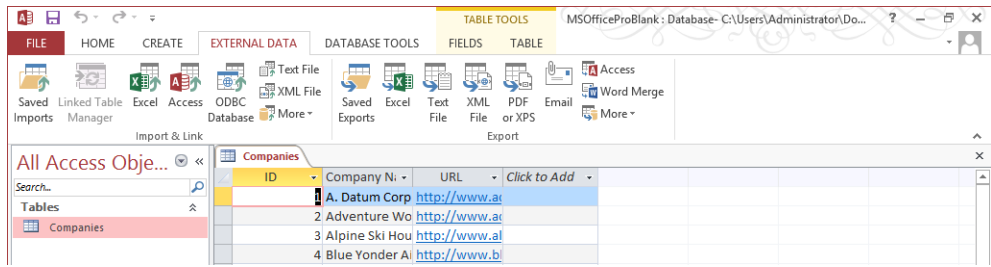
- 4 Ensure that the first button to **Import data** is selected, and press **OK**. The **Import Spreadsheet Wizard** will now be displayed.
- 5 Select the **First Row Contains Column Headings** check box, and notice how the display changes to remove the column headings from the data records. Click **Next**.

- Click the second **URL** column, and use the drop-down **Data Type** to change the data type to a **Hyperlink**, and then click **Next**.



TIP This stage in the wizard allows you to select an appropriate data type for the column that will be created to hold the data.

- On the next screen, Access will display an **ID** as the primary key (if you wanted a different column to be the primary key, then it could be selected from the **Choose my own primary key** drop-down list). For this exercise, accept the default choice of **ID**, and then click **Next**.
- The **Import to Table** will display the name **Companies**. You can change the name of the new table at this point. Click **Finish**.
- The very last screen allows you to save these steps if you will need to repeat them. Click **Close** (you do not need to save the steps).
- Double-click the table now shown in the **Navigation** pane to display your data.



TIP Click the X next to field list to close this window. This allows for more space to display the data contained in your table.

- ✕ **CLEAN UP** Close the Companies table and retain the MSOfficeProBlank database for use in later exercises.

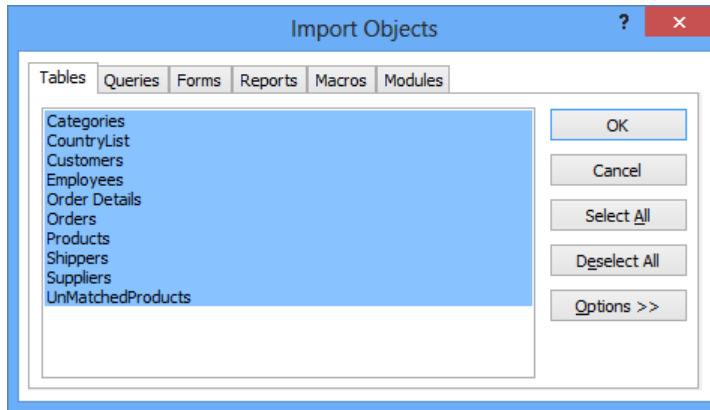
Importing from another Access database

When you import data from another Access database, you can choose to import any of the available design objects. The MSOfficeProData.accdb database contains data that you will need in the following exercise. You will import some of the items in this database into your blank database.

In this exercise, you'll import data from another Access database.

- ➔ **SET UP** You need the MSOfficeProBlank.accdb database from the previous exercise and the MSOfficeProData.accdb database from the Chapter37 practice file folder to complete this exercise. Open the MSOfficeProBlank.accdb database, if it is not already open.

- 1 Click the **External Data** tab.
- 2 Click **Access** in the **Import & Export** group.
- 3 Locate the **MSOfficeProData.accdb** file in the **File Name** box.
- 4 Leave the default selection of **Import tables, queries, forms** active, and click **OK**. You will then have the option to import different Access objects from the database.



- 5 On the **Tables** tab, click **Select All** to highlight all the tables.
- 6 Click the **Forms** tab and click to highlight the **frmCustomers** form. Then click **OK** to import all the tables and the selected form.
- 7 Click **Close** when prompted to save the import steps (you do not need to save a record of these steps, because you will not repeat this operation).

TIP If you import several tables that have relationships, then the relationships will also be imported by default into the new database.

CLEAN UP Retain the **MSOfficeProBlank** database for use in later exercises.

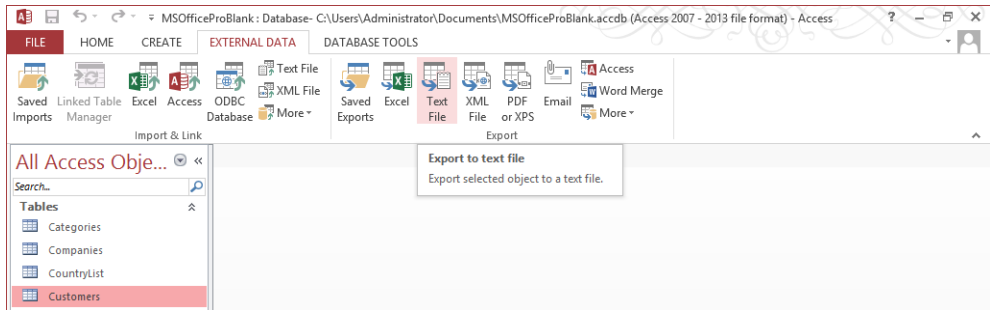
Exporting data from an Access database

Access supports the export of data from both tables and queries (which we will discuss in the next chapter). To export data, select the table or query in the Navigation pane and then either use the right-click option to select an export format, or use the appropriate icon on the ribbon.

In this exercise, you'll export data from an Access database.

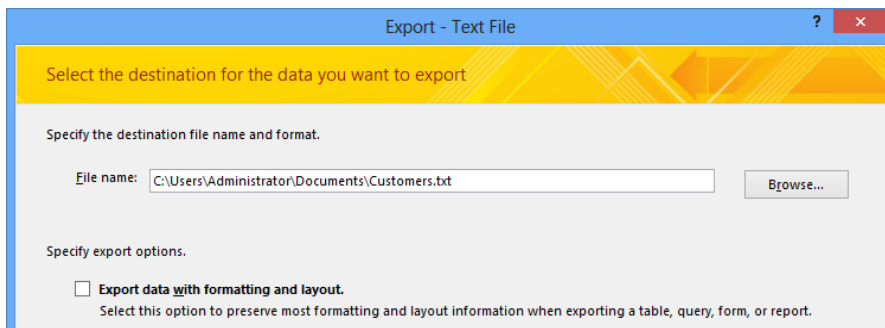
SET UP You need the **MSOfficeProBlank.accdb** database from the previous exercise to complete this exercise. Open the database, if it is not already open.

- 1 In the **Navigation** pane, click the **Customers** table.
- 2 Click the **External Data** tab, and click the **Text File** icon in the **Export** group.



This will then display the Text File Export wizard.

- 3 Use the **File name** text box to browse to a location to save your exported data.



- 4 Do not make any further selections, but click **OK** to proceed.

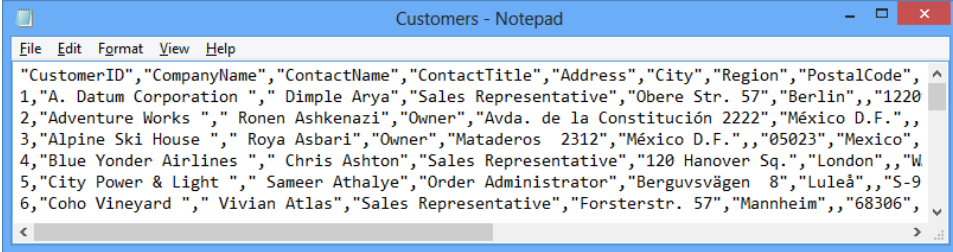
TIP Choosing to export the data with formatting will result in a format that is not easily imported to other programs, but it does result in a simple text layout that could be printed.

It is recommended that you follow through and accept the default selections. More details will be revealed regarding important choices as we proceed through the steps. This wizard, which is similar to the Import Text Wizard, has a number of advanced choices.

- 5 On the next wizard page, you can choose between **Delimited** or **Fixed Width, Delimited**; which is the default for a more standard choice. An **Advanced** option (bottom left) allows you very detailed control of how each column is exported. Click **Next** to proceed.
- 6 The next wizard page allows you to change the delimiters used for the export, and you can optionally include field names. Click the box to **Include Field Names on First Row**.

- 7 Change the **Export to file name** setting, if required, and then click **Finish**.
- 8 Click **Close** when prompted to save the export steps (you do not need to save the steps).

