

# PRACTICE EXERCISES

## 1 Financial Management



You are working as a customer service representative for a financial management firm. Your task is to contact a list of prospective customers and introduce yourself and the services of your company. The list is currently in Excel but you decide it will be easier to create an Access database to store the data. You will create a Leads table and then copy and paste the Excel data into the new table. You decide that a form will help you add and update the data. After creating the form, you will customize it in Layout view. This exercise follows the same set of skills as used in Hands-On Exercises 1 and 2 in the chapter. Refer to Figure 4.52 as you complete this exercise.

Form Header	
New Leads	
Detail	
ID	ID
First Name	FirstName
Last Name	LastName
City	City
State	State
Zip Code	ZipCode
Phone Number	PhoneNumber
Email	Email
Birth Date	BirthDate
Net Worth	NetWorth
Form Footer	
Our records indicate that you are eligible for our gold package.	

FIGURE 4.52 Leads Form in Form View ►

- Open Access, and then type `a04p1prospects_LastnameFirstname` in the **File Name box**. Click **Browse**. Locate your Student Data Files folder in the File New Database dialog box, click **OK** to close the dialog box, and then click **Create** to create the new database.
- Click **View** in the Views group to switch to Design view. Type **Leads** in the **Save As dialog box**, and then click **OK**.
- Type **FirstName** in the second row, and then press **Tab**. Accept **Text** as the Data Type. Type **25** in the **Field Size property** in Field Properties, and then type **First Name** in the **Caption property**.

- d. Type the remainder of the fields and adjust the field properties as shown:

Field Name	Data Type	Field Size	Caption
<b>LastName</b>	Text	25	<b>Last Name</b>
<b>City</b>	Text	25	n/a
<b>State</b>	Text	2	n/a
<b>ZipCode</b>	Text	5	<b>Zip Code</b>
<b>PhoneNumber</b>	Text	14	<b>Phone Number</b>
<b>Email</b>	Text	30	n/a
<b>BirthDate</b>	Date/Time	n/a	n/a
<b>NetWorth</b>	Currency	n/a	<b>Net Worth</b>

- e. Verify that the first field (ID) is set as the **Primary Key**.
- f. Click **View** in the Views group to switch to Datasheet view. Click **Yes** to save the table. Open the *a04p1leads\_import* Excel file, and then manually add the first three records into the Leads table. (Begin typing in the FirstName field; the ID field will be generated automatically.) Press **Tab** to move to the next field.
- g. Click **row 5** in the Excel file, press and hold the **left mouse button**, and then drag through row 15 (Lynne Miller's row) so that 11 rows are selected. Click **Copy** in the Clipboard group.
- h. Return to Access, and then click on the **asterisk (\*)** on the first new row of the Leads table. Click **Paste** in the Clipboard group to paste the 11 rows into the Leads table, and then click **OK** to confirm. Save and close the table.
- i. Click the **Create tab**, and then click **Form** in the Forms group to create a new form that opens in Layout view.
- j. Click the **ID box**, and then drag the right border of the first field to the left to shrink the column by 50%.
- k. Change the title of the form to **New Leads**.
- l. Click on the **ID field**, and then click the **Layout Selector** (the small square in the top-left corner with a cross inside). Click the **Arrange tab**, and then click the **Control Padding arrow** in the Position group. Select **Narrow** from the list of options.
- m. Click the **Home tab**. Click the **View arrow**, and then select **Design view**. Click the bottom of the Form Footer bar, and then stretch the *Form Footer* section to the 1" mark. Click **Label** in the Controls group. Add a label to the Form Footer as shown in Figure 4.52, and then apply bold to the label.
- n. Save the form as **Leads Form**. Switch to Form view.
- o. Return to the Excel file, and then manually enter the last two records into the Leads table using the Leads Form. Close the form.
- p. Click the **File tab**, and then click **Compact & Repair Database**.
- q. Exit Access.
- r. Submit the database based on your instructor's directions.

## 2 Comfort Insurance

The Human Resources department of the Comfort Insurance Agency has initiated its annual employee performance reviews. The reviews affect employee salary increases and bonuses. The employee data, along with forms and reports, are stored in an Access database. You need to prepare a report showing employee raises and bonuses by city. This exercise follows the same set of skills as used in Hands-On Exercises 1, 3, and 4 in the chapter. Refer to Figure 4.53 as you complete this exercise.

