

**ACCESS 2013**

# Customizing the Database Interface and Startup Options

**N**ow that you have learned how to create customized forms and reports, you can focus on sharing your database with others. In this lesson, you will create a Navigation Form, which is an attractive, user-friendly interface to allow for quick and accurate data entry. You will also split a database so that the database tables and their data are protected, while allowing users to create and modify their own personal queries, forms, and reports, and set and modify various Access options.

## LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Set Access options
- Split a database
- Explore switchboards and create a Navigation Form
- Set and modify startup options

## LESSON TIMING

- Concepts/Develop Your Skills: 1 hr 45 min
- Concepts Review: 15 min
- Total: 2 hr 00 min

## CASE STUDY: CUSTOMIZING – AS YOU LIKE IT

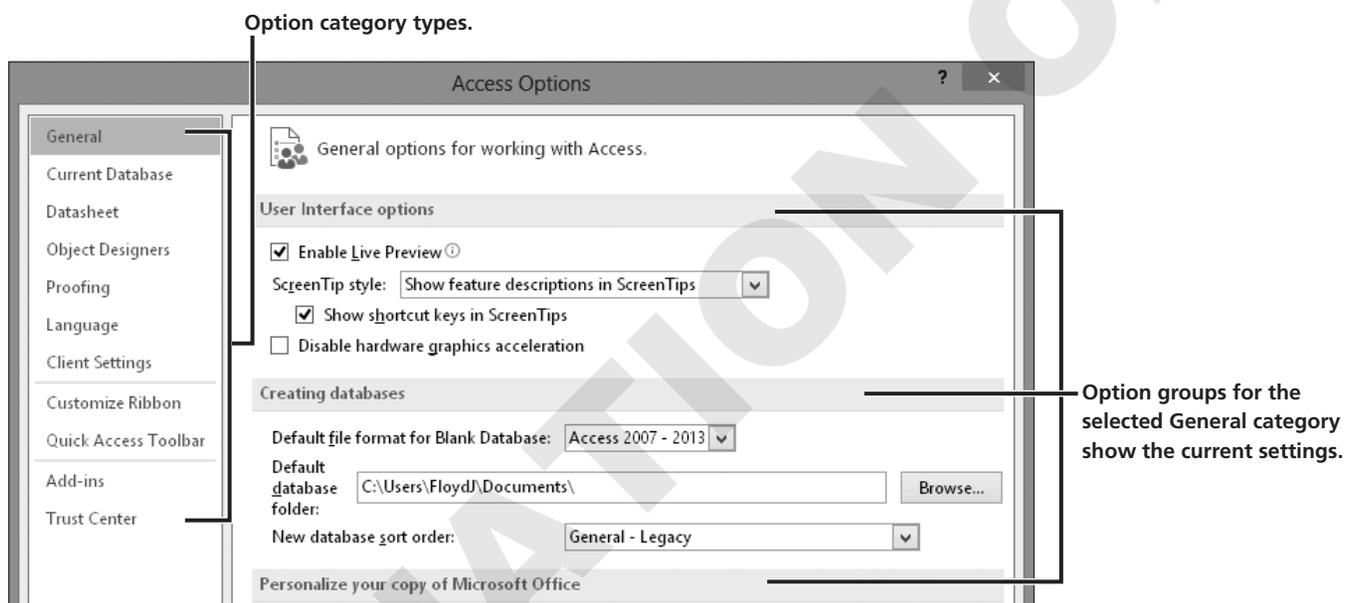
The Winchester Web Design database is almost complete. However, the owner is concerned about its ease of use and future maintenance. He would like to allow individuals to make their own customized queries and reports, while maintaining a standard company interface and ensuring data validity and database security.

# Setting Access Options

Each Microsoft Office application provides options to control the way the application performs. Access options can control the color of datasheets, set default fonts, create sections on the Navigation Pane, add a title to the application window, customize the Quick Access toolbar, set a default startup form, and so on. Some options control settings for the active database, while others control the default settings for all databases used on a particular machine.

## Displaying Access Options

The Access Options dialog box groups features by type. It lists the categories in a panel on the left side and their associated options in the panel on the right side. Some options are used frequently while others are rarely used.



## Exploring Datasheet Effects

Tools for setting default gridlines, cell effects, and font size and weight are found in the Datasheet category of the Access Options dialog box.

**DEVELOP YOUR SKILLS AC02-D01****Display and Explore Access Options**

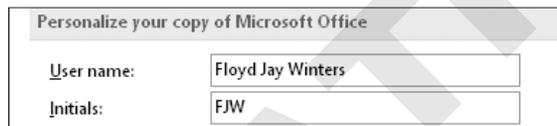
1. Open **AC02-D01-WinWebDesign** from your **AC2013 Lesson 02** folder and save it as **AC02-D01-WinWebDesign- [FirstInitialLastName]**.
2. Choose **File**→**Options** and click the **Datasheet** category.
3. Review the options available in each category.
4. **Close**  the dialog box without changing any options.

**Setting Personal Information**

The Access Options dialog box includes a General category that allows you to set the format in which databases are created, and also permits you to set personal information for your copy of Microsoft Office.

**DEVELOP YOUR SKILLS AC02-D02****Set Personal Information**

1. Choose **File**→**Options**.
2. In the **General** category, view and modify the personalized settings as desired.



Personalize your copy of Microsoft Office	
User name:	Floyd Jay Winters
Initials:	FJW

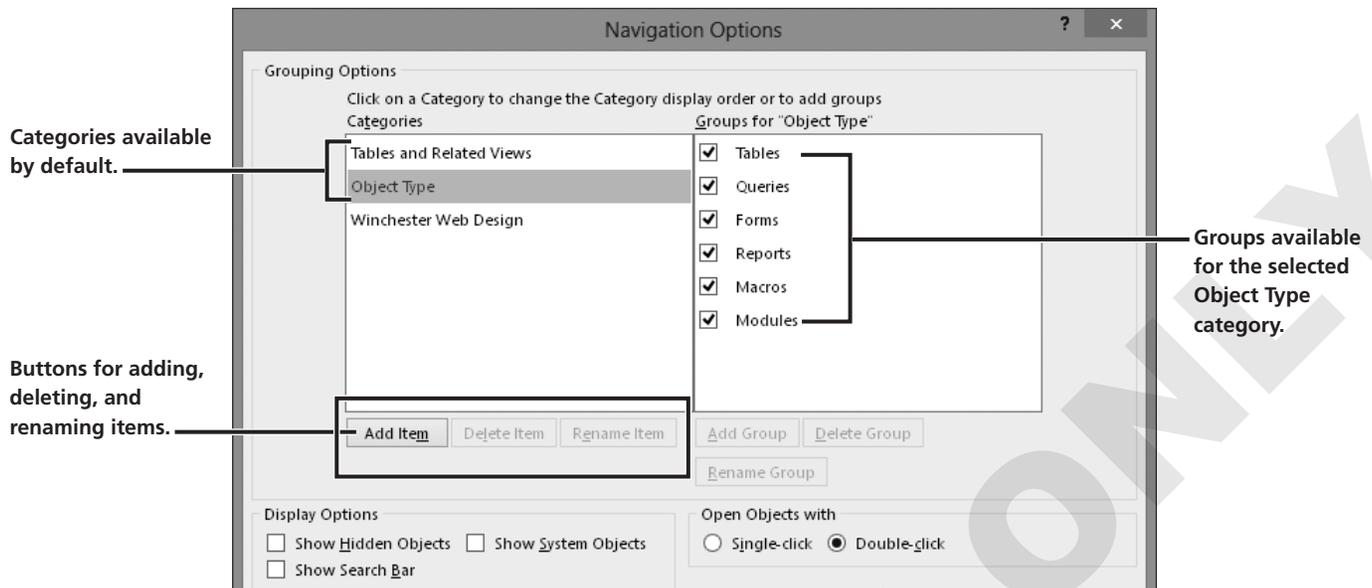
3. Click **OK** to save any changes and close the Access Options dialog box.

