

CONTENTS

INTRODUCTION

xxvii

PART I: ACCESS WEB APPLICATION DESIGN AND DEVELOPMENT

CHAPTER 1: INTRODUCTION TO ACCESS WEB APPS AND ARCHITECTURE

3

Deprecated Components	4
Access Data Projects	5
Jet Replication	6
Menus and Toolbars	6
Import/Export/Link to Jet 3.x and dBASE Files	7
PivotTables and PivotCharts	8
Collect Data via E-mail	8
SharePoint Workflow	8
Source Code Control Extension	9
Packaging Wizard	10
Upsizing Wizard	10
Creating Access Web Databases	11
New Components Added	12
Database Compare	12
Audit and Control Management Server	13
What Is an App?	13
How Is an App Hosted?	15
How Is an App Distributed?	16
App Marketplace for Publicly Available Solutions	16
App Catalogs for Internal-Facing Solutions	16
How Are Security and Trust Managed in Apps?	18
Setting Up a SharePoint Site for Your Apps	20
Setting Up an Office 365 Trial Account	21
Solving Business Problems	24
The Maid To Order Work Schedule Database	24
Summary	24

CHAPTER 2: DESIGNING TABLES

25

Creating a Blank App	26
Keeping Your Log Ins Straight	27

Creating Tables	29
Creating Tables Using Nouns	29
Creating Tables from Imported Data Sources	31
Creating Tables the Traditional Way	36
Tables and Their Related Views	37
Data Type Changes from Previous Versions	38
Text Data Type	38
Hyperlink Fields	39
Numeric Data Type	39
Date/Time Data Type	40
Image Data Type	40
Lookup Data Type	40
Field Properties	40
Linking SharePoint Lists	41
Summary	42
CHAPTER 3: UNDERSTANDING THE NEW USER INTERFACE	45
<hr/>	
Web Navigation	46
Navigation Tools	46
The New Approach to Layout	51
The New Ribbon	55
Mobile Devices Support	60
SharePoint and Office 365	65
Creating a Web App via Team Site	67
Deleting Web Apps	69
Sharing Web Apps with Others	69
Summary	70
CHAPTER 4: DESIGNING VIEWS	73
<hr/>	
View Design Surface	74
Ribbon	75
Tiles	76
Links and Creating Views	78
Field List	79
Popup Properties	84
Manipulating Control Placement	88
Duplicating a View	92
Action Bar and Action Bar Buttons	93
Action Bar Button Properties	93
Default Action Button	94
Custom Action Buttons	95

Controls	96
Changed Controls	96
New Controls	103
Common Properties	108
Client Controls with No Counterparts	109
Web Browser Control	110
Summary	114
CHAPTER 5: CREATING QUERIES AND WRITING EXPRESSIONS	115
<hr/>	
Query Architecture	116
SQL Server Views	116
Table-Valued Functions	117
Changes in the Query Designer	119
Creating, Editing, Saving, and Previewing Queries	119
Action Queries	125
Parameterized Queries	125
Aggregates, Unique Values, and Top Values	126
Query Properties	127
Functions and Expressions	128
Delimiters	129
Operator Differences	129
New Constants	131
Data Type Inspection and Conversion	132
String Functions	135
Date and Time Functions	139
Math Functions	141
Other Functions	145
Availability by Context	146
Summary	148
CHAPTER 6: Creating Macros	149
<hr/>	
Why We Need a New Web-Compatible Macro Language	150
Where We've Been	150
Access's Traditional Role as Tool of First Choice	151
Macro Designer	152
Action Catalog	153
Expressions and Expression Builder	153
Data Macro Tracing	154
Parameter Box	155
Macro Links	155
Interacting with the Macro Designer	155

