

Access 2013: Create web-based databases

Practical workbook

Aims and Learning Objectives

Access web apps can only be used via Microsoft's SharePoint. The easiest way to gain access to SharePoint is to subscribe to SharePoint Online, which is available from Microsoft for an annual fee. This then lets you host, use and share Access web apps from any Internet-enabled device. This document will be of no use if you do not have access to SharePoint Online.

This document assumes that you are experienced at designing and building Access databases so, rather than dwelling on these aspects, concentrates on the core building blocks – the 'must knows' – necessary for getting an Access web app online.

The core learning objectives for this document are to:

- Set up a new SharePoint Online Site to host your app
- Choose, 'launch' and use an Access web app from a template
- Modify your new Access web app

Note on versions of Access:

This document is only relevant to Access 2013 and will be of no use if using earlier versions of Access.

Document information

Course files

This document and any associated practice files (if needed) are available on the web. To find these, go to <http://www.bristol.ac.uk/it-services/learning/resources> and in the **Keyword** box, type the document code given in brackets at the top of this page.

Related documentation

Other related documents are available from the web at:

<http://www.bristol.ac.uk/it-services/learning/resources>



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Contents

Document information

Task 1	Create a new SharePoint Site	1
Task 2	Select a pre-existing template and 'launch' it to your new Site	2
Task 3	Modify your Access web app	4

Important: security information

Remember that if you store or otherwise process personal or restricted University data on a database, whether web-based or otherwise, you should be aware of your responsibilities toward keeping this data safe and secure, both from point of view of University regulations and the Data Protection Act.

See the Information Security website (www.bristol.ac.uk/infosec) for further information.

Important: prerequisites/support

1. You must have a SharePoint Online account before you can use this document.
2. You must determine in advance what Microsoft Services you need. You can compare options at <http://office.microsoft.com/en-gb/sharepoint/collaboration-tools-compare-sharepoint-plans-FX103789400.aspx>.
3. You may also need to buy further Microsoft Services, such as Office 365 to ensure that your version of Access is always up-to-date (SharePoint Online only lets you modify or launch new Access apps using the current version of Access).

Please note: IT Services does not provide support for any issues to do with creating, hosting, using or sharing Access web apps on SharePoint Online or for any problems in launching web apps. The SharePoint Online and Office 365 services are provided by Microsoft – for support you should go to <http://support.microsoft.com/ph/15834#tab6>.

Task 1 Create a new SharePoint Site

Objectives To login to your SharePoint Online account and create a new Site to host your Access web app.

Comments By creating a new Site you make it easier to control access to your Access web app if you intend to share your database with others and let them update it online.

1.1 To login to your SharePoint Online account and go to Sites:

- Open **Internet Explorer** and navigate to <https://login.microsoftonline.com/> and enter your SharePoint username (which is in the form of an email address) and password.

Note Chrome and other browsers do not work well (if at all) with SharePoint Online.



Figure 1 – select Sites from the menubar

- Select **Sites** in the **Menubar**.

1.2 To create a new Site to host one or more Access web apps:

- Click on the **new site** link to open the **Start a new site** dialogue.

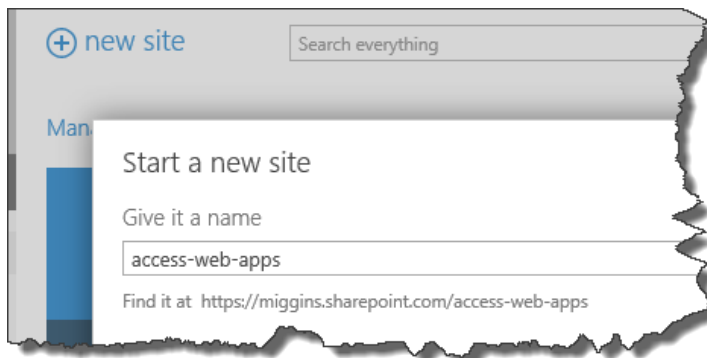


Figure 2 – don't include spaces when naming your new site

- Enter a name in the **Give it a name** field, e.g. **access-web-apps**.

