# PART   I

An Overview of Access

LEARN TO:

- *Get around in Access*

- *Use Access in one short evening*

- *Open databases and projects*

- *Make the most of Access, Office, and Windows together*
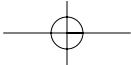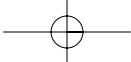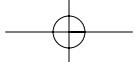
CHAPTER $\textbf{1}$

Getting Started and Getting Around

FEATURING:
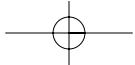
Microsoft Access is a database management system, or DBMS. As the name implies, a DBMS helps you to manage data that's stored in a computer database. The data you manage can be virtually anything, including:

- Names and addresses
- Business contacts, customers, and sales prospects
- Employee and personnel information
- Inventory
- Invoices, payments, and bookkeeping
- Libraries and collections
- Schedules, reservations, and projects

You may already know what kinds of data you plan to manage with Access, and you may already be familiar with other database programs and the basic concepts of database management. If not, you'll learn more about databases in the next chapter. But whether you're a seasoned veteran eager to start working in Access or a database newcomer wondering where to begin, the first step is to learn how to start Access and use its extensive Help system to coach you along as you work.

Access Isn't Just for Techies!

Don't worry if you know nothing about databases and don't want to become an expert on the topic. Access wizards can guide you through almost any step, and they can create databases for you automatically. So even if you need to set up something as complex as a system for managing orders, inventory, or assets—or something as simple as a list of contacts and birthdays—Access wizards can take care of the grunt work while you focus on getting useful information from your computer. You'll have a chance to try wizards during the hands-on tour in Chapter 3 and in many other chapters of this book.

If you're a technical type, never fear! Access has more than enough to make you happy. It's a full-featured application development system that includes the Visual Basic programming language and other tools for setting up sophisticated applications for yourself and your customers. You'll learn more about these features in Parts Four and Five.
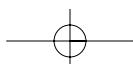
Starting Access

To start Microsoft Access:

1. Start Windows in the usual manner.

TIP   If you're using Microsoft Office and have added Access to the Microsoft Office Shortcut Bar, you can start Access by clicking the appropriate button on the Office Shortcut Bar (see Chapter 4). Or if you've set up a shortcut icon for Access on the Windows Desktop, you can double-click that icon to start Access. Then skip to step 3 below.

2. Click the Start button on the Windows Taskbar and then choose Programs ➢ Microsoft Access.

After a short delay, you'll see the Microsoft Access startup dialog box shown in Figure 1.1. (If you've just installed Access, the list box below the Open an Existing File option is empty.)

FIGURE 1.1

The Microsoft Access startup dialog box. From here you can create a new database, a data access page, or a project. You can also open an existing file, or click Cancel to go to the main Access window.

Click here and then OK to create a new, blank database.

Click here and then OK to create a new database, page, or project.

Click this option to open an existing database. Then click a recently used database name or click More Files to search for and open a database. Finally, click OK.

Click Cancel to go directly to the main Access window.

3. Do any of the following:

- **To create a new blank database**, choose Blank Access Database and then click OK.
- **To use the Database Wizard to create a new database**, choose Access Database Wizards, Pages, and Projects. Then click OK to open the New dialog box. (There's more about creating new databases in Chapter 5.)
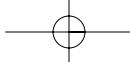
- **To create a data access page or a project**, follow the preceding instructions for creating a new database. Then refer to Chapter 14 for details on working with data access pages, or Chapter 30 for projects. (You'll learn more about the difference between databases and projects later in this chapter.)

- **To open an existing database or project**, choose Open an Existing File. If a list of database names appears, choose a recently used database name in the list or click More Files so you can look for the database you want to use. Click OK. See "Opening an Existing Database or Project" later in this chapter for more details.

- **To go to the main Microsoft Access window** (shown in Figure 1.2) without creating or opening a database, click the Cancel button or press Esc.

FIGURE 1.2

The main Microsoft Access window that appears when you click Cancel in the startup dialog box and anytime you close an Access database. You'll also see this window if Access is set up to bypass the startup dialog box.
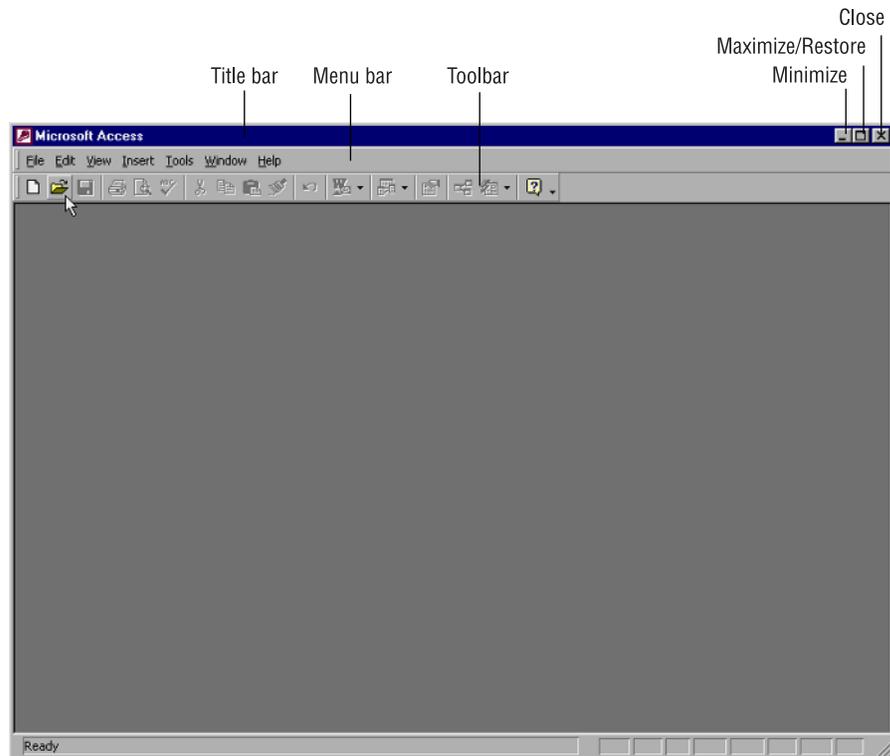

NOTE If Access is customized to bypass the startup dialog box, you'll be taken to the main Access window as soon as you finish step 2, above. We explain how to bypass the startup dialog box later in this chapter.
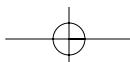
Advanced users can learn about optional command-line startup switches for Access in Chapter 16 and by searching the Access Help index for *Startup Options, Command-Line Options*. We'll explain how to use Access Help in the "Getting Help" section, later in this chapter.

Organizing the Start ➢ Programs Menu Items

If your Start ➢ Programs menu has too many entries or isn't organized the way you like, you can rearrange it easily. Suppose you want to move Microsoft Access and other Microsoft Office programs from the main Start ➢ Programs menu into a Microsoft Office submenu that looks something like the image below.
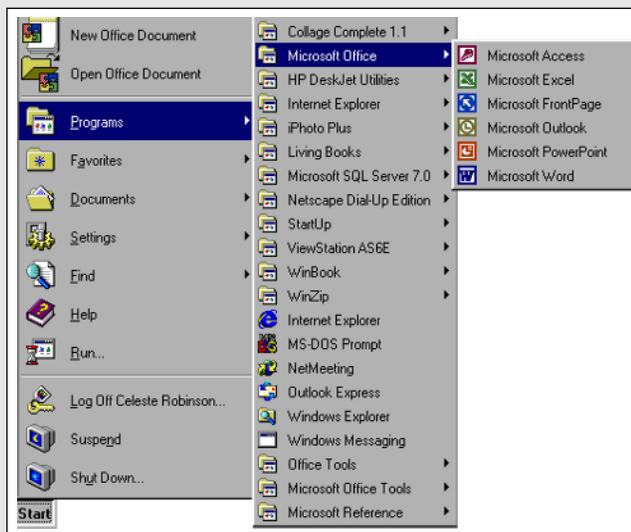
All it takes is a little knowledge of Windows Explorer and these basic steps:

1. Right-click the Start button on the Taskbar and choose Explore.

2. Click the Programs folder in the left pane of the Exploring window. (It's below the Start Menu folder.) The right pane will show the contents of the Programs folder.

