

Easy Way



Teach yourself...

Microsoft Access 2013

(Level 2)

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

A Cheryl Price Publication

Easy Way - Microsoft Access 2013 (Level 2)

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 xi. 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 xii.

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

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Sample Document

Introduction

Welcome to Easy Access 2013 Level 2.

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 xi and instructions for downloading these files from our web site are included on page xii.

What you will learn

In this course you will learn how to -

Create and use a computer database to produce a solution for organisation use, ie

- plan a database
- create and use the database
- create end-user documentation for the database

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 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.

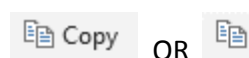
forecast
= to
calculate a
future
result

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.

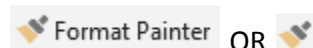
Different Access buttons

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.

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

Ctrl S

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.



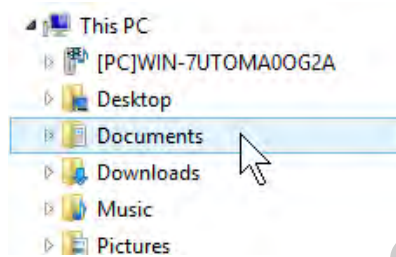
Consolidation Exercise

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

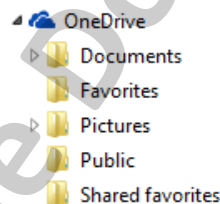
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



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

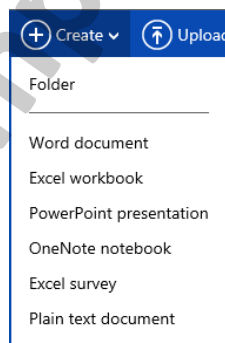
You can log in to the OneDrive website using your web browser with your login name and password.

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	
Care Cosmetics Staff	MovieMaker Database
Coronation Road Book Store	Southfield Mall Tenants
Database Documents	Southfield Mall Tenants Database
Fresh Products Database	



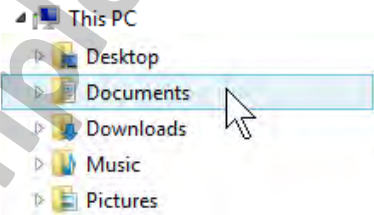

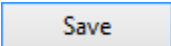
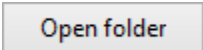
Sample Document

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 2 <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 2 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>

Section

1

Database Theory Entering Simple Data Field Types



Section 1 revises some of the learning covered in the Cheryl Price book, Easy Way Access 2013 Level 1, which is recommended prior learning. If you have already worked through the Level 1 book, you may still like to read through this section to refresh your memory.



Learning Outcomes

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

- ☐ Understand database concepts and 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 database 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 database 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.

ANTI-VIRUS SOFTWARE
ATTACHMENT
AUTONUMBER
BACKSTAGE VIEW
CONTEXTUAL TABS
DATA TYPE
DATABASE
DATABASE OBJECT
FIELD
FIELD NAME
FLAT FILE DATABASE

FORMS
HIERARCHICAL MODE
HYPERLINK
LOOKUP WIZARD
MACROS
MICROSOFT ACCESS HELP
NAVIGATION PANE
NETWORK MODEL
OLE OBJECT
PRINT PREVIEW
QUERIES

QUICK ACCESS TOOLBAR
RECORD
RELATIONAL DATABASE
RELATIONSHIPS
REPORTS
TABLES
VIRUSES

What is a Database?



Any reference to Access in this book should be understood as referring to Access 2013.

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 – i.e. 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 here.

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	30/11/2013	Injury
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	22/11/2013	Illness
Robbn1	Dr	Jonathan	Robbins	122 Crowley Court	Tippy	bird	19/11/2014	Illness
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Jennifer	bird	18/11/2013	Injury
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	11/11/2014	Routine
Evans1	Mr	Bill	Evans	34 Hopetown Rd	Matthew	cat	03/11/2013	Illness
Andrw1	Mrs	Judy	Andrews	2 Ocean View Rd	Zachary	dog	02/11/2014	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.