You should then have produced an export file.



```
Customers - Notepad
File Edit Format View Help
"CustomerID","CompanyName","ContactName","ContactTitle","Address","City","Region","PostalCode",
1,"A. Datum Corporation "," Dimple Arya","Sales Representative","Obere Str. 57","Berlin","1220
2,"Adventure Works "," Ronen Ashkenazi","Owner","Avda. de la Constitución 2222","México D.F.",
3,"Alpine Ski House "," Royá Asbarí","Owner","Mataderos 2312","México D.F.",,"05023","Mexico",
4,"Blue Yonder Airlines "," Chris Ashton","Sales Representative","120 Hanover Sq.,"London",,"W
5,"City Power & Light "," Sameer Athalye","Order Administrator","Berguvsvägen 8","Luleå",,"S-9
6,"Coho Vineyard "," Vivian Atlas","Sales Representative","Forsterstr. 57","Mannheim",,"68306",
```

 **CLEAN UP** Leave the MSOfficeProBlank database open for use in later exercises.

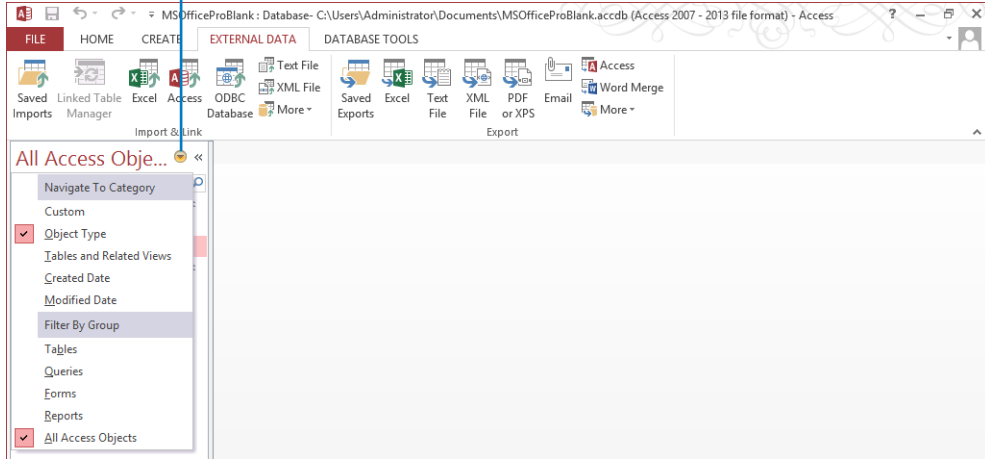
Navigating the user interface

There are two key components in navigating the Access user interface. The first is the Navigation pane, which lists all the objects in your database. This can also be changed to display either all your objects or objects of a specific type. The key to productivity with this part of the interface is the search bar, which allows you to quickly locate an object and then click to change or activate the object.

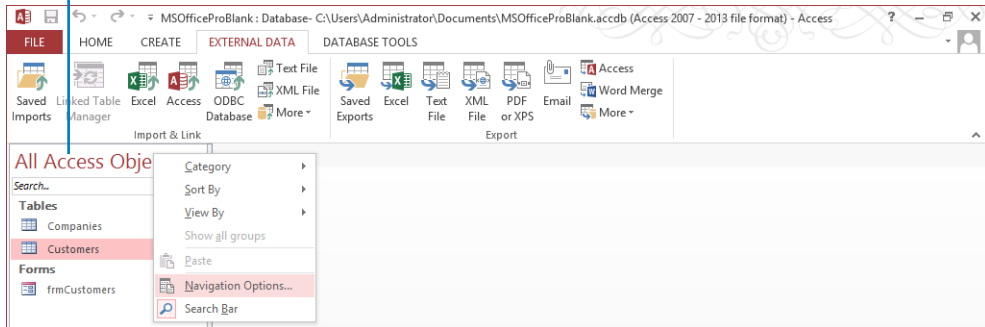
There are several useful features in the Navigation pane.

- **Search** When you enter words in a partial pattern, the **Navigation** pane will filter results.
- **All Access Objects** This drop-down list allows you to quickly change what is ordered in the pane.
- **Shutter bar open/close option** This allows you to minimize the **Navigation** pane to the left.
- **Navigation options** These options permit much finer control of the behavior of the navigation bar.

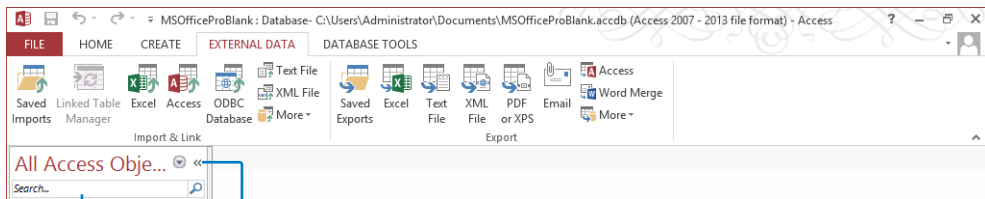
All Access Objects



Right-click the title of the Navigation pane to see the Navigation options.



37



Search bar

Shutter bar

Working with the tabs

The second and complementary approach to navigating the Access interface is to use the ribbon. Although you will quickly become familiar with the options on the ribbon to create new objects, after an object has been opened, the ribbon Home tab allows you to quickly change the design of an object.

The File tab is often called the Backstage view—a behind-the-scenes set of choices for configuring Access and performing general operations, such as opening a database or saving a database in a different format. One of the most important menu choices in the Backstage view is the Options choice, because this choice contains a very large number of settings that can be used to control the behavior of the database.

One of the great strengths of Access is that you can do the same thing in more than one way. At first, this may appear confusing, but as you gain familiarity with the product, it is a very useful feature. Access is a powerful development tool. You may find that when you decide to make certain changes in the environment, some paths to features are no longer available. As a simple example, you could choose to hide or fully customize the ribbon, in which case you would then be relying on a right-click to provide you with features that would otherwise associate with the ribbon.

Access has five key ribbon tabs, although, as you open different objects, additional tabs will become available, depending on the context. Following is a list of the tabs and their usage.

- **File** The File tab provides general options and settings for working in the product.
- **Home** This tab is used principally for formatting, filtering, and selecting data while you view the data.
- **Create** This tab is used to create new objects.
- **External Data** This tab is used to import, export, and link to external data.
- **Database Tools** This tab is associated with general operations in maintaining your database.

The File tab has the following features:

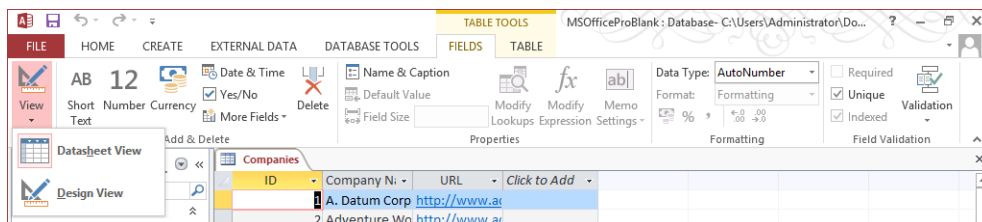
- **Info** Allows you to compact and repair your database and encrypt the database with a password.
- **New** Allows you to create a new database.
- **Open** Provides a path to opening recently accessed databases.
- **Save** If you have a design object open, this will save any changes.
- **Save As** This has two functions. If you have an object open, you can save any changes to the object, but more importantly, it allows you to save the database in an alternative format.
- **Print** Allows you to print an object that is open and active.
- **Close** Closes the database.
- **Account** Displays helpful information for connecting to online services.
- **Options** The Access options have been described earlier in this chapter, and are used to configure both the Access installation and database-specific options.

In this exercise, you'll use the Navigation pane to open an object and then switch to Design View.

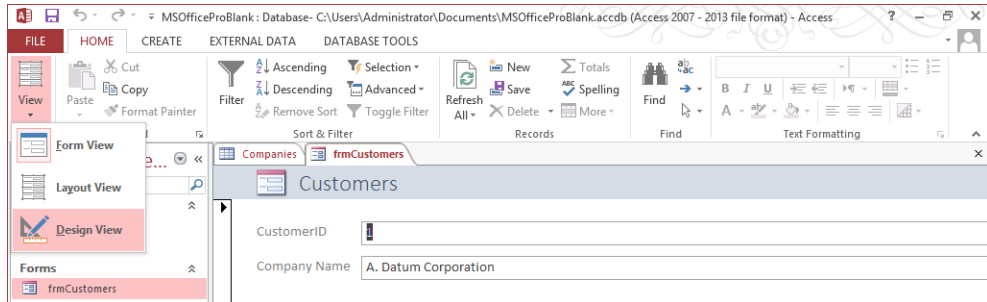
➔ **SET UP** You need the **MOfficeProBlank.accdb** database from the previous exercise to complete this exercise. Open the database, if it is not already open.