**Customizing the Navigation Pane**

The Navigation Pane is your tool for selecting database objects and identifying objects associated with each object type. You use the Navigation Pane to display objects in different views. You can also customize the Navigation Pane to contain additional sections to make the pane even more useful.

**Navigation Pane Categories and Groups**

The Navigation Options dialog box shows two list boxes: one that identifies the categories of objects displayed on the Navigation Pane and one that shows the groups available for display on the pane.

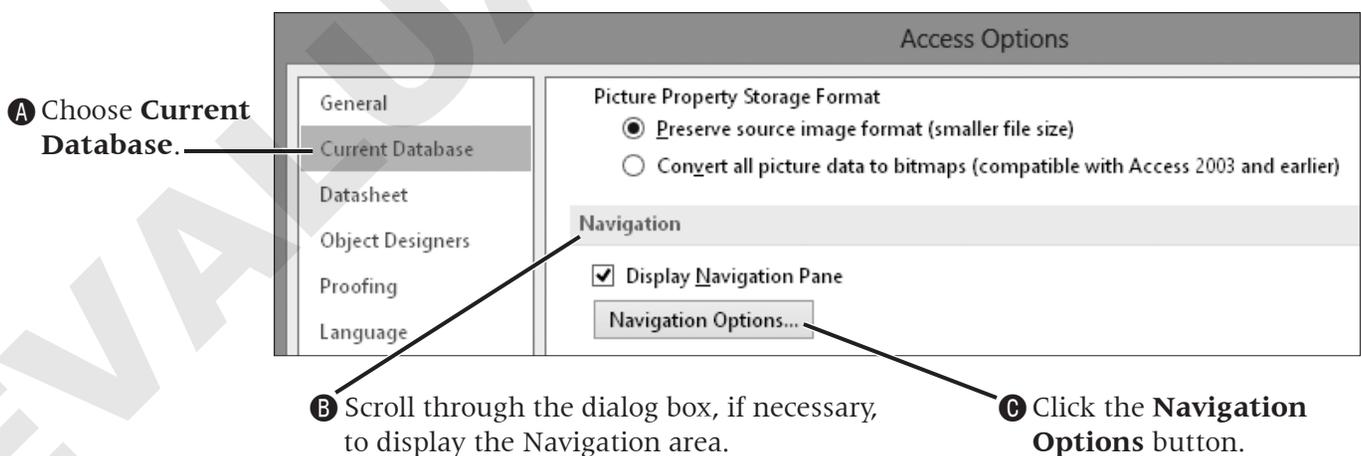


## Working with Groups

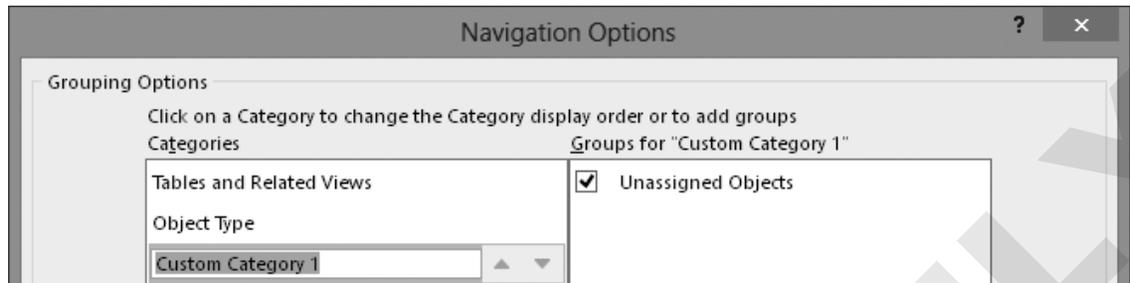
Access prevents you from changing, deleting, or adding additional object type groups to the essential Tables and Related Views and Object Type categories. However, the Custom category allows you to rename, delete, and add groups to a category. When you add or rename groups in the Navigation Pane, you must reassign objects to the groups so Access knows where to place them.