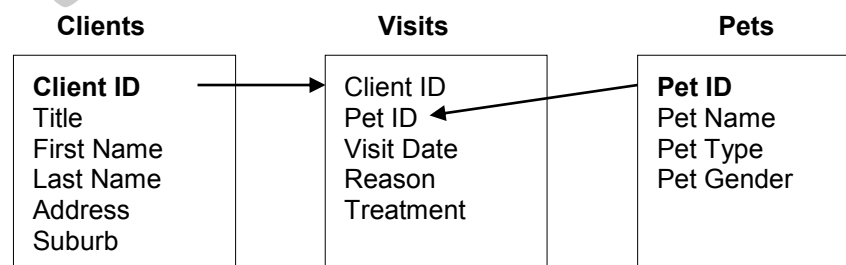
Data duplication is a problem with the Flat File Data Model, and this increases the chances of information being entered incorrectly.

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

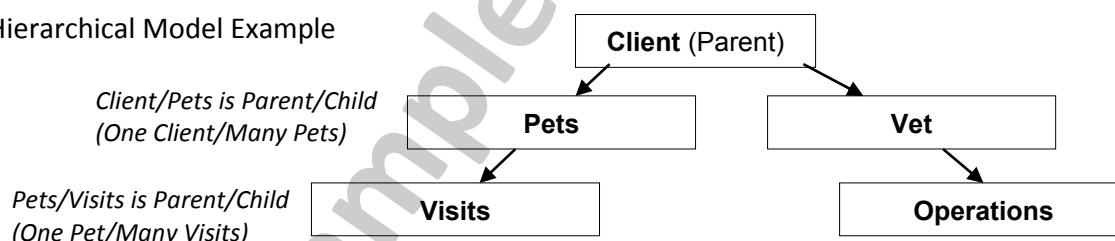
Visits Table

Client ID	Pet ID	Visit Date	Reason	Treatment
Evans1	1	18/11/2013	Injury	Bandage leg
Evans1	2	03/11/2013	Illness	Medication for cat fever
Evans1	2	11/11/2014	Routine	Full examination, no problems
Evans1	2	22/11/2013	Illness	Under observation
Andrw1	3	30/11/2013	Injury	Operation
Andrw1	4	02/11/2014	Illness	Injection for diarrhoea
Robbn1	5	19/11/2014	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.

Customers

CompanyName	ContactName
Arround the Horn	Thomas Hardy
End Handel	Roland Mendel
Foles gourmandes	Marlene Rance

Orders

OrderDate
1/1/95

Order Details

UnitPrice	Quantity
1	100

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

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

Print Invoice

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

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
México D.F. 05023
Mexico

Arround the Horn
120 Hanover Sq.
London QA1 1DP
UK

Berglunds snabbköp
Berguvsvägen 8
Luleå S-958 22
Sweden

Blondel 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

Starting Access 2013

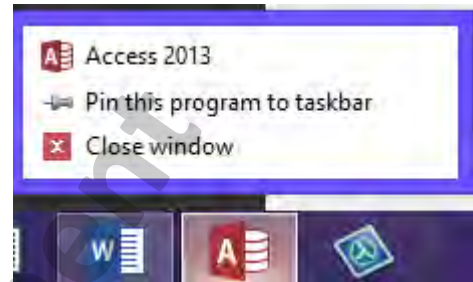


EXERCISE 1

- Click on the Start button  then scroll across the screen and click on . Access opens and a button for the program appears on the Taskbar at the bottom of the screen.

