# **About data access pages**

A data access page is a special type of Web page that enables you to view and work with data from a <u>database</u>. It might also include data from other sources, such as Microsoft Excel. How you interact with the page depends on what it's used for.

- Interactive reporting
- Data analysis

Data access pages are supported in Microsoft Internet Explorer 5.01 with Service Pack 2 (SP2) or later.

# Parts of a data access page

A data access page can have many features; however, these features vary depending on the purpose of the page. Some of the most common features are listed below. (Fields and records are always part of a data access page; however, how they are presented varies.)



- Expand indicator
- Group header
- **a** A record is a collection of related facts about one entity, such as a customer, a customer order, or an employee, stored in a database.
- A text box displays existing data from the underlying database, or, if allowed, accepts new data that you enter to be stored in the database.
- 5 Group records for 04-Mar.
- The record navigation toolbar lets you quickly move between records or add, delete, save, undo changes to, sort, or filter records.

Groups organize data into sets. For example, the above page groups records of customers' orders by date. The name of each date is the group header. Depending on how the page was designed, either all the groups are displayed on the page (usually with their records hidden), or

no specific group is displayed until you choose one from a list of available groups. If the page shows all groups, you can display the records for a specific group by clicking its expand indicator. Some or all groups in the page may support data entry.

In a grouped data access page, each group might have its own record navigation toolbar located at the bottom of the expanded group.

In addition to the above, a page might contain one or more of the following:

- PivotTable lists
- Spreadsheets
- Charts

# Work with data on a data access page

- Add, edit, and delete data
- Save or undo changes
- Navigate between fields and records
- ▶ Sort, find, filter, or refresh data
- Use shortcut keys on a data access page

# **Glossary**

## <u>CDEFGHJMPRSU</u>

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#### calculated field

A field, defined in a query, that displays the result of an expression rather than displaying stored data. The value is recalculated each time a value in the expression changes.

### chart

A graphical view of database data that is used to visually display trends, patterns, and comparisons. When the data in the database changes, the chart updates accordingly. If the chart is linked to a PivotTable list or spreadsheet on the data access page, the chart changes when you change the data in the PivotTable list or spreadsheet. A chart includes its own toolbar and built-in Help.

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# data access page

A Web page that has a connection to a database. By using a data access page, you can view, add, edit, and manipulate data stored in the database. A data access page can also include data from other sources, such as Microsoft Excel.

### database

A collection of data related to a particular subject or purpose. A data access page can connect to a Microsoft Access database or a Microsoft SQL Server database.

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## expand indicator

A button that is used to expand or collapse groups of records on a data access page; it displays the plus (+) or minus (-) sign.

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### filter

A set of criteria that is applied to data to show a subset of the data. In a data access page, you can filter records by using the Filter By Selection command. Note: A data access page can also have a built-in filter. On this type of page, you don't see any records until you choose a value from a list on the page. Only records that contain the value you choose will be displayed in the page until you choose another value to filter on.

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#### **GIF**

A graphics file format (.gif extension in Microsoft Windows) used to display indexed-color graphics on the World Wide Web. It supports up to 256 colors and uses lossless compression, meaning that no image data is lost when the file is compressed.

## group

A collection of objects that behave as one for the purpose of moving, resizing, or rotating them. A group can be composed of multiple sets of groups.

# group level

The depth at which a group in a report or data access page is nested inside other groups. Groups are nested when a set of records is grouped by more than one field, expression, or group record source.

# grouped data access page

A data access page that uses two or more group levels to create a hierarchy that groups records from general categories to specific details.

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#### HTML

The standard markup language used for documents on the World Wide Web. HTML uses tags to indicate how Web browsers should display page elements such as text and graphics and how to respond to user actions.

#### **HTML** extensions

A feature or setting that is an extension to the formal HTML specification. Extensions may not be supported by all Web browsers, but they may be used widely by Web authors. An example of an extension is marquee scrolling text.

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### **JPEG**

A graphics file format (.jpg extension in Windows) supported by many Web browsers that was developed for compressing and storing photographic images.

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#### Microsoft Access database

A collection of data and objects, such as tables, queries, or forms, related to a particular topic or purpose. The Microsoft Jet database engine manages the data.

# **Microsoft Office Web Components**

Interactive components, such as spreadsheets, charts, and

PivotTable lists on Web pages that facilitate data analysis. To use these components, you must have an Office 2003 license.