## DEVELOP YOUR SKILLS AC02-D03 Customize the Navigation Pane

1. Choose **File**→**Options**, and follow these steps to customize the Navigation Pane:

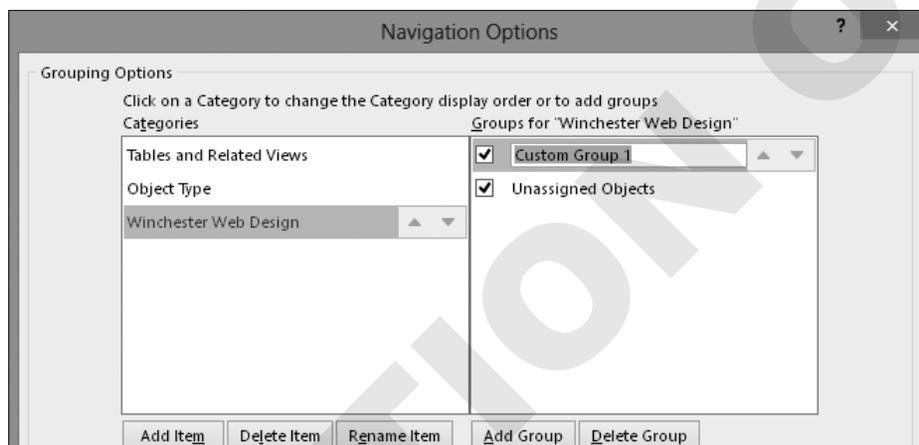


2. Click **Add Item**.



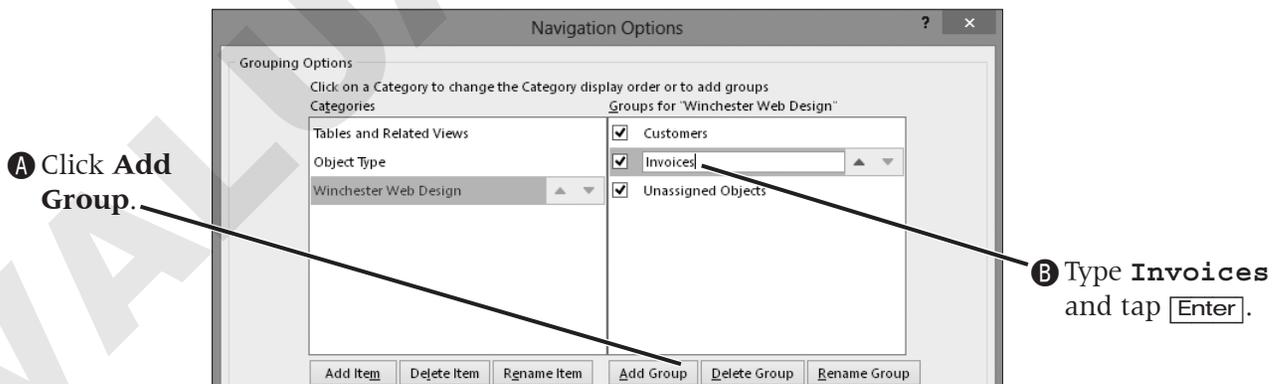
3. Type **Winchester Web Design** in the Custom Category 1 box and tap **Enter**.

4. Click **Add Group**.



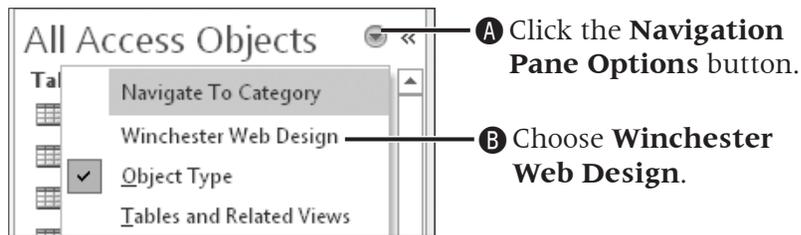
5. Type **Customers** in the Custom Group 1 box and tap **Enter**.

6. Follow these steps to add a new group to the Groups list:

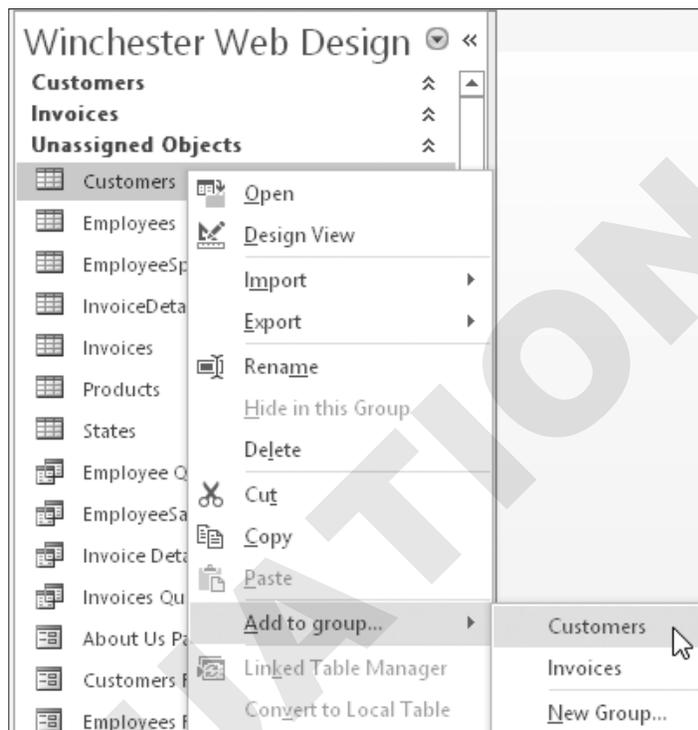


7. Click **OK** to close the Navigation Options dialog box. Click **OK** to close the Access Options dialog box.

8. Follow these steps to display the new Winchester Web Design category:



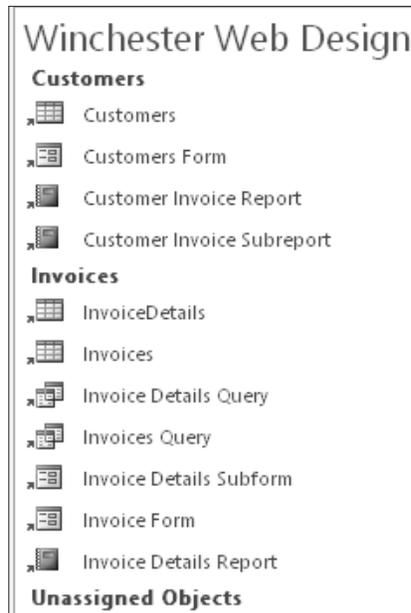
9. In the Unassigned Objects group on the Navigation Pane, right-click the **Customers** table object and choose **Add to Group**→**Customers**.



10. One at a time, right-click the **Customers Form**, the **Customer Invoice Report**, and **Customer Invoice Subreport** to add them to the Customers group.

11. Assign the following objects to the Invoice group:

Object	Type
InvoiceDetails	Table
Invoices	Table
Invoice Details Query	Query
Invoice Query	Query
Invoice Form	Form
Invoice Details Subform	Form
Invoice Details Report	Report

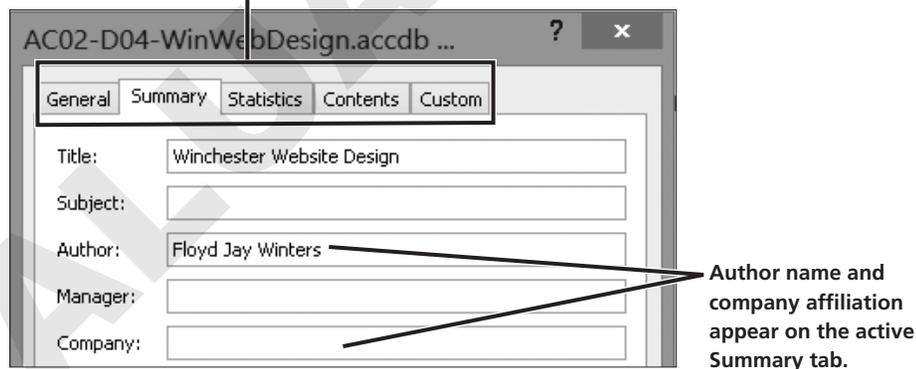


12. Click the **Navigation Pane Options** drop-down button and choose **Object Type**.

## Setting Database Properties

Database properties are similar to other object properties, except that they identify or describe an *entire* database, such as the database title and author, names of objects contained in the database, or the date and time it was created or last updated.

Tabs provide access to groups of database properties.