3. Right-click your mouse on an empty part of the right pane of the Exploring window and choose New ➢ Folder from the shortcut menu.

4. Type a new folder name, such as Microsoft Office, and press Enter.

Continued ▮▶
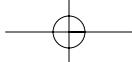
CONTINUED

5. Click the + sign next to the Programs folder in the left pane; then use the vertical scroll bar to scroll the left pane until you can see the new folder you created and named in steps 3 and 4.

6. Drag the program (or folder) you want to move from the right pane to your new folder in the left pane.

7. Repeat step 6 as needed and then click the Close button in the Exploring window.

For more details on customizing the Start menu, choose Start ➢ Help and click the Index tab. Then type **Start Menu, Reorganizing** and press Enter. To learn more about Windows Explorer, look up topics below *Windows Explorer* on the Index tab in Help.

Creating a Desktop Shortcut

You can double-click a shortcut icon on the Windows Desktop to launch a program or open a file. To quickly add an icon that will launch the Access program from the Desktop, minimize or close any open windows and then follow these steps:

1. Use Windows Explorer to open the folder that contains Microsoft Access. For example, right-click the Start button on the Windows Taskbar, choose Explore, and navigate to the `Program Files\Microsoft Office\Office` folder. (It's usually on drive C.)

2. On the right side of the Explorer window, locate the Msaccess program icon. It will appear as a key next to the program name, `msaccess.exe`.

3. Hold down the right mouse button while you drag the icon to the Windows Desktop. Release the mouse button.

4. Choose Create Shortcut(s) Here from the shortcut menu.

In the future, you can start Access by double-clicking the Shortcut to Msaccess.exe icon on your Desktop. To discover other ways to create shortcuts for Access, look up the *Shortcuts* topics in the Access Help index or the Windows Help index. (To get Windows Help, click the Start button on the Taskbar and choose Help.)
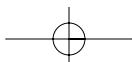
Opening an Existing Database or Project

In word processing programs, you work with documents. In spreadsheet programs, you work with worksheets. In database management systems, such as Access, you work with *databases*. Chances are you'll want to create your own database. But you can get some practice now by exploring one of the sample databases that comes with Access.

NOTE In Access, you can also work with *projects* stored in .adp files. A project holds tools like forms and reports for working with SQL Server data. See "And What About Projects?" later in this chapter for more information on Access projects and how they are different from Access databases.

To open a database or a project:

1. Do one of the following, depending on whether you're starting from the startup dialog box, from the main Microsoft Access window, or from the Windows Desktop:

- **From the startup dialog box** (refer to Figure 1.1), choose Open an Existing File. (This is the default choice.) Then if the name of the database or project you want to open is shown on the list, double-click that name and you're done. If the name isn't on the list, double-click More Files and continue with step 2. (If no list appears, click OK and continue with step 2.)

TIP As usual in Windows, you can choose an option from a list by clicking it and then clicking OK (or whatever button carries out the default command), or by clicking the option and pressing Enter. Or for quicker selection, try double-clicking the option you want.

- **From the main Microsoft Access window** (refer to Figure 1.2), choose File ➤ Open, click the Open toolbar button (shown at left), or press Ctrl+O. You'll see an Open dialog box, similar to the example shown in Figure 1.3.

TIP If you recently used the file you want to work with, try this tip to open it quickly: Choose File from the menu bar, and look for the file name near the bottom of the File menu (just above the Exit option). Then click its name or type the number shown next to the name.
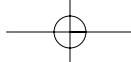
FIGURE 1.3

The Open dialog box.

This drop-down list shows the files you chose recently.

Open the highlighted database name.
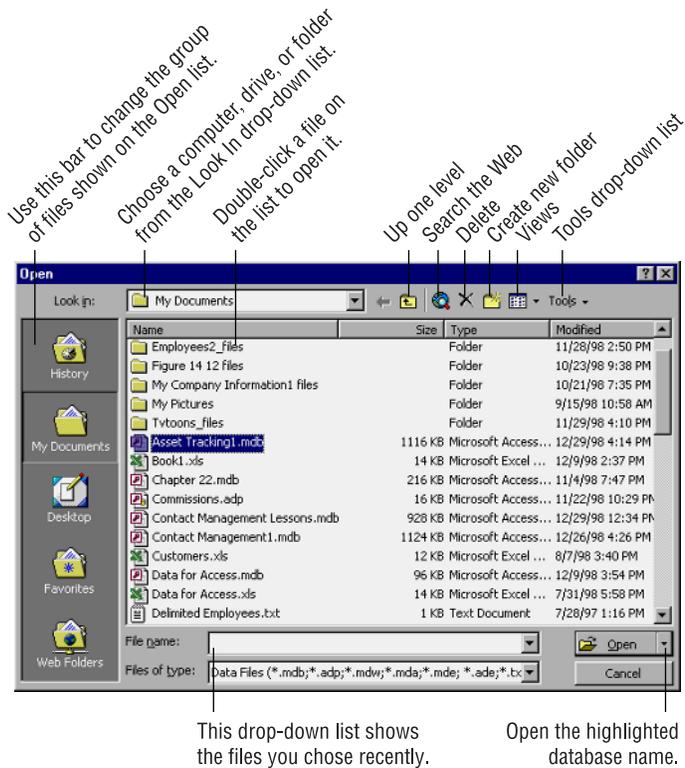
• **From the Windows Desktop**, locate the desired database or project using standard techniques in Windows Explorer, My Computer, or Network Neighborhood. When you find the file you want to use, double-click its name or icon (see the sample icon, shown at left). Or if you've used the file recently, click the Start button on the Windows Taskbar, choose Documents, and then click the name of your database in the list that appears. Access will start, and the database or project will open. You're done, so you can skip steps 2 through 4.

2. Use any of these methods to find the database or project you want to open:

• **To see the files you opened most recently**, click the button for History on the left side of the Open window.

• **To show the files in My Documents or on the Desktop** without having to navigate using the Look In drop-down list, click the My Documents or Desktop button.
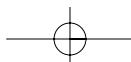
- **To open an object shown in the list below Look In**, double-click the appropriate object icon or name.

- **To choose the computer, drive, or folder where the database is stored**, click the Look In drop-down list button and then click the appropriate item.

- **To open the folder that's just above the currently selected folder**, click the Up One Level button in the Open dialog box, or click anywhere in the list below Look In and then press Backspace.

TIP   To learn the purpose of any toolbar button in a window or dialog box, move your mouse pointer to that button and look for the ScreenTip near the mouse pointer. See "Using the Toolbars and Menu Bar" later in this chapter for more information.

- **To display a list of your favorite databases and folders**, click the Favorites toolbar button. The list below Look In will then show your favorite folders and databases only.

- **To add an item to your Favorites list**, make sure the appropriate item appears in the Look In text box or click an item name in the list below Look In. Then choose Add to Favorites from the Tools drop-down list.

- **To manually enter a drive, directory, and/or file name**, type the appropriate information into the File Name text box in the lower part of the Open dialog box or choose an item from the File Name drop-down list.