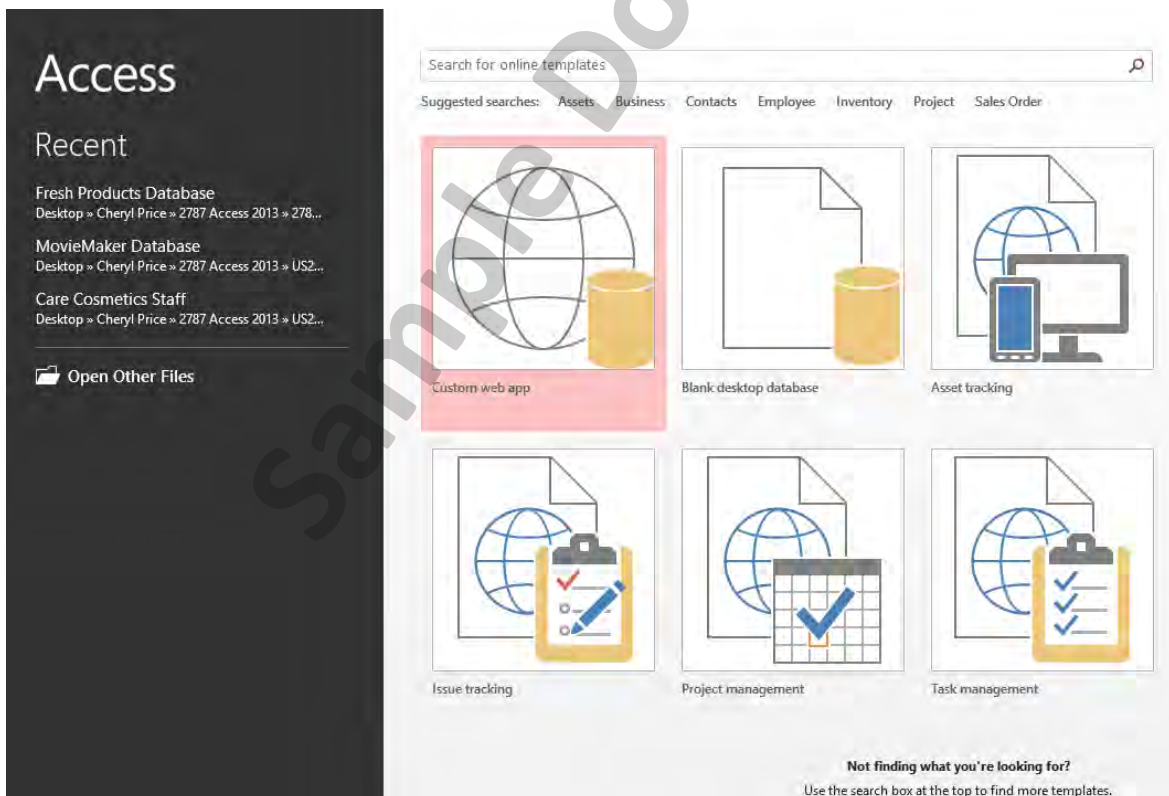


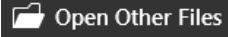
To keep this button permanently displayed on the Taskbar, right click on it and choose *Pin this program to taskbar*. You can then just click on it whenever you want to start Access.



