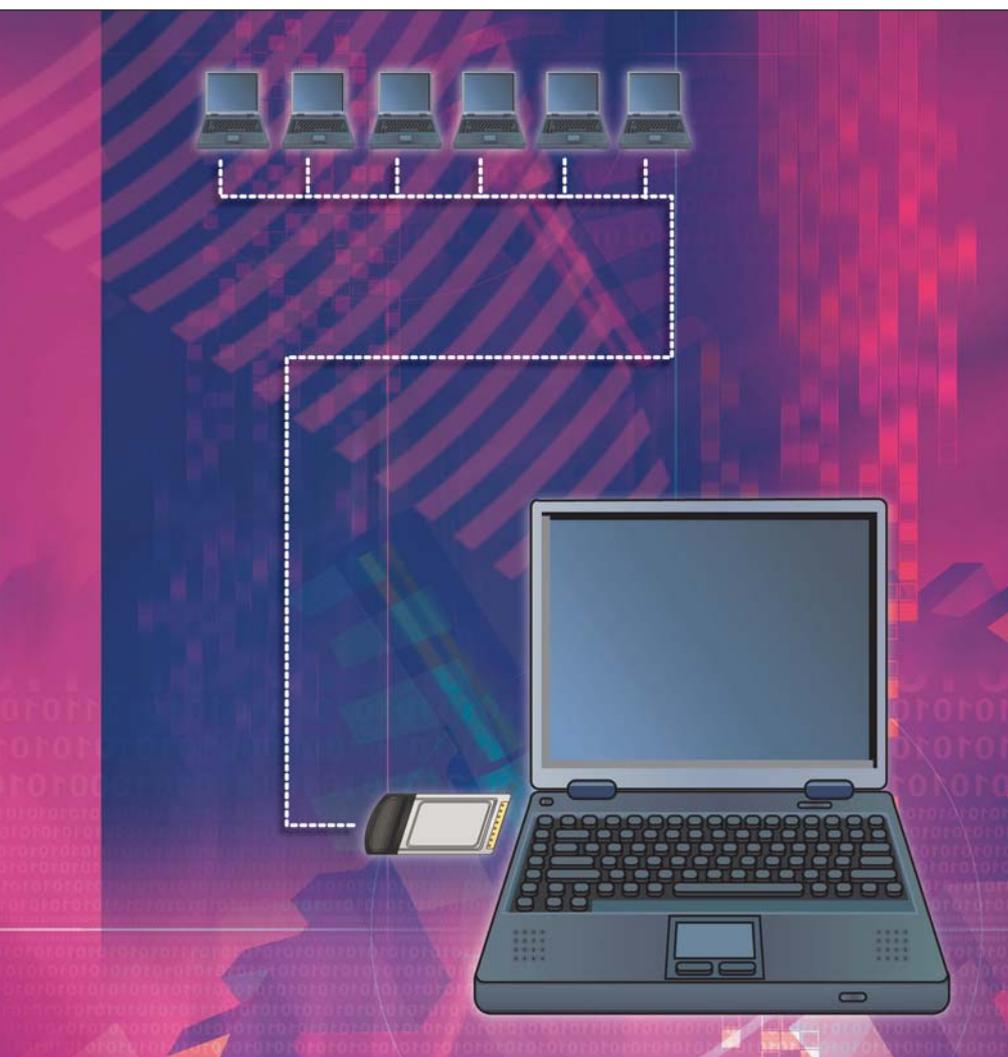


# workshop



## INDEX

- 169 Creating a form
- 169 Making contact
- 170 Tailoring your form
- 170 Forms, tables, queries and reports
- 170 Additional software
- 171 Adding images

## Easier Access

A PC's ability to store and sift through data on demand is one of its most valuable assets, enabling the user to collate and make sense of information highly efficiently. Databases specialise in just this. Emma Northam shows you how to set one up in Microsoft Access

**A**ny business knows that information is money, but information is useless if it can't be accessed quickly and easily or viewed in different ways – especially once it extends beyond a few pages. Calling up the Find command and searching through 50 pages of text for that vital fact while you've got a customer hanging on the phone isn't an ideal option.

A spreadsheet can be useful for handling large amounts of data, but sometimes the only real answer is a database. Databases are searchable repositories, useful for splicing information in several ways and for linking various different types of data together.

