Overview

In Access 2003 and earlier versions, you used the Database window to run and manage the objects — the tables, reports, forms, and so on — in a database. For example, if you wanted to start the Report Wizard or change the design of a data entry form, you did so from the Database window.

If you wanted to make it easier to locate and use a set of objects, such as data entry forms or reports that you ran every week, you created a switchboard. Switchboards are small screens that contain buttons or hyperlinks that, for example, opened a form or a report. Using a switchboard is a way of hiding database objects that you do not want other users to see and possibly damage. For example, if you don't want users to change the data in an underlying table, you configure your database to display only the switchboard, thus limiting users to an appropriate set of tools.
Starting with Access 2007, the Database window is replaced by the Navigation Pane. The Navigation Pane makes it easier and faster to use a database in several ways:

- **The pane helps keep the objects in your database visible:** You can't accidentally hide the Navigation Pane behind other screens.

- **You can manage the objects that others see and use by customizing the Navigation Pane categories and groups:** For example, suppose you run a set of three reports every Friday morning. Instead of scrolling through a long list of database objects to locate the reports, you can create a custom category in the Navigation Pane and put shortcuts to those reports in that category.

- **You can organize database objects in the Navigation Pane to suit your needs:** Access 2010 provides several categories that you can use right away, and also lets you create custom categories and groups. You can create a maximum of 10 custom categories, and you can change or delete custom.

Located along the side of the screen, the Navigation Pane provides an interface for the objects in your database, and provides several features that help you to customize the user experience. The Navigation Pane is the primary means by which you view and access all your database objects. When you open a database in Access 2010, by default the Navigation Pane appears along the left side of the workspace.

In the Navigation Pane, items are arranged into groups. You choose how to group the items by specifying a category, such as **Object Type** or **Created Date**. The preceding illustration depicts the All Access Objects group of the Object Type category, with some of the object type groups, such as Tables and Queries, closed.

**Note:** The Navigation Pane cannot be used in a web browser. To use the Navigation Pane with a web database, you must first open the database by using Access.

**Before you begin**

By using a combination of these features, you can effectively control the organization of the Navigation Pane to improve usability. However, these features will not prevent a malicious user from making unwanted design changes to your database. Moreover, these features will not prevent unauthorized access to data. Consider the following:

**Usability features can be bypassed.**

- If you use a macro to control and lock the Navigation Pane, remember that users can disable the macro at startup by pressing and holding the SHIFT key.

- Although Navigation Pane shortcuts have a **Disable Design View shortcuts** property, database objects themselves do not. You can hide the categories and groups that contain database objects and you can hide the objects themselves, but it is possible for users to unhide them.

**Focus on the user.**

- When you plan and design the navigation system for a database, work with the people who will use it. If it is not practical to work with the specific people who will use a database, keep their needs central to your design process.

- Depending on your resources, consider using focus groups for planning, and conducting usability tests during design.
Security is not the goal.
- Your goal in implementing these features to control the Navigation Pane should be to improve the usability of a database. These features are not designed to help secure a database.

Adjusting the Navigation Pane
You can adjust the appearance of the Navigation Pane in the following ways:

<table>
<thead>
<tr>
<th>To</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the width of the Navigation Pane</td>
<td>Position the pointer over the right edge of the Navigation Pane and then, when it changes to a double-sided arrow, drag the edge to increase or decrease the width.</td>
</tr>
<tr>
<td>Open and close the Navigation Pane</td>
<td>Click the Shutter Bar Open/Close Button, or press F11 to open and close the Navigation Pane.</td>
</tr>
</tbody>
</table>

Using database objects
You can use any object in the Navigation Pane by double-clicking it. If you right-click an object, you see a shortcut menu that lets you do a variety of things, such as opening an object in Design view.

Customize the Navigation Pane
Display and sort objects
You can select the way in which the objects in the database are displayed in the Navigation Pane. For example, you can include the creation or modified dates, or display objects as icons or lists. By default, Access sorts the objects in the Navigation Pane by object type in ascending alphabetical order, but you can also change the sorting to suit your needs. To specify how objects are displayed and sorted, do the following:

1) Right-click the top of the Navigation Pane to display the shortcut menu, and then do any one of the following:
   a) To change how the objects are displayed, point to View By, and then click Details, Icon, or List.
   b) To view all the groups in the database, click Show all groups.
   c) To change the sort order of the Navigation Pane, point to Sort By and then select a sorting option.
   d) To sort manually and customize the display order, click Sort By, and then click Remove Automatic Sorts.

