

Easy Way



Teach yourself...

Microsoft Access 2013

(Level 1)

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

A Cheryl Price Publication

Easy Way - Microsoft Access 2013 (Level 1)

This book is designed to teach beginner topics for learning Microsoft Access 2013. It contains simple step-by-step exercises to guide you through the learning process.

There are dozens of exercises including consolidation exercises, both theory and practical at the end of each section.

The process of consolidation and accumulation of learning is unique to the Cheryl Price books.

Retrievable exercise files are used with this book and listed on page x. These are available as a free download from our web site at www.cherylprice.co.nz. Instructions for downloading the exercises are included on page xi.

This book has been written using Microsoft Access 2013 with Windows 8.1.

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Introduction

Welcome to Easy Access 2013 Level 1.

This book has been written using Microsoft Access 2013 with Windows 8.1. (The Windows 7 operating system can be used. However screen shots will differ slightly from those shown in this book.)

Retrievable Exercise Files

Some exercise files have been created for you to prevent time in keying in many exercises. You can then open these files and use the features of Access to manipulate and format text.

A list of these files is shown on page x and instructions for downloading these files from our web site are included on page xi.

What you will learn

In this course you will learn how to -

Create and use a computer database to solve a problem, ie

- Plan a computer database to solve a problem using a supplied brief
- Create a computer database to solve a problem using a supplied brief, ie
 - create database fields and properties, eg size, data type and format
- Use the computer database to provide a solution to the problem, ie
 - manage database records, eg add new records, delete records update records
 - demonstrate data integrity practices, sort database records, apply queries

How you will learn

This book is divided into sections. Each section page lists the learning outcomes for that section. You will work through each section and do all exercises.

Revision theory is included at the end of most sections followed sometimes by a Consolidation Exercise. Our books include accumulation and consolidation of learning which carries across each section.

Word meaning boxes

Sometimes you will see a box at the left side of the page of a line that has dotted underlining. This box will contain information to help you understand the meaning of the underlined word (or how that word is formed). An example is shown below.

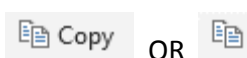
forecast
= to
calculate a
future
result

Data can therefore be altered to re-calculate budgets and to forecast results using different sales figures. Worksheets can be saved, opened and printed as required.

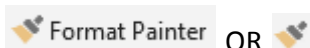
Different Access buttons

Depending on the size of your Access screen buttons on the ribbon may vary to those shown in this book. The icon with the word of that feature may show, or the icon only.

For example, the Copy button in the Clipboard group on the Home tab may be displayed in either of the following ways.





The Format Painter button can show as either -



Shortcut keys

Shortcut keys are indicated in the left margin, usually the first time they are used. An example follows.

Ctrl S

- 1 Click on the Save button  on the Quick Access Toolbar .
- 2 Type a file name for your document then click on Save.

Glossary

Generally when a word(s) is first used that is a technical term or a word that you may not know that relates to an exercise, or a particular Access 2013 feature, a description is given. You will also see that such words are in **SMALL CAPS**.

These terms are listed on each section page, an example is shown below. Explanations are also included in the Glossary at the end of the book.



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

AUTOCORRECT
CLIPBOARD
CORRECTION SIGNS
CUT
DRAW AND DROP
FIND

FORMAT
MICROSOFT OFFICE HELP
MOVE TEXT
NAVIGATION PANE
PROOF-READING
REDO

REPLACE
SELECTING TEXT
SYNONYMS AND THESAURUS
TYPING REPLACES SELECTION
UNDO

Icons used in this book

This book contains icons to help guide you in your learning.

The following list shows the icon and its meaning.

Learning Outcomes

Learning Outcomes are displayed on the section page and describe what you will learn in that section.



EXERCISE 1

These are the exercises that you are required to do. Often there will be an introduction sentence to tell you what you will be doing in that exercise.



These are notes for your information.



Revision

This appears at the end of each section and contains theory revision questions relating to features learnt in that section.



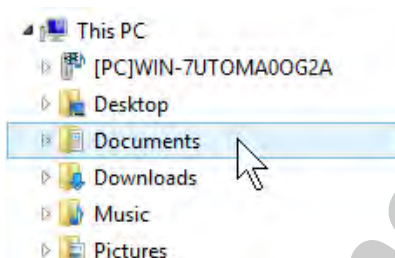
Consolidation Exercise

Each consolidation exercise covers a review of topics learnt in that section and provides additional practice.

Save Options

When a document is saved you will be requested to select the location, ie Computer then click on the Browse button and select the folder required. You can eliminate this procedure by selecting the location and saving directly to the Save dialog box and therefore bypass Backstage view.