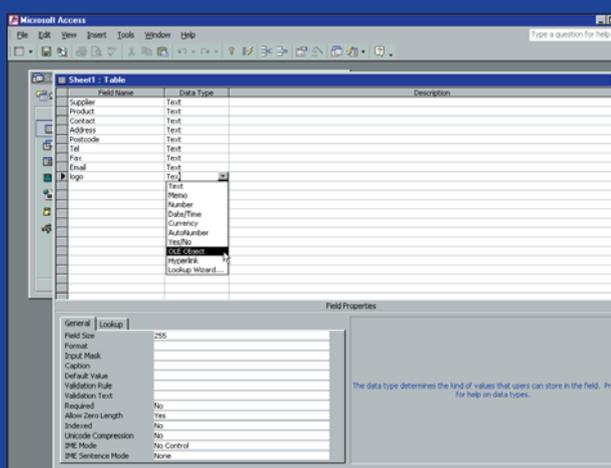
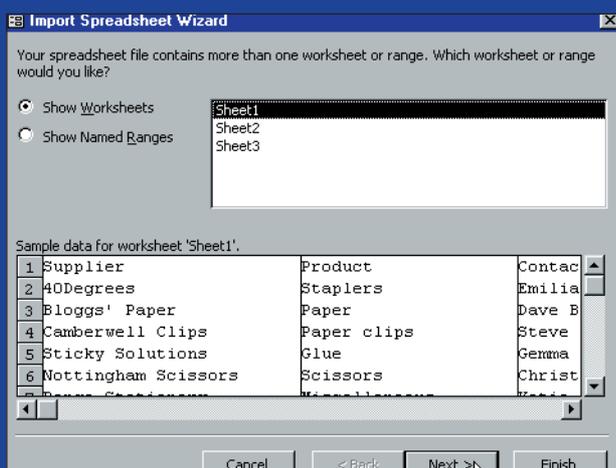
So if, for instance, you run a company, you might want to set up a database of suppliers, another one containing customer data and another for employee details. These could all be linked to accounts databases, storing information about costs and transactions.

But databases aren't only for business information. If you have a huge record collection, for example, you might want to use Access to make a searchable database of your music files for reference purposes. Indeed, some packages are written specifically for personal collections. You'll find some in our Download Directory ([www.pcadvisor.co.uk/downloads](http://www.pcadvisor.co.uk/downloads)).

## Creating a form

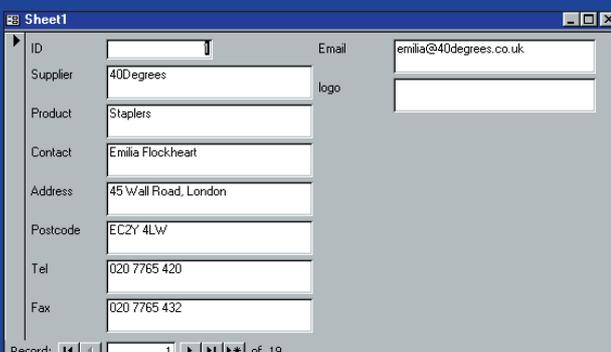
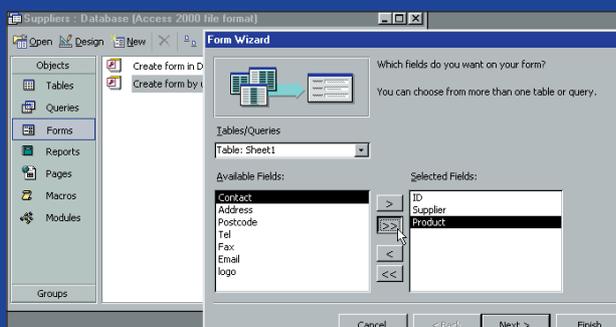
To create a form we first need to import the data we want to move from an Excel spreadsheet into Access. Open Access, click File, Get External Data, Import and locate the

spreadsheet on your hard drive. You will need to choose Excel Files from the drop-down menu that appears in order to see the spreadsheet.



**1** The Import Spreadsheet Wizard will appear, showing sample data from the spreadsheet. Click Next to continue. Check the box at the top that asks whether you want the first row of your spreadsheet to show column headings. Click Next again, then Finish

**2** You should now see an icon labelled 'Sheet1'. Double-click it and you'll see it's an Access table. Switch to Datasheet View under the View menu and change the Data Type in the logo field to OLE Object so we can add an image to this field later. Save and close the table. To use hyperlinks or email addresses, select the appropriate option under Data Type



**3** Click Forms in the lefthand Objects column, then double-click Create form by using Wizard to bring up the Form Wizard. You can include all or some of the fields from your table in your form. Choose them one by one by highlighting them in the lefthand column and clicking the top > arrow, or select them all by clicking the >> arrow once

**4** Click Next, choose your form's layout (we have picked Columnar, but select each radio button to view the options before selecting one) then click Next again and choose a style for your form in the same way. Click Next, then Finish and your form will appear

### Making contact

To demonstrate the advantages of using a database we'll show how it can add an extra dimension to a contacts list, making a plain-vanilla list more user-friendly. We've devised a fictional office supplies company, PaperPushers, which sells direct to businesses and shops. PaperPushers has many suppliers and keeps track of them by entering their details in an Excel spreadsheet. However,

it's not an ideal format as viewing data on a single supplier at a time isn't possible and scrolling across the screen is necessary to access some of the data, such as the telephone number and email.