Different Types of Macros	157
UI Macros	157
Data Macros	157
Data Macro Architecture	158
UI Macro Architecture	159
Block Macro Action	160
Creating and Editing Data Macros	160
Creating a Standalone Data Macro	162
Using the Action Catalog	162
Using the Add New Action Drop-Down	162
Using Program Flow Actions	162
How to Use the LookupRecord Data Block	165
How to Use ForEachRecord and EditRecord	165
How to Use DeleteRecord	166
Creating and Editing UI Macros	166
How to Use SetProperty	168
How to Use ChangeView and OpenPopup	169
How to Use RequeryRecords	171
How to Use Data Entry Operations	171
Using UI and Data Macros Together	172
How to Create and Use Parameters	172
How to Return Values	174
Summary	175
CHAPTER 7: DESIGNING THE TABLE STRUCTURE	177
New Data Types	178
Short and Long Text Fields	178
Number Fields	182
Date/Time Fields	183
Currency	187
Yes/No	188
Hyperlink	188
Image	189
Calculated Fields	190
Lookup Fields	191
Validation Rules and Text	193
Field Level Validation	193
Record Level Validation	195
Editing Validation Rules with Existing Data	195
Validation Rules Design Consideration	196
Leveraging Calculated Fields	197
Creating Concatenated Fields	197

Configuration Tables	199
Tally Table	199
Utility Table	200
Summary	200
CHAPTER 8: DESIGNING THE USER INTERFACE	203
Naming Convention for Web Apps	204
Planning the User Interface	205
Reusing Create, Read, Update, and Delete Views	205
Effective Navigation Design	206
Traditional Navigation Patterns	206
Web Design Principles	211
Tile-Bound View and Popup Views	215
Creating a Splash Screen	216
Designing an Index Form	219
List View: Searching on a field	219
Summary View: Searching on an Aggregated Value	223
Datasheet: Filtering Cumulatively	230
Creating a Query By View	237
SQL Construction	237
Techniques for Filtering	241
Design Requirements	246
Creating Filter Tables	248
Creating Data Macro to Clear Selections	249
Creating Query By View	249
Filtering Query	252
Building Data Macros to Populate Filter Tables	257
Building a Popup View to Display the Filter Results	260
Building a Click Event Handler	261
Summary	263
CHAPTER 9: SOLVING BUSINESS PROBLEMS WITH MACROS	265
Macro Design Considerations	266
When to Use Data Macros	266
When to Use UI Macros	268
On Start Macro	269
Using Freestanding Macros	270
Cloning a Record	270
Generating a Set of Records with Variable Parameters	278
Generating Records in Different Tables	290
Updating and/or Deleting Several Records	294
Using Table Events	296
Performance Considerations	297

Preventing Deletions of Completed Records	298
Acquiring Default Values from Other Tables	300
Maintaining a History of Change	301
Summary	303
CHAPTER 10: EXTENDING WEB APPS	305
<hr/>	
Integration Options	306
Security Considerations	307
Introduction to Web Services	310
Linking a Web App for Additional Functionality	311
Locating and Adding the Locations Mapper App	311
Configuring and Using the Locations Mapper App	315
Inlining a Web App in Access Web App	322
Adding a PayPal Button	333
Getting the PayPal HTML	333
Authoring a Custom Page in SharePoint Designer	336
Allowing Framing of Custom Page	338
Adding the PayPal HTML	339
Showing a PayPal Button on an Access Web App	340
Adding a Site Mailbox	341
Configuration for a Site Mailbox	342
Setting Up the Site Mailbox	343
Team Site Mailbox as a Shared Tool	347
Using APIs with a Web Browser Control	362
Building a Page to Handle JavaScript Code	363
Development Experience	366
Adding the Charting Page to Access Web App	368
Consuming ZIP-Lookup Web Services in the Client	371
Creating a User Account for the Web Service	372
Library References and Code	373
Summary	394
CHAPTER 11: CONNECTING TO YOUR WEB APP	397
<hr/>	
Info Backstage	398
Connections	399
Enable/Disable Connection	400
Getting Connection Details	401
Reset Passwords	401
Using the Access Client	401
Adding VBA Code to Relink	406
Best Practices	409