Find objects in a database
While you type text in the Search box, Access searches within the category for any groups that contain an object or object shortcut that meets your search terms. Any groups that do not contain a match are collapsed.

Note: Access searches for objects only in the categories and groups that are currently displayed in the Navigation Pane.
**Tip:** To search the whole database for a specific object, select one of the predefined categories in the Navigation Pane, such as **Tables and Related Views** or **Object Type**. This helps make sure that all the groups are visible in the Navigation Pane.

**Use the Search box to find database objects or shortcuts**

1) If the **Search** box is not already visible at the top of the Navigation Pane, right-click the menu bar at the top of the Navigation Pane, and then click **Search Bar**.

2) Type either a part or the complete name of the object or shortcut in the **Search Bar** box.
   
a) While you type characters, Access searches and eliminates any group headings that do not contain a match.

3) To perform another search, click **Clear Search String** or press BACKSPACE to delete characters, and then type the new text for which you want to search.

   **Note:** When you clear the **Search Bar** box, the Navigation Pane again displays all of the available objects.

**Categories and groups**

When you create a custom category, you create it for the database that you have open, and it travels with that database. You cannot transfer custom categories and groups to other databases.

You use the **Navigation Options** dialog box to create and manage custom categories and groups. The process follows these broad steps:

- You first create a custom category. Access provides one for you: **Custom**. You can rename that category and add or remove groups to suit your needs, or you can create a new category at any time.

- After you create a category, you create one or more groups for the new category.

- You close the **Navigation Options** dialog box, and in the Navigation Pane, you drag or copy and paste the database objects that you want to assign to your custom group. You drag or copy the objects from a special group called **Unassigned Objects**, which Access creates for you whenever you create a custom category.

**Notes:**

- When you add a database object from the **Unassigned Objects** group to your custom group, Access creates a shortcut to that object — you are not moving or copying the object itself.

- If you rename or delete a shortcut in a custom group, those changes do not affect the actual object, only the shortcut to it.

- You can create as many shortcuts to a database object as you want. Each group should have only one shortcut to a given database object.
Show or hide groups or objects in a custom category. After you populate your custom group or groups, you can hide the **Unassigned Objects** group and any other groups that you don't want to display. You can also hide individual objects.

You can organize the objects in a database into categories and groups. Categories let you arrange the objects in the Navigation Pane and groups let you filter the categorized objects.

When you select a category, the items are arranged into the groups that the category contains. For example, if you choose the **Tables and Related Views** category, the items are arranged into one group per table, with each group containing shortcuts to all the objects that use the table — queries, forms, reports, and so on. If an object uses more than one table, it appears in all relevant groups.

**Select a category**

When you create a new database, the category displayed by default is **Tables and Related Views**, and the group is **All Tables**. Every database also has a category named **Custom** that you can use to create a custom view of your objects. In addition, Access provides two more predefined categories that you can select according to the way in which you want the objects to be displayed:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Type</td>
<td>View all the objects in the database, sorted by their type.</td>
</tr>
<tr>
<td>Created Date and</td>
<td>Locate objects that are created or modified on a specific date or in a date range. You can filter by Today or All Dates. These categories display objects in descending order from when they were created or last modified.</td>
</tr>
<tr>
<td>Modified Date</td>
<td></td>
</tr>
</tbody>
</table>

Each time that you select a predefined category, Access includes a global group that contains all the objects in the database. You can easily locate the global group for a category by looking for the word **All** in front of the group name. For example, if you select the **Tables and Related Views** category, the global group is called **All Tables**.

**Create and modify custom categories and groups**

When you create a new database without using a template, by default the database contains a **Custom** category, which displays one group that contains all the objects that are defined in the database. You can rename the custom category, create more custom groups in it, and assign objects to those groups. The default sorting option for groups is **All Tables**.

Another way to customize the objects in a database is by creating custom categories. When you create a custom category, it applies to the current database only. You cannot transfer custom categories and groups to other databases. You can create a custom category by either renaming the default **Custom** category that Access provides or by creating a new custom category. Limiting the number of custom categories and groups in your database can make it easier to locate data.

Note: Although you can remove objects from a custom category or group, you cannot remove objects from a predefined category or group.
When you view custom categories and groups from the Navigation Pane, you always see the shortcuts to the objects. Shortcuts can be identified by a small arrow next to the lower-left corner of the object icon.