Location	LastName	FirstName	Hire Date	Salary	2012Increase	2012Years	Years
L01	Abrams	Wendy	3/24/2011	\$47,000.00	3.00%	14.25	
	Anderson	Vicki	9/21/2008	\$47,000.00	4.00%	13.68	
	Bruchette	Susan	9/30/2012	\$51,000.00	4.00%	21.60	
	Brook	Leonard	12/23/2010	\$26,200.00	3.00%	7.96	
	Brown	Patricia	6/13/2014	\$20,100.00	5.00%	1.05	
	Brimbough	Maige	11/25/2009	\$49,300.00	3.00%	14.79	
	Carvick	Paul	11/27/2011	\$42,600.00	3.00%	12.71	
	Davis	Martha	6/14/2010	\$51,000.00	4.00%	20.76	
	Diaben	Lolly	9/12/2009	\$37,000.00	1.00%	12.20	
	Farris	Latoria	5/22/2011	\$25,000.00	3.00%	8.40	
	Ferguson	Erin	12/15/2009	\$45,000.00	3.00%	12.13	
			12/21/2008	\$38,400.00	3.00%	11.71	

**FIGURE 4.53** Employee Compensation Report with Totals ▶

- Open *a04p2insurance*. Click the **File** tab, click **Save Database As**, and then type *a04p2insurance\_LastnameFirstname*. Click **Save**.
- Select the **Locations** table. Click the **Create** tab, and then click **Form** in the Forms group to create a new form that opens in Layout view.
- Click the **LocationID** text box containing *L01*. Move the mouse to the right edge of the orange border until the mouse pointer changes to a double-headed arrow. Drag the right edge to the left to reduce the size of the text box to approximately 50% of its original size.
- Click the subform at the bottom of the form, and then click the **Layout Selector** (the small square with a four-headed arrow inside). Press **Delete** to delete the subform.
- Click **Themes** in the Themes group on the Design tab. Right-click a **Solstice** theme (second column, second row from bottom), and then choose **Apply Theme to This Object Only**.
- Save the form as **Locations**. Close the form.
- Select the **Locations** table. Click the **Create** tab, and then click **Report** in the Reports group to create a new tabular layout report in Layout view.
- Click the **Locations** label, and then drag the right border of the label to the left to reduce the size of the control to 50%.
- Repeat the sizing process with the Zipcode label and the OfficePhone label. Adjust the other columns if necessary until there are no controls on the right side of the vertical dashed line.
- Display the report in Print Preview. Verify that the report is only one page wide. Close and save the report using the name **Locations**.
- Select the **Employee Query**. Click the **Create** tab, and then click **Report Wizard** in the Reports group to launch the Report Wizard. Respond to the questions as follows:
  - Click (>>) to add all the fields to the Selected Fields box. Click **Next**.
  - Accept grouping by Location. Click **Next**.
  - Select **LastName** for the first sort order and **FirstName** for the second. Click **Summary Options**.
  - Click **Sum** for Salary, **Avg** for 2012Increase, and **Avg** for YearsWorked. Click **OK**. Click **Next**.
  - Accept the Stepped layout. Change Orientation to **Landscape**. Click **Next**.
  - Type **Employee Compensation** for the title of the report. Click **Finish**.
  - The Report is displayed in Print Preview mode. Some of the columns are too narrow. Next, you will adjust the columns and summary controls.
- Click **Close Print Preview**. Switch to Layout view.
- Adjust the column widths so that all the data values are showing. Some of the columns will need to be reduced and some will need to be widened. Change the YearsWorked label to **Years**. Use Figure 4.53 as a guide.
- Adjust the Summary controls at the bottom of the first Location (L01) so all the values are visible. Adjust the Summary controls in the Report Footer so all the values are visible. Align all the Summary controls with their associated detail columns.

- o. Open the Property Sheet. Click the **Avg Of YearsWorked control**, and then select **Fixed** for the Format property and **0** for the Decimal Places property.
- p. Click **Themes** in the Themes group. Right-click the **Module theme** (first column, fourth row from bottom), and then choose **Apply Theme to This Object Only**.
- q. Display the report in Print Preview. Close the Navigation Pane, and then verify that the report is still one page wide. Compare your report to Figure 4.53. Adjust column widths if necessary.
- r. Save and close the Employee Compensation report.
- s. Click the **File tab**, and then click **Compact & Repair Database**.
- t. Close the database. Exit Access.
- u. Submit based on your instructor's directions.