For the purposes of this book we have used the Documents folder within This PC as the default folder. This folder is shown below which is the shortcut for the actual path name of C:\Users\User Name\Documents. This means that files you open and save will be on your hard drive.



Use the following instructions to specify the Documents folder as the default file location:

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the Documents folder is displayed as the Default local file location as shown below.

- ☒ Don't show the Backstage when opening or saving files
- ☐ Show additional places for saving, even if sign-in may be required.
- ☐ Save to Computer by default

Default local file location:

- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.
- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*
- 6 Click on OK.



If you wish to open and save files to OneDrive (ie the cloud) use instructions on the next page.

If you have Windows 8, or have updated to Windows 8.1 from Windows 8, SkyDrive may be displayed instead of OneDrive but is essentially the same.

OneDrive

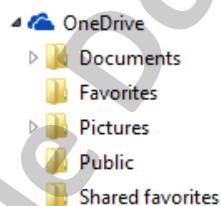
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” (in addition to your hard drive) it means that you can access those files from anywhere in the world because you will always have access to the OneDrive application and your files. You do however need an Internet connection for the files to be updated from your hard drive to OneDrive.



Saving to OneDrive

OneDrive is automatically set up when Microsoft Office 2013 (ie Office 365) is installed on your computer. A OneDrive folder will be displayed on the Navigation Pane in Windows Explorer as below.



Files can be saved manually by clicking on the Save button  on the Quick Access Toolbar, specifying a name for your file then clicking on the  OneDrive icon (you may wish to double click on Documents and save to that folder).

OneDrive as the Default File Location

Use the following instructions if you wish to specify OneDrive as your default file location.

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the C:\Users\User Name\OneDrive\Documents folder is displayed as the Default local file location as shown on the next page. (You may need to retype the location)
- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.

- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*

- ☒ Don't show the Backstage when opening or saving files
☐ Show additional places for saving, even if sign-in may be required.
☐ Save to Computer by default

Default local file location:

C:\Users\Cheryl\OneDrive\Documents

Browse...

- 6 Click on OK.

OneDrive Website

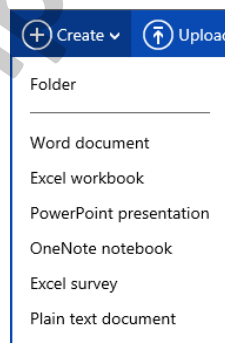
You can log in to the OneDrive website using your web browser with your login name and password.

The website is www.OneDrive.live.com.



You can upload photos and use files and share files.

New files can be created through OneDrive by clicking on **Create** and selecting the program you wish to use, eg Word (web applications in OneDrive are slightly cut-down versions of Office 2013 programs).



Sharing Files

From within Access 2013 you can save files to OneDrive (usually to the Documents folder) and then share those files. You can then click on the **FILE** tab, on **Share** and invite people to share files in OneDrive.

Alternatively, you can right click on a file in the OneDrive website (see above) and select Sharing.

Use Google in your web browser to search for additional information on OneDrive.

Exercise Files used in this book

(Instructions are included on the following page for downloading retrievable files from our web site at www.cherylprice.co.nz)



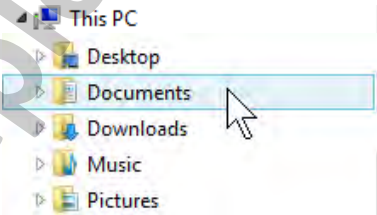

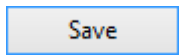

Names of files	
<i>Microsoft Access Files</i>	<i>Microsoft Word Files</i>
Friends Database	Database Plan
MovieMaker Database	Motorhomes Data - 1
Student Database	Motorhomes Data - 2
Wedding Database	

Downloading Exercise Files

The exercise files listed on the previous page can be downloaded from the Cheryl Price web site using the instructions below.



For the purposes of this book we have specified Exercise files to be downloaded to the Documents folder within This PC which is the shortcut for the actual pathname of C:\Users\User Name\Documents. This is where files will be opened from and saved to.

1	In the address bar of Internet Explorer, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Resources tab as shown at the right. 
4	Click on <u>Easy Way – Microsoft Access 2013</u>
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Access 2013, Level 1 <u>Free Download</u> The File Download dialog box will display.
7	<p>a Click on  Save as then</p> <p>b Change file name to <i>Easy Way Access 2013 Level 1 Exercise Files</i>.</p> <p>c Click on the Documents folder shown below.</p>  <p> The Documents folder under This PC is the shortcut for C:\Users\User Name\Documents</p> <p>d Click on .</p>
8	<p>a Click on .</p> <p>b Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.</p> <p>c Delete the Compressed (zipped) Folder.</p>