## DEVELOP YOUR SKILLS AC02-D04

### Set Database Properties

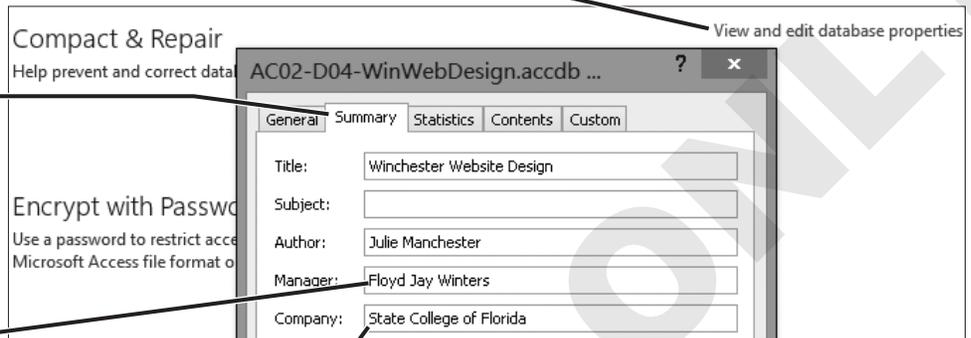
1. Choose **File**→**Info**, and follow these steps to set the database properties:

**A** Click the **View and Edit Database Properties** link.

**B** Click the **Summary** tab on the Properties dialog box.

**C** Type your instructor's name in the **Manager** line.

**D** Type your school's name in the **Company** line.



2. Click **OK**.

### Setting Up Current Database Format

Current database settings enable you to change the way Access displays and works with the *active* database. You can, for example, change the text Access displays in the title bar when the database is open, show or hide the Navigation Pane, enable views, or change the way Access displays open objects.

#### Changing Title Text in the Application Bar

Sometimes, the actual filename assigned to a database may be different from the text you want users to see when they open the database. You can change the text that appears in the title bar using the Current Database options window.



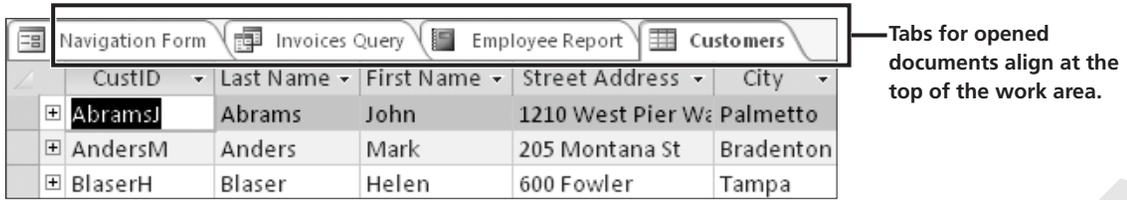
Type the text that you want displayed in the title bar into the Application Title text box.

#### Setting Object Window Format

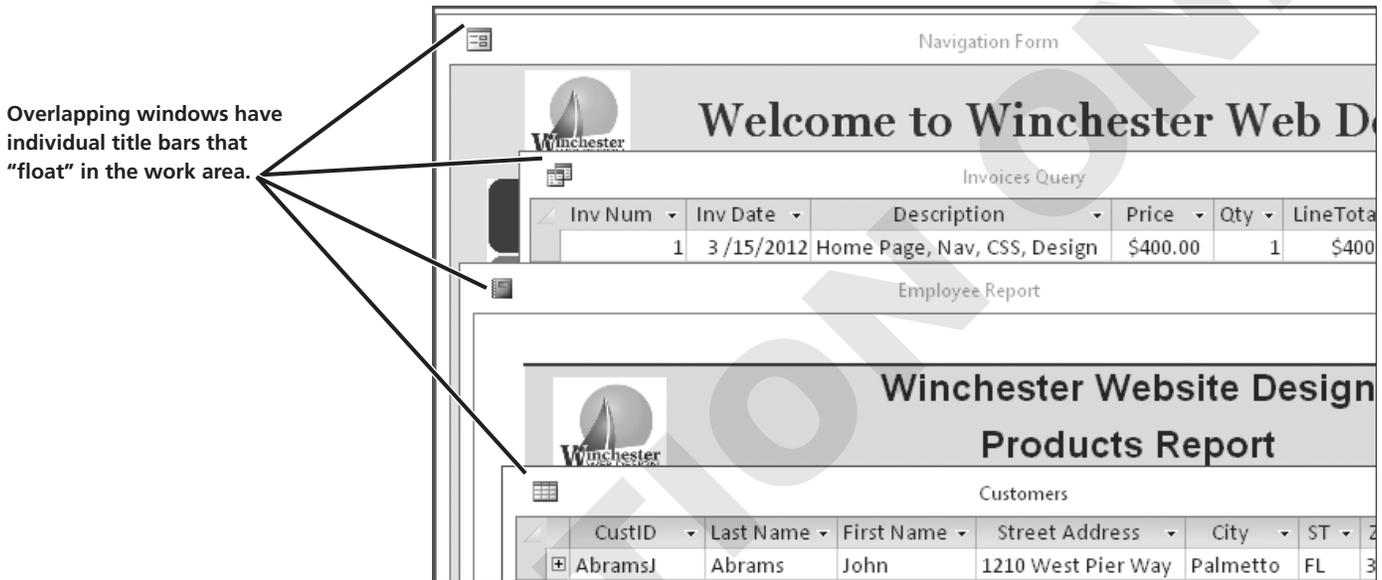
Open database objects are set to format as tabs within the database work area. You have to click the tab of the object that you want to see in the work area.

#### FROM THE KEYBOARD

**[Ctrl]+[F6]** to navigate among open objects



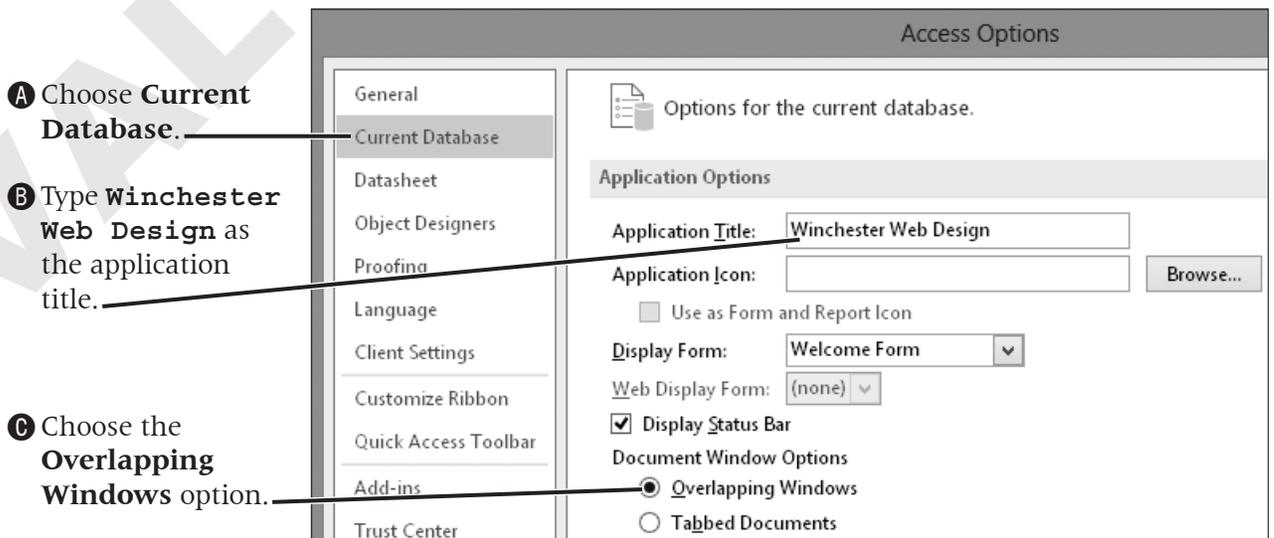
You can change the format so objects display as overlapping windows in the work area similar to what was used in previous versions of Access. You can also move and resize the objects for easier comparison of styles, layout, and contents.