## Microsoft SQL Server database

A database in Microsoft SQL Server that consists of tables, views, indexes, stored procedures, functions, and triggers.

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### path

The route the operating system uses to locate a folder or file; for example, c:\House finances\March.doc.

### PivotTable list

Similar to a Microsoft Excel PivotTable report, a PivotTable list displays data in a row and column format. A PivotTable list provides interactive capabilities in Microsoft Internet Explorer, enabling you to reorganize the data by moving rows to columns and columns to rows, displaying totals at the intersection of rows and columns, and otherwise rearranging and summarizing the data to analyze it in different ways. A PivotTable list includes its own toolbar and built-in Help.

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# record navigation toolbar

A toolbar that contains buttons for adding, deleting, saving, undoing changes to, sorting, filtering, and moving between records, and getting Help. In a grouped data access page, each group may have its own record navigation toolbar that's located at the bottom of the expanded group.

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## spreadsheet

A feature on a data access page that is similar to a Microsoft Excel worksheet. Using a spreadsheet, you can enter raw data, add formulas, apply filters, and perform additional spreadsheet operations. A spreadsheet includes its own toolbar and built-in Help.

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# **Uniform Resource Locator (URL)**

An address to an object, document, page, or other destination (for example, a newsgroup or a World Wide Web page) on the Internet or an intranet. A URL expresses the protocol (such as FTP or HTTP) to be accessed and where the destination is located. A URL may also specify an Internet e-mail address. Some examples of URLs are: http://www.someones.homepage/default.html, ftp://ftp.server.somewhere/ftp.file, news:alt.hypertext

## **Universal Naming Convention (UNC)**

A naming convention for files that provides a machine-independent means of locating the file. A UNC name will usually include a reference to a shared folder and file accessible over a network rather than a folder and file that's specified by a drive letter and path. For example, the UNC name for a database named Northwind.mdb on a shared directory named Samples on a computer called MyWorkstation would be \\MyWorkstation\Samples\Northwind.mdb. The UNC is particularly useful in Web-based applications because it allows you to reference data that is not necessarily stored on a particular Web server.

# Get Help on using a data access page

This topic explains how to view and work with a data access page in general; however, the designers of the data access page that you are viewing might have provided Help information specific to that page. For example, they might have added instructions directly to the page, or they might have added a custom Help button or a hyperlink to information about the page.

A data access page may also include features that have their own built-in help. For example, the Microsoft Office PivotTable Component, Spreadsheet Component, and Chart Component have their own help, which explains how to work with just that feature of the page.

To get help about using Microsoft Internet Explorer, click **Contents and Index** on the Internet Explorer **Help** menu.

To get help for a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>, click **Help** on that component's toolbar.

To redisplay Microsoft Access Help, close the Help window for the PivotTable list, spreadsheet, or chart, and then click **Help** on the data access page record navigation toolbar.

**Note** Other features, such as Windows Media Player, also have their own Help, which is available by right-clicking that feature.

# **Get Help on Microsoft Office Web Components**

To get help for the PivotTable Component, Spreadsheet Component, or Chart Component, click **Help** on the toolbar in the <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>.

# **About Microsoft Office Web Components**

Microsoft Office Web Components is a set of ActiveX controls installed with Microsoft Office 2003. With Office Web Components installed on your computer, you can interactively use a spreadsheet, a PivotTable list, and a chart on a Web page in Microsoft Internet Explorer 5.01 with Service Pack 2 (SP2) or later.

If Office Web Components is not installed on your computer but you have an Office 2003 site license that permits intranet distribution, you can configure the components so that users will be prompted to download Office Web Components from your corporate intranet. This allows users at your site to use a data access page without having Office 2003 software installed on their computers.

For information about how to configure Office Web Components, see the *Microsoft Office 2003 Resource Kit*.

# **About View-only mode for Office Web Components**

If you do not have a Microsoft Office 2003 software license installed on your computer or accessed via a Microsoft Office 2003 application, you can view a Microsoft Office Web Component— a Spreadsheet Component, Chart Component, or PivotTable Component— on a Web page, but you cannot interact with it.

To be able to interact with and use full functionality of the component you are viewing, you must install Microsoft Office 2003 or have access to an Office 2003 license. If you are in a corporate or group environment, check with your network administrator for assistance.

When you are in View-only mode, you can:

View data.