Sample Document



Learning Outcomes

At the end of this section you should be able to -

- ☐ Understand database concepts and the uses of databases
- ☐ Understand the different types of databases
- ☐ Start Access 2013
- ☐ Open an existing database
- ☐ Understand the database window and database objects
- ☐ Open a table
- ☐ Identify parts of a table
- ☐ Navigate through records in a table
- ☐ Manipulate data in a table by filtering and sorting records
- ☐ Add a new record to a table
- ☐ Delete a record from a table
- ☐ Close a table
- ☐ Close a database
- ☐ Exit Access 2013



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

AUTOCORRECT
BACKSTAGE VIEW
CONTEXTUAL TABS
CRITERION
DATABASE
DATABASE OBJECTS
DATABASE VIEW
DESIGN VIEW
DIALOG BOX LAUNCHER
FIELDS

FILTER
FLAT FILE DATABASE
FORMS
HIERARCHICAL MODEL
MACRO
NAVIGATION PANE
NETWORK MODEL
QUERIES
QUICK ACCESS TOOLBAR
RECORDS

RECORDSET
RELATIONAL DATABASE
RELATIONSHIPS
REPORTS
RIBBON
SEARCH CRITERIA
TABLE
TASKBAR

What is a Database?

A **DATABASE** is an organised collection of information on a specific subject. We use databases all the time in everyday life – the telephone directory, for example, is a database.

Other examples of databases are:

- Recipe book
- List of employee details (start date, name, address, date of birth, salary)
- List of CD collection (name of CD, date of release, artist/band)
- Stock listing (product name, number of stock, supplier, type of product)
- Library (where all the books are categorised and then stored alphabetically within the category making them easy to find)

The data in an Access database is stored in one or more tables. A **TABLE** is made up of **RECORDS**, and records are made up of **FIELDS**. In a Customers' table, a record could be:

Smith Jane 319 Alfred St East Sydney NSW 2010 (02) 9955 2523

The fields could be called:

Last Name First Name Street Suburb State Post Code Phone Number

Uses of Databases

Databases hold information. This information can be searched and selected.

For example:

- A telephone directory is used to search for the telephone number of a person whose name is known to you. You already know the contents of the Last Name field, and usually the First Name field – these are your **SEARCH CRITERIA**.
- The search criteria are then used to look up the additional information about the person – ie to find the particular record and therefore the address and telephone number of the person.
- If you only know one **CRITERION** value (eg the Last Name), you will find many more matching records than if you know more criteria (eg the Last Name, First Name and Street Address).

Advantages of Databases

Databases are designed to store large amounts of data. They allow you to control the way the data is organised and displayed.

Once the required information has been stored in a database, it can be used in many ways. For example, you can format and print it as a report. Charts can also be created using information in the database.

Examples of database programs other than Access are Lotus Approach, DataEase, and Dbase IV.

Different Types of Databases Models

There are several different types of Database Models: Flat File, Relational, Hierarchical, and Network models. Each is briefly described below.

Flat File Data Model (Single Table)

This data model stores data in a single table in rows and columns. There are no links to any other sources of data. Data stored in a single Excel spreadsheet is an example of a **FLAT FILE DATABASE**.

If only one table is used for a database all data will be stored in, and accessed from, that table. This is an example of a Flat File Database.

Clients' Pet Visits

Client ID	Title	First Name	Last Name	Address	Pet Name	Pet Type	Visit Date	Reason
Andrw1	Mrs	Judy	Andrews	2 Ocean View Rd	Lassie	dog	30/11/2015	Injury
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	22/11/2015	Illness
Robbn1	Dr	Jonathan	Robbins	122 Crowley Court	Tippy	bird	19/11/2016	Illness
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Jennifer	bird	18/11/2015	Injury
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	11/11/2016	Routine
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	03/11/2015	Illness
Andrw1	Mrs	Judy	Andrews	2 Ocean View Rd	Zachary	dog	02/11/2016	Illness

duplication
= when
items are
repeated

You will notice that data duplication occurs in this Flat File Data Model. For example:

- Mr Bill Evans's name and address appear in each of his records.
- He has two pets, a cat and a bird and has visited the Vet several times with these pets. Their names and types are also duplicated.

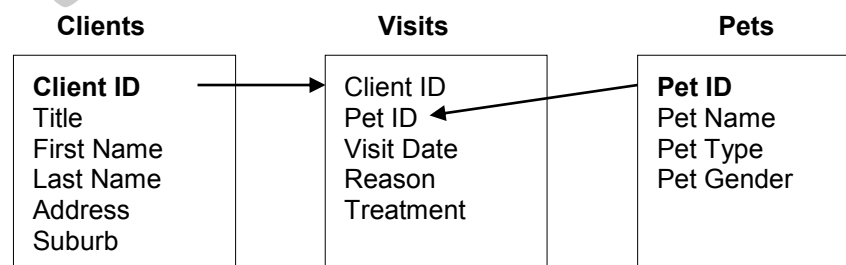
Data duplication is a problem with the Flat File Data Model, and this increases the chances of information being entered incorrectly.