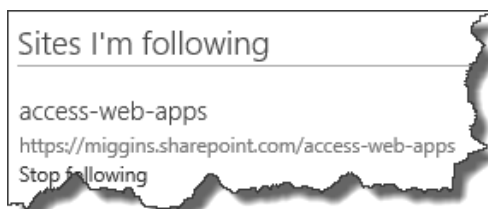


Figure 3 – all sites you create appear here

- Click **Create** and notice that your new site is now listed under **Sites I'm following**.

Task 2 Select a pre-existing template and 'launch' it to your new Site

Objectives To look at the pre-existing templates and select one that has at least some of the functionality that you want for your database and to 'launch' the new app to your SharePoint Site

Comments You could build the app from scratch – in which case you would create a blank web database, build it and then 'launch' it.

2.1 To create a custom web app:

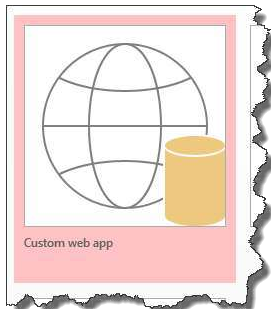


Figure 4 – click on the extremely intrusive Custom web app icon

- Open **Access** and select **Custom web app**.
- In **App Name** type a name that tells you what the database does, e.g. **MyContacts**.

Note Keep this simple, with no spaces, because it becomes part of the URL.

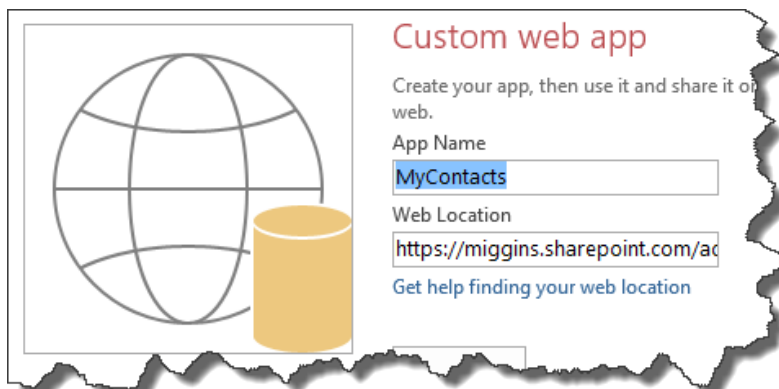


Figure 5 – enter the web address properly – typos cause confusing error messages

- In **Web Location** enter the URL of your SharePoint Online site complete with the name of the site to which you want to upload your new app – i.e. your SharePoint web address, followed by a forward-slash, followed by the name of your new site, then click on **Create**.
- In the **Add Tables** window that opens enter a search term to look for pre-existing templates, e.g. type **contacts**.



Figure 6 – the best matches will appear in the list below the search box

- Select **Contacts** and when Access has stopped processing your request click on **Navigation Pane** to see the objects that make up your new app.

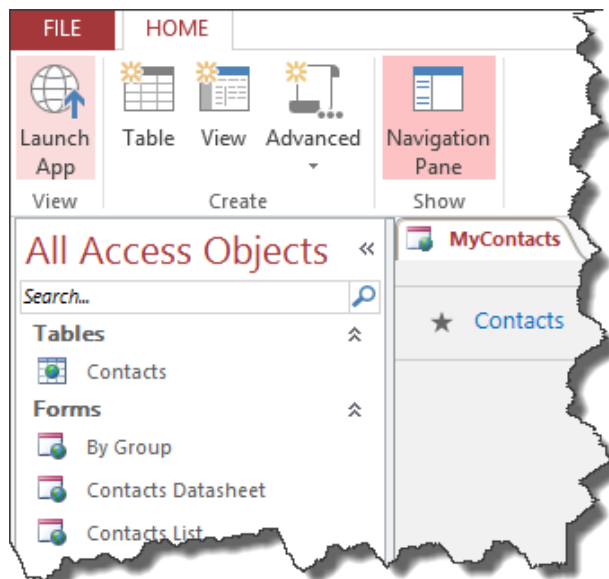


Figure 7 – launch your new Access web app

- If you want to do some minor editing to remove fields that you know you don't want, or to move the order of fields, you can do this now – otherwise select **Launch App**.