Print.

Select and scroll.

Use hyperlinks.

Resize a component.

Select sheets in the Spreadsheet Component.

Expand or collapse members in a PivotTable list.

Refresh data in a PivotTable list.

Use the **About**, **Help**, and **Refresh** commands. Help topics that deal with interactivity (such as formatting cells, dragging fields, sorting, filtering, and so on) do not apply.

All commands except **About**, **Help**, and **Refresh** are unavailable in Viewonly mode.

# Use shortcut keys on a data access page

To use the following keys, press the TAB key repeatedly until the <u>expand</u> indicator or <u>record navigation toolbar</u> has focus. If a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u> currently has focus, press CTRL+TAB.

Press	То
SPACE or ENTER	Expand or collapse a group of records that correspond to the expand indicator in a grouped data access page
LEFT ARROW or RIGHT ARROW	Select a button on the record navigation toolbar
SPACE or ENTER	Activate the selected button on the record navigation toolbar

# **About hyperlinks**

A hyperlink is a pointer from one object to another. The destination is frequently another Web page, but it can also be a picture, an e-mail address, a file (such as a multimedia file or Microsoft Office document), or a program. The hyperlink itself can be displayed as text or as a picture.

You can use hyperlinks to do the following:

Navigate to a file or Web page on a network, an intranet, or the Internet

Send an e-mail message

Start a file transfer, such as a download or an FTP process

When you point to text or a picture that contains a hyperlink, the pointer becomes a hand , indicating that it is something you can click. When a site visitor clicks the hyperlink, the destination is displayed, opened, or run, depending on the type of destination. For example, a hyperlink to a sound file opens the file in a media player, and a hyperlink to a Web page displays the page in a Web browser.

- Parts of a hyperlink address
- Hyperlink subaddress syntax
- Examples of hyperlink addresses

# Enter a hyperlink address

- ▶ Paste a hyperlink or hyperlink address
- Drag an Internet shortcut
- ▶ Type a hyperlink address

# Follow a hyperlink

Point to the hyperlink. Click the hyperlink when the pointer changes to a hand  $\oplus$ .

By default, a hyperlink that you haven't clicked is blue and underlined, and a hyperlink that you have clicked is purple and underlined.

# Find specific data using a filter

By using a filter, you can find records based on whether they contain a specific value in a particular field. For example, you can find all records that have "Germany" in the Country field. When you apply the filter, only the records that contain the value you selected will appear in the data access page. Once you remove the filter, all the records will be displayed again. For grouped data access pages, you can filter the list of groups (the group headings) or the records within groups.

- 1. Do one of the following:
  - In an ungrouped page
  - ▶ In a grouped page
- 2. To further narrow the subset of records, continue selecting fields and clicking **Filter By Selection 1** until you have just the records you want.

For example, if you want to see records only for customers in Germany with a required date of 5/12/98, select "Germany" in the Country field, click **Filter By Selection**, select "5/12/98" in the Required Date field, and then click **Filter By Selection** again.

#### **Notes**

If you select only part of the value in a field, the data access page still uses the entire field value for filtering.

You can remove the filter and then reapply it during the same working session.

If you browse to another data access page, you'll lose the filter.

This procedure doesn't apply to a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>. These features can be filtered independently from the rest of the data on the data access page and may also support additional filtering capabilities. For more information, click **Help** on that component's toolbar.

## Remove a filter to show all records

Click **Filter Toggle** on the <u>record navigation toolbar</u>.

### **Notes**

Removing a <u>filter</u> doesn't delete it. However, if you close or refresh the page, or move away from the current set of records, you will lose the filters on a page.

This procedure doesn't apply to a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component. These features can be filtered independently from the rest of the data on the data access page, and may also support additional filtering capabilities. To display help for a <a href="PivotTable list">PivotTable list</a>, <a href="Spreadsheet">spreadsheet</a>, or <a href="Chart">chart</a>, click <a href="Help">Help</a> on its toolbar.

# Sort data on a data access page

You can sort data on a data access page, including data that's grouped. For grouped data access pages, you can sort the list of groups or the records within a group.

- 1. Do one of the following:
- In an ungrouped page, click the field you want to use for sorting records.
- In a grouped page, expand the group that you want to sort, and then click the field you want to sort records on.