## DEVELOP YOUR SKILLS AC02-D05

### Set Current Database Options

1. Choose **File**→**Options**, and follow these steps to change the application title text and window display:



2. Explore other options available for the current database, and then click **OK**.
3. Choose **OK** in the message dialog box; then close and reopen the database.
4. Display the **Customers** and **Products** tables in separate windows.
5. Drag down the title bar of the **Products** table window slightly to view the Customers table.

Customers				
CustID	Last Name	First Name	Street Address	City
AbramsJ	Abrams	John	1210 West Pier Way	Palmetto
AndersM				
BlaserH				
DavisP				
Fleetwood				
HassanA				
JeffriesD				

Products		
ProdID	Description	Price
PROD-01HP	Home Page, Nav, CSS, Design	\$400.00
PROD-02SP	Secondary Page	\$200.00
PROD-03BL	Blog, Integrated into Site	\$300.00

6. Choose **File**→**Options**→**Current Database**, reset the Document Window option for **Tabbed Documents**, and click **OK** in the message box.
7. Close both the **Customers** and **Products** tables; close the database.

## Splitting a Database

Sometimes users want to edit the design and layout of queries, forms, and reports or even develop their own objects to meet their particular needs. However, if the database is shared by other users, this may cause some potential problems.

### Record Locking

Multiple users can simultaneously use an Access database to add, edit, and delete data. Whenever an Access database is opened, Access also creates a small temporary file by the same name, but with the extension .laccdb. This file manages record locking. The initial file extension character, *l*, stands for locked, which means whenever one user edits a record, that record is locked and no other user can edit it until the first user moves to another record. Record locking helps maintain consistent data and protects the integrity of record updates.

### Reasons for Splitting Databases

Allowing users to create their own objects in a shared database can create confusion and increase the chance of data corruption or broken database relationships. To protect company data, many businesses prohibit users from creating and saving new objects. One alternate solution that protects table data while enabling users to create and customize objects to meet their personal needs is to split the database.

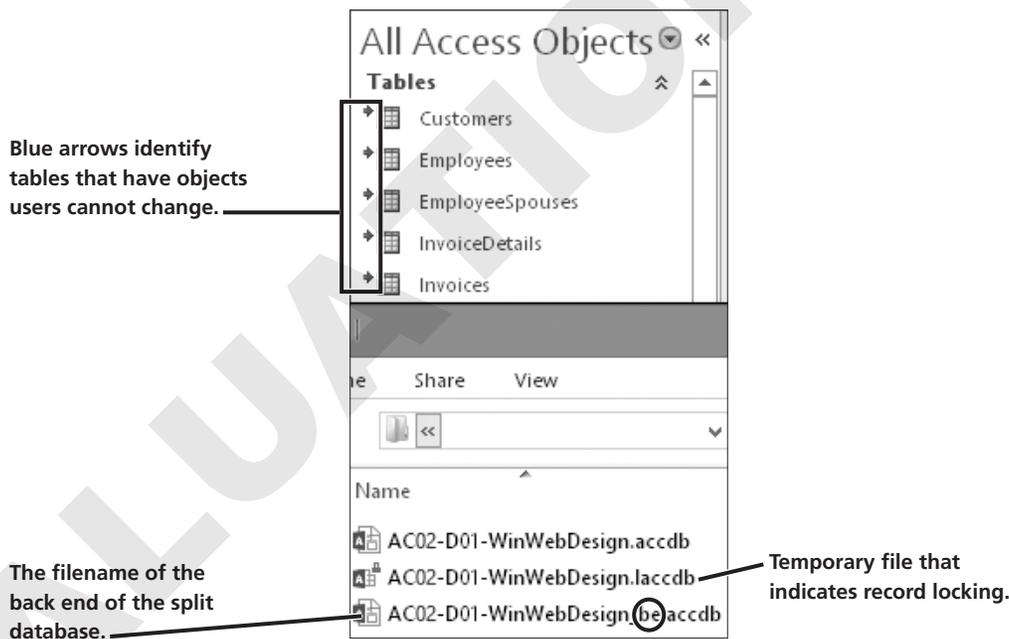
## Using the Database Splitter

The database splitter converts a database into two files—one that contains the tables holding the data that support all other database objects and one that contains the database reports, forms, queries, and other objects that use the data. After splitting the database, multiple users in a networked environment can access the database at the same time. As a result, each user can access, design, and modify their own database objects, and update data from the database tables without interrupting other users or increasing the number of objects contained in the central database.

## Split Database Terminology

Two terms are often associated with split databases:

- **Front-end** refers to the up-front portion of a split database with which users interact—the queries, forms, and reports that they use or may create and customize. Access places a blue arrow beside each table name in a split database to identify objects that users can view but not change.
- **Back-end** refers to the underlying database tables that support the front-end. These tables are protected so that users cannot modify their structure. Access adds *\_be* to the end of the back-end portion of the database filename.



When you split a database, Access links the front-end and back-end of the database so that users can work with controls on forms, queries, and reports.

## Backing Up a Database Prior to Splitting

Access recommends that you back up a database before you split it to preserve the database in case an error occurs during the splitting process. One quick way to do this is to select and copy the database in Windows Explorer, and then paste a backup copy in the desired folder.

### FROM THE RIBBON

File→Save As→Save Database As to copy a database

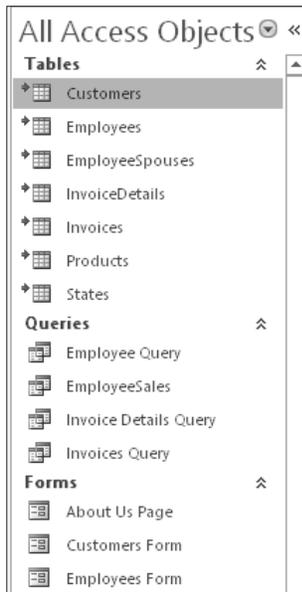
**DEVELOP YOUR SKILLS AC02-D06****Split a Database**

1. Open **AC02-D01-WinWebDesign-[FirstInitialLastName]** but *do not* open any database objects.
2. Choose **File**→**Save As**→**Save Database As**→**Save As**.
3. Open your **AC2013 Lesson 02** folder and click **Save** to save a backup as **AC02-D06-WWD-Backup- [FirstInitialLastName]**.
4. Close the new backup database then reopen **AC02-D01-WinWebDesign-[FirstInitialLastName]** without opening any objects.
5. Choose **Database Tools**→**Move Data**→**Access Database** .