1 Double-click the **Companies** table in the **Navigation** pane.

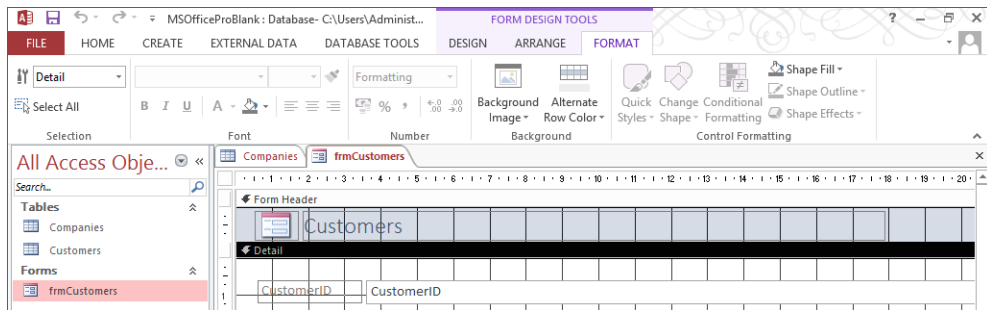
This will then display the two tool tabs, **Fields** and **Table**. The **Fields** tool tab will allow you to add or alter the design of the table, and the **Table** tool tab allows more advanced macro programming for the table. Notice the **View** drop-down list on the left, which allows you to quickly switch between the **Datasheet View** and the **Design View** for changing the design of a table.



- 2 In the **Navigation** pane, double-click the form **frmCustomers**. Then, on ribbon, click the **View** arrow and select **Design View**.



The tabs now change as shown below. The **Form Design Tools** have three tabs for assisting in the layout of a form:



TIP If you right-click the ribbon, you can choose to unpin the ribbon. This means that the ribbon will float and drop down when required.

CLEAN UP Close the **Companies** table and form **frmCustomers**, and retain the **MSOfficeProBlank** database for use in later exercises.

Working with data in a datasheet

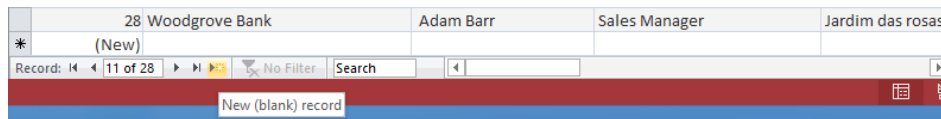
Each table of data in a database has an associated datasheet. The datasheet allows you to present and interact with the data in the database. It has a series of columns across the top and a series of rows containing the data records. You can adjust these presentations by hiding, freezing, and ordering the columns without changing the underlying design of the table.

Datasheets are limited in controlling how a user can interact with the data (when compared to using a form), but they are also a key feature to understand, because you can further exploit the power of a datasheet through a form. A form can be used to present data as a datasheet and make use of a number of more sophisticated features to extend the datasheet with capabilities only available through the form's Datasheet View.

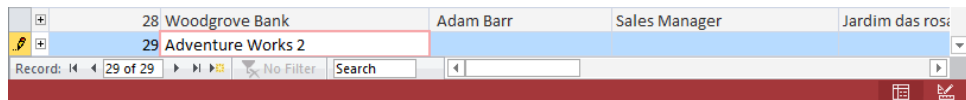
In this exercise, you'll work with datasheets.

→ SET UP You need the **MSOfficeProBlank.accdb** database from the previous exercise. Open the database, if it is not already open.

- 1 At the lower left of a datasheet are navigation buttons for moving to the first, next, previous, and last records. In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 Click **New (blank) record** in the set of navigation controls located in the lower-left corner of the screen (the icon has a >* symbol). This will take you to a new record.



- 3 Move to the **Company Name** column and enter the words: **Adventure Works 2**. The **Record Selector** will change from a star (new record) to a pencil (editing record symbol).



- 4 Click the next row, or press **Shift+Enter** to save your changes to the record. The **Record Selector** will no longer show the pencil symbol.
- 5 Click the **Record Selector** to highlight the row, and then press the **Delete** key. Access will prompt you to confirm deleting the record. Click **Yes** to delete the record.

TIP To edit data, move to the appropriate row/column and begin entering text. You can undo changes by pressing the Esc key or using the Undo icons on the Quick Access Toolbar.


✕ CLEAN UP Close the **Customers** table and retain the **MSOfficeProBlank** database for use in later exercises.

Sorting a datasheet

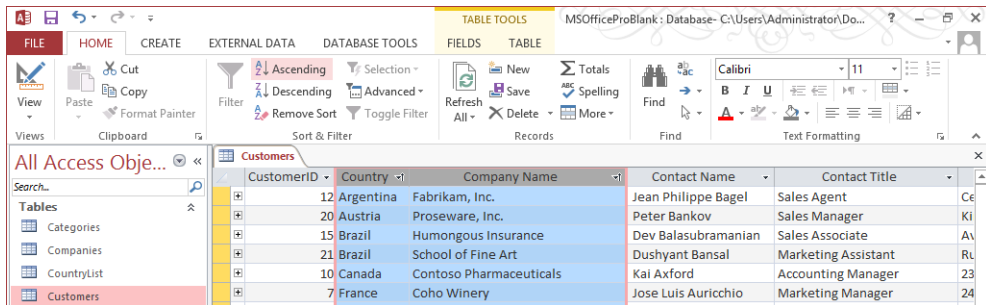
Sorting data in a datasheet means that you can very quickly locate and display a subset of data without the need to use more sophisticated methods such as queries.

In order to sort by multiple columns, you need to use drag and drop to order the sorted columns from left to right (this is the order in which columns are sorted). Individual or selected groups of columns can be sorted either in an ascending or descending sort.

In this exercise, you'll sort data in a datasheet.

 **SET UP** You need the **MOfficeProBlank.accdb** database from the previous exercise to complete this exercise. Open the database, if it is not already open.

- 1 In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 Click the **Country** heading (scroll right to locate the column), and drag this column to the left of **Company Name**.
- 3 Click the **Country** heading, and holding down the **Shift** key, click **Company** (so that both columns are highlighted).
- 4 On the **Home** tab of the ribbon, in the **Sort & Filter** group, click **Ascending**. This will sort by **Country**. Then, sub-sort those results by **Company Name**.



The screenshot shows the Microsoft Access interface with the 'Customers' table open in Datasheet View. The ribbon is set to 'HOME' and the 'Sort & Filter' group is active. The 'Ascending' button is highlighted. The table data is sorted by 'Country' and then 'Company Name'. The 'Customers' table is selected in the Navigation pane on the left.

CustomerID	Country	Company Name	Contact Name	Contact Title
12	Argentina	Fabrikam, Inc.	Jean Philippe Bagel	Sales Agent
20	Austria	Proseware, Inc.	Peter Bankov	Sales Manager
15	Brazil	Humongous Insurance	Dev Balasubramanian	Sales Associate
21	Brazil	School of Fine Art	Dushyant Bansal	Marketing Assistant
10	Canada	Contoso Pharmaceuticals	Kai Axford	Accounting Manager
7	France	Coho Winery	Jose Luis Auricchio	Marketing Manager

- 5 Click the **X** in the upper-right corner to close the datasheet. You will be prompted to save the design changes made to the table. Click **Yes** (the next time you open the table, the **Column** order and **Sorting** will be remembered).

 **CLEAN UP** Retain the **MOfficeProBlank** database for use in later exercises.

Filtering a datasheet

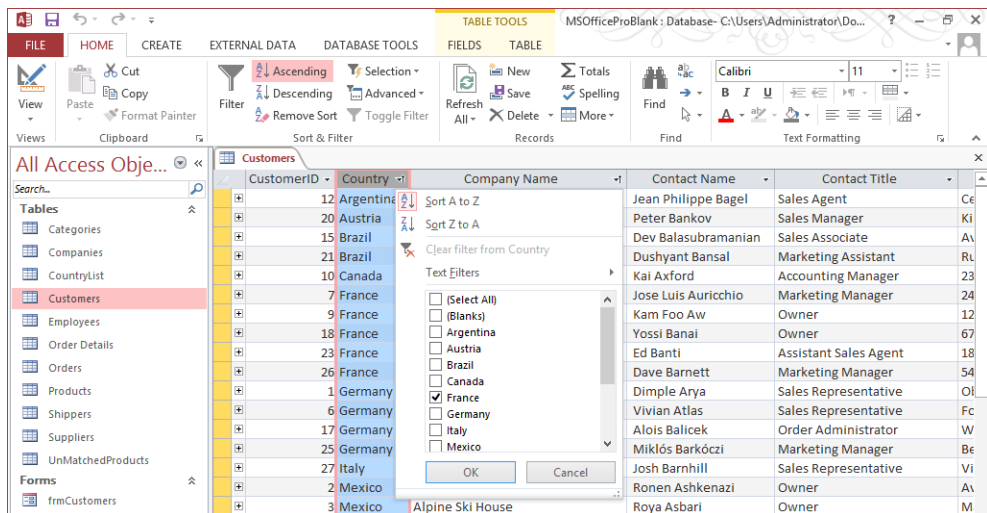
Access supports several techniques for filtering the data in a datasheet. If you click a column heading, then you can filter by specific data values. Alternatively, right-click in a field and then filter the data by a variety of matching options on the shortcut menu. This section will demonstrate these two techniques.