Note You may be asked to login to your Microsoft Office 365 account at this point – if your browser gives a warning message select to run the required plugin. You may find that Access opens Chrome if you have it set as your default browser, in which case close this and open Internet Explorer instead. Chrome does not work well (if at all) with SharePoint Online.

- Have a play with your new online database noting that it is generic and will most likely need modification, such as adding new fields or removing unwanted ones, unless you want to do something very simple with it.
- (If you're not sure how to use your new database, check out one or more YouTube videos.)

Task 3 Modify your Access web app

Objectives To get to know the required workflow for modifying an existing Access web app; to lightly modify an existing Access web app.

Comments You could, if you want, modify your Access web app prior to first launching, but it generally helps to see how any app looks in situ first.

3.1 To prepare your web app for modification:

- Login to your SharePoint Online account (if not already logged in) - make sure that you are using Internet Explorer and **not** Chrome.

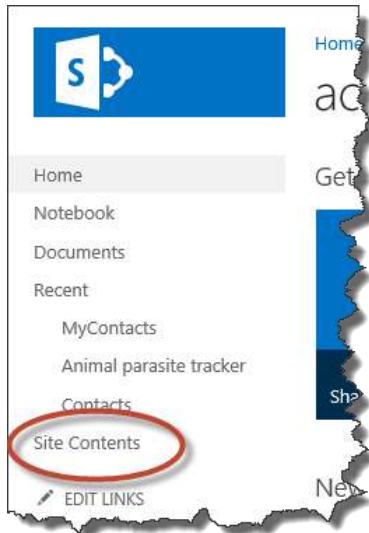


Figure 8 – find your new database by selecting Site Contents

- Navigate to the site in which you have created your Access web app and click on **Site Contents** in the left-hand navigation. (It may also be available under **Recent**.)

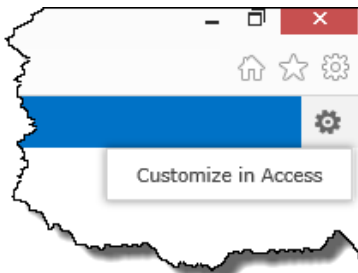


Figure 9 – click on the cog and select Customize in Access

- Open the database, then click on the **Cog** icon in the top, right-hand corner and select **Customize in Access**.
- (Select **Open** if a popup message appears asking what you want to do with the database.)
- (If a message opens when **Access** opens, select **OK**.)
- Enter your **SharePoint Online** account username and password when prompted. (If this doesn't work try again with your Microsoft account details instead. Sometimes one works, sometimes the other – please don't ask why!)

3.2 To modify the Contacts table:



Figure 10 – select Navigation Pane to view all Access objects

- In Access click on the **Navigation Pane** option to see the objects that make up the database.
- Right-click on the **Contacts** table and select **Design View**.
- Change **City** to **Town**, **State** to **County** and **Zip** to **Postcode**.
- Right-click in **Country** and select **Delete Rows**, followed by **Yes**.

Mobile Phone	Short Text
Address 1	Short Text
Address 2	Short Text
Address 3	Short Text
Town	Short Text
County	Short Text
Postcode	Short Text
Web Page	Hyperlink
Notes	Long Text

Figure 11 – how the updated field names and data types should look

- Right-click in **Town** and select **Insert Rows** and add a new field **Address 3** (leave it as the default **Short Text**).
- Close the table and save the changes.