6. Review the information in the Database Splitter. Then, click **Split Database**.
7. Navigate to your **AC2013 Lesson 02** folder and click **Split**.

- Click **OK** in the message box.



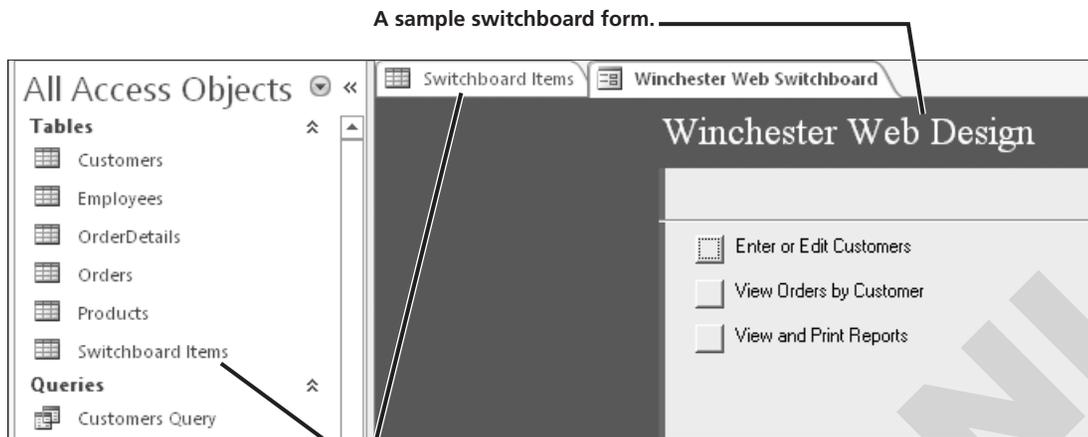
- Right-click the **Customers** table in the Navigation Pane and choose **Design View**.
- Read the warning message, then click **No**.
- Right-click the **Customers Form** in the Navigation Pane and choose **Design View**.
- Select the **Notes label** and **Notes text box** and tap .
- Save the form and close **AC02-D01-WinWebDesign-[FirstInitialLastName]**.
- Navigate to your **AC2013 Lesson 02** folder. Rename the front-end database **AC02-D01-WinWebDesign-Split-[FirstInitialLastName]**, and open **AC02-D01-WinWebDesign-[FirstInitialLastName].be**.
- Close the back-end database.

## Customizing the Database Interface

Access offers a number of options for customizing the user interface. Switchboards and Navigation Forms can be set to automatically open when a database is opened. They provide buttons and tabs to perform an array of functions from displaying forms and reports to printing, saving, and even closing the database and exiting Access.

### Exploring a Database Switchboard

A switchboard is an easy-to-use interface that contains menus and buttons for opening database objects and performing common tasks such as adding records or printing reports. Switchboards were common in older versions of Access.



Underlying Switchboard Items table.

## Adding Switchboard Manager to the Ribbon

To create a switchboard in Access 2013, the Switchboard Manager command button must be on the Ribbon. To add a command button to the Ribbon, right-click the Ribbon and choose Customize the Ribbon to open the Access Options dialog box. Then, from the All Commands menu, select the desired command.

### FROM THE RIBBON

File→Options→  
Customize Ribbon→  
All Commands→  
Switchboard  
Manager→Add

## Creating a Navigation Form

An alternative to the older switchboard is a Navigation Form, or special interface that allows you to quickly access forms and reports in your database. Microsoft introduced Navigation Forms to accommodate online databases published to the web, because the Access Navigation Pane will not display in a browser.

### Navigation Form Features

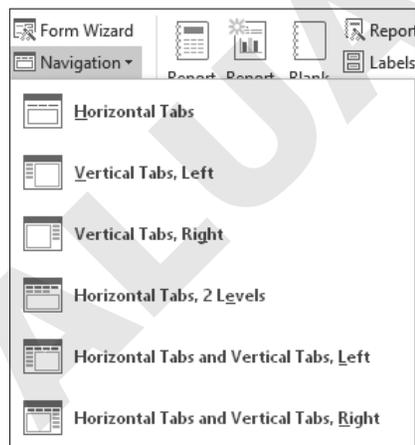
Navigation Forms usually have tabs across the top of the form to group common elements with sub-navigation links along the left side or directly below. The Navigation Form opens like a regular form in the Access window.

Tabs can group forms and reports by subject.

Individual objects can be accessed via controls listed on the side of an active tab.

## Navigation Form Layouts

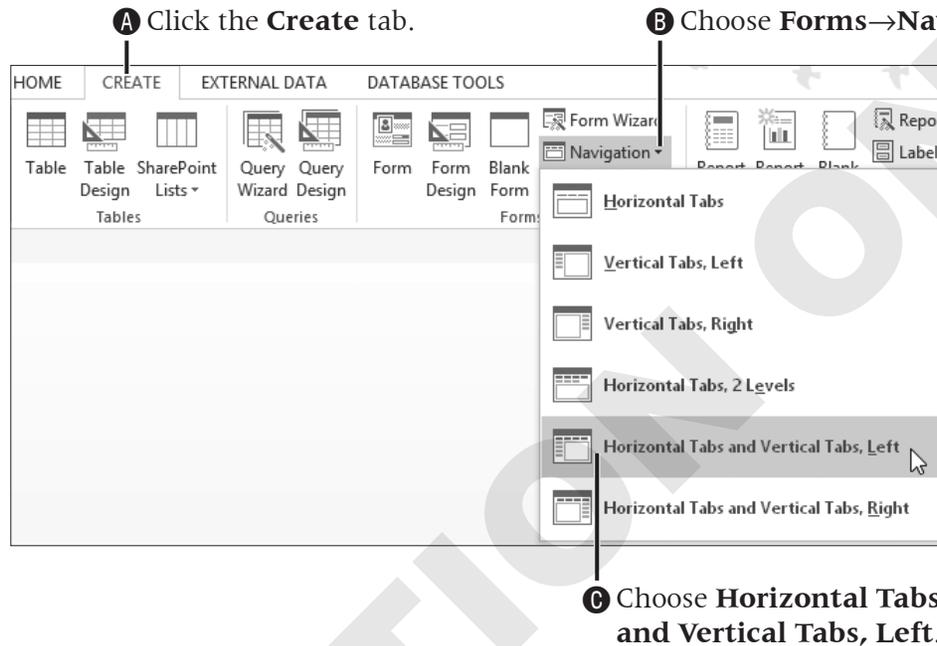
The Winchester Web Design database includes an Employees Form, an Employee Spouses Form, and an Employee Report that you can place on the same Employees tab on a Navigation Form. You can also add other forms and reports. Access offers six different Navigation Form layouts from which you can choose. You can also change fonts, colors, and themes for the Navigation Form.