In this exercise, you'll filter data.



SET UP You need the **MOfficeProBlank.accdb** database from the previous exercise to complete this exercise. Open the database, if it is not already open.

- 1 In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 On the column heading for **Country**, click the right drop-down arrow in the **Column Heading**. Clear the **(Select All)** option, and select the single country **France** and click **OK**.



- 3 Click in the **Contact Title** column containing **Owner** in the row where the **CustomerID** has the value **9**.
- 4 Right-click and select **Equals "Owner."** This will then further filter the results.

CustomerID	Country	Company Name	Contact Name	Contact Title	Address
7	France	Coho Winery	Jose Luis Auricchio	Marketing Manager	24, place Kléber
9	France	Contoso, Ltd	Kam Foo Aw	Owner	
18	France	Margie's Travel	Yossi Banai	Owner	Quante Otages
23	France	Tailspin Toys	Ed Banti	Assistant Sales	Le Tournai
26	France	Wide World Importers	Dave Barnett	Marketing Manager	
(New)					

- 5 Close the **Customers** datasheet and then answer **No** when prompted to save the changes to the design.

TIP You will notice when filtering data that on left side of the navigation buttons is a symbol indicating that the data is filtered. Click this button to unfilter all the results.

CLEAN UP Retain the MSOfficeProBlank database for use in later exercises.

Adjusting the presentation of a datasheet

The height of rows, width of columns, and general look and feel of a datasheet can be defined for each individual datasheet. Columns can also be hidden or frozen (allowing you to scroll to the right while keeping some information in view).

In this exercise, you'll define the look and feel of the data presented in a datasheet.

SET UP You need the MSOfficeProBlank.accdb database from the previous exercise to complete this exercise. Open the database, if it is not already open.

- 1 In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 To adjust the row height, point to the **Record Selector** (the pointer will change to a selection arrow), then move the pointer down to the horizontal grid line (still pointing at the **Record Selector**; the pointer will change its shape to a horizontal bar). Click, hold, and drag down to adjust the row height.

CustomerID	Country	Company Name	Contact Name	Contact Title
12	Argentina	Fabrikam, Inc.	Jean Philippe Bagel	Sales Agent
20	Austria	Proseware, Inc.	Peter Bankov	Sales Manager
15	Brazil	Humongous Insurance	Dev Balasubramanian	Sales Associate

- 3 On the **Home** tab, in the **Text Formatting** group, at the lower right is a very small diagonal arrow. Click the arrow to display the **Datasheet Formatting** window.
- 4 Select an **Alternate Background Color** and click **OK**.

Datasheet Formatting

The screenshot shows the Microsoft Access interface with the 'Customers' table open in Datasheet view. The 'Datasheet Formatting' dialog box is open, allowing users to customize the appearance of the table. The 'Cell Effect' is set to 'Flat'. Under 'Gridlines Shown', both 'Horizontal' and 'Vertical' are checked. The 'Background Color' is set to a medium blue, and the 'Alternate Background Color' is set to a lighter blue. The 'Border and Line Styles' section shows 'Datasheet Border' and 'Solid' line style. The 'Direction' is set to 'Left-to-right'.

- 5 Close the datasheet without saving any design changes.

CLEAN UP Retain the **MSSOfficeProBlank** database for use in later exercises.

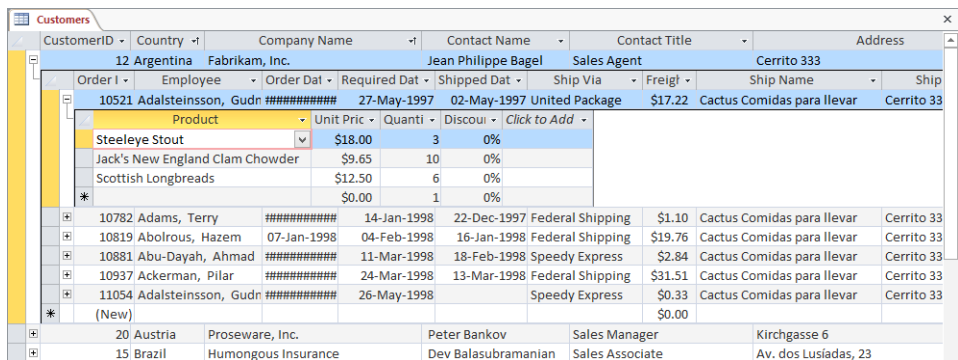
Working with a subdatasheet

By default, every table has an automatic feature where, by using the relationships, it can expand related data in other tables. This enables you to explore the relationship between data in your tables with a minimum of effort.

In this exercise, you'll work with relationships and subdatasheets.

→ SET UP You need the **MOfficeProBlank.accdb** database from the previous exercise to complete this exercise. Open the database, if it is not already open.

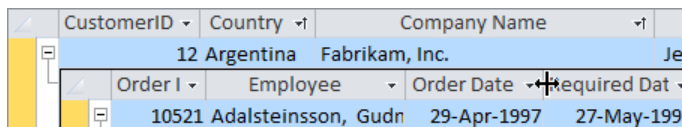
- 1 In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 Click the **+** symbol next to **Company**. This will expand the relationship, showing the **Orders** for the **Company**.
- 3 Click the **+** symbol for any **Order**. This expands the relationship between each **Order** and the **Order Details**.



CustomerID	Country	Company Name	Contact Name	Contact Title	Address			
12	Argentina	Fabrikam, Inc.	Jean Philippe Bagel	Sales Agent	Cerrito 333			
Order ID	Employee	Order Date	Required Date	Shipped Date	Ship Via	Freight	Ship Name	Ship
10521	Adalsteinsson, Gudn	#####	27-May-1997	02-May-1997	United Package	\$17.22	Cactus Comidas para Llevar	Cerrito 33
Product	Unit Price	Quantity	Discount	Click to Add				
Steeleye Stout	\$18.00	3	0%					
Jack's New England Clam Chowder	\$9.65	10	0%					
Scottish Longbreads	\$12.50	6	0%					
*	\$0.00	1	0%					
10782	Adams, Terry	#####	14-Jan-1998	22-Dec-1997	Federal Shipping	\$1.10	Cactus Comidas para Llevar	Cerrito 33
10819	Abolrous, Hazem	07-Jan-1998	04-Feb-1998	16-Jan-1998	Federal Shipping	\$19.76	Cactus Comidas para Llevar	Cerrito 33
10881	Abu-Dayah, Ahmad	#####	11-Mar-1998	18-Feb-1998	Speedy Express	\$2.84	Cactus Comidas para Llevar	Cerrito 33
10937	Ackerman, Pilar	#####	24-Mar-1998	13-Mar-1998	Federal Shipping	\$31.51	Cactus Comidas para Llevar	Cerrito 33
11054	Adalsteinsson, Gudn	#####	26-May-1998		Speedy Express	\$0.33	Cactus Comidas para Llevar	Cerrito 33
*	(New)					\$0.00		
20	Austria	Proseware, Inc.	Peter Bankov	Sales Manager	Kirchgasse 6			
15	Brazil	Humongous Insurance	Dev Balasubramanian	Sales Associate	Av. dos Lusíadas, 23			

- 4 Close the datasheet.

TIP Notice that because the **Order Date** field is not wide enough to show the available information, a series of # symbols are displayed. To avoid this, you can grab the right edge of the column header and drag it to the right, increasing the column width.



CustomerID	Country	Company Name	
12	Argentina	Fabrikam, Inc.	
Order ID	Employee	Order Date	Required Date
10521	Adalsteinsson, Gudn	29-Apr-1997	27-May-1997

✕ CLEAN UP Retain the **MOfficeProBlank** database for use in later exercises.

Copying and pasting from a datasheet

Access provides great support for the Microsoft Office Clipboard operations. Copy and paste can be used to make copies of tables (with or without data) and copies of forms and reports by using the Navigation pane to select objects, highlight the object, and use Ctrl+C and Ctrl+V to make copies of and paste the objects.

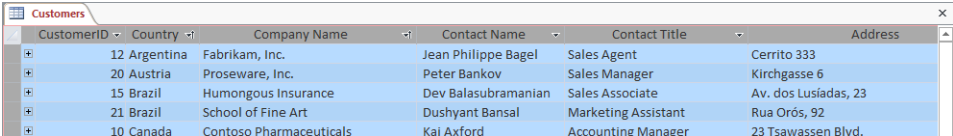
This functionality has some special applicability when you are working in the design tools; for example, with a query, you can copy columns on the query grid, or with a form or report, you can copy sets of controls.

