

## CHAPTER 1

## InFocus

# GETTING TO KNOW ACCESS 2013

Microsoft Access 2013 is described as a **database management system** (DBMS).

A database is a structure that contains data. You enter data into the database via a variety of sources including typing (data entry), importing from other sources, and even electronically and automatically from other equipment (data logging). The data can then be manipulated by the DBMS to provide a range of useful information.

**In this session you will:**

- ✓ gain an understanding of how **Access** works and what it can be used for
- ✓ learn how to start **Word** from the **Start Screen** in **Windows 8**
- ✓ learn how to start **Access** from the desktop
- ✓ gain an understanding of the **Access Start** screen
- ✓ learn how to create a new blank database
- ✓ gain an understanding of the **Backstage View**
- ✓ learn how to open an existing database file
- ✓ gain an understanding of the **Access 2013** screen
- ✓ learn how to use the ribbon
- ✓ learn how to work with the **Navigation** pane to filter database objects
- ✓ learn how to add commands to the **QAT**
- ✓ learn how to work with **Touch Mode**
- ✓ learn how to work with a table
- ✓ learn how to work with other database objects
- ✓ learn how to close a database file
- ✓ learn how to exit from **Access 2013**.



# UNDERSTANDING MICROSOFT ACCESS 2013

Microsoft Access has a reputation for being a more difficult application to learn and use than its Office siblings: Word, Excel and PowerPoint. There are many reasons for this and a good

orientation to Microsoft Access will greatly help in understanding how this powerful application can be used to perform a range of useful jobs for work and even for pleasure.

## How Access Is Different

Unlike its Office 2013 siblings, Word, Excel and PowerPoint where you can start to create something useful almost immediately and directly on the screen, Access needs you to first design and create structures to hold your data, and then create special template layouts for displaying, manipulating and presenting that data in a useful and meaningful way. In other words, rather than just playing around and looking to see how things are going, Access requires more thought, more planning and good designs in order to be used effectively. While there is a lot of *learn by doing* involved with Access, there is also great deal more *learn before doing* associated with it.

## How Access Works

Basically, Access allows you to do two main things: firstly, it allows you to *store* huge amounts of data, and secondly, it allows you to *manipulate* that data to produce relevant and useful information. This is what **Database Management Systems** (DBMS) are all about, and the good news is that Access is one of the easiest of these to learn and use.

Data is *stored* in **tables**. Tables are structures made up of rows and columns and are similar in appearance and operation to Excel worksheets. You do, however, need to design and create these tables yourself, before the data can be entered.

The data in tables is *manipulated* using **forms**, **reports** and **queries**. A **form** is mostly used for data entry (although you can enter data directly into a table). A **report** is used to manipulate the data and present it either on the screen or printed on paper in a more pleasing way. A **query** is used to produce a subset of the data – for example, in a sales system you may only want to see the sales in the northwest region.

**Forms**, **reports** and **queries** are created as layout frameworks. Once the framework has been designed you can then run the data from the tables through them. Indeed, this is a common theme throughout Microsoft Access: *design* versus *display*. You create or modify a form, report or query in **design mode**, and then preview the data in **display mode**.

Even tables (that store your data) conform to this design/display metaphor. You *design* a table structure, then enter the data in a *display* (they call it a **datasheet**) view.

Tables, forms, reports and queries are known as **database objects**. In fact, each of these is like a mini-application within the broader Access application. Each has a very large range of commands and options that you can use to both design the structure or framework, and also use to display data.

## What Can Access Be Used For?

Virtually anything.

You can use Access to create a system for managing your music or stamp collection, membership at your local soccer or polo club, petty cash, inventory and stock control, or sales at work and much, much more. Any situation where you need to store data, manipulate it, and then present it as useful information is a perfect contender for Access.

The only snag with Access is that unless you use one of the pre-created system templates, you need to plan and design the system and the database objects (the tables, forms, reports and queries) used in that system. And this is what takes time and learning to do.



# STARTING ACCESS FROM THE WINDOWS START SCREEN

To create a new database or work with an existing one, the first thing you must do is to start Microsoft Access. If your computer is running Windows 8 and defaults to the **Start** screen when


switched on, there are several ways in which you can start Access. You can do so through the **Apps** screen, via an **Access** tile or by simply typing **access** to search for it.