When you open a shortcut, you open the object it points to. However, if you delete a shortcut, Access 2010 does not delete the object in the database that the shortcut points to. You can also hide and rename shortcuts without changing the data that the shortcuts point to in the database.

Use the **Navigation Options** dialog box to create and manage custom categories and groups. The dialog box displays a list of all the categories that have been defined in the database, and shows the groups for a selected category.

**Create a custom category**

When you create a new custom category, groups named **Unassigned Objects** and **Custom Group 1** are created for that category. By default, Access 2010 does not put any objects in the **Unassigned Objects** group. Instead, all the objects in a category that are not assigned to any group are displayed in the **Unassigned Objects** group in the Navigation Pane.

1) Right-click the menu at the top of the Navigation Pane and then click **Navigation Options**.
2) In the **Navigation Options** dialog box, under the **Categories** list, click **Add Item**.
   a) A new category appears in the list. The figure illustrates a new custom category.
3) Type a name for the new category and then press ENTER.

**Tip:** Try to create a name that makes sense to the people who use your database. After you create the name, the caption for the list on the right changes to match that name. For example, if you name the new category **My Switchboard**, the caption in the list on the right reads **Groups for "My Switchboard"**. The list contains a group called **Unassigned Objects**. Access creates that group by default. This group contains all of the objects in your database, and you use those objects to populate your custom group.

After you create your custom category, you create one or more groups for that category. You can create as many groups as you need.

**Rename a custom category**

If an unused custom category is available, you can rename it instead of adding a new custom category.

1) To rename a custom category, right-click the menu at the top of the Navigation Pane, and then click **Navigation Options**.
2) Under **Categories**, click **Custom**, and then click **Rename Item**.
3) Type a new name for the category, and then press ENTER.
Create a custom group
Access automatically creates a **Custom Group 1** and an **Unassigned Objects** group under each new category. Objects that are not assigned to groups are automatically put in the **Unassigned Objects** group. You can either create a new custom group or rename the **Custom Group 1** group to the name that you choose.

1) Under the **Groups for "Group Name"** list, click **Add Group** and then type a name for the group.
   a) You can repeat this process as often as you need.
      For example, **My Switchboard** might contain three groups - Data Entry Forms, Reports, and Queries. The needs of your users or your own preferences should determine the groups that you add.

2) Leave the check box next to **Unassigned Objects** selected, and then click **OK**.
   a) Access closes the **Navigation Options** dialog box and adds your new custom group to the Navigation Pane, but you cannot yet see the new group.

3) Go to the next set of steps to make the new group visible and to add objects to the group.

Add objects to a custom group
After you have created a custom group in a custom category, you add or move objects, such as tables, into the custom group.

You can add objects to a custom group in several different ways, such as dragging an object to create a shortcut, copying and pasting, and importing objects from external sources. However, if you choose to cut an object from a group, be aware that this can cause problems. We do not recommend cutting an object because a database is a set of components that work together, and if an object is deleted from that set of components, it can break part or all of the functionality of the database.

1) Click the menu at the top of the Navigation Pane, and in the upper section of the menu, click your new category. The group or groups that you created for your category appear in the lower section of the menu, along with the Unassigned Objects group.

2) In the **Unassigned Objects** group, select the items that you want to use in your custom group, and then move them to that group. Access provides several ways to move the selected items. You can:
   a) Drag the items individually.
   b) Hold down CTRL, click multiple items, and then drag the items to your custom group.
   c) Right-click one of the selected items, point to **Add to group**, and then click the name of your custom group.

3) When you finish, you can leave the **Unassigned Objects** group visible in the Navigation Pane, or you can hide it.

Copy and paste objects
1) In the Navigation Pane, right-click the object that you want to copy, and then click **Copy**.
2) Right-click the group in the Navigation Pane where you want to paste the object, and then click **Paste**.
   a) You can also paste the object into the Navigation Pane of another database that is open in Access 2010.
Create a new custom group by using an object in an existing custom group

**Note:** To use this technique, you must first create a custom category and group by following the steps in the previous sections.

1) With a custom category and group open in the Navigation Pane, right-click an object that you want to place in a new group.
2) Point to **Add to group**, and then click **New Group**.
3) A new group appears in the Navigation Pane. Enter a name for the new group, and then drag additional shortcuts to the new group as needed.