- **To change the appearance of the list below Look In**, click the Views button and select List, Details, Properties, or Preview.

- **To search for a database or project**, click the Tools drop-down list and select Find to open a dialog box you can use for searching.

TIP   You can delete, rename, and do other handy operations on items from the Open dialog box. To begin, right-click an item in the list below Look In. Then choose an option from the shortcut menu.

3. If you're choosing the database or project from the list below Look In, make sure its name is highlighted on the list. (Click the name if necessary.)

4. Click the Open button. (As a shortcut for steps 3 and 4, you can double-click a filename in the list below Look In.)
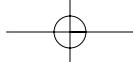
The database or project will open, and you'll see the database window or a form that either describes the database or lets you work with it.

TIP If the database or project you're planning to open usually displays a form, but you'd prefer to bypass that form and go directly to the database window, hold down the Shift key while you open the file. This action bypasses the form and any options that are set in the Startup dialog box (Tools ➢ Startup).

As Figure 1.3 shows, the Open dialog box contains many buttons and special features that we haven't mentioned here. If you've played with other Open dialog boxes in Microsoft Office or you've spent some time with Windows Explorer, you'll learn the fine points quickly. For more guidance, click the ? button in the upper-right corner of the Open dialog box and then click the part of the dialog box you're curious about. Feel free to experiment!

Opening the Sample Northwind Database

To use the Northwind database that comes with Access, you have to make sure it gets installed. By default, it gets installed on first use, which means the first time you try to use it, it will be copied from your Office CD to your computer. For this to work, you have to select `Northwind.mdb` from the File menu before it gets overwritten by other databases you open after you first install Access.

If you don't find `Northwind.mdb` on the bottom of your File menu, run Setup for Office again, and click Add or Remove Programs. In the window that lets you select the programs to install, click the Expand button for Microsoft Access for Windows. Then expand Sample Databases and change the setting for Northwind Database from Installed on First Use to Run from My Computer. Then click Update Now. Once the Northwind database is installed, you can open it this way:

1. Choose Open an Existing File from the Microsoft Access startup dialog box. Then highlight More Files (if it's available) and click OK.

   Or

   Choose File ➢ Open from the main Microsoft Access window.

2. Using the Look In drop-down list, navigate to the folder `C:\Program Files\Microsoft Office\Office\Samples`.

3. Double-click `Northwind.mdb` in the list below Look In.

4. Click OK to go to the database window if the Welcome form appears.
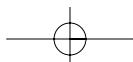
Maximizing Your On-Screen Real Estate

The Windows Taskbar can take up valuable on-screen real estate that you might prefer to make available to your database objects. Fortunately, hiding the Taskbar temporarily and bringing it into view only when you need to is easy. (Most screen shots in this book were taken with the Taskbar hidden.)

To hide the Taskbar temporarily, right-click any empty spot on the Taskbar, choose Properties, make sure the Always On Top and Auto Hide options in the Taskbar Properties dialog box are checked, and then click OK. In the future, the Taskbar will remain hidden until you move your mouse pointer to the edge of the screen where the Taskbar was lurking the last time you used it. (If you don't remember where the Taskbar was, move the mouse pointer to the bottom, top, left, and right edges of the screen until it pops into view.)

To display the Taskbar permanently again, return to the Taskbar Properties dialog box and deselect (clear) the Auto Hide option. (It's usually best to leave Always On Top checked.) Then click OK.

The *objects* (a term for database components, such as tables and forms) that are part of the Northwind database will appear in the *database window* (see Figure 1.4). You can move, size, maximize, minimize, and restore the database window using all the standard Windows techniques.

What Is a Database, Anyway?

A widely accepted definition of a database is "a collection of data related to a particular topic or purpose." If that sounds a bit stuffy, just think of a database as a general-purpose container for storing and managing information. The information can be anything from names and addresses to details about your business's inventory and orders.

There's more to a database than data. A database can also contain *objects* to help you manage that data, such as forms (for entering and editing data) and reports (for printing data in the format you want). All told, a database can contain any combination of the following types of objects:

Table   Tables are the fundamental structures in an Access database because they store the data you'll be managing (see Chapter 6). Within a table, data is organized into fields (columns) and records (rows). When you open a table, it is shown in a window called a *datasheet view*.

FIGURE 1.4

The Northwind : Database window with Tables selected under Objects.

1. Under Objects, click the type of object you want to work with.

Database window

2. To open an object, double-click its name.
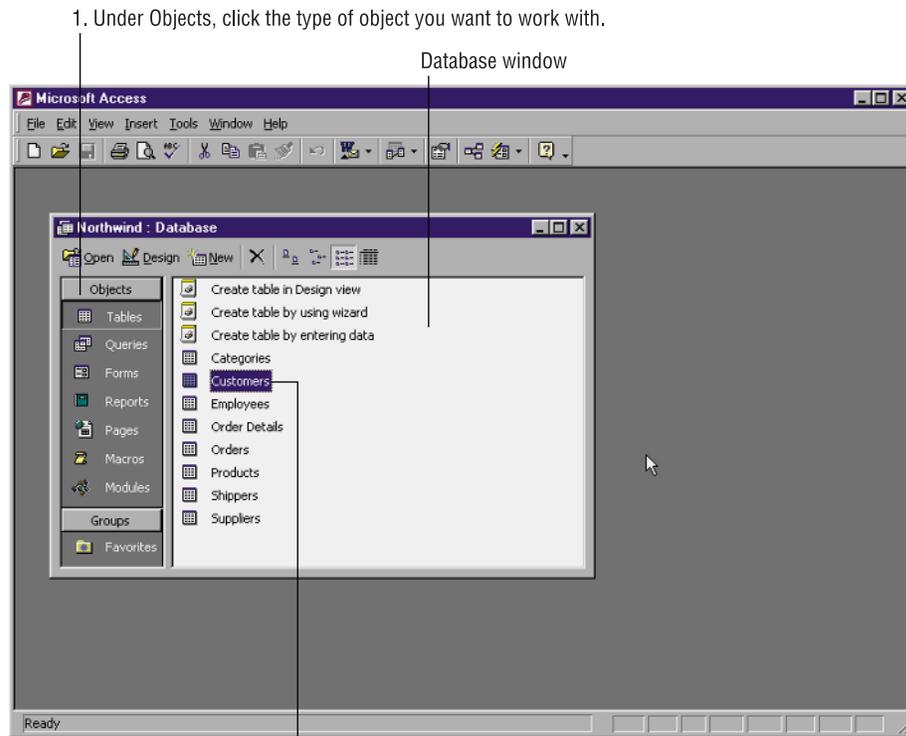
Query   A query is a tool for asking questions about data in your tables and for performing actions on data (see Chapter 10). Queries can answer questions, such as: How many customers live in Connecticut, and what are their names and phone numbers? You can use queries to combine or join data from many separate but related tables. A query can, for example, join Customers, Orders, Order Details, and Products tables to answer the questions: Who ordered left-handed farkledorfers? and What is the value of those orders? Queries can also help you change, delete, or add large amounts of data in one fell swoop. Finally, you can use queries as the basis for your forms and reports.

Form   Forms let you display and enter data in a convenient format that resembles fill-in-the-blank forms (see Chapters 11 and 13). Your forms can be plain and simple or quite elaborate with graphics, lines, and automatic lookup features that make data entry quick and easy. Forms can even include other forms (called *subforms*) that let you enter data into several tables at once.

PART

I

An Overview of Access

Report   Reports let you print or preview data in a useful format (see Chapters 12 and 13). Like forms, reports can be plain or fancy. Examples include mailing labels, lists, envelopes, form letters, and invoices. Reports also can present query results in an easy-to-understand format. For instance, you can print sales by customer, receivables aging, and other management information for use in making business decisions.