Relational Data Model (Multiple Tables)

Data in this model is stored in multiple tables, each on a specific subject. Sometimes you will want to combine data from two or more tables, and this requires that **RELATIONSHIPS** have been created between them.

If we took the single table example above and converted it into a **RELATIONAL DATABASE**, we would split the data into three separate tables. This would remove the problem of duplication of data.

The diagram below shows an example of relationships between tables.



The tables would appear as shown on the following page. Each table is storing data on a specific topic. The tables are related by a common field: **Clients** and **Visits** by Client ID, and **Pets** and **Visits** by Pet ID.

Clients Table

Client ID	Title	First Name	Last Name	Address	Suburb
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Takapuna
Andrw1	Mrs	Judy	Andrews	2 Ocean View Rd	Torbay
Robbn1	Dr	Jonathan	Robbins	122 Crowley Court	Epsom

Pets Table

Pet ID	Pet Name	Pet Type	Pet Gender
1	Jennifer	bird	F
2	Matthew	cat	M
3	Lassie	dog	F
4	Zachary	dog	M
5	Tippy	bird	F

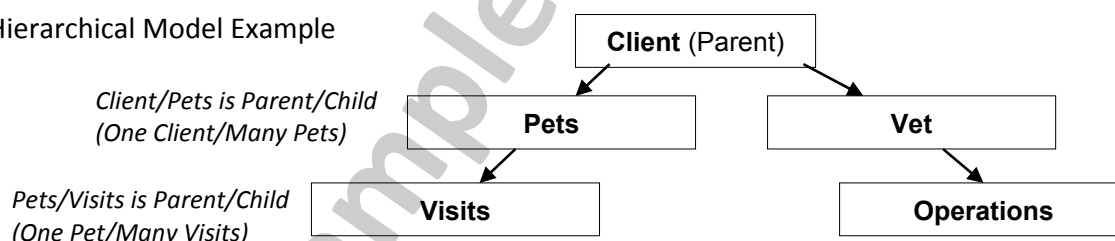
Visits Table

Client ID	Pet ID	Visit Date	Reason	Treatment
Evans1	1	18/11/2015	Injury	Bandage leg
Evans1	2	03/11/2015	Illness	Medication for cat fever
Evans1	2	11/11/2016	Routine	Full examination, no problems
Evans1	2	22/11/2015	Illness	Under observation
Andrw1	3	30/11/2015	Injury	Operation
Andrw1	4	02/11/2016	Illness	Injection for diarrhoea
Robbn1	5	19/11/2016	Illness	Ointment

Hierarchical Data Model (Tree-like Structure)

The **HIERARCHICAL MODEL** is organised in a tree-like structure. This means it allows there to be repeating information in the data that uses parent/child relationships. A parent/child relationship means that each parent may have many children but each child will only have one parent.

Hierarchical Model Example



If we were to use this on the Client and Pets example the Client is the Parent and the Pet is the Child. Under a Hierarchical structure One Client may have many Pets, but each Pet may only have One Client (Owner).

Network Data Model (Tree-like Structure)

The **NETWORK MODEL** uses objects and their relationships in a more flexible way. The important thing about a Network Model is it is viewed as a graph using object types which are referred to as nodes and relationship types which are referred to as arcs.

When you compare the hierarchical model with the tree structure which has one parent and many children records this model gives the flexibility of having multiple parent and child records which make up a graph type of structure.

This model was used widely in the early years of computing. However, as computer processing became faster, people began using the Relational Model in preference to the Network Data models.

Explanation of a Relational Database

In business and personal life, you keep track of information from a variety of sources, each related to a particular topic or purpose. Your knowledge and organizational skills are required to coordinate information from all these sources.

Customer addresses in a mailing list

Product information in a file cabinet

Invoices in a spreadsheet

Supplier phone numbers in a card file

Once you've added data to your database, you'll want to analyze the data in different ways. You can use a query to perform calculations and totals, or to select only certain kinds of data. For example, you can define a query to show all customers who have placed orders of \$5000.00 or more within the last year.

Field	CompanyName	ContactName	OrderAmount	Sum([UnitPrice]*[Quantity])	OrderDate
Table:	Customers	Customers			Orders
Total:	Group By				Where
Sort:	Ascending				
Show:					
Criteria:				>5000	Between Date() And Date() -365

Customers

Orders

Order Details

It's usually easiest to add data to a database by using a form. In Microsoft Access, you can use a form to add, view, and edit your data one or more records at a time. You can also work with data from several tables at once with forms, and automate tasks by including macros or Visual Basic in your forms.