Using Excel	412
Creating an ODC Connection	412
Creating an Excel Table	415
Creating an Excel PivotChart	416
Creating an Excel PivotTable	420
External Data Considerations	421
Sharing Excel Workbooks on the Web	425
Using SSMS	430
Connecting to a Web App Database	430
Adding a Linked Server on the Web App Database	433
Querying Data in a Linked Server	437
Using Linked Server Programmability Objects	442
Summary	446
CHAPTER 12: WEB APPS IN THE ENTERPRISE	449
<hr/>	
Creating a Document Library	450
Creating a Custom Content Type	452
Importing Image Files	455
Customizing a Library	456
Customizing a Library Ribbon	458
Version Control	460
Customizing an App Package	463
Linking to a Template File	467
Synchronizing Data Between App Databases	468
Local Differential Backup	468
Choosing Approaches	479
Summary	479
CHAPTER 13: IMPLEMENTING SECURITY MODELS FOR THE ACCESS WEB APP	481
<hr/>	
Security Considerations	482
File-Based Security	482
Agent-Based Security	482
Securing Web Apps on SharePoint	483
Security in the Application Layer	484
SharePoint Security	485
Team Sites and Personal Storage	486
Managing User Accounts	486
Extending Permissions	490
External User Accounts	491
Anonymous Access	492

Securing Web Apps in the Web Browser	494
Using Subsites to Restrict Users to Specific Apps	498
Sites and Subsites	499
Traditional Methods for Security in Client Solutions	509
Web App Linked File Security	513
DSN-Less Linking and Relinking	514
Password Storage/Non-Storage	515
Local SQL Server	532
Summary	537
CHAPTER 14: DEPLOYING ACCESS WEB APPS	539
Deploying Access Web Apps	540
Web Apps and App Catalogs	540
On-Premises SharePoint Server	541
Versioning Web Apps	551
Summary	562
PART II: CLIENT-SERVER DESIGN AND DEVELOPMENT	
CHAPTER 15: MANAGING DATA SOURCES	565
Normalization	566
First Normal Form: Eliminate Repeating Groups	566
Second Normal Form: Eliminate Duplicate Data	567
Third Normal Form: Eliminate Fields That Do Not Depend on the Key	567
Other Normalization Forms	568
Normalization Examples	568
Un-Normalized Table	568
First Normal Form: Eliminate Repeating Groups	568
Second Normal Form: Eliminate Duplicate Data	569
Third Normal Form: Eliminate Fields That Do Not Depend on the Key	569
Primary Keys	570
Overview of Access Files and the Database Engine	572
Other Data Sources	572
Overview of ODBC Linking	573
Managing Linked Objects	576
Querying External Data Effectively	579
Linked Object Performance and Query Optimization	579
Passthrough Query and T-SQL	580
Comparing Access SQL and T-SQL	581
Summary	582

CHAPTER 16: PROGRAMMING USING VBA, APIS, AND MACROS	585
VBA	586
Procedures	586
User-Defined Functions	586
Error Handling	591
Debugging	596
Leveraging Queries	597
Enhancing Query Techniques	597
Query by Form	604
Creating a Query On the Fly Using VBA	606
API	608
Obtaining Documentation for API Functions	609
Mapping Data Types	609
VBA User-Defined Types and C-Style Structs	610
Pointers and Handles	611
32-Bit vs. 64-Bit	611
Putting It All Together: Create and Manage an Explorer Window	613
API Declaration	617
Declaring the Enumeration Function	618
Declaring the Callback Function	619
Determining the Class Name of a Window	619
Preparing the EnumChildProc for Two Different Uses	620
Creating the Main Procedure	620
Retrieving Window Information	621
Tips and Techniques	622
Introduction to Data Macros	624
Why Use Data Macros?	625
Differences in Client and Web Data Macros	625
Use Cases for Data Macros	626
Creating Data Macros	628
Maintaining Calculated Values to Support Indexing	628
Maintaining Quantity On Hand to Support Business Logic	631
Data Macros and VBA	640
Summary	641
CHAPTER 17: CREATING INTUITIVE FORMS	643
Creating Intuitive Forms	644
Clean Layout	645
Guiding the User Through the Process	645
Showing and Verifying Data in a Timely Manner	646
User-Friendly Messages and Tips	646