**Rename a custom group**

1) To rename a custom group, right-click the menu at the top of the Navigation Pane, and then click **Navigation Options**.
2) Under **Groups for category name**, click the custom group, and then click **Rename Group**.
3) Type a new name for the group, and then press ENTER.

Alternatively, you can also rename a custom group in the Navigation Pane:

1) In the Navigation Pane, right-click the shortcut that you want to rename, and then click **Rename Shortcut**.
2) Type the new name for the shortcut and then press ENTER.

**Hide objects and groups**

You can hide some or all of the groups in a custom category and some or all of the objects in a group. Remember these facts as you proceed:

- Access provides two ways to hide items. You can use commands that are provided by the Navigation Pane to hide a shortcut in a group, or you can set a database object's **Hidden** property to hide shortcuts to the object in all the groups and categories in the open database, including built-in categories and groups.

- You can make hidden objects and groups completely invisible, or you can display them in the Navigation Pane as dimmed, unavailable icons. You do this by selecting or clearing the **Show Hidden Objects** check box in the **Navigation Options** dialog box. You also use that check box when you need to unhide, or restore, a group or an object.

The built-in categories and groups in the Navigation Pane do not display shortcuts, and instead display actual database objects. These groups include:

- All groups in any built-in category.
- The **Unassigned Objects** group of any custom category.

Hiding an object or group can be a better option than deleting it when the object or group is not used or you want to restrict access to it. Hiding an object does not change the database, whereas deleting an object or group (even if it appears to be a duplicate) can break part or all of the functionality of the database.

**Hide an object or group in the Navigation Pane**

- To hide an object, right-click the object, and then click **Hide in this Group**.
- To hide an entire group, right-click the group, and then click **Hide**.

**Note:** You can also hide a group by using the **Navigation Options** dialog box. Open the dialog box and, in the **Groups for "category"** list, clear the check box next to the group that you want to hide.
Hide an object or group that appears dimmed in the Navigation Pane

1) Right-click the menu bar at the top of the Navigation Pane, and then click Navigation Options.
2) In the Navigation Options dialog box, clear the Show Hidden Objects check box, and then click OK.

Hide an object from all categories and groups

1) Right-click the object that you want to hide, and then click Object Properties or (for a table) Table Properties on the shortcut menu.

The Object_name Properties dialog box appears, and Access appends the name of the object to the dialog box title.

For example, if you open a form called Orders, the dialog box title displays Orders Properties. The figure shows the dialog box.

2) Select the Hidden check box.
3) Click OK.

Hide the Unassigned Objects group

1) Right-click the menu at the top of the Navigation Pane and click Navigation Options.
2) In the Groups for category pane, clear the Unassigned Objects check box.

Remove and restore shortcuts in custom groups

Your custom groups may change over time, as user and business demands change. You can add or remove the shortcuts in a group at any time.

If you remove or delete a shortcut from the Navigation Pane, you are only removing the pointer to that object and not removing the object from the database. When the shortcut of an object is removed from a custom group in the Navigation Pane, the reference to the object is removed from the custom group, and the object appears in the Unassigned Objects group in the Navigation Pane.

Remove a shortcut from a custom group

• In the Navigation Pane, right-click the shortcut that you want to remove, and then click Remove.

Restore a shortcut to a custom group

• If the Unassigned Objects group is hidden, display it.
  1) Right-click the menu at the top of the Navigation Pane and click Navigation Options on the shortcut menu.
  2) In the Groups for "category" pane, select the check box next to Unassigned Objects.
  3) As needed, drag or copy and paste the object that you want from the Unassigned Objects group to your custom group.
Disable Design view for an item
The items that are displayed in your custom categories and groups are actually shortcuts that point to database objects.

Shortcuts in the Navigation Pane have a Disable Design View shortcuts property that you can set. Right-click the shortcut, click either Object Properties or (for a table) Table Properties on the shortcut menu, and then select the Disable Design View shortcuts check box. If this property is enabled, the shortcut cannot be used to open its target object in Design view or Layout view. For example, if you enable this property for a shortcut to a form, users cannot change the design or layout of the form by using the shortcut.

1) In the Navigation Pane, right-click the shortcut for which you want to disable Design view, and then click Object Properties or (for a table) Table Properties.
2) In the Object_name Properties dialog box, select the Disable Design View shortcuts check box.