You can create a form that looks just like a printed paper form with instructions on how to fill it out.

Automate tasks

Orders

Bill To:

Franchi S.p.A.

Via Monte Bianco 34

Torino

10100

Italy

Salesperson: Suyama, Michael

Order ID: 10000 **Order Date:** 12-Jun-95

Product	Unit Price	Quantity	Extended Price
Alice Mutton	\$27.00	4	\$108.00

Print Invoice

Using reports, you can print your data in a broad variety of layouts and type styles. Reports can print data from fields; text you define; totals and the results of calculations; or charts, pictures, or other objects — even another report. You can also use reports to print mailing labels.

Use a report to print mailing labels to send a discount offer to your best customers.

Antonio Moreno Taqueria Mataderos 2312 Mexico D.F. 05023 Mexico	Blond père et fils 24, place Kléber Strasbourg 67000 France	Bon app' 12, rue des Bouchers Marseille 13008 France	Bottom-Dollar Markets 23 Tsawassen Blvd. Tsawassen BC T2F 8M4 Canada
Around the Horn 120 Hanover Sq. London QA1 1DP UK	Berglunds snabbköp Berguvsvägen 8 Luleå S-958 22 Sweden		

Starting Access 2013



EXERCISE 1



- From the Start screen scroll across and click on **Access 2013**.
Access opens, and a button for the program appears on the **TASKBAR**.



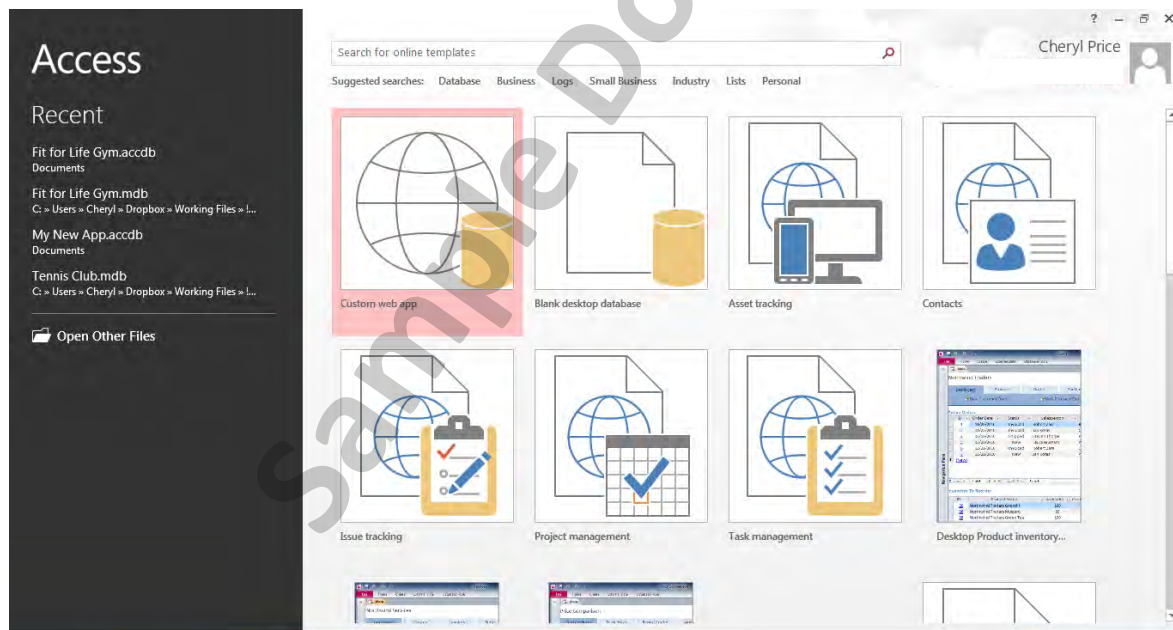
To keep this button permanently displayed on the taskbar, right click on it and choose *Pin this program to taskbar*. You can then just click on it whenever you want to start Access.

The full name of the application is Microsoft Office Access 2013, but for the rest of this book it will be referred to simply as Access.

Backstage View

When you open Access you will see **BACKSTAGE VIEW**. This shows you a list of recently opened databases, and templates that you can use if you are creating a new database.

(You would click on Blank desktop database to create a new database from scratch.)