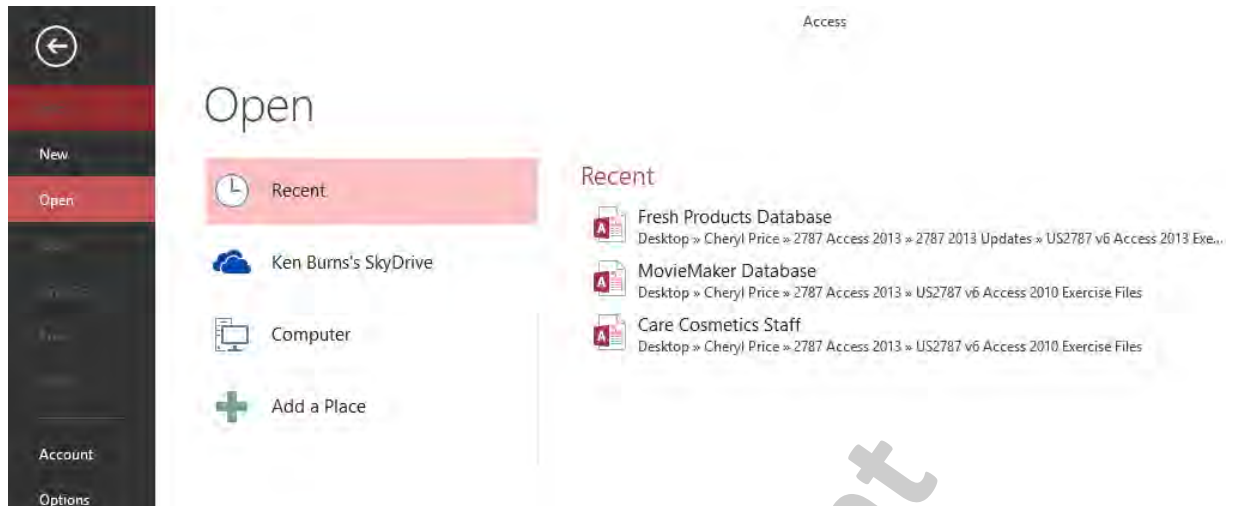
Backstage View

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



If you want to work with a database that is not in the Recent list, click on .

This will display a second Backstage view where you can locate and open databases.



When you have opened a database, you can click on the **FILE** tab to return to Backstage view. This will now display information about the current database, as well as a menu of commonly used commands to the left of the screen.

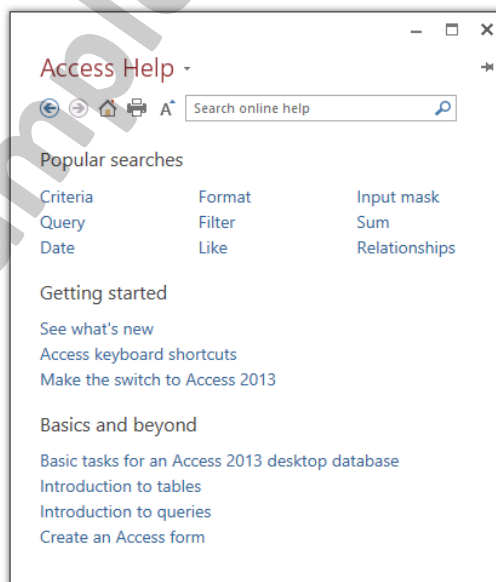
To return to the current database window, click on the Back button

Microsoft Access Help



EXERCISE 2

- 1 Click on the **MICROSOFT ACCESS HELP** button in the top right corner of the window (or press F1) to display the Access Help window.




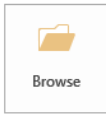
- 2 Select a topic from those displayed, or type a specific topic into the Search online help box above it (eg Create a table) and click on the Search button . Information on that topic will be displayed.
- 3 Click on the Close button to exit from Help.