It is also possible to copy rows of data between tables (subject to the tables having an identical structure), or within a table.

In this exercise, you'll copy data to the Clipboard to paste into other applications.

 **SET UP** You need the `MOfficeProBlank.accdb` database from the previous exercise to complete this exercise. Open the database, if it is not already open.

- 1 In the **Navigation** pane, double-click the **Customers** table to open the datasheet.
- 2 Open a copy of Microsoft Excel to view the results of the copy and paste operations.
- 3 Click the upper-left corner of the datasheet. This will select the entire datasheet, which will darken to indicate everything is selected.



CustomerID	Country	Company Name	Contact Name	Contact Title	Address
12	Argentina	Fabrikam, Inc.	Jean Philippe Bagel	Sales Agent	Cerrito 333
20	Austria	Proseware, Inc.	Peter Bankov	Sales Manager	Kirchgasse 6
15	Brazil	Humongous Insurance	Dev Balasubramanian	Sales Associate	Av. dos Lusíadas, 23
21	Brazil	School of Fine Art	Dushyant Bansal	Marketing Assistant	Rua Orós, 92
10	Canada	Contoso Pharmaceuticals	Kai Axford	Accounting Manager	23 Tsawassen Blvd.

- 4 Press **Ctrl+C**, switch to a new sheet in Excel, click in an empty cell, and then press **Ctrl+V** to copy the data.
- 5 Returning to Access, click a column heading to select the column.
- 6 Press **Ctrl+C**, switch to a new sheet in Excel, click in an empty cell, and then press **Ctrl+V** to copy the column of data.

- 7 Returning to Access, in the datasheet, click in a cell under the column **Company Name**. Move the pointer towards the upper-left corner of the cell as the pointer shape changes to a large + symbol. Click and drag the pointer down and over associated cells.

CustomerID	Country	Company Name	Contact Name	Contact Title
12	Argentina	Fabrikam, Inc.	Jean Philippe Bagel	Sales Agent
20	Austria	Proseware, Inc.	Peter Bankov	Sales Manager
15	Brazil	Humongous Insurance	Dev Balasubramanian	Sales Associate
21	Brazil	School of Fine Art	Dushyant Bansal	Marketing Assistant
10	Canada	Contoso Pharmaceuticals	Kai Axford	Accounting Manager
7	France	Coho Winery	Jose Luis Auricchio	Marketing Manager
9	France	Contoso, Ltd	Kam Foo Aw	Owner
18	France	Margie's Travel	Yossi Banai	Owner
23	France	Tailspin Toys	Ed Banti	Assistant Sales Agent
26	France	Wide World Importers	Dave Barnett	Marketing Manager
1	Germany	A. Datum Corporation	Dimple Arya	Sales Representative

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23	France	Tailspin Toys	Ed Banti	Assistant Sales Agent
26	France	Wide World Importers	Dave Barnett	Marketing Manager
1	Germany	A. Datum Corporation	Dimple Arya	Sales Representative

- 8 Press **Ctrl+C**, switch to a new sheet in Excel, click an empty cell, and then press **Ctrl+V** to copy the data.

TIP An interior area of cells can also be selected by clicking into the first cell, then holding down the Shift key and clicking into the bottom right cell.



CLEAN UP Retain the MSOfficeProBlank database for use in later exercises, and close it.

Changing between tab pages and overlapping windows

Surprisingly, deciding if you want to change between tab pages and overlapping windows is probably one of the most important decisions you can make with a database. It is key for determining what you want to get out of Access, and how you envision using the product.

The first question you should ask is, "Do I intend to use Access as a tool for others to use?" If others will use what you construct in Access, then ask: "To what extent do I want to allow

others to use the underlying product, and do I want to allow them to make changes to what I've created?"

Often, people who use Access for themselves don't really care much about the fine detail of the interface, because they just make changes according to the tasks they want to accomplish. Basically, their goal is more flexibility and productivity with important tasks.

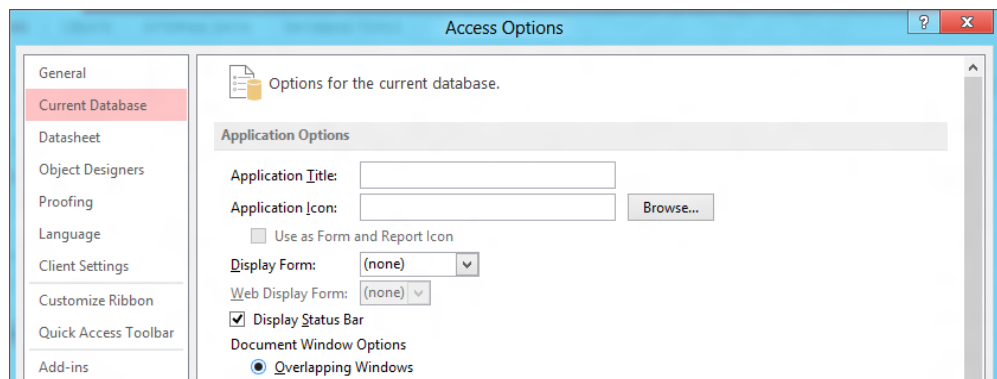
However, when you build something for other people to use, you must think a great deal about whom they are, what they're trying to achieve, and what you'll allow them to do.

Access supports two basic user interface (UI) presentations, and this is set as an option for the database. You can choose a tabbed interface, which is what we have seen so far in this chapter, where each object opens in a separate tab. The second option is to use overlapping windows. The tabbed interface can be used when designing something for your own use, but it's often more desirable to use overlapping windows if you want to construct something for others to use. One reason is you can start to create windows which pop up on top of other windows.

In this exercise, you'll work with tabbed interfaces and overlapping windows.

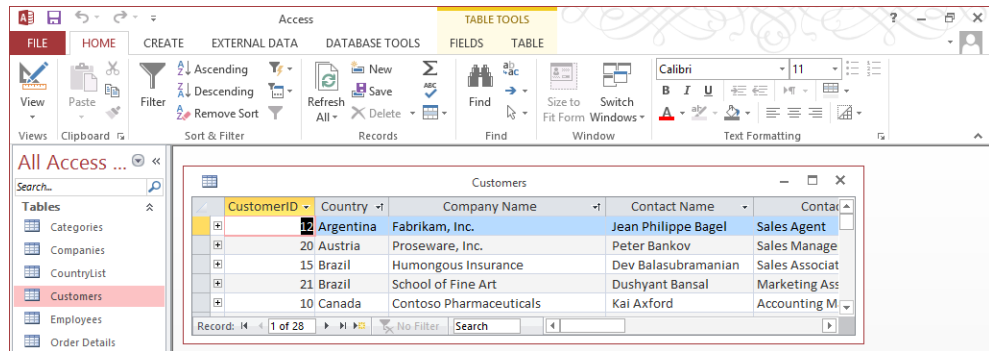
→ SET UP You need the **MSOfficeProBlank.accdb** database located in the **Chapter37 practice file folder** to complete this exercise. Open the **MSOfficeProBlank.accdb** database.

- 1 From the **File** tab, choose **Options**.
- 2 Select the **Current Database** option on the left.
- 3 Change the **Document Window Options** to **Overlapping Windows**.



- 4 Click **OK**, and **OK** again to close the database prompt.

- 5 Close and re-open your database.
- 6 In the **Navigation** pane, double-click any table and notice how the table opens in a separate window.



TIP Notice that you can still maximize the window by clicking the second square from the far right in the table window.

CLEAN UP Retain the **MSoftwareProBlank** database for use in later exercises.

Configuring Access options

In addition to the context-sensitive ribbon used to interact with Access, above the ribbon in the upper-left corner is the Quick Access Toolbar. The Quick Access Toolbar can be customized to display icons that help you work more efficiently with Access.



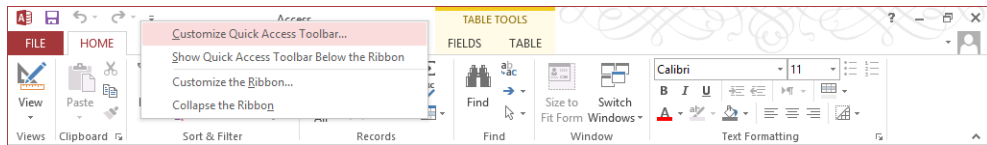
Although both the main ribbon and the Quick Access Toolbar can be customized, it is more common to customize the Quick Access Toolbar by adding features.

In this exercise, you'll add features to customize the Quick Access Toolbar.