Opening a Database




EXERCISE 2


- 1 Click on  **Open Other Files**

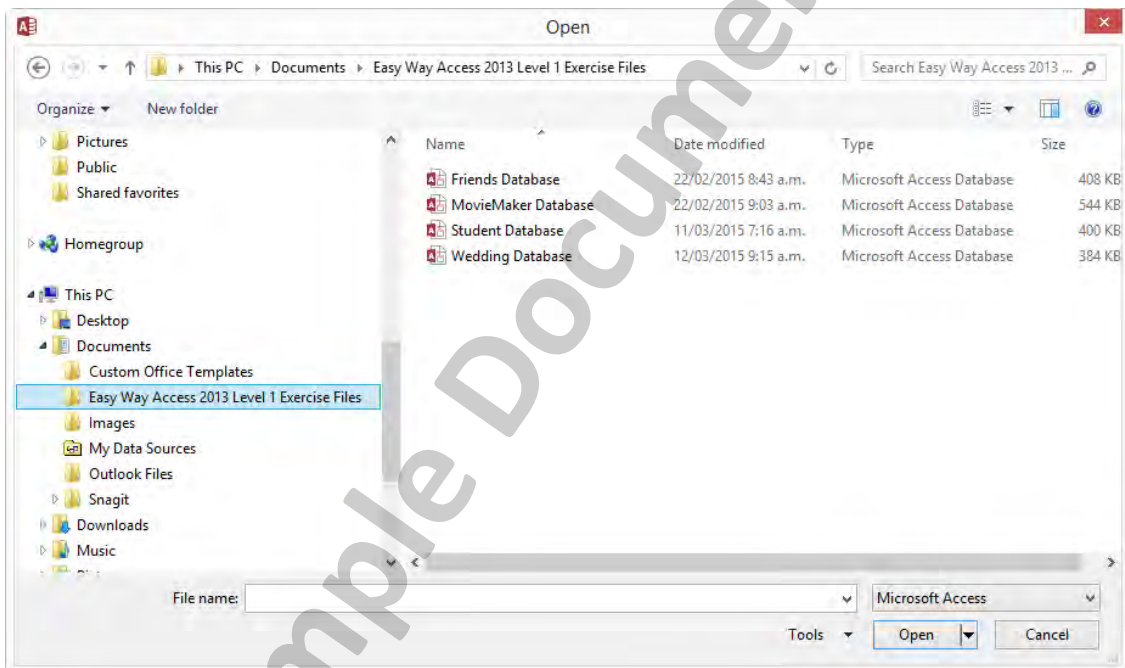
- 2 Click on  **Computer** then on .

navigate
= find the
way to

- 3 Navigate to the folder where your exercise files are located, which is normally as shown below:

This PC\Documents\  **Easy Way Access 2013 Level 1 Exercise Files**

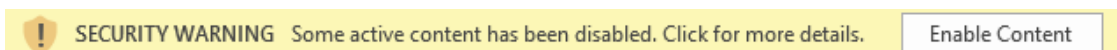
- 4 Double click on  **Easy Way Access 2013 Level 1 Exercise Files** which will display the Open dialog box.



- 5 Double click on **MovieMaker Database**. (This is a database that has been set up with information about classic movies from 1973-1995.)

Access has security measures to protect your PC from viruses. Many database files contain shortcut programs called macros that are designed to help the user work more efficiently. A **MACRO** could also be a virus however, and Access may try to warn you about this.

Unless your security settings are already set to the lowest level, Access may display the following security warning when you click on Open.



- 6 Click on Enable Content.

The Moviemaker Database is clear of viruses and is now enabled so it can be accessed and used.

Using the Quick Access Toolbar

The **QUICK ACCESS TOOLBAR** is displayed in the top left corner of the Access window. It allows you to keep your most frequently used commands in easy reach, and can be customised by adding or removing commands.

The Quick Access Toolbar can be positioned either above or below the **RIBBON**.




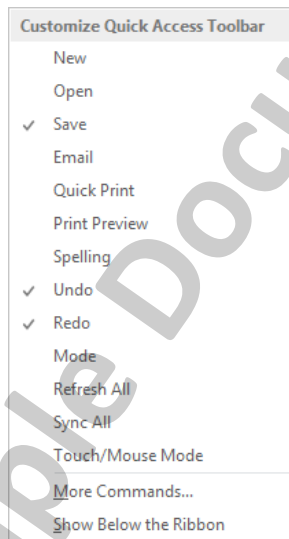
Quick Access Toolbar Menu

In the following exercise you will add several commands to the Quick Access Toolbar.



EXERCISE 3

- 1 Click on the Customize Quick Access Toolbar button  at the right end of the toolbar.
A menu of commands will display.



A tick is shown at the left of every command that is currently on the toolbar.

- 2 Click on the **New** command to add it to the Quick Access Toolbar.
- 3 Display the commands menu again and select the **Open** command.
- 4 Add the following commands to the Quick Access Toolbar using the same steps.