**Note** When you sort records within a group, the sort order only applies to that group. It does not affect the order of records in other groups. For example, say a data access page is grouped by region, the region names are listed in ascending order, and under each region employees are listed in ascending order by their last name. If you display employee records for Mexico and then sort employees in descending order by last name, then the employee records for other regions will still be sorted in ascending order, as will the list of regions themselves.

- 2. Do one of the following:
- To sort in ascending order, click **Sort Ascending** .
- To sort in descending order, click **Sort Descending**

#### Notes

If the records are displayed in tabular format, simply click the label of the field you want to sort records on. The records will display in ascending order. To sort records in descending order, click the label again.

If you browse to another data access page and come back to this page, you'll lose the sort order.

The order in which numbers, text, and special characters are sorted depends on the database and your regional settings in Microsoft Windows Control Panel.

This procedure doesn't apply to a Microsoft Office PivotTable

Component, Spreadsheet Component, or Chart Component. These features can be sorted independently from the rest of the data on the data access page, and may also support additional sorting capabilities. To display help for a <a href="PrivotTable list">PrivotTable list</a>, <a href="Spreadsheet">spreadsheet</a>, or <a href="Chart">chart</a>, click <a href="Help">Help</a> on its toolbar.

# Apply an existing filter to a data access page

You can reapply <u>filters</u> that you created earlier in the current working session. However, if you browse to another data access page after creating the filters, or if you navigate away from the records that are currently displayed, the filters will be lost.

On an ungrouped page, click **Filter Toggle**  $\overline{\hspace{0.1cm}}$  on the <u>record navigation</u> toolbar.

On a grouped page, expand the group that you want to filter, and then click **Filter Toggle**  $\square$  on the record navigation toolbar for that group.

**Note** This procedure doesn't apply to a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component. These features can be filtered independently from the rest of the data on the data access page, and may also support additional filtering capabilities. To display help for a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>, click **Help** on its toolbar.

# Make a data access page available offline

- 1. On the Favorites menu, click Add to Favorites.
- 2. In the Add Favorite dialog box, select Make available offline.

**Note** If the **Make available offline** check box is unavailable, you won't be able to take a data access page offline. Contact the designer of the page for assistance.

3. Click OK.

The page and associated data are saved to your computer.

# Switch between offline and online modes of a page

- 1. Open a data access page in Microsoft Internet Explorer 5.01 with Service Pack 2 (SP2) or later.
- 2. On the **File** menu, click **Work Offline**.

If **Work Offline** is selected, the page is offline. If it is not selected, the page is online.

**Note** A page will be offline if your computer is not connected to a network when you open the page.

# Synchronize an offline data access page with source data

- 1. On the **Tools** menu, click **Synchronize**.
- 2. In the **Items to Synchronize** dialog box, select the check box for the data access page you want to synchronize.
- 3. Click **Synchronize**.

The Microsoft Synchronization Manger merges the offline changes with the data in the source database.

**Note** The rules for merging offline data with the source database are defined either by the designer of the page or the database administrator. Contact them if you encounter errors or conflicts during the synchronization process. You might lose some of your changes during the merge operation, depending on how the rules are defined.

# Make an offline data access page online

- 1. On the **File** menu, click **Work Offline** so that it is no longer selected.
- 2. On the **Favorites** menu, right-click the entry for the data access page, and then click **Make available offline** so that it is no longer selected.
- 3. In the Confirm Offline Item Delete dialog box, click Yes.

### Add a record

1. On the <u>record navigation toolbar</u>, click **New** ...

**Note** If you don't see the **New** button, it means one of the following:

- The page does not support data entry.
- The designer of the page has customized the button. Look for custom instructions on how to use the page, or contact the designer.
- 2. Type the data you want in the first field, and then press TAB to go to the next field.
- 3. When you are finished adding data to each field, save the record.

**Note** If you make a typing mistake, press BACKSPACE. To cancel your changes in the current field, press ESC. To cancel your changes to the entire record, click **Undo** on the record navigation toolbar.

### Edit data in a record

1. Click in the field you want to edit.

**Note** You cannot edit <u>calculated fields</u> and fields that are being used to group data. If you can't insert the input cursor inside any of the fields in the page, the page does not support edits.

- 2. Type the text you want to insert.
- 3. Save the record.

**Note** If you make a typing mistake, press BACKSPACE. To cancel your changes in the current field, press ESC. To cancel your changes to the entire record, click **Undo** on the <u>record navigation toolbar</u>.