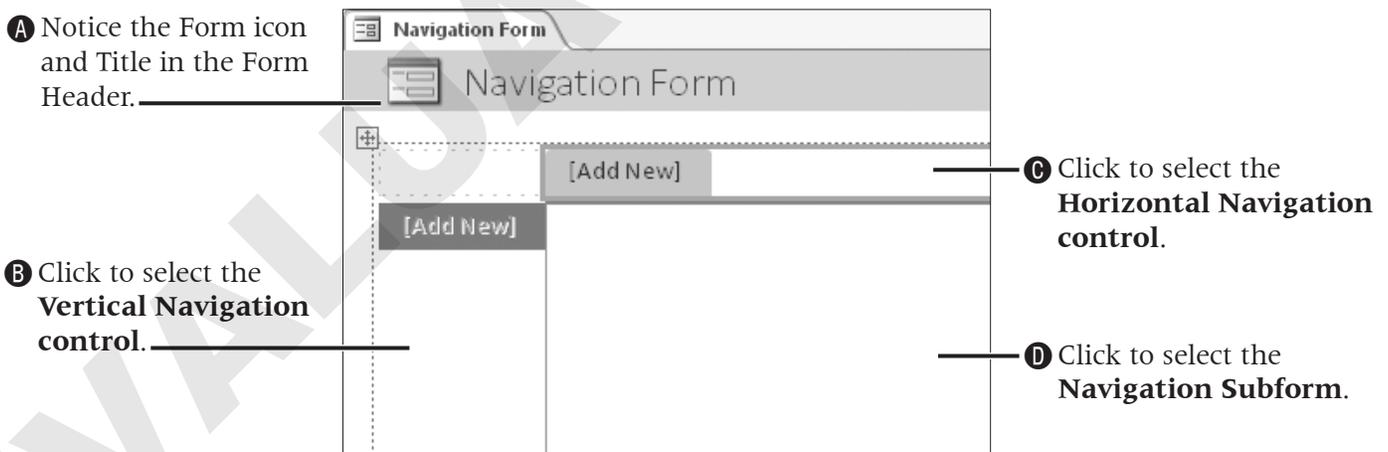
## DEVELOP YOUR SKILLS AC02-D07

### Create a Navigation Form

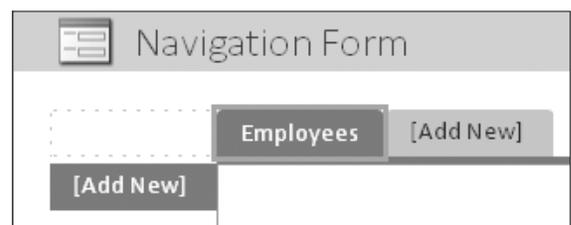
1. Rename the backup database **AC02-D01-WinWebDesign-[FirstInitialLastName]** then open it.
2. Follow these steps to create a new Navigation Form:



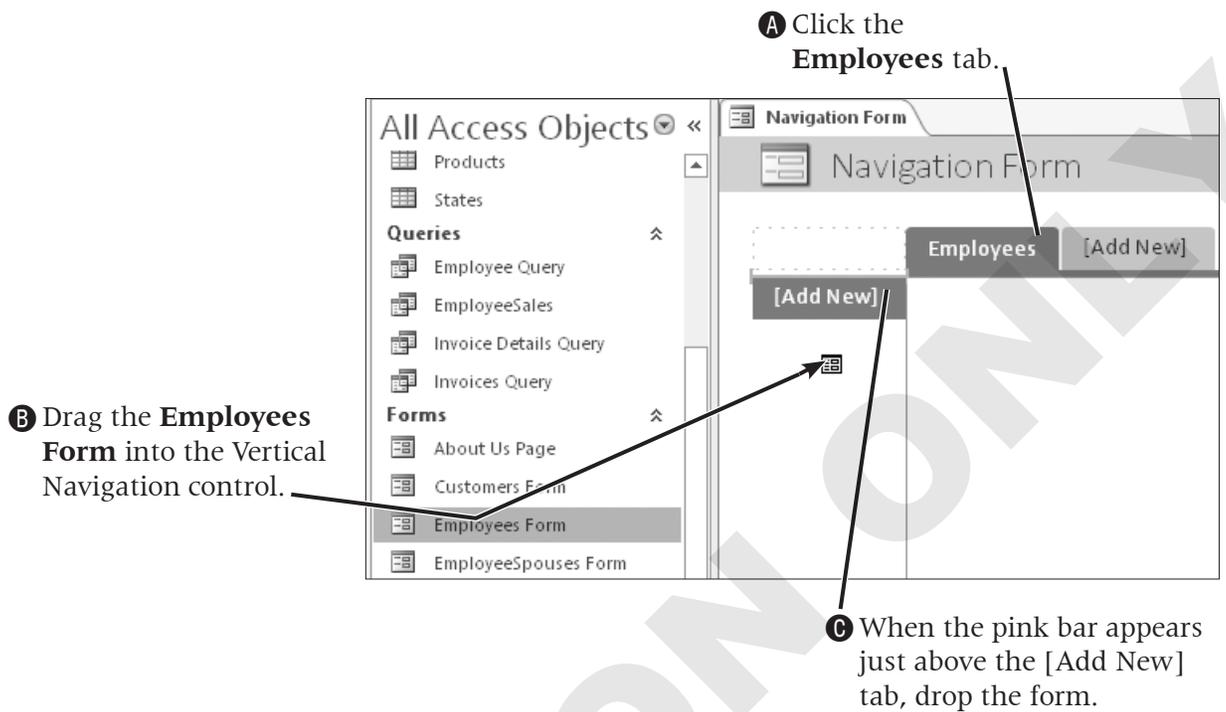
3. Follow these steps to review the new Navigation Form:



4. Double-click the **[Add New]** tab in the Horizontal Navigation control, type **Employees**, and tap **[Enter]** to display another **[Add New]** tab.
5. Create additional tabs for **Customers**, **Invoices**, and **Products**.



6. Follow these steps to add an item to a tab:



7. Drag the forms and reports to the tab indicated:

Tab	Form or Report
Employees	EmployeeSpouses Form
Employees	Employee Report
Customers	Customers Form
Customers	Customer Invoice Report
Invoices	Invoice Form
Invoices	Invoice Details Report
Products	Products Form
Products	Products Report

8. Save the form as **WWD Navigation Form**. Switch to **Design View**.

9. Delete all the controls in the **Form Header** section.

10. Choose **Design**→**Controls**→**Label** and draw a title label in the Form Header section.

11. Type **Welcome to Winchester Web Design** as the label and tap **[Enter]**.

12. Enter these properties for the new title label on the Property Sheet:

Property	Value
Width	5.5"
Height	.45"
Top	.1875"
Left	1.5"
Font Name	Georgia
Font Size	22
Text Align	Center
Font Weight	Semi-bold
Fore Color	Blue, Accent 1, Darker 50%

13. Click the **Form Header** section bar; type **.8"** for the **Height** and choose **Blue, Accent 1, Lighter 80%** for the **Back Color** property.
14. Choose **Design**→**Controls**→**Insert Image** , navigate to the **AC2013 Lesson 02** folder, and choose **WWD-Logo**.
15. Draw the new logo image in the **Form Header** section to the left of the title.
16. With the **WWD-Logo** selected, type **.7"** for the **Width** and **Height** properties, type **.05"** for the **Top** property and type **.5"** for the **Left** property.
17. Click the **Detail** section bar and type **Accent 1, Lighter 90%** for the **Back Color** and **Alternate Back Color** properties.
18. Select the left column of the navigation form (**NavigationControl5**) in the **Selection Type** list, and then choose **Transparent** for the **Back Style** property.