Opening a Database




EXERCISE 3

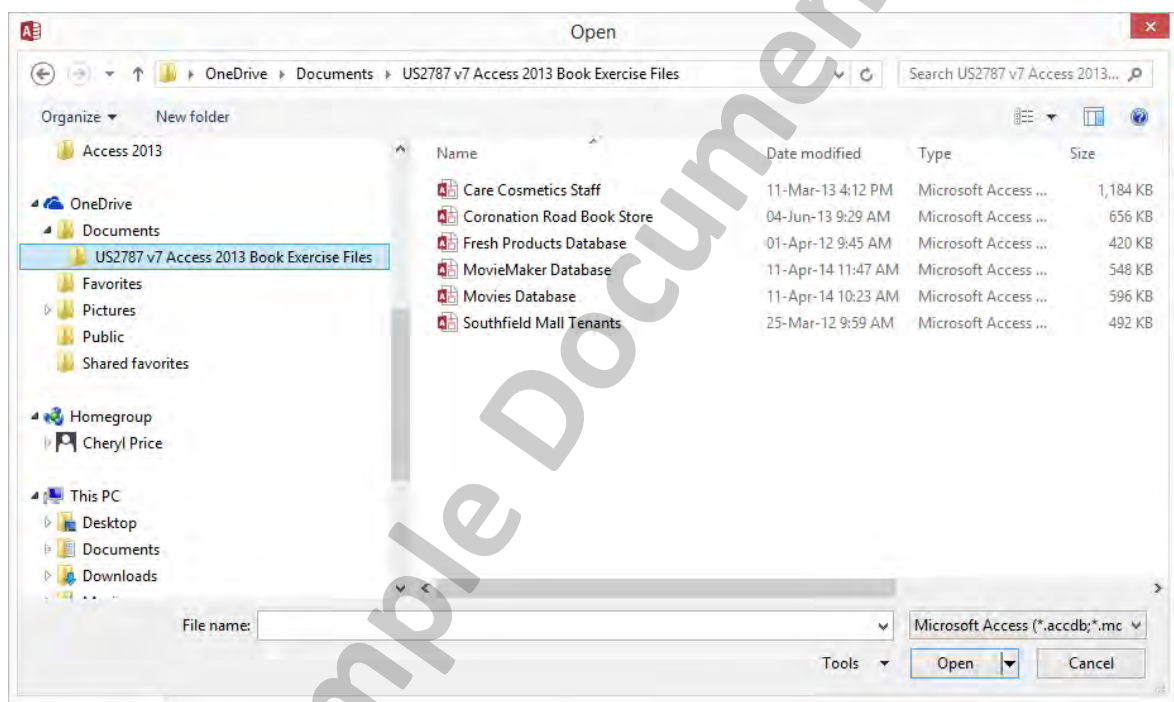
- 1 Click on .

- 2 Click on  Computer then on .

- 3 Under OneDrive on the Navigation bar click on the ▸ at the left of  Documents.

- 4 Click on  US2787 v7 Access 2013 Book Exercise Files.

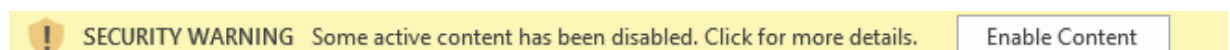
The Open dialog box will display existing database files that are included with this book.



- 5 Click on **MovieMaker Database** then click on .

Access has improved 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:

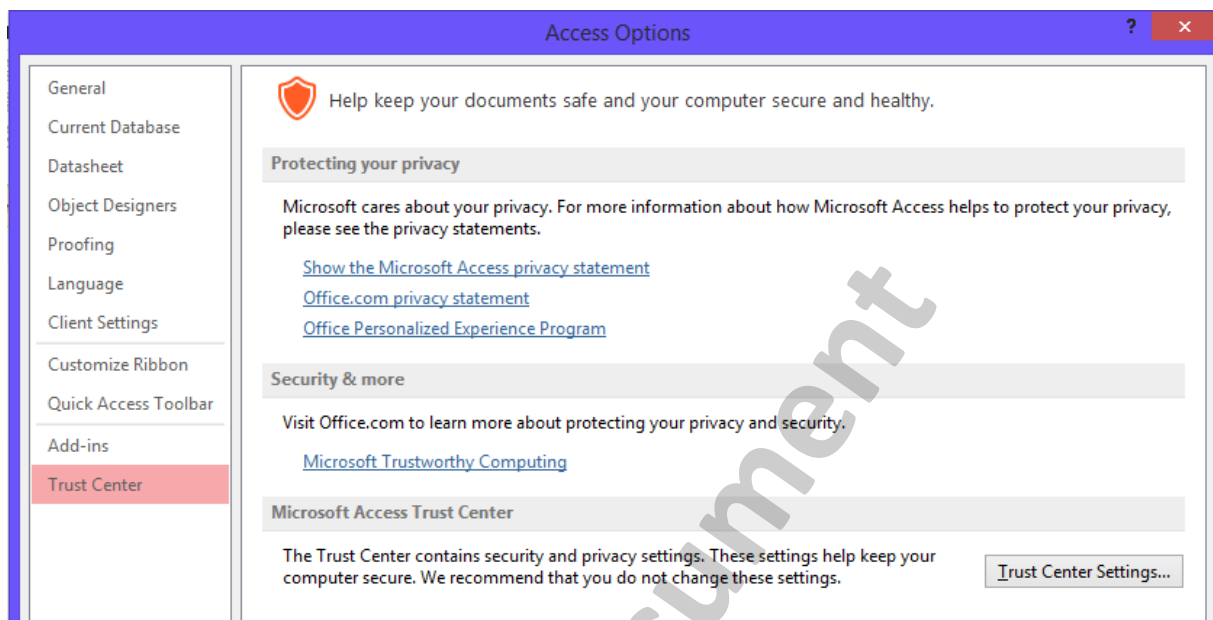
Moviemaker Database is clear of viruses.