Leveraging Built-in Functionality	647
Textbox	647
Label	648
Command Buttons	649
Split Forms	650
Pop-up, Modal, or Dialog Forms	652
The Demo Forms	653
Tag Property	653
Displaying Images	654
List and Combo Boxes	656
Datasheet View Search Forms	657
Multiple Instances of a Form	660
Multi-Value Fields	663
Appending MVFs	664
Appending Attachments	665
Report Runner	668
Creating the Foundation	668
Setting Up the Report and Its Criteria Fields	669
Selecting the Criteria and Running the Report	673
Summary	685
CHAPTER 18: CREATING POWERFUL REPORTS	687
<hr/>	
Introduction to Reports	688
Creating Reports	689
Fundamentals	689
Creating and Customizing Reports	693
SubReports	696
Drill Down Reports	698
Report Examples	700
Grouping Data	700
Reports with Simple Criteria	701
Reports with Simple Groupings	702
One Flexible Report	702
Calling the Criteria Form from the Report	706
Reports that Compare Values	706
Professional Polish	709
Report Criteria	709
Confidentiality Statement	711
Page Numbers and Report Date	711
Report Name	711
Using Work Tables	711

Filling Out PDF Forms Using Access	712
Using Reports	712
Using an XFDF file	713
Summary	715
CHAPTER 19: AUTOMATING AND INTEGRATING WITH OTHER PROGRAMS	717
<hr/>	
Overview of Interoperability	717
Getting Started with Automation	719
Declare and Instantiate Variables	721
Early Binding Versus Late Binding	722
Automating Office Programs	724
Microsoft Excel Integration	725
Integration with Excel Using Ribbons, Menus, and Macros	725
Referencing the Excel Object Library	728
Working with the Excel Object Model	728
Using Automation to Send Data to Excel	728
Creating an Excel PivotTable from Access	731
Generating an Excel Chart from Access	734
Word Integration	737
Integration with Word Using Ribbons, Menus, and Macros	737
Referencing the Word Object Library	737
Working with the Word Object Model	738
Sending Access Data to Word with Automation	738
Using Access Automation to Create Word Tables	741
PowerPoint Integration	744
Setting a Reference to the PowerPoint Object Library	745
Working with the PowerPoint Object Model	745
Creating a Presentation from an Access Table	745
Outlook Integration	749
Sending Outlook Mail Using a Macro Action	750
Referencing the Outlook Object Model	751
Sending Mail Using VBA and Automation	751
Reading and Moving Mail Using VBA and Automation	753
Creating Other Outlook Items Using VBA and Automation	755
Integrating Access with Other Applications	759
Summary	762
CHAPTER 20: SECURING, DEPLOYING, AND MAINTAINING ACCESS APPLICATIONS	763
<hr/>	
User Level Security and Audit Trail	764
Local User Table	765

Network Identity	766
Network Identity with a User Table in Access Database	766
Different Front-end Files for Different User Roles	767
Security Summary	767
Converting from .mdb with User Level Security to .accdb	768
Audit Trail	769
Using VBA	770
Using Data Macros	771
Remote Query	772
Deployment Considerations	772
Deploying Front-end Files	773
Auto-Updating the Front End	775
Deploying Back-end Changes	776
Maintaining Different Environments	778
Development, Test, and Production Environments	778
Promoting Files from Test to Production	784
Version Control	785
Data Maintenance	786
Automating Backups	786
Automating Maintenance	789
How to Kick Users Out of the Application	791
Ownership of Code	791
Intellectual Property Rights	791
Trial Version	792
Summary	794
CHAPTER 21: MAXIMIZING SQL SERVER CAPABILITIES	795
Upsizing	795
When to Upsize	796
The Upsizing Process	802
Things to Watch for When Upsizing	805
Working with SQL Server as the Back End	807
SQL Server Management Studio	807
SQL Server Objects	814
Troubleshooting	817
Summary	820
INDEX	823