3.3 To modify the Contacts List form:

- Right-click on **Contacts List** in the **Navigation Pane**.
- Change the labels on the fields that you altered above (**Town**, **County** and **Postcode**). You may not have to rename them all because the labels don't always seem to match the fieldname!
- Delete **Country** (you have to delete field and label individually).
- Move **Postcode** to the space left by deleting **Country**, then move **Town** and **County** in turn.
- Drag **Address 3** across from the **Field List** to the space on the form left by moving **Town** across.

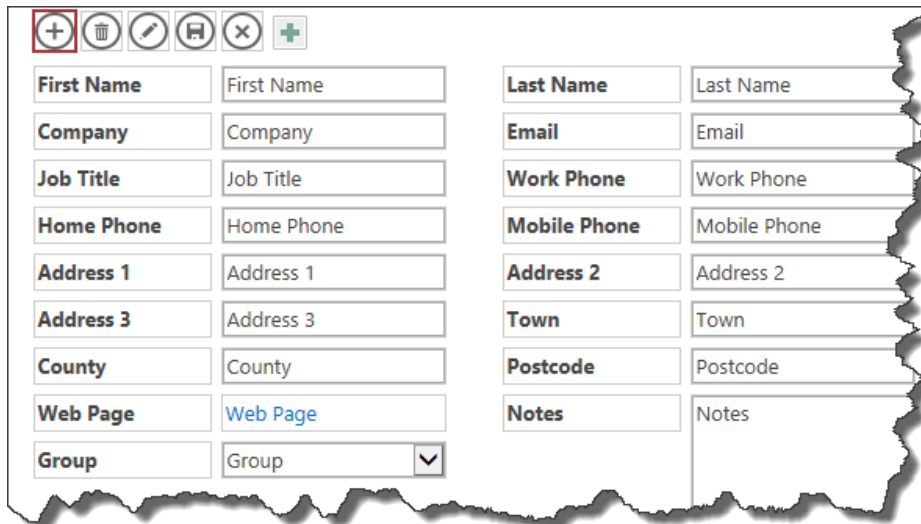


Figure 12 – how the updated form should look

- Close the form and save when prompted then click on **Launch App**.

Warning! Annoyingly, this is likely to open your web app in Chrome or other browser if Internet Explorer is not your default browser. You may have to logout and log back in to your SharePoint Online account and re-navigate to your app to see the updated version. If lucky you may get away with clicking on Back to Site and then on the app name in the Recent or Site Contents list.

3.4 To complete modification of your app:

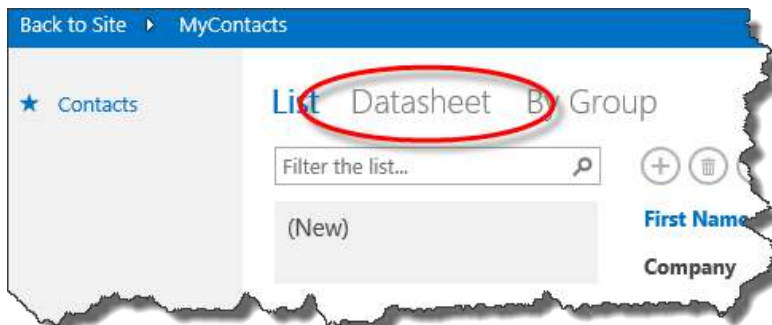


Figure 13 – select Datasheet

- In **Internet Explorer**, navigate to your app in **SharePoint Online** and click on the **Datasheet** option.
- Notice that it still shows the old fields and field names.
- Click on the **Cog** icon and select **Customize in Access** and select appropriate options (see Task 3) for any messages that pop-up.
- Right-click on **Contacts Datasheet** in the **Navigation Pane**, select **Open** and make the necessary changes, then save.
- Launch the app again, most likely pausing only to logout and log back in to your **SharePoint Online** account in **Internet Explorer** – annoying, isn't it?
- Close **Access**.