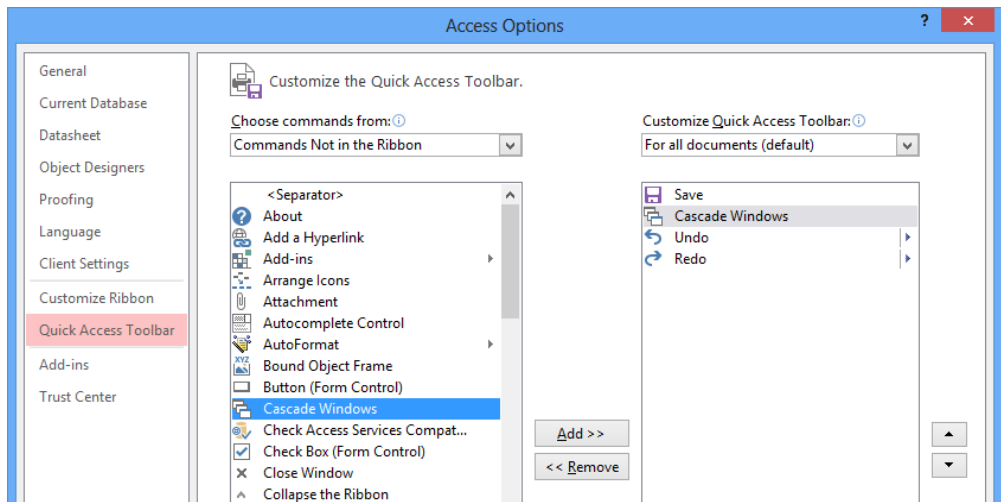
SET UP You need the **MSoftwareProBlank.accdb** database from earlier in this chapter to complete this exercise. Open the database, if it is not already open.

TIP Access also supports extensive features for replacing the built-in ribbon with very powerful custom ribbons; this requires the use of more advanced VBA programming.

- 1 Right-click the **Quick Access Toolbar** and select **Customize Quick Access Toolbar**. Make sure your pointer is positioned to the right of the main Access icon in the very top-left corner. This will then display the **Access Options** screen.

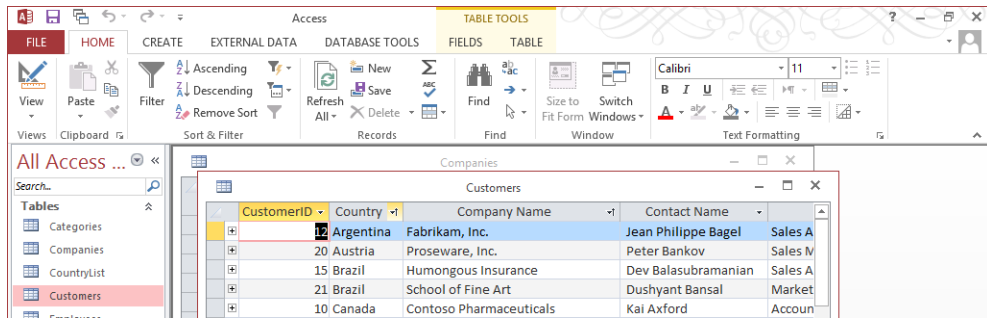


- 2 Use the **Choose commands from** drop-down list to select **Commands Not in the Ribbon**.



IMPORTANT To display the effect of cascading windows, you need to have changed the current database option to display overlapping windows as described in a previous section.

- 3 Click **Cascade Windows**, then click **Add**. Click **OK** to save your changes.
- 4 Open both the **Companies** and **Customers** datasheets by double-clicking each table in the **Navigation** pane.
- 5 Click the new **Cascade Windows** icon on the **Quick Access Toolbar** to cascade the windows.



TIP Both for the main ribbon and for the Quick Access Toolbar, there is an option to unpin the ribbon with a right-click. If you chose this option, it will minimize the ribbon (providing more area in the desktop) and then you can extend the ribbon to show choices that float on top of your desktop when you point to the ribbon. This option applies more obviously to the main ribbon than to the Quick Access Toolbar.

 **CLEAN UP** Retain the MSOfficeProBlank database for use in later exercises.

Linking Access to external data

Access has a great set of features for linking to data that is held in other systems. When a database is linked to data, if the data is then changed outside of the database for another system and the linked table is closed and then re-opened or refreshed by pressing Shift+F9, the changes in the data will appear. Earlier in this chapter, you learned that importing data makes a copy of the data. With linking, you dynamically view the data in another system or in an external file.

A link to data in another system will appear in the Navigation pane with a different icon than the standard local Access Table Icon. When you open a linked table in a number of situations, (depending on the type of data you are linked to), you can directly edit the data in the linked table. This changes the data stored in the originating file or system.

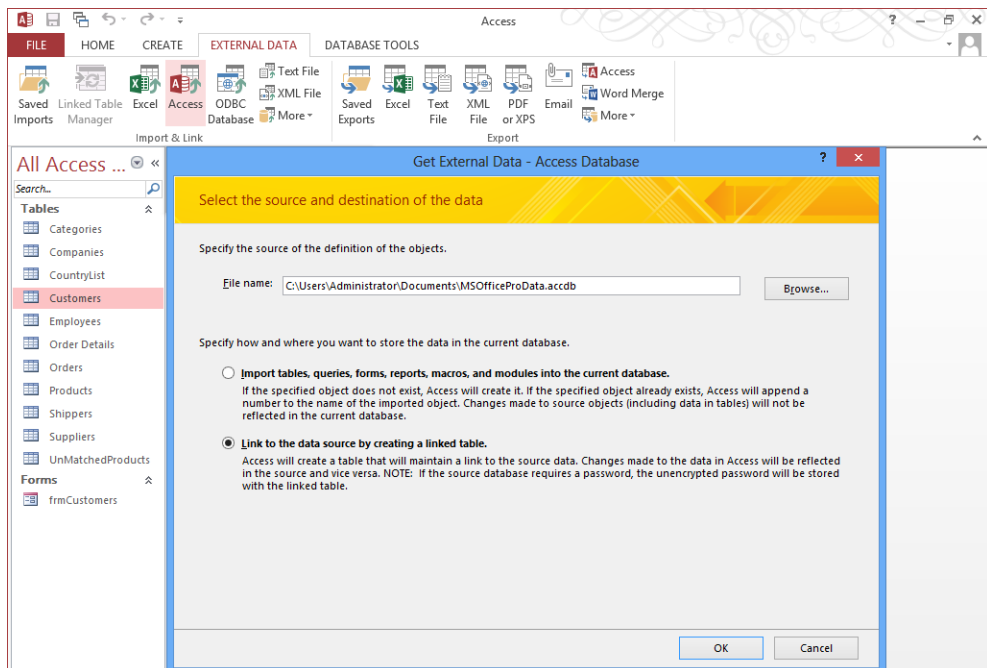
In organizations where data is held in IBM mainframes, on a Microsoft SQL Server server, on Excel spreadsheets, on Microsoft SharePoint, and in other sources, Access is a very powerful tool for both importing and linking to data. You can also use Access to produce management reports for data held in other systems.

In this exercise, you'll link to a table of data in another Access database.

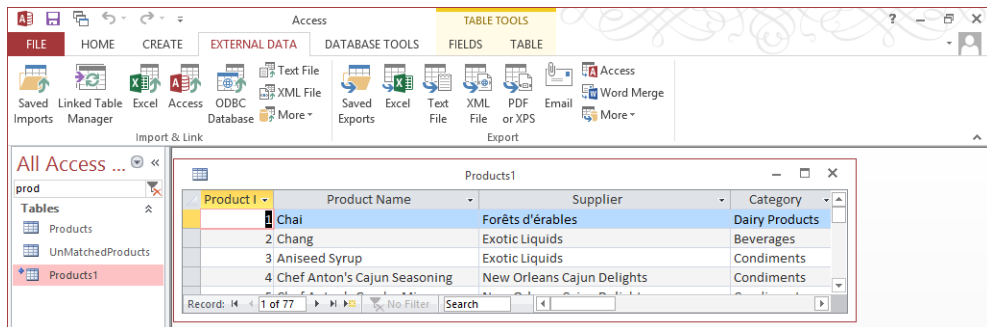
➔ **SET UP** You need the **MSOfficeProBlank.accdb** database created in earlier exercises and the **MSOfficeProData.accdb** database located in the **Chapter37** practice file folder to complete this exercise. Open the **MSOfficeProBlank.accdb** database, if it is not already open.

TIP When you link from one Access database to another Access database, if you want to change the design of the table, then you need to do that in the other database. You cannot change the design by using the linked table. Although this may seem like a restriction, this is also a very clever feature, which is not shared by data when linked to anything other than Access. If you change the design of the linked table in the other Access database, then the linked table will automatically know that the design has been changed. Then it will show those changes (normally when you do this linking to data in other systems, you need to refresh the linked table with the **Linked Table manger** to view the changes).

