Quick Reference Card: Make the switch to Access 2010

Move around in Backstage view

- Access 2010 opens to Backstage view. Go to and from Backstage view by clicking the **File** tab.
- You can open a database by clicking its name under **File**, or by clicking the **Recent** tab.
- On the **New** tab, you can create a new database, including blank databases and templates:
- On the **Save & Send** tab, you can save a database in another file format, package and sign a database, compile it into an executable file, and publish a database to a SharePoint 2010 server running Access Services.
- Click **Options** to start the **Access Options** dialog box and set options for your databases, and for Access itself.

Create a new, blank database

1. Double-click the template you want.
2. Accept the default name or type a better one.
3. Click **Create** .

Use the Navigation Pane

- Double-click an object to open it for use.
- Right-click an object to make design changes in the object, to export it, rename it, or open the properties sheet for the selected object.

Change how the pane categorizes objects

1. Click the bar at the top of the pane. That opens a list of categories and groups.
2. Select a category from the top half of the list, or a group from the bottom half.

Set options for the pane

- Right-click the bar at the top of the pane and click **Navigation Options**.

Search for objects

1. If the Search bar isn't visible, right-click the bar at the top of the Navigation Pane and click **Search Bar**.
2. Enter part or all of an object name in the **Search** box. The pane filters the list of objects as you type.

To keep database objects from obscuring each other

1. In Backstage view, click **Options**.
2. Click **Current Database**.
3. Select **Tabbed Documents** and **Display Document Tabs**.
4. Close and reopen the database to see your changes.

Use the ribbon

- The ribbon isn't static—it changes depending on the object that has the focus or on the task you're doing.
- The ribbon places commands in a set of tabs and divides those tabs into groups.
- The **Home** tab provides the commands that you use the most.
- In addition, the Quick Access Toolbar in the upper left corner of the Access window contains the most frequently used commands. The Quick Access Toolbar remains the same no matter which ribbon tab you're using.
- You can customize the Quick Access Toolbar and the ribbon.

Use Key Tips

- Press the ALT key to display Key Tips for each ribbon tab. Pressing ALT plus the letter assigned to a tab takes you to that tab.
- When you use Key Tips to go to a tab, you also see the Key Tips for each command on that tab. To use a command, just press the number, letter, or letters. If the Key Tips for the commands on a tab disappear, press ALT plus the letter of the tab.

Customize the Quick Access Toolbar

1. Click the arrow at the right side of the toolbar to open a menu of commands.
2. Select the command you want to add to the toolbar.
3. If you don't see the command you want, click **More Commands**. That starts the **Access Options** dialog box.
4. Add commands from the left-hand pane to the right-hand pane.

Customize the ribbon

When you customize the ribbon, your changes apply to Access, not to an individual database.

Important   When you place a command in a custom ribbon tab or group, you sever the link between that command and its F1 help topic.

1. Click the **File** tab to go to Backstage view, then click **Options**.
2. Click **Customize Ribbon**.
3. Below the left-hand pane, click either **New Tab**, **New Group**, or **Rename**, depending on what you want to do.
4. In the left-hand pane, enter a name for the tab or group.
5. If you're creating a new tab or group, select the command you want from the left-hand pane and either double-click the command, or click **Add**, to move the command to the right-hand pane.

Rules for using files from previous versions of Access

- Databases created in Access 2000, Access 2002, and Access 2003 will run in Access 2010, but some features won't work, including the Database Window and replication.
- Access 97 files open in Access 2010, but you can only view objects and add records. You can't save any design changes unless you convert the database to Access 2010 file format.
- Once you save an older database as an ACCDB file, you can only use it in Access 2007 or 2010.
- If you open an Access 2010 database in Access 2007, any features unique to Access 2010 won't work.

Use templates and Web databases

Access provides two classes of templates, local and online. Local templates are installed on your computer when you install Access. The online templates are available if you have an internet connection.

To use online templates

1. In Backstage view, on the **New** tab, click **Sample Templates**, or double-click one of the template categories under **Office.com Templates**.
2. Give the new database a name, choose a location if you need to, and click **Create** to download and open the template.
3. Enable any blocked content, and start entering data, or modify the template to suit your needs.

To publish a Web database

1. In Backstage view, click the **Save & Publish** tab if it's not selected, and then click **Publish to Access Services**.
2. Click **Run Compatibility Checker**.
3. Click **Yes** to close any open objects and let the Compatibility Checker run.
4. If there are no issues found, the database is ready to publish.
5. Enter the URL of your server and a name for the site.

6. Click **Publish to Access Services**.
   Once the publish process is complete, the tables in your database become SharePoint lists and the forms look and behave like they do in Access.

Use Layout view

Layout view is a visual designer for forms and reports in Access 2010. It's also the only designer for forms and reports in a Web database.

To use Layout view

- In the Navigation Pane, right-click a form or report and click **Layout View**.
  - or -
  Right-click the document tab for any open form or report and click **Layout View**.

Some quick changes you can make in Layout view

- Select a single control or label and drag it to resize all the controls or labels in that column.
- Select a label, click the **Format** tab, and use the commands there to change the font, font color, or text alignment.
- Press CTRL, select multiple labels, and format them.
- To make global changes in a layout, click the Layout selector, the cross in the upper-left corner of the layout. For example, select the entire layout. On the **Design** tab, click **PropertySheet** to open the properties for the form, and set the controls to a different height.

To move or place controls by adding blank columns and rows to a layout

1. On the **Design** tab, click **Add Existing Fields**.
2. Drag the fields you want to use to the layout.
3. As needed, drag controls separately from their labels and drop them in the desired location. An orange bar indicates the destination.

To group and sort the data in your reports

1. On the **Design** tab, click **Group & Sort**.
2. In the **Group, Sort, and Total** pane, click **Add a group**, and then click the field around which you want to group your data. Your change appears right away.
   You can add as many as seven levels of grouping.