19. Select the top navigation control row (**NavigationControl0**) and choose **Transparent** for the **Back Style** property.

20. Switch to **Form View** and click the **Employees** tab.

WWD Navigation Form

Welcome to Winchester Web Design

Employees Customers Invoices Products

Employees Form  
EmployeeSpouses Form  
Employee Report

Winchester Web Design  
Employees Form

EmpID JFW

Last Name Winchester

First Name Jay

Street Address 9972 2nd Ave.

City Bradenton

State FL

ZIP 34210

Telephone (941) 555-9382

Email WinchesterJay@email.com

Hire Date 12/1/2010

Web Cert

21. Save the **WWD Navigation Form**.

## Adding Custom Command Buttons

Now that you have a Navigation Form that opens each of the forms and reports in the database, you can add command buttons that will perform functions using Design View. Then you can size and position the buttons, and add the text that will be displayed on each button.

Hire Date 12/1/2010

Web Cert

Record: 1 of 4 No Filter Search

Exit Access

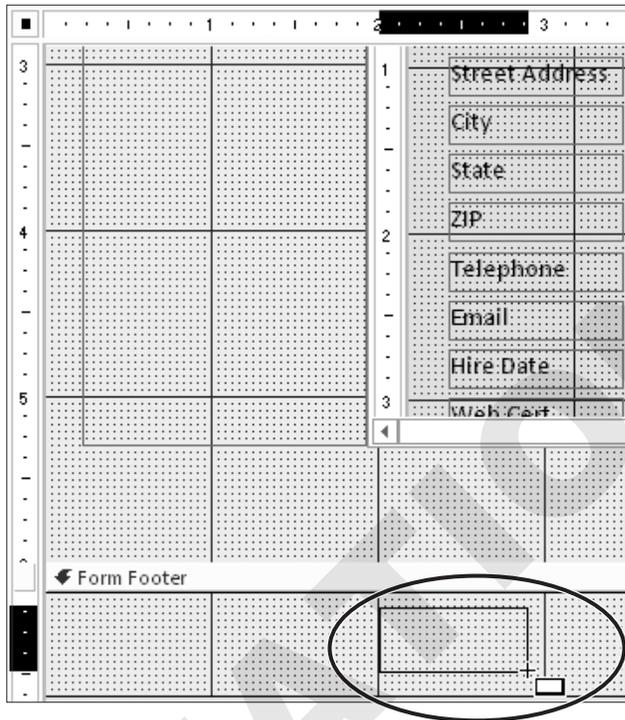
A button is added to the form to exit Access when work is completed.

When you use the Command Button control from the Ribbon to create an action command button on a form, the Command Button Wizard opens and walks you through the process. Placing command buttons in the Detail section will replicate the button for each entry in the form.

## DEVELOP YOUR SKILLS AC02-D08

### Add Command Buttons to a Switchboard

1. Display the **WWD Navigation Form** in **Design View**.
2. Expand the **Form Footer** section by dragging the bottom of the form down.
3. Type **Accent 1, Lighter 90%** for the **Back Color** of the Form Footer section.
4. Choose **Design**→**Controls**→**Button**  and draw a button in the Form Footer section.



5. Follow these steps to complete the first button:



6. Click next and follow these steps to complete the button:



7. Save changes to the form and then switch to **Form View**.
8. Click the **Exit Access** command button on the form.

## Setting Startup Options to Open a Form

Switchboards and Navigation Forms provide an interface between the user and the forms, queries, and reports contained in the database. In most cases, data entry personnel have no need to create objects or see the Navigation Pane.

As a result, many businesses set startup options that display either the most commonly used form, such as the Invoice Form, or the database interface so that it is the first thing a user sees when they open the database. Setting these startup options is also a way to protect the database from unauthorized access.

### Overriding Startup Options

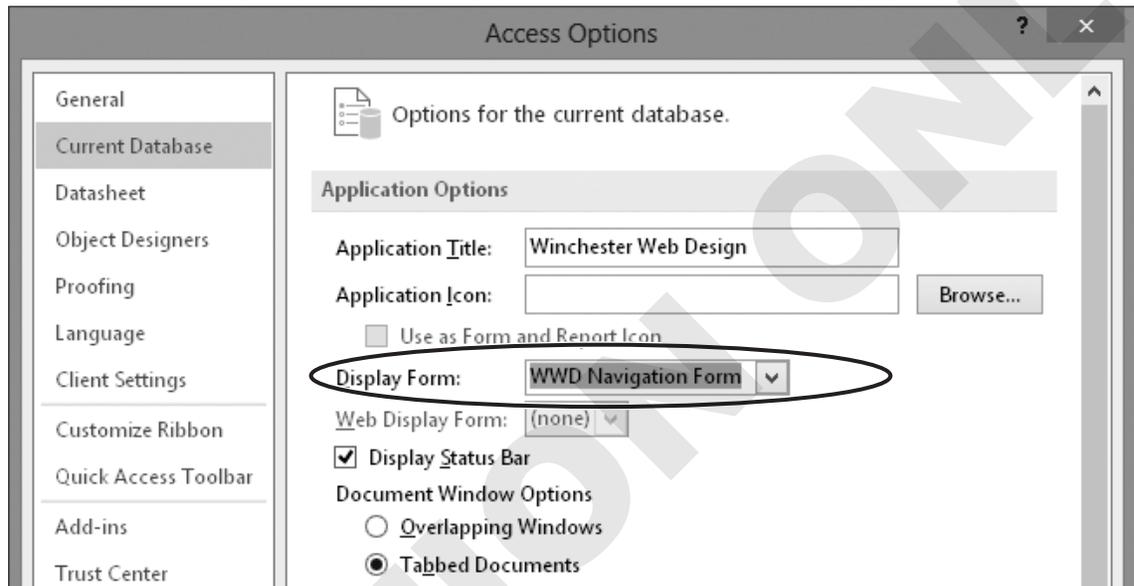
After you set startup options for a database, the Navigation Pane and many of the underlying objects and database tools may be hidden. To override the startup settings, press and hold the **Shift** key as you open the database in Access.

#### FROM THE KEYBOARD

Press **Shift** to override startup options

**DEVELOP YOUR SKILLS AC02-D09****Set a Startup Form**

1. Start **Access**. Open **AC02-D01-WinWebDesign-[FirstInitialLastName]**.
2. Choose **File**→**Options**→**Current Database**.
3. Click the **Display Form** list button and choose **WWD Navigation Form**.



4. Click **OK** twice, once to close the Access Options dialog box and once to acknowledge the message box.
5. Close the database and open it again.
6. Click the **Exit Access** command button.

**Concepts Review**

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz on the student resource center.