Page   Data access pages are HTML files that display data in a format that can be browsed on the Web. Unlike other kinds of database objects, data access pages are stored in their own files instead of in an Access database or project file.

Macro   A macro is a set of instructions that automates a task you need to do often (see Chapter 21). When you run a macro, Access carries out the actions in the macro in the order in which the actions are listed. Without writing a single line of program code, you can define macros to automatically open forms, print mailing labels, process orders, and more. Macros enable you to assemble a collection of tables, queries, forms, and reports into turnkey *applications* that anyone can use, even if they know little or nothing about Access itself.

Module   Like macros, modules allow you to automate and customize Access (see Part Five). However, unlike macros, modules give you more precise control over the actions taken, and they require you to have Visual Basic programming expertise. You may never need to use modules, so don't worry if you're not a programmer.

During the hands-on lessons in Chapter 3, you'll have a chance to create a database complete with tables, forms, reports, a data access page, queries, and even a simple form module. You'll be astounded at how quickly you can do this job when you let the wizards do all the tough stuff for you.

And What about Projects?

An Access *project* is a set of database objects that can be used to work with data stored in tables on an SQL server. A project doesn't hold any tables or queries of its own. The only kind of Access objects it includes are forms, reports, macros, modules, and data access pages. A project can also include these kinds of SQL Server objects: views, database diagrams, and stored procedures.

A project can work with data stored on these servers:

• SQL Server 6.5

• SQL Server 7

• The Integrated Store that comes with Access
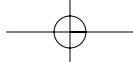
If you'd like to find out more about working with projects, take a look at Chapter 30.

Working in the Database Window

The database window is one of your main tools for using Access. When exploring the sample Northwind database and when creating databases or projects of your own, you'll use this simple three-step process to work with the objects listed in the database window:

1. Choose the *type* of object you want to create, use, or change using the buttons in the bar on the left side of the database window. That is, click Tables, Queries, Forms, Reports, Pages, Macros, or Modules.

2. If you want to use or change an existing object, click its name in the list of objects.

3. Do one of the following:

   • **To create a new object of the type you selected in step 1**, click the New button along the top of the database window.

   • **To use (or view or run) the object**, click the Open (or Preview or Run) button.

   • **To change the object's appearance or structure**, click the Design button.

> **TIP**   As a shortcut for opening (or previewing or running) an object, you can double-click its name in the database window.

What happens next depends on the type of object you selected and on the type of operation you chose in step 3. We'll say more about the various types of objects in upcoming chapters.

Closing an Object

Regardless of how you open an object, you can use any standard Windows technique to close it. Here are three sure-fire methods:

   • Click the Close (×) button in the upper-right corner of the window you want to close (*not* the Close button for the larger Microsoft Access program window).

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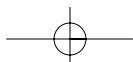
- Choose File ➢ Close from the Access menu bar.

- Press Ctrl+W or Ctrl+F4.

Some Access windows also display a Close button on the toolbar.

If you've changed the object you were viewing, you may be asked if you want to save those changes. Respond to the prompt accordingly.

Uncovering a Hidden Database Window

Sometimes the database window will be invisible, even though you've opened a database. If that happens, you can return to the database window (assuming the database is open) by using any of these techniques:

- Press the F11 key.

- Choose Window ➢ *Name*: Database from the menu bar (where *Name* is replaced by the name of the open database, such as Northwind).

- Click the toolbar's Database Window button (shown at left).

If none of those methods works, close any other objects that are on the screen and try again. If you still can't get to the database window, you've probably closed the database. To reopen the database, choose File from the Access menu bar and then click the name of the database near the bottom of the menu. Or use File ➢ Open as discussed earlier in this chapter.

NOTE   When you open some databases, a custom form window, rather than the database window, will appear. That's because whoever created that database has turned it into an *application*. Even so, pressing F11 usually will take you to the database window (unless the application designer has disabled this feature). Often you can bypass the initial form window and all the other startup options by holding down the Shift key as you open the database.

Changing Your View of Database Window Objects

You can use options on the View menu, or equivalent buttons on the database window toolbar, to change the size of objects and the amount of detail listed for them. Table 1.1 summarizes these options and buttons. In Figure 1.4, for example, we clicked the List button on the toolbar (alternatively, View ➢ List) to display database objects in a list.
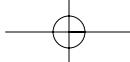
TABLE 1.1: VIEW MENU OPTIONS AND EQUIVALENT TOOLBAR BUTTONS		
VIEW MENU OPTION	**BUTTON**	**DESCRIPTION**
Large Icons		Shows each object as a large icon with the object name below the icon. Object names initially appear in rows; however, you can drag them as needed.
Small Icons		Shows each object as a small icon with the object name next to the icon. Object names initially appear in horizontal rows; however, you can drag them as needed.
List		Shows each object as a small icon with the object name next to the icon. Object names appear vertically, in one or more columns.
Details		Shows each object as a small icon with the object name next to the icon. Object names appear with one object to a line and five columns of detail about each object. The columns list the object's Name, Description, date/time Modified, date/time Created, and object Type.
		• To resize a column, move your mouse pointer to the vertical divider that's just to the right of the column heading. When the pointer changes to a crosshair, drag the mouse to the left or right-click or double-click the divider for a snug fit.
		• To sort a column in ascending order, click the appropriate column header button. To sort the column in descending order, click the column header button again.
		• To add a Description to any object, right-click the object name in the database window, choose Properties, type a description, and then click OK.

Note: You can use the View ➢ Arrange Icons and View ➢ Line Up Icons commands on the menu bar (or right-click a blank area on the database window and choose the View ➢ Arrange Icons or View ➢ Line Up Icons options from the shortcut menus) to rearrange and align icons as needed. (If you don't see these choices on the View menu, click the arrows at the bottom of the menu to show more choices.)
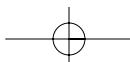
Working with Groups of Objects

At the bottom of the bar on the left side of the database window under Groups is an item called Favorites. This is a place where you can add objects you use frequently, regardless of their type. Then, when you click the Favorites button, these objects appear in the database window together, instead of being separated by type.

Adding Objects to the Favorites Group

If you want to add an object to the Favorites list, first click the button on the Objects bar for the right type, to bring the object into view. Then right-click the object and select Add to Group ➤ 1 Favorites from the shortcut menu that appears. When you click the Favorites button under Groups, you'll see the object you added on the Favorites list.

Creating a New Group

If you're working with a complex database that includes many objects, you might want to group the objects into more than one category. For this reason, Access lets you create your own groups and add them to the database window Objects bar. Any group you add will appear under Groups, along with the Favorites button.

To create a new group, right-click any item under Objects or Groups and choose New Group from the shortcut menu that appears. Then enter a name in the New Group window and click OK.

TIP   After you add new groups to the Objects bar, there won't be enough room to display all the object types. You can use the Show More button just above Groups to bring them into view. Or, resize the database window to make it longer, and drag Groups down to make more room for the Objects list.

Adding Objects to a New Group

To add an object to a new group, follow the instructions for adding an object to the Favorites list with this change: instead of choosing 1 Favorites, select the new group from the shortcut menu that appears after you select Add to Group.

Deleting a Group

If you don't need to use a group anymore, you can remove it from the Groups list on the Objects bar. Just right-click the group's name under Groups and choose Delete Group from the shortcut menu.