The database is now enabled so it can be accessed and used.

Security Settings

To view your current security settings you can click **FILE** and select **Options** from the menu.

In the Access Options dialog box click on Trust Center.



It is essential that you ensure the security of your computer, by using and maintaining up-to-date **ANTI-VIRUS SOFTWARE**.

If you make changes click on OK, or click on Cancel.

MovieMaker Database

Moviemaker is a simple database designed to keep track of videos for a video shop.

The **MovieMaker Database** can be used as follows:

- To search for specific videos
- To find a specific type of video, eg action, romance, comedy
- To see in how many videos the lead role is played by a specific actor or actress
- To search for a specific director
- To see if a video is in the shop or on lease

Before you start using this database you will add buttons to the Quick Access Toolbar for speedy use of common commands.

The Quick Access Toolbar

The **QUICK ACCESS TOOLBAR** is a useful feature for accessing your most frequently used commands. Commands can be added or removed, and the toolbar itself can be positioned either above or below the ribbon. In Access the ribbon can also be customised.



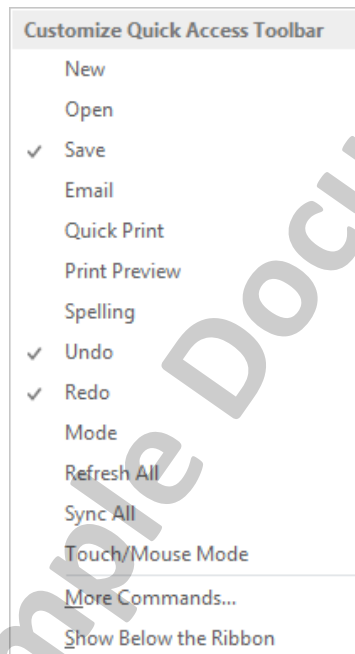
Quick Access Toolbar List



EXERCISE 4

- 1 Click on the Customize Quick Access Toolbar down arrow to the right of the Quick Access Toolbar. The Customize Quick Access Toolbar menu will be displayed.

A tick is shown at the left of every command that presently displays on the Toolbar.



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

Quick Print
Print Preview
Spelling

The Quick Access Toolbar is now displayed as shown below.