# Display the most current data

If other users are entering data at the same time as you are, your <u>data</u> <u>access page</u> may not be displaying the most recent changes to the <u>database</u>. To see current data, refresh the page periodically.

Click **Refresh** on the Microsoft Internet Explorer toolbar or press F5.

**Caution** If you click **Refresh** before you have saved your changes, Internet Explorer warns you that your changes may be discarded. You must click **Cancel** to prevent losing your changes to the current record.

#### **Notes**

If reloading the data takes a long time and you want to cancel the operation, click **Stop** on the Internet Explorer toolbar or press ESC.

Your data access page might have a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component, which have their own methods of selection. To display help for the <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>, click **Help** on its toolbar.

## Save a record

On the record navigation toolbar, click **Save** .

**Note** If you don't see the **Save** button, it means one of the following:

The designer of the page has customized the button. Look for custom instructions on the page on how to save your changes.

The page is read-only and does not support additions or edits.

# Show or hide records for a group

- 1. Scroll to the group for which you want to show or hide detail records.
- 2. Do one of the following:
- If the detail records are not visible, click **Expand** next to the group heading.
- If the detail records are visible, click **Collapse** □ next to the group heading.

**Note** The **Expand** and **Collapse** buttons might look different on your page.

## Select fields and records

- Using the mouse
- Using the keyboard

**Note** Your data access page might have a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component, which have their own methods of selection. To display Help for one of these components, click **Help** on its toolbar.

# Undo changes when adding or editing records

To undo changes to the current record, click  ${\bf Undo}$  on the record navigation toolbar.

**Note** If you don't see the **Undo** button, it means one of the following:

The designer of the page has customized the button. Look for custom instructions on the page on how to undo your changes.

The page is read-only and does not support additions or edits.

## Move between records

Use the navigation buttons located on the <u>record navigation toolbar</u> to quickly move between records or a group of records on a <u>grouped data access page</u>.



- First record
- Previous record
- Record source and number
- Next record
- Last record

**Note** If you don't see the record navigation toolbar on your page, it means one of the following:

All the records are displayed on the page, so the navigation buttons are not necessary.

The designer of the page has customized the toolbar. Look for custom instructions on how to use the page, or contact the designer.

# Add, change, or delete the path to a picture

**Note** The picture is not stored in the database. Rather, the <u>path</u> to the picture's location is stored in the database, and the picture is stored in a computer's file system.

- 1. Click inside the path field.
- 2. Do one of the following:
- To add the path to the picture, type the path of the picture's location.
- To change the path to the picture, edit the path.
- To delete the path to the picture, select the contents of the field and press DELETE.

#### **Notes**

You cannot edit a field on a page unless the page supports edits.

The path can be a relative path, a path on your computer, a <u>universal</u> <u>naming convention (UNC)</u> path, or a <u>uniform resource locator (URL)</u>. The type of path you should use depends on the requirements of the database.

If you want to delete the picture file, you must do so from its location in your computer's file system. See Microsoft Windows Help for more information about deleting files.

### Delete a record

**Important** Once you delete a record, you cannot undo the deletion from the database.

On the <u>record navigation toolbar</u>, click **Delete .** 

Note If you don't see the **Delete** button, it means one of the following:

The page does not support deletions.

The designer of the page has customized the button. Look for custom instructions on how to use the page, or contact the designer.

# Preview a data access page

To preview a data access page, you must have Microsoft Internet Explorer 5.5 or later on your computer.

On the **File** menu, click **Print Preview**.

# Print a data access page

When you print a data access page, the printout contains only what is currently displayed on the screen, including <u>expand indicators</u> and <u>record navigation toolbars</u>.

- 1. Scroll to the part of the data access page you want to print.
- 2. Expand or collapse any groups you do or do not want to print.
- 3. In Microsoft Internet Explorer, on the **File** menu, click **Print**.

**Note** Your data access page may have a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component, which have their own methods of selection. To display help for a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>, click **Help** on its toolbar.

# **Troubleshoot data access pages**

- Record navigation toolbar
- ▶ Entering or editing data
- Viewing data

**Note** The data access page might contain a Microsoft Office PivotTable Component, Spreadsheet Component, or Chart Component, which has its own troubleshooting information. To display help for a <u>PivotTable list</u>, <u>spreadsheet</u>, or <u>chart</u>, click **Help** on its toolbar.