PART

I

An Overview of
Access
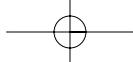
Managing Database Objects

The database window lets you do much more than just open objects. You also can use that window to manage the objects in a database—that is, to copy them, delete them, rename them, and so on. Here's how:

1. If the object you want to work with is currently open, close it, as described earlier under "Closing an Object."

2. If you haven't already done so, choose the type of object you want to work with (by clicking Tables, Queries, Forms, Reports, Pages, Macros, or Modules in the database window). Click the name of an object and then:

   • **To delete the object**, choose Edit ➢ Delete or press Delete; click Yes when prompted for confirmation. To delete the object and move it to the Windows Clipboard (without being asked for confirmation), hold down the Shift key while pressing Delete or press Ctrl+X. (Be careful, there's no undo for this operation; however, you can paste the object from the Clipboard by pressing Ctrl+V.)

   • **To rename the object**, click the object name again (or choose Edit ➢ Rename), type a new name (up to 64 characters, including blank spaces if you wish), and then press Enter.

   • **To copy the object** into this same database, choose Edit ➢ Copy or press Ctrl+C. Then choose Edit ➢ Paste or press Ctrl+V. Enter a valid object name (up to 64 characters), choose other options as appropriate, and then click OK. The copy will appear in the list of objects in its proper alphabetical position. (You may need to scroll through the object names to find the copy.) Copying can give you a head start on designing a table, form, report, or other object that is similar to the object you copied. You can then change the copied object without affecting the original.

   • **To create a shortcut icon on the Windows Desktop for the selected object**, choose Edit ➢ Create Shortcut, specify the Location (if you wish), and then click OK. In the future, you can double-click the shortcut icon on the Windows Desktop to start Access and open the object in one fell swoop.

TIP Another way to create a shortcut to an Access object is to size the Access window so that you can see Access and the Windows Desktop at the same time. (One way to do this is to right-click an empty place on the Windows Taskbar and choose Cascade.) Then, if you want to put the shortcut in a folder, open that folder in Windows Explorer, My Computer, or Network Neighborhood. Finally, drag and drop the selected Access object to the Desktop or folder. You also can drag and drop tables and queries from the database window to Microsoft Excel, Microsoft Word, and other program windows (see Chapter 4).
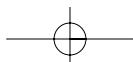
- **To print the object**, choose File ➤ Print, press Ctrl+P, or click the Print toolbar button (shown at left). Then click OK from the Print dialog box to print the entire object.

- **To preview the object before printing**, choose File ➤ Print Preview or click the Print Preview toolbar button (shown at left). When you're done previewing the object, close it as described earlier under "Closing an Object."

- **To save the object with a new name in the same database**, choose File ➤ Save As.

- **To export the object to a Web Page, another Windows program, or to a different Microsoft Access database**, choose File ➤ Export. Complete the dialog box and click OK.

- **To import or link data from another program or database**, choose File ➤ Get External Data and then choose either Import or Link Tables. Complete the dialog box that appears and then click the Import or Link button.

> **TIP**   Many of the operations described above also are available when you right-click an object or right-click any gray area on the database window. See "Opening Shortcut Menus" later in this chapter for details.

See Chapter 7 for more information about moving and copying objects between databases or about interacting with other programs. Or search the Access Help index for any of these topics: *Exporting Data*, *Importing Data*, and *Linking*.

Using the Toolbars and Menu Bar

Toolbars offer time-saving shortcuts to commonly used commands. To use the toolbars:

1. Move the mouse pointer to the toolbar button you want to choose.

2. Wait a moment, and a brief description (called a ScreenTip) will appear near the mouse pointer, as shown below.
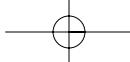
3. Do one of the following, depending on the type of button you're pointing to (see Figure 1.5 for examples):

- **For a square (normal) button**, click the button.

- **For a drop-down button**, you have two choices. Either click the picture part of the button to take whatever action the picture shows, or click the drop-down arrow next to the picture and then choose an option from the menu or palette that appears.

- **For a drop-down list**, click the drop-down arrow next to the box and then choose an option from the list that appears, or click the drop-down arrow and then type your choice into the text box.

FIGURE 1.5

Examples of square (normal) buttons, drop-down buttons, and drop-down lists on toolbars.

Square (normal)   Drop-down list
button

Drop-down   Drop-down button
button (closed)   with palette (opened)
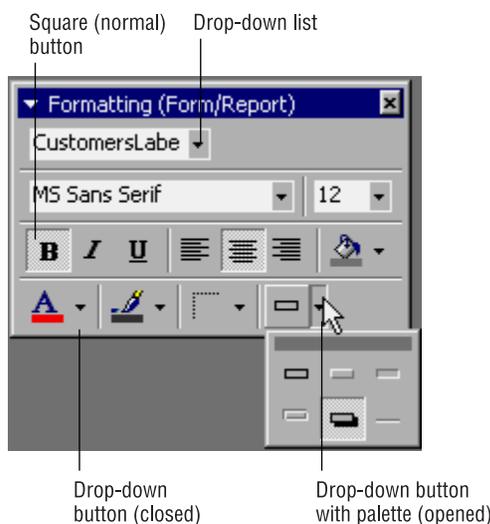
🔲 **NOTE**   If you change your mind about choosing a drop-down button or drop-down list after you've clicked on its drop-down arrow, click the drop-down arrow again or click an empty area outside the toolbar.

⚠️ **TIP**   If the drop-down button opened a palette, you can drag the palette anywhere on the screen. After you detach the palette from its button, the palette remains open and available until you click the Close button on the palette, click the arrow next to the drop-down button, or close the object you're working with.
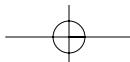
Viewing Toolbars, ScreenTips, and the Status Bar

Toolbars, ScreenTips, the status bar, and other on-screen features are optional and customizable. If you don't see one of these features in Access, chances are it's just hidden (or turned off).

To display (or hide) the status bar or the startup dialog box (shown in Figure 1.1):

1. Open any database window. (The Tools ➢ Options and Tools ➢ Startup commands described below are available only when a database is open.)

2. Choose Tools ➢ Options from the Access menu bar and then click the View tab.

3. Select (check) an option to display (or turn on) the feature; deselect (clear) the option to hide (or turn off) the feature. For example, select Status Bar and Startup Dialog Box to display the status bar and startup dialog box described in Chapter 4. Click OK.

To display or hide ScreenTips (the descriptions that appear when you point to a toolbar button):

1. Choose View ➢ Toolbars ➢ Customize from the Access menu bar and then click the Options tab.

2. Select (check) Show ScreenTips on Toolbars to show a brief description of what a toolbar button does when you point to it.

3. Click Close.

You also can customize many startup features for the current database (including whether the database window, status bar, and built-in toolbars appear). To do so, choose Tools ➢ Startup. You'll see the Startup dialog box shown in Figure 1.6. As usual, you can select (check) options you want to turn on and deselect (clear) options you want to turn off. You also can type text into the text boxes and choose options from the drop-down lists. When you're finished making changes, click OK. See Chapter 16 for more about personalizing Access.

FIGURE 1.6

This sample Startup dialog box shows default options that work well for most people. Choose Tools ➢ Startup to get here.
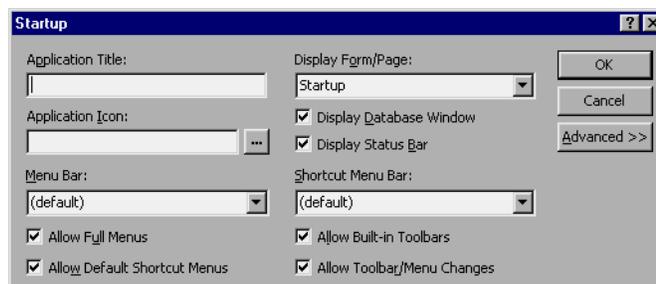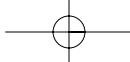
NOTE Pressing the Shift key when you open the database will bypass any Startup options that you've changed, giving you the default options shown in Figure 1.6.