- 1 Click the **External Data** tab.
- 2 Click **Access** in the **Import & Export** group.
- 3 Locate the **MSOfficeProData.accdb** database file in the **File Name** box.
- 4 Change the default selection to **Link to the data source** and click **OK**.



- 5 Select the **Products** table, and click **OK**.



Notice that the icon for the linked table to products is slightly different than the one for a table held inside your Access database. If you open this table, you can edit, delete, insert, and update the data, and the data will change in the linked database. This is a very clever feature that allows Access to update the original data. Also in this example, the linked table name is shown as Products1, because you already have a table called Products.

TIP Access databases are often designed where all the items except the tables are held in one database, and the tables are held in a different database. This method enables users to have their own copy of the application on their local hard drive but to link to and share the data from another Access database on the network.



CLEAN UP Close any open datasheets and retain the MSOfficeProBlank database for use in later exercises.

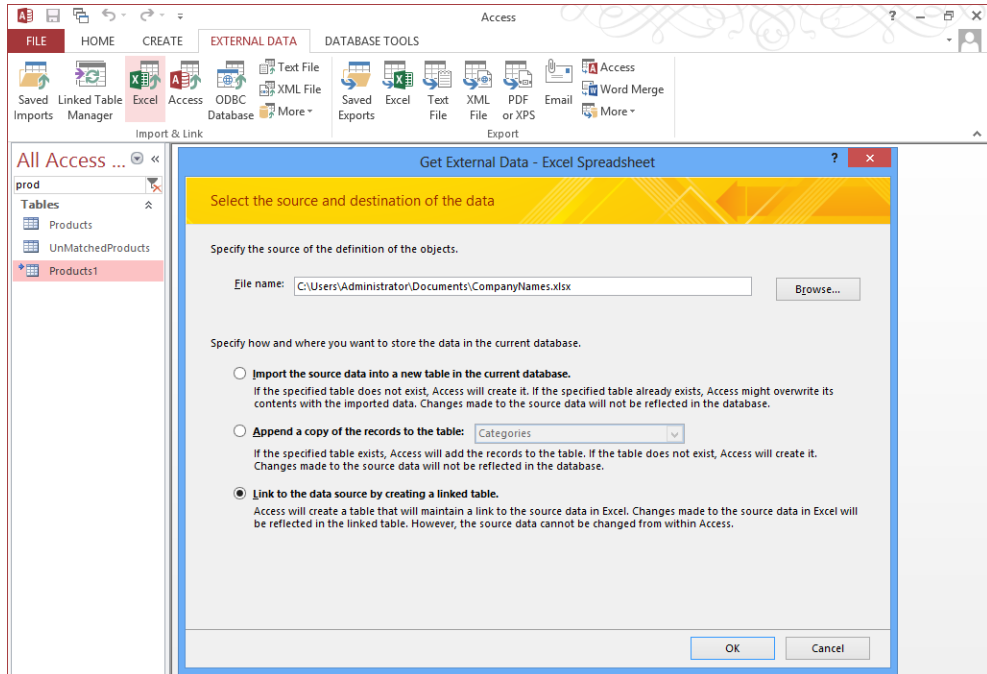
Linking to data in Excel

Linking Access together with Excel means that you can share data between Office applications and take advantage of the strengths of each product. For example, you could have data in Excel, which you need to combine with data in Access, and rather than repeatedly importing a copy of the data from Excel, linking means that Access can work with a dynamic link to the Excel data. Therefore, when the data in Excel is updated, Access will always have the latest changes in the data.

In this exercise, you'll link data in Excel.

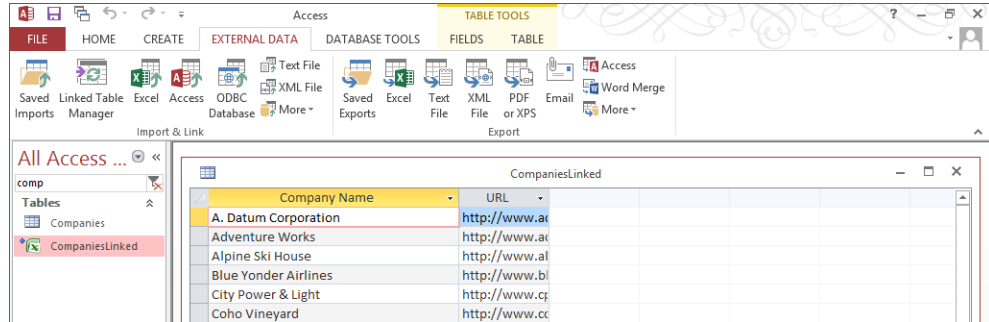
→ SET UP You need the **MSSOfficeProBlank.accdb** database created in earlier exercises and the **CompanyNames.xlsx** spreadsheet located in the **Chapter37** practice file to complete this exercise. Open the database, if it is not already open.

- 1 Click the **External Data** tab.
- 2 Click **Excel** in the **Import & Export** group.
- 3 Locate the **CompanyNames.xlsx** file in the **File Name** dialog box.
- 4 Change the default selection to **Link to the data source** and click **OK**.



This will then launch the Link Spreadsheet Wizard.

- 5 Click **First row contains column headers**. Then click **Next**.
- 6 Because the sample database has already imported this table, change the default linked **Table Name** to **CompaniesLinked**. Click **Finish**.
- 7 Click **OK**. The table has now been linked.



A very subtle difference between this and a linked Access table in which you can change the data, is that with a linked Excel table, you cannot change the data. So, what you link to can determine the available features when you are working with the linked data.

TIP After you link to tables from other sources, you may need to refresh the links to allow for changes in the design of tables in the other systems (for example, when using ODBC) or to allow for file paths that have changed. The Link Table Manager in the External Data Tab – Import & Link Group can guide you through the process of changing the links.

✕ CLEAN UP Close any open datasheets and retain the MSOfficeProBlank database for use in later exercises.


Compacting, repairing, and encrypting a database

When you work with a database, after a period of time, the organization of the data becomes out of order, in terms of how the data is physically stored on the storage medium. Compacting the database reorganizes it so it will be more efficient to work with the data in the database.

If the database is shared by more than one user, then you need to ensure that no one else is using the database before you compact it. How often you need to compact a database depends on how often the database is used, and how many changes are made to the data. As an example, an individual's Accounts database might only get compacted maybe once a year, but at the other extreme, a shared database with forty users could need compacting every couple of days.

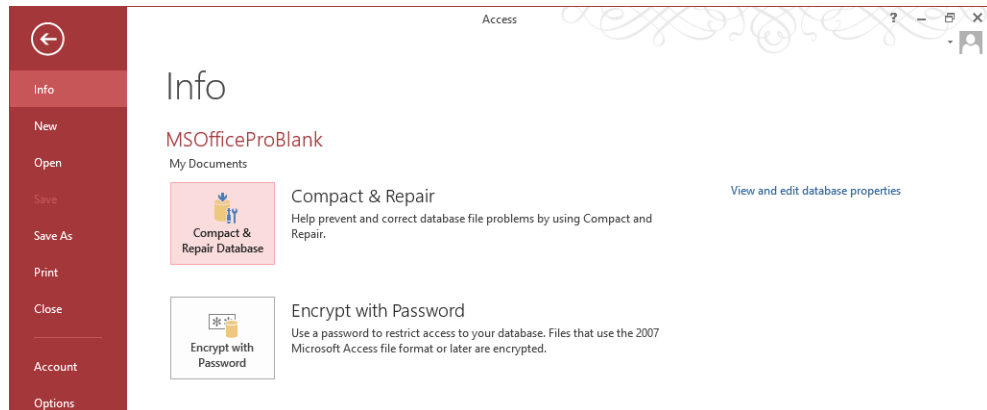
With the idea of compacting and repairing a database, the repair function fixes something that has gone wrong with the structure of the files. Because Access is a shared file database, and certain parts of the database (notably indexes) get copied into a local computer's memory, and users can switch off their computers, inconsistencies in the database indexing can occur. The repair operation fixes these inconsistencies. Again, deciding when to perform a repair operation depends upon how much data is changed and how many shared users are working in the database.

In this exercise, you'll perform a repair operation in a database.

 **SET UP** You need the **MSSOfficeProBlank.accdb** database created in earlier exercises to complete this exercise. Open the database, if it is not already open.

IMPORTANT This operation requires only a single action, and if the database is shared, all other users must have closed any copies of the database, or closed any other databases that are linked to the database that you will compact.

- 1 Click **File, Info**, and then **Compact & Repair Database**. The database will then be compacted, repaired, and re-opened.



TIP If you have a database that contains a large amount of data, and/or is used by a number of users on a regular basis, and you need to compact and repair the database every couple of days, then this is a good indication that you should consider converting the data storage to a SQL Server solution. You can still keep Access as a front-end, but moving the data to a SQL Server solution will then require less maintenance.