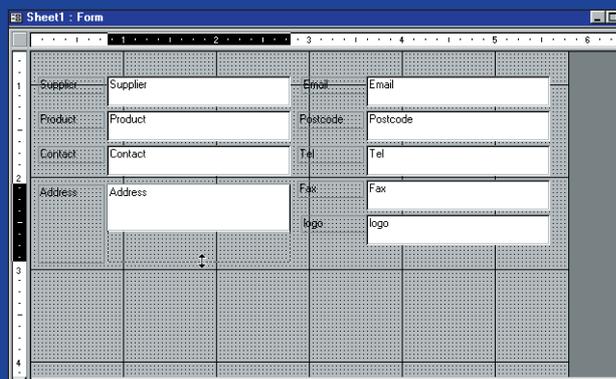
We're going to port all the information held in Excel into Access and create an electronic card index system for contacts. We're going to add logos, too, so that the company moniker appears on every record and each supplier's insignia appears on

the relevant card. We've imported data from an Excel spreadsheet to create our electronic Rolodex card forms, though another option would have been to link the data so that, whenever the spreadsheet was amended in any way, the Access records would also be updated. If the Excel version is redundant once your database is rolling, however, you can delete it and update or amend forms or add new records from within Access.

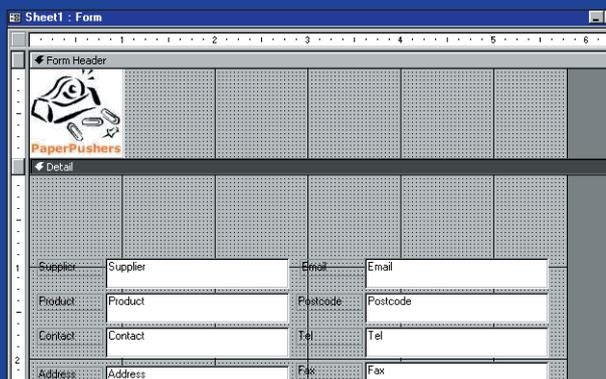
## Tailoring your form

**W**e want to improve on the basic form layout that Access has generated and while we're editing the design we'll also add company logos. Choose Design View from the View

menu or click on the set square, ruler and pencil icon,  which you'll find in the top lefthand corner of the menu bar. Then follow the steps below.



**1** You can click and drag to move fields. Hold down Shift while clicking to select multiple boxes. To get rid of unwanted boxes, such as the ID field, hit Delete while fields are selected. With the fields moved to your satisfaction, click on the white Address box and drag the middle handle downwards to make the box deeper. If you need to make the form larger, just click and drag at its edges



**2** To add the PaperPushers' logo at the top of every record, simply click and drag on the Form Header at the top of the form. Now click in the Header area and choose Insert, Object, Create from file and browse to the image on your hard drive. Back in Form View, you'll see the PaperPushers logo is now on every card

There are plenty of ways to customise your form beyond the methods outlined here. You can add fields for email and web addresses, then turn them into hyperlinks. If you have multiple users, it might also be a good idea to add controls via the Tools, Security submenu so that other users can't change information.

Once you've got to grips with Access' basics you can start experimenting with its other functions. For instance, we've used forms to hold dynamic data but they can also be used to present static information in a dialog box style, such as user options boxes (useful for navigating through larger databases), ok buttons and so forth.

But we're getting into the realms of Visual Basic programming here and, for the purposes of this workshop, we'll stick with our simple Rolodex form, create an Access table from a spreadsheet and turn it into a custom-designed form complete with logos.

### Forms, tables, queries and reports

Access creates a table from your data, which provides the basis for your form design. It's important that you decide on the different elements you want to include in your form – figures, text, web or email addresses and images – and how it will be

laid out before you start manipulating data. Changes you make to the table and attributes you assign at this stage will affect the way the form works, and it may be harder to change them later. Access sets up its relationships with other documents according to your initial database setup choices, so have a clear idea of what you're trying to achieve in advance.

'Queries' let you view, change and analyse data. You can also use them as the source of records to create forms and reports. The most common type is a select query, which retrieves data from one or more tables and displays it in the order you want. You can create this with a wizard or from scratch in Design View, where you specify the data you want to work with by adding the tables or queries that contain data and then filling in the design grid.

Reports provide a way for users to present information from a database in a logical, printed format. Because you have control over the size and appearance of everything on a report, you can display the information the way you want to see it.