Showing More of a Menu

Some of the drop-down lists for Access menu choices, such as Edit, come in two versions: a short list of the most commonly used commands and a longer list with extra commands. When you're viewing the short version of a drop-down list, it will have a Show More button like the one shown for the Edit menu here:

Show More button

To see the long version of a menu, click its Show More button. Or, just leave the menu open for a few seconds without making a choice. The short version will then transform into the longer list on its own, if there is one available. The long version of the Edit menu looks like this:

Positioning the Toolbar or Menu Bar

By default, the toolbar is *docked* just below the menu bar (refer to Figure 1.4). You can convert the toolbar to a free-floating element or dock it to some other edge of the screen. You can also move the menu bar or dock it in a new location. Follow these steps to move the menu bar or a toolbar:

1. Move the mouse pointer to the handle on the left side of the toolbar.

2. Drag the menu bar or toolbar toward the center of the screen, double-click to make it free-floating (see the example below), or drag it to some other edge of the screen to dock it there. To restore a floating menu bar or toolbar to its previous docked position, double-click its title bar.

When the toolbar is floating freely, you can drag it by its title bar to any place on the screen. Here are some other toolbar tips:

• **To close (hide) the floating toolbar**, click the Close button on the toolbar's upper-right corner or right-click any toolbar and click the toolbar's name in the shortcut menu that appears. (Shortcut menus are discussed in the next section.)

• **To redisplay a hidden toolbar**, choose View ➢ Toolbars, click the check box next to the toolbar you wish to view, and then click the Close button in the Toolbars dialog box.

• **To redisplay a default toolbar for the current view**, right-click any visible toolbar and then click the toolbar's name in the shortcut menu that appears.

If the redisplay procedures above don't work, choose Tools ➢ Startup, select (check) Allow Built-In Toolbars, and then click OK. Close and then open the database again. If necessary, choose View ➢ Toolbars to redisplay the toolbar.

NOTE If you manually show a built-in toolbar, it will appear in every view. If you hide a built-in toolbar from within its default view, it will be hidden in every view (including its default view).

We discuss many other ways to use and customize the toolbars in Chapter 24. But for now, just knowing how to hide, display, and position the toolbar is enough. If you do need a quick reminder or more information on toolbars, use the Office Assistant to find help for *Toolbars*.

Opening Shortcut Menus

Access provides many *shortcut menus* to save you the trouble of looking for options on the menu bars and toolbars. Shortcut menus in the Open and Save dialog boxes also offer handy ways to manage your files and folders without leaving Access.

To open a shortcut menu that's tailored to whatever you want to work with, right-click the object or place you're interested in, or click the object and then press Shift+F10. For example, right-clicking a table name in the database window opens this menu:
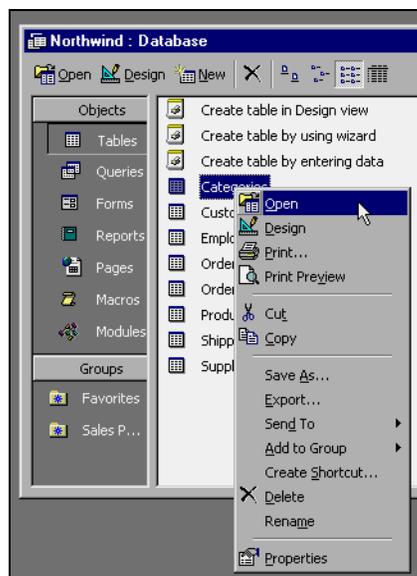
> **NOTE**   If the shortcut menus don't appear when you right-click, choose Tools ➢ Startup, select (check) Allow Default Shortcut Menus, and click OK. Then close and open the database again.

To select an option from the menu, do one of the following:

- Press Enter if you want to choose the boldfaced option on the menu.
- Click the option with either the left (primary) or right (secondary) mouse button.
- Type the option's underlined letter or highlight the option with your mouse, and then press Enter.

To close the menu without selecting an option, press Esc, Alt, or Shift+F10—or click outside the menu.

> **TIP** The term *right-click* means to point at something with your mouse pointer and then click the *right* (secondary) mouse button. (If your mouse is set up for lefties, you'll have to click the left mouse button instead.) This right-click trick is available throughout Access (and, indeed, throughout Windows). As you work with Windows and Access, be sure to experiment with right-clicking. It is a great way to discover some truly useful shortcuts.

Closing a Database or a Project

When you're done working with a database or a project, you should close it. Any of these methods will work:

- Click the Close button in the upper-right corner of the database window.
- Go to the database window and then choose File ➢ Close from the Access menu bar.
- Press Ctrl+W or Ctrl+F4.

As usual, you'll be prompted to save any unsaved work.

> **NOTE** You can have only one database open at a time. Access will automatically close the currently open database if you choose File ➢ Open or File ➢ New before closing the database or project that's open.

Getting Help

One thing we hope to teach you in this book is how to get answers to questions— even if *we* haven't provided those answers. You can achieve this goal easily if you learn how to use Access's plentiful built-in Help. We'll show you how to use this self-help tool next.

Summary of Self-Help Techniques

Table 1.2 summarizes many ways to get and use online Help in Access. Remember that you can use all of the standard Windows techniques while you're in the Help system to annotate Help, print a topic, change fonts, and so forth. For more information on those topics, see your Windows documentation or the Windows online Help. You can experiment by right-clicking in any Help text window and choosing options from the shortcut menu.

TABLE 1.2: MICROSOFT ACCESS 2000 ONLINE HELP OPTIONS AND TECHNIQUES	
TYPE OF HELP	**HOW TO GET IT**
Office Assistant	Choose Help ➢ Microsoft Access Help, or click the Office Assistant button on the toolbar.
Table of Contents	Choose Help ➢ Microsoft Office Help, click the Office Assistant's Search button, and click the Contents tab in the Help dialog box. If the Contents tab isn't visible, click the Show button first.
Search Help	Click the Index tab in the Help dialog box.
Find Help on the Web	Choose Help ➢ Office on the Web.
Display a Minimized Help Window	Click the ? Microsoft Access Help button on the Windows Taskbar.
What's This…?	Choose Help ➢ What's This?, press Shift+F1, or click the ? button on the toolbar or at the upper-right corner of a dialog box; then click the command or place you want help with.
Version Number, System Information, Technical Support	Choose Help ➢ About Microsoft Access.
Exit Help	Click the Close button at the upper-right corner of a Help screen.

Using the Help System and This Book

This book is designed to complement the Help system, not to replace it. Because the online documentation does such a good job of showing you the steps for practically any procedure you can perform in Access, and because many of those procedures won't interest everyone, we've taken a more conceptual approach here—one that should help you work more creatively. Instead of presenting hundreds of little step-

by-step instructions (as the Help system does), this book deals with larger, more general concepts so that you can see how (as well as when, why, and sometimes whether) to apply the nitty-gritty details you'll find in the Help system.
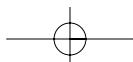
Looking Up Information

Like a book, the Access Help system has a table of contents, which is a great way to learn how to do things. To get to the Help contents:

- Use the Office Assistant to open any Help topic, click the Show button if the left pane of the Help window is not visible, and then click the Contents tab in the Help dialog box.

  Or

- If you're already in a Help window and the Contents side of the Help window isn't visible, click the Show button on the left side of the Help toolbar to return to the Contents Answer Wizard or Index tab you selected most recently.