CLEAN UP Retain the MSOfficeProBlank database for use in later exercises.

Encrypting with a password

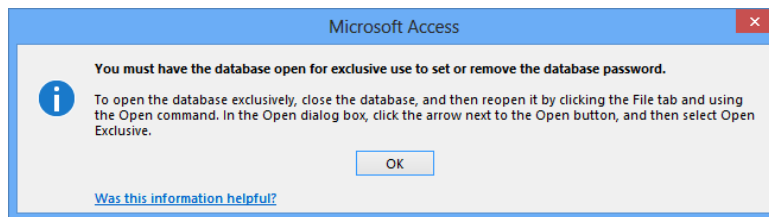
If you need to protect your database, then Access offers an option that will both encrypt the data and secure the database with a password. The level of security you will obtain here is excellent, but it would not necessarily protect your data against a determined hacker. You should plan for using additional techniques to secure the data as appropriate to your security needs. This level of security will certainly prevent casual file browsers from opening or deciphering your data.

Database passwords and encryption are an excellent offering to provide an additional level of protection for certain files to augment network security.

In this exercise, you'll encrypt a database with a password.

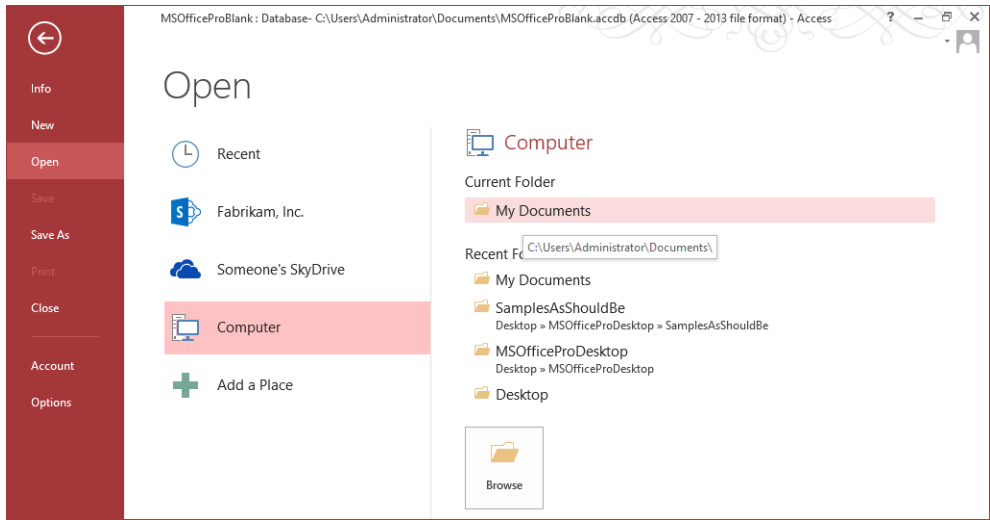
SET UP You need the MSOfficeProBlank.accdb database created in earlier exercises to complete this exercise. Open the database, if it is not already open.

- 1 Click **File, Info**, then **Encrypt with Password**. The following warning will then most likely appear:

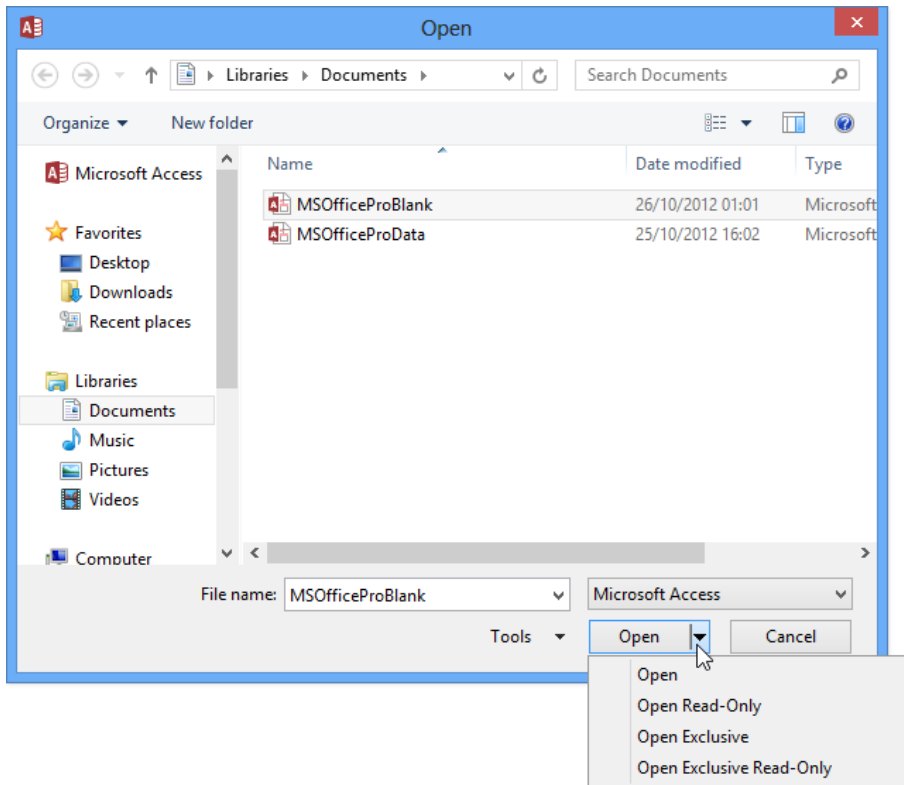


In order to apply or remove a password or encryption from a database, you need to open the database using a very specific technique.

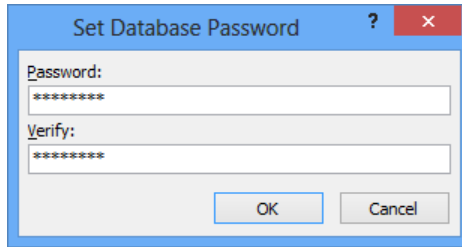
- 2 Click **OK** to close the message. Use the **Open** page to browse to or otherwise locate your database.



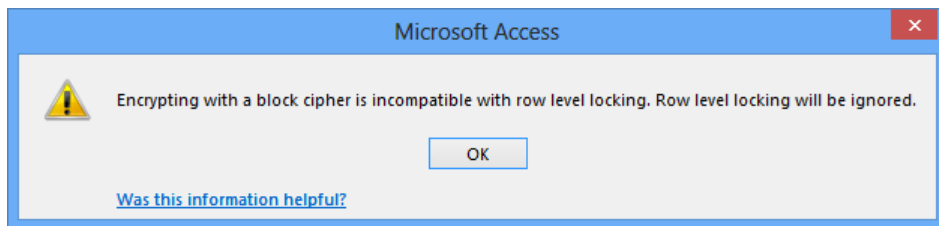
- 3 When prompted to select your database, ensure that you use the **Open** option to **Open Exclusive**.



- 4 Click **File, Info**, then **Encrypt with Password**. You will then be able to create a password and encrypt your database. Enter and verify your password. Click **OK**.

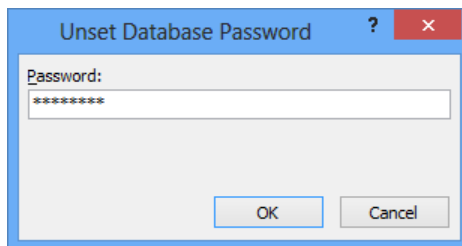


- 5 You will also receive the following warning when you choose this option. Click **OK**.



TIP This warning means that although Access is designed to allow multiple users to share data, because you have chosen to further constrain the sharing of data with encryption, Access can no longer share data with other users with the normal flexibility of locking individual rows, because it will lock pages of data. This is not normally a serious limitation in a database with just a few users. However, for a database that is shared with a larger number of users, you would probably not want to impose encryption. Encryption reduces performance and offers less flexibility in the method for locking data.

- 6 Return to the **Info** page, and click **Decrypt Database**.
- 7 Enter your password to decrypt the database, then click **OK**.



CLEAN UP Close the **MOfficeProBlank** database and save the file.

Key points

- Access can create two distinct types of databases. The first is a desktop database. You can either create a blank desktop database or use one of a number of template desktop databases. The second type of database is a Web App, which is discussed in Chapter 40, “Creating and sharing a Web App.”
- Data can be imported from a wide variety of Office files and other databases. Data can be exported from both tables and queries (discussed in the next chapter).
- Navigating the user interface effectively involves understanding how to use both the Navigation pane and ribbon. The Quick Access Toolbar provides a useful tool for customizing how you work with Access.
- There are a large number of configurable settings in a database, and these are set by using the Backstage view database options.
- Access allows you to link to data held in other database systems or files. When Link Tables is used, the data is held outside of Access and will appear to change as data is modified in the source application. This makes Access a fantastic tool for gathering and reporting on data held in other systems.

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