### Additional software

Microsoft Access uses information saved in tables to build forms (or records) and link

them so that updates made to one table are shared with all linked records. Access is compatible with all Microsoft's offerings and you may already have it preinstalled on your PC as part of the Office suite.

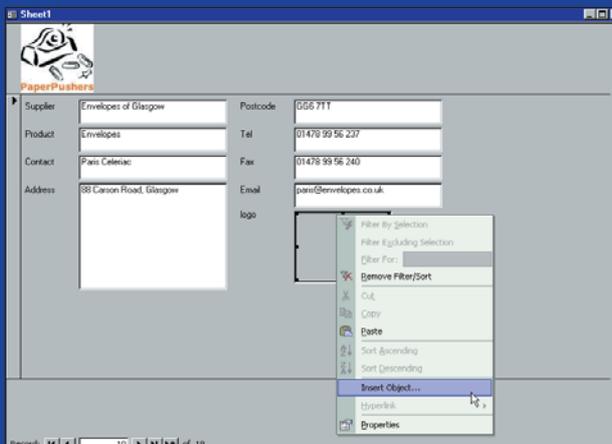
Other databases you might want to consider are the £245 FileMaker Pro 5.5 ([www.filemaker.com](http://www.filemaker.com)). Experiment with the 30-day trial on this month's cover disc. It's comparable to Access and several pounds cheaper (Access will set you back £282). It also has a user-friendly interface and support for other file formats, such as Excel. Free software options include the excellent MySQL (available free from [www.mysql.com](http://www.mysql.com) or on this month's cover disc), but novices might find its icon-free DOS interface difficult to master.

If you need the functionality of a database without using forms, tools such as AskSam ([www.asksam.com](http://www.asksam.com)) or OmniForm ([www.scansoft.co.uk](http://www.scansoft.co.uk)) will save you hours of work. They let you create a searchable database from imported, typed or scanned text, such as web pages, email messages, Word documents and news clippings. But OmniForm's ease of use doesn't come cheap at £480. A full version of AskSam 3.0 Professional is available on this month's cover disc. ■

## Adding images

There are two ways to add images to a form: as unbound objects, where the same picture appears in every record, or as bound objects, where an image changes from record to record. This allows us to add specific company logos to individual records and our PaperPushers logo to every record, as we did in *Tailoring your form* on page 170.

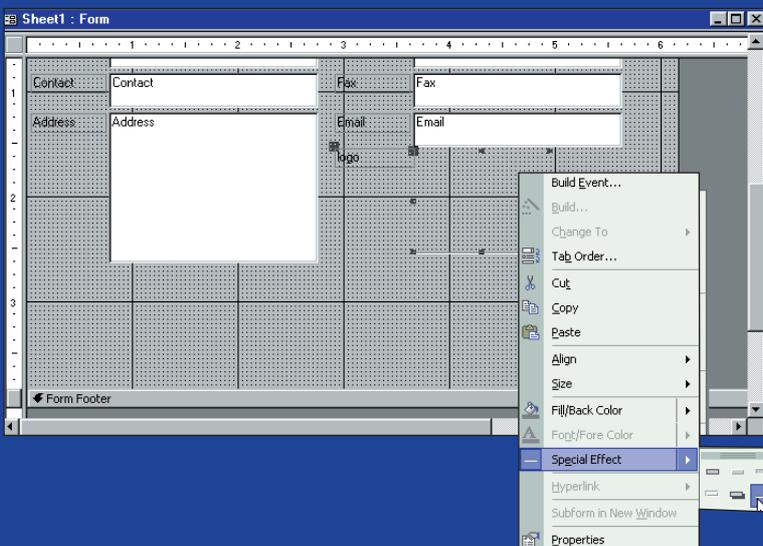
Here, we're going to show you how to add bound images so that different logos appear in each record. We've already defined a field for this purpose by including a blank field in our original datasheet and changing its data type to OLE Object in step two of *Creating a form* (see page 169). This field appears in the bottom righthand corner of our record.



**1** To add the relevant company logo from Design View, right-click the logo box and choose Insert Object then browse to the logo on your hard drive. Note that you may need to adjust the size of your logo box in Form View and this sizing will apply to all records. Repeat this for every record



**2** Still in Design View, click through your records using the arrows at the bottom of the form. You'll see that individual company logos now appear in the same place on every record to which you've added an image



**3** You might want to get rid of the field label 'logo' or give it a more useful name. Do this in Form View: click on the label and either delete the box or type a different word or phrase. Experiment with border styles, too, as the logos vary in size and shape. We've taken all the box styles off the logo field (in Form View, right-click the logo box and choose Special Effect)



Experiment with the full version of AskSam 3.0 Professional, available on this month's cover disc