The Contents lists many options to explore. Figure 1.7 shows the Contents tab with the Data: Find book opened. To open or close a *book*, click the Expand or Collapse button before the book's name, or just double-click the book. To display a *topic* (preceded by a question mark icon, like this **?**), click that topic. In Figure 1.8, you see the Help window that opened after we expanded the Data: Find book and then clicked on the *About Using Wildcard Characters* topic.

FIGURE 1.7

The Contents displays electronic books filled with help on many topics. Double-click books to open or close them. Click topics to display them.

Click an expand button or double-click a closed book to show its topics.

Click the collapse button or double-click an open book to close it.

Click a topic to view it.
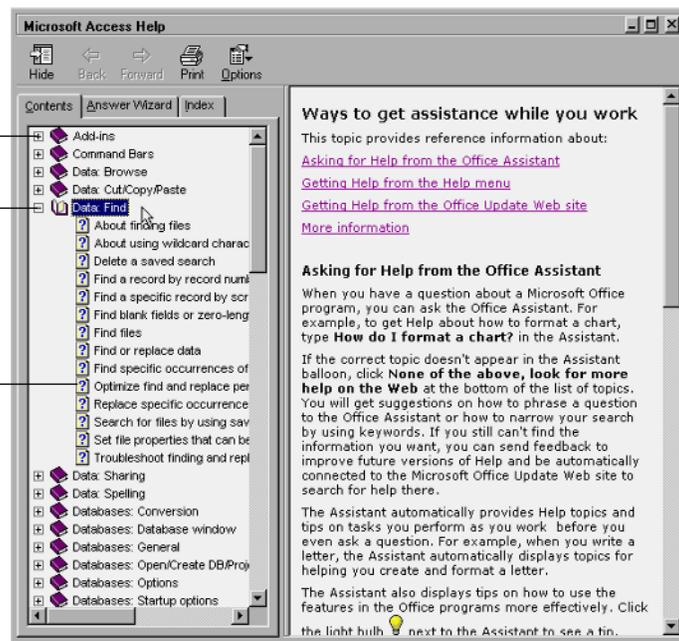
FIGURE 1.8

A Help window that shows information about using wildcard characters.
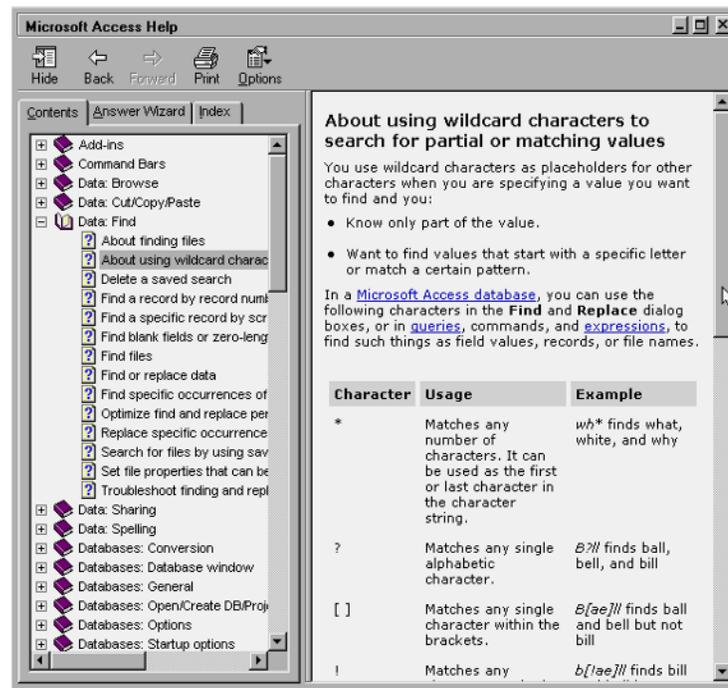
Here are some tips for using a Help window (see Figure 1.8):

- **To view Help text that's hidden at the moment**, use the vertical and horizontal scroll bars as needed, or resize the Help window.

- **To jump to a related topic**, click the small button next to that topic in the help text. The mouse pointer changes to a pointing hand when you point to a jump button.

- **To see the definition of a term or a button**, click any text that's underlined, or click a picture of a button. (Click anywhere inside or outside the definition, or press Esc to hide the definition again.)

- **To print the current Help window**, click the Print button on the Help window toolbar.

- **To return to the previous Help window**, click the Help window's Back button.

- **To show the Help Contents** if it's not visible, click the Show button on the Help window's toolbar.

- **To make the Help window reappear** if it's minimized or hidden, click the Microsoft Access Help button on the Windows Taskbar. (The button name is preceded by a small **?** icon.)
- **To close the Access Help window**, make sure it's the active window and then click its Close button.

Help with Whatever You're Doing

Even when you're not in a Help window, you should look at the status bar, preview areas, and any colored text on the screen for hints on what to do next. For example, you'll often see a hint box on the object and a description of available shortcut keys in the status bar, as shown in Figure 1.9. (Though that example won't appear until you design a table, as discussed in Chapter 6.)

FIGURE 1.9

Hint boxes and the status bar often provide further information about what to do next.
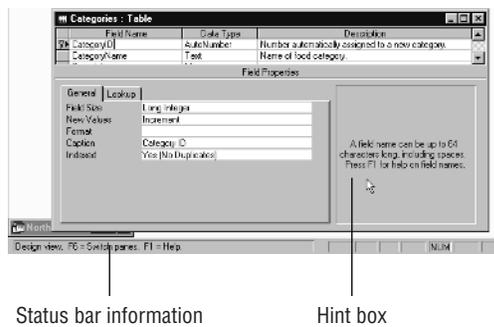
Status bar information   Hint box

Searching Help

Like any good book, the Help system also has its own index. You can search the index for help with just about any topic. Here's how:

1. Go to the Help window as explained earlier in this chapter and then click the Index tab. Figure 1.10 shows the Index tab's contents after we typed **wildcard** in the text box and clicked Search.
2. Type a word or select one from the list of topics. Search is not case sensitive. This step highlights the closest match to your entry in the list(s) below the text box.
3. Click Display (or double-click a topic).

FIGURE 1.10

The Index tab after we typed wildcard in the text box.
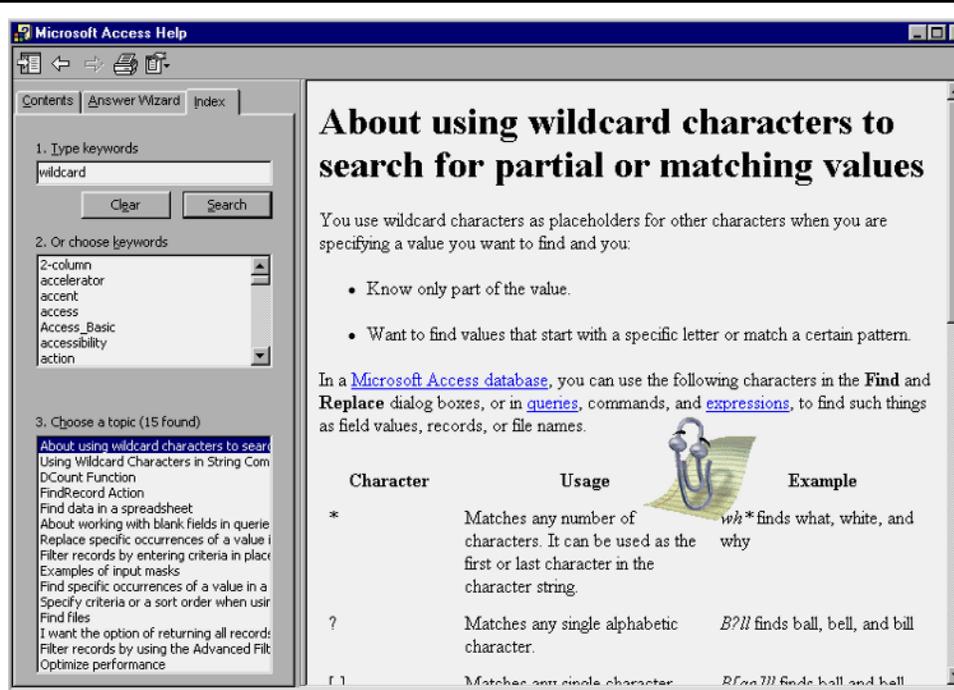
Once the Help topic is shown on the right side of the Help window, you can use any of the techniques described earlier to work with that information (see "Looking Up Information").