Quick Print

Print Preview

Spelling

Customise the Quick Access Toolbar

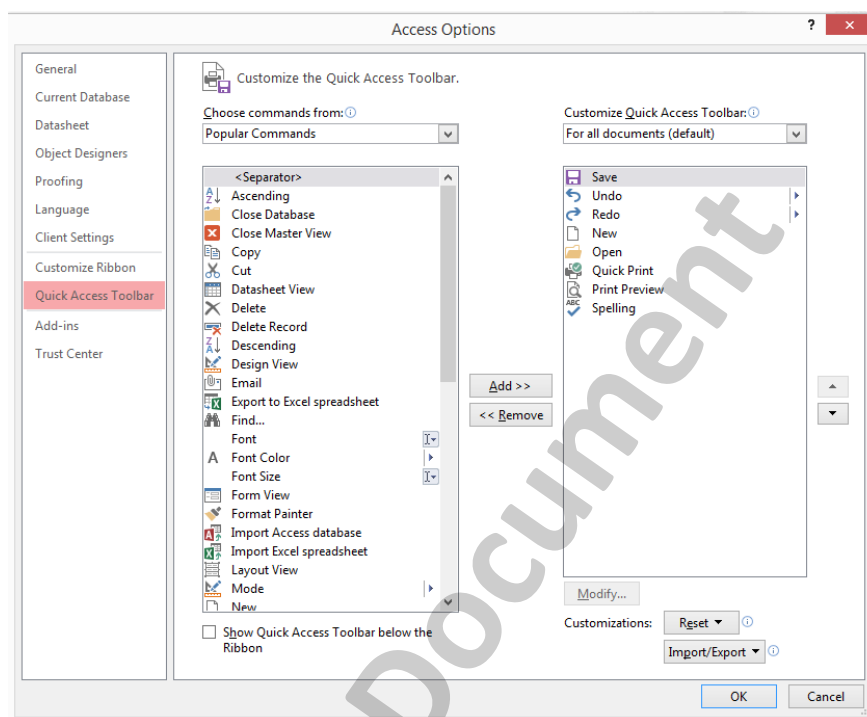
Other useful commands are not on the Quick Access Toolbar menu, but can be added using the following steps.



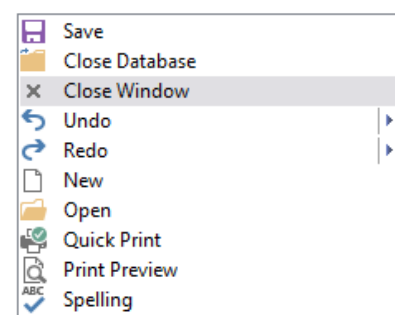
EXERCISE 4

- 1 Redisplay the Quick Access Toolbar menu and select *More Commands...*

The Access Options dialog box will display, with the Quick Access Toolbar option selected.

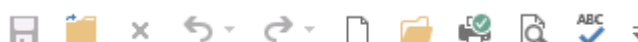


- 2 Click on the **Choose Commands from:** and select **All Commands**. The commands are listed in alphabetical order.
- 3 Scroll down the list until the Close commands are displayed.
- 4 Click on **Close Database** then click on **Add >>**.
- 5 In the same way, add **Close Window**.
The two commands will be added to the Quick Access Toolbar list as shown at the right.
- 6 Select ☒ **Show Quick Access Toolbar below the Ribbon**.
- 7 Click on OK to close the Access Options dialog box.



You can select Show Above the Ribbon or Show Below the Ribbon at any time from the Customize Quick Access Toolbar menu.

- 8 Ensure the Quick Access Toolbar is displayed above the Ribbon.



The commands that you have just added in the two previous exercises will be used throughout this book.

Using the FILE Tab

The FILE tab is located at the left end of the Ribbon.



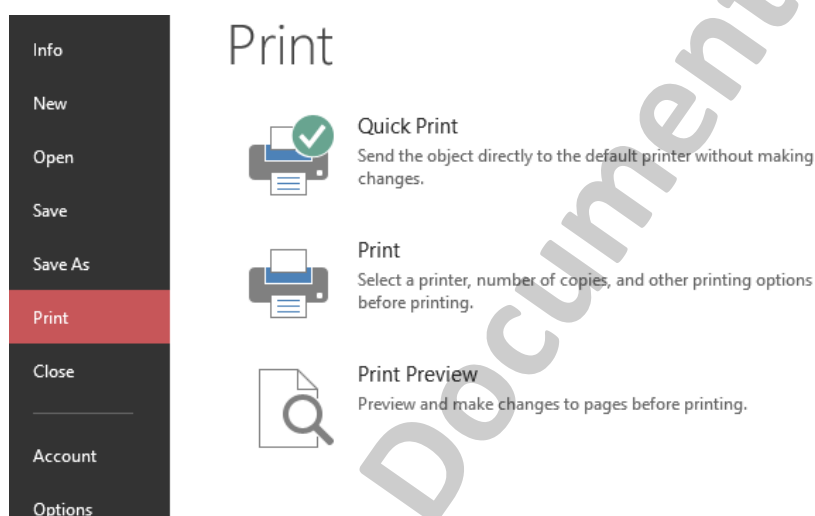
EXERCISE 5

- 1 Click on **FILE**.