Customising the Quick Access Toolbar

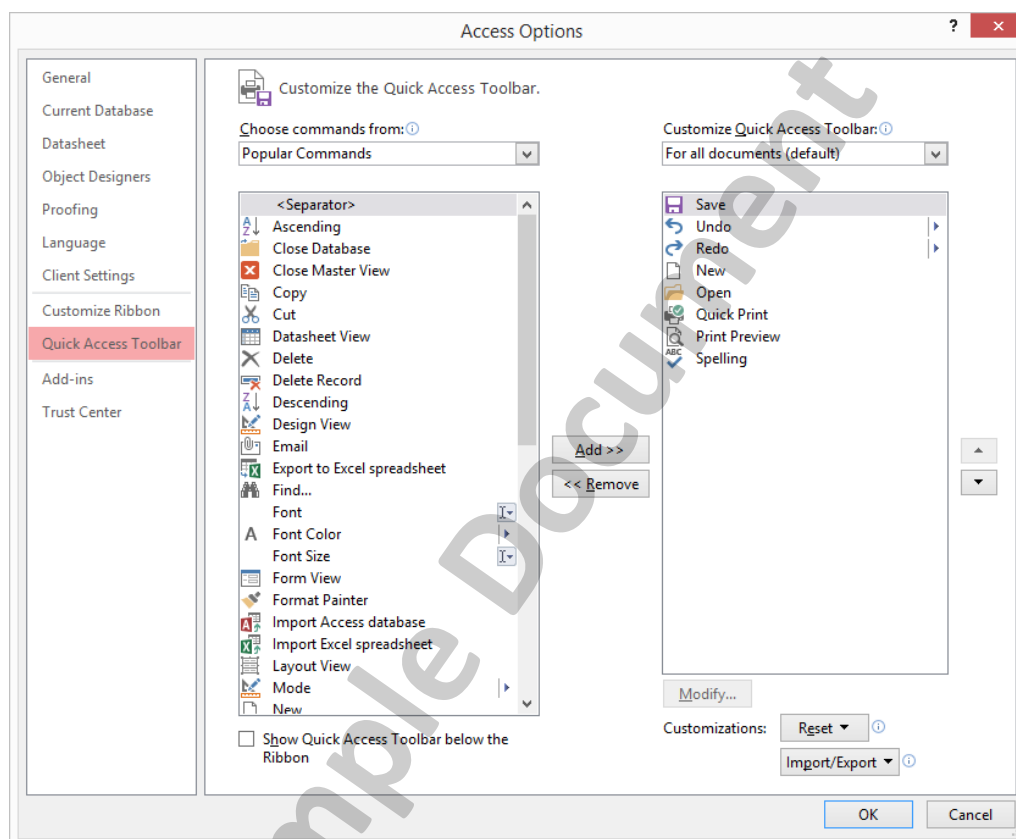
Other commands that are not on the Quick Access Toolbar can be added using the following steps.





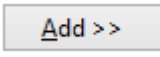


EXERCISE 5

- 1 Click on the Customize Quick Access Toolbar down arrow  and select *More Commands...*

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

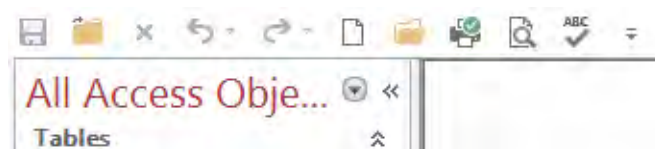



- 2 Click on the Choose Commands from:  and select All Commands. The commands are listed in alphabetical order.
- 3 In the list shown, scroll down until the Close commands are displayed.
- 4 Click on  **Close Database** then click on .
- 5 Click on  **Close Window** then click on .

The two commands have now been added to the Quick Access Toolbar list at the right of the Access Options window.

- 6 Select the following option ☒ **Show Quick Access Toolbar below the Ribbon**
- 7 Click on OK to save the changes to the Quick Access Toolbar.

The Quick Access Toolbar is now displayed between the ribbon and the Navigation Bar as shown below



- 8 Click on the Customize Quick Access Toolbar down arrow  and select Show Above the Ribbon to restore the Quick Access Toolbar to its original position.

Where you display the Quick Access Toolbar is entirely up to you. (I have positioned it below the ribbon.)

If you want to have the commands on the Quick Access Toolbar in a particular sequence, go back to the Access Options – Quick Access Toolbar window.

In the list of commands currently on the toolbar that is displayed to the right, select a command you want to move, and click on either the up or down arrow button.





The commands that you have added in the above exercise will be used throughout the remainder of this book. You may wish to add other commands now, or as you work through the book.

Closing Access 2013

Leave the MovieMaker Database open.

However, when you want to close a database use the Close Database button on the Quick Access Toolbar or Close on the File tab menu.



In Access, clicking on  Close Window on the Quick Access Toolbar OR at the top right of the screen the Close button  will close Access down completely.