Asking the Office Assistant

The Office Assistant enables you to search for information by typing in a few words. The more specific your words are, the more on-topic the suggested topics will be. But you don't have to worry about matching a topic name exactly because the Office Assistant is pretty forgiving and even quite smart.

To use the Office Assistant, choose Help ➤ Microsoft Access Help from the Access menu bar, press F1, or click the Office Assistant button on the toolbar (see Figure 1.11). You can choose from several personalities for the assistant. Just click the Options button in the yellow bubble for the assistant and click the Gallery tab. Besides choosing the appearance of the assistant, you can change its behavior. Click the Options tab in the Office Assistant dialog box, make your selections, and click OK.

FIGURE 1.11

*The Office Assistant
showing Help topics on
customizing toolbars.*
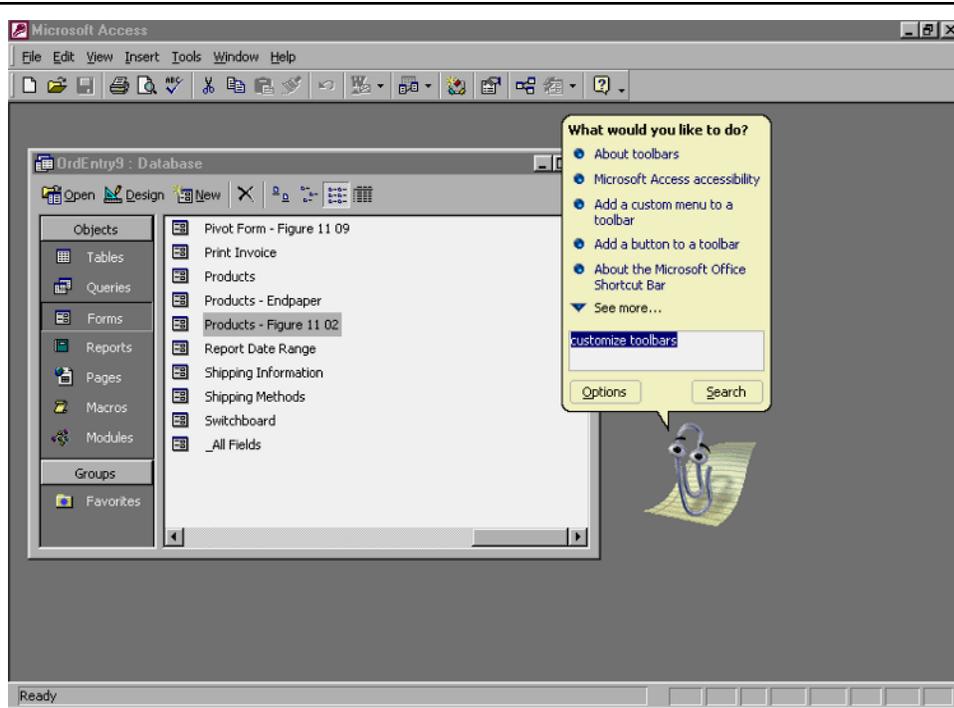
To get help from the Office Assistant, first open the assistant if it's not already visible on the Desktop. If you don't see a yellow bubble with a Search button, click anywhere on the assistant, and then type a few words describing what you want to do in the box under "What would you like to do?" and press Enter or click the Search button. When the list of related topics appears, click the topic you're interested in to open the corresponding Help entry.

In Figure 1.11, we typed **customize toolbars** and pressed Enter. The Office Assistant ignores extraneous words, such as *how do I fix,* and focuses on the important keywords, such as *toolbar* and *customize*. It then displays a list of topics that seem to answer your question.
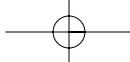
Asking "What *Is* This Thing?"

Another way to get quick information is to use "What's This?" Help. This type of help explains the function of menu commands, buttons, or dialog box options.

1. Press Shift+F1 or choose Help ➢ What's This? from the Access menus. If you're in a dialog box, click the ? button in the upper-right corner of the dialog box. The mouse pointer changes to a combination arrow and question mark.

2. Click a button on the toolbar, select commands from the menus, or click a place in the dialog box to get help with that particular item.

If you change your mind about using What's This? Help before choosing a topic, press Esc or Shift+F1, or click the Help or ? button again, to return to the normal mouse pointer.

Here are some other ways to get What's This? Help:

• In a dialog box, right-click the option name or button you're curious about and choose What's This?

• In a dialog box, click or tab to the place you want help with and then press Shift+F1 or F1.

• In the menus, highlight the option you want help with and then press Shift+F1 or F1.

Version Number, System Information, Technical Support

Do you need to check the version of Access you're using to see how much memory and disk space are available or to find out how to get technical support? It's easy:

1. Choose Help ➢ About Microsoft Access to open the About Microsoft dialog box.

2. Click the System Info button (for information about your system resources) or click Tech Support (for details about getting help from humans).

3. Click the Close and OK buttons (or press Esc) as needed to return to Access.

Getting Out of Help

You can get out of Help in many ways, but the easiest is simply to make sure the Help window is active (Click the window or its Taskbar button if you need to.) and then click its Close button.
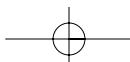
NOTE   In addition to the online Help described in this chapter, Microsoft offers many other sources of help for Microsoft Access, Microsoft Office, and other Microsoft products. See Chapter 4 for information about these additional resources.

Exiting Microsoft Access

When you're done using Access, you should return to Windows before shutting down and turning off your computer. You can exit from Microsoft Access using the techniques you'd use with other Windows programs:

1. Go to the database window or to the main Microsoft Access window.

2. Choose File ➢ Exit, click the Close button in the upper-right corner of the Microsoft Access window, or press Alt+F4.

You'll be returned to Windows or to another open program window.

TIP   To exit Access when Access is minimized, right-click the Microsoft Access button on the Windows Taskbar and then choose Close.

Where to Go from Here

Where you go from here depends on your past database experience.

• **If you're new to Access and to databases**, continue with Chapters 2 and 3.

• **If you're new to Access but know something about databases**, try the hands-on guided tour in Chapter 3.

• **If you're familiar with Access**, flip to the "What's New in the Access Zoo" section at the end of most chapters in this book, including this chapter. For another view of what's new, open the Office Assistant, enter **What's New**, and then click a What's New topic.

2326ch01.qxd 5/19/99 6:42 AM Page 36
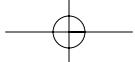
What's New in the Access Zoo?

Some of the many features discussed in this chapter are new to Access 2000. New features include:

• Projects, special Access files that hold objects for working with SQL Server data
• Show More buttons on some of the Access menus
• A new Open dialog box with buttons for quickly showing the file lists for History, My Documents, the Desktop, and your Favorites
• A revised database window with buttons for optionally displaying objects by group instead of by type
• A revamped Help system that's easier to navigate
• New Office Assistant personalities