A menu with commands for working with your files will display, eg to open a database, create a new one, or to save or print the file you are working on.

Command Options

Some commands have options that you can select from. Click on the menu item to display them, eg Print as shown below.



The Print options allow you to choose between Quick Print, to send the whole document straight to your default printer; Print, for selecting printing options; and Print Preview which allows you to view your document as it will be printed.


Closing a Database

If you want to keep Access open for other work, use the Close Database button you added to the Quick Access Toolbar, or the Close command on the FILE tab menu, to close the database you are working on.

- 2 **Closing Backstage View**

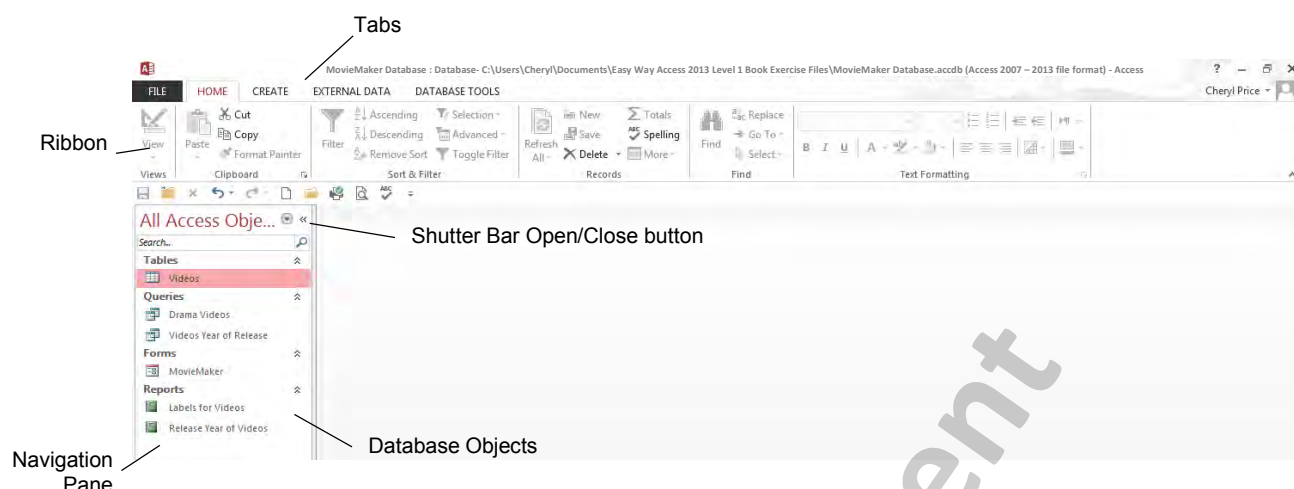
Click on the Back button  to close Backstage View.

Closing Access

You can click on the Close button  at the top right of the screen to close Access.

The Database Window

When a database is open, the Ribbon is displayed along the top of the Access window, and the **NAVIGATION PANE** displays a list of the Objects that make up the database.



Ribbon

The Ribbon displays commands in groups that can be used to format, modify text, manage records and sort and **FILTER** data.

Navigation Pane

The Navigation Pane can be used to access the objects (tables, forms, queries and reports) that make up the currently open Database.

Database Objects

The database objects are displayed in the Navigation Pane. Double click on the name of the object you want to work with to open it.

Shutter Bar Open/Close Button

The Shutter Bar Open/Close Button allows you to hide the Navigation Pane. Click on the button again to redisplay it.

Use the Navigation Pane to Collapse Objects



EXERCISE 6

- 1 At the top of the Navigation Pane click on **Tables**. The table (ie Videos) under the heading will collapse.
- 2 From the menu select Queries – all queries will be hidden.
- 3 Select Forms from the menu.
- 4 Similarly, collapse the list of Reports in the database.

Only the object names will be displayed as shown below.





- 5 Select Tables from the list to view the tables list which will now display the Videos table.



Use the Navigation Pane to View All Objects



EXERCISE 7

- 1 To display all objects, right click on the Tables button  and select  **Expand All** .
This will display all the Access objects in the Navigation Pane.
- 2 Select the **Videos** table as shown below.