## Try This Yourself:

*Before you begin, ensure that your computer is switched on and the Start screen is displayed...*

- 1 Move the mouse pointer to display the white **down arrow** icon in the bottom left corner of the screen
- 2 Click on the arrow to display the **Apps** screen
- 3 If necessary use the scroll bar at the bottom of the screen to display the **Microsoft Office 2013** apps, then click on **Access 2013** to open the program

*There is an even faster way to open Access...*

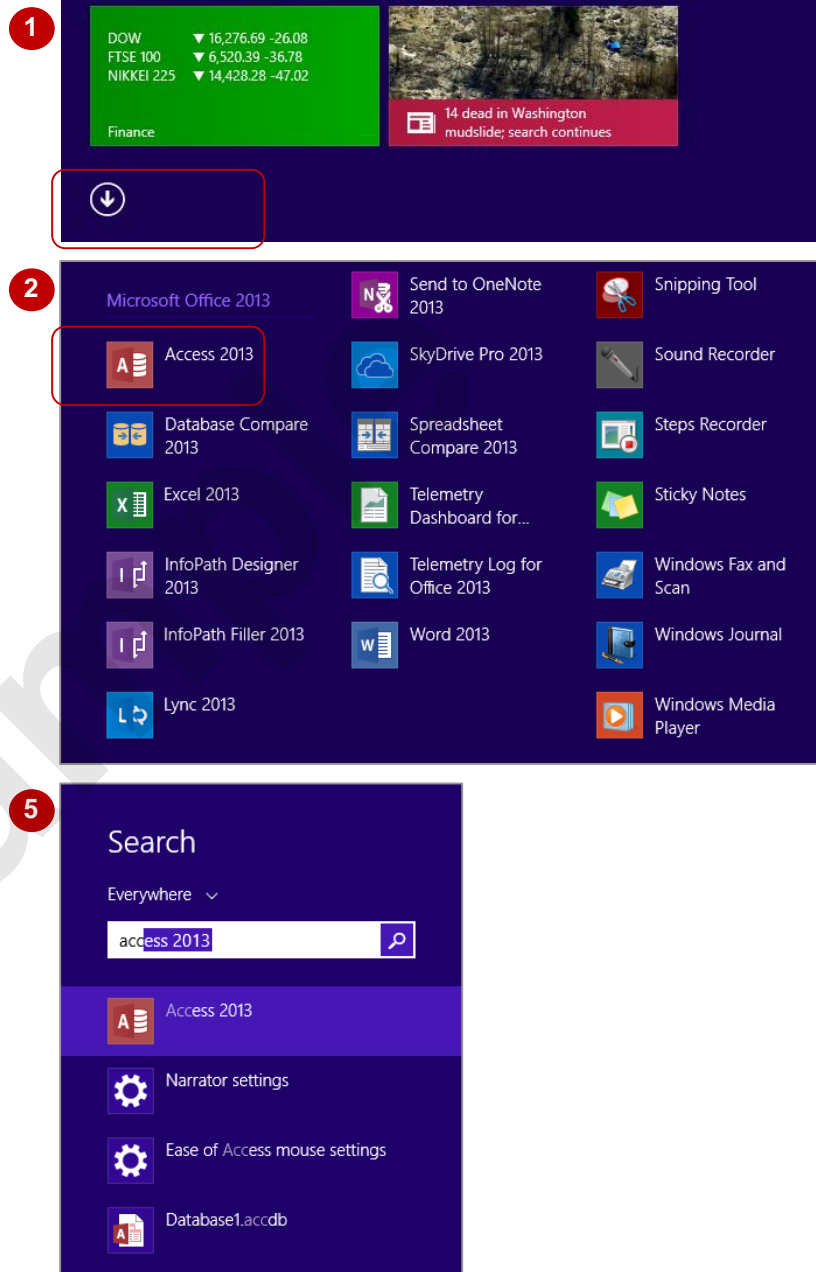
- 4 Press the **Windows** key  to return to the **Start** screen

- 5 Begin typing **access** into the **Start** screen

*A Search pane will appear on the right side of the screen and Access 2013 will be displayed...*

- 6 Click on **Access 2013** to open the program

*The start screen will be displayed*



## For Your Reference...

To **start Access** from the **Start screen**:

- Display the **Apps** screen and click on **Access 2013**, or
- Type **access** into the **Start** screen and click on **Access 2013**, or
- Click on the **Access 2013** tile on the **Start** screen

## Handy to Know...

- You can add an Access 2013 tile to the **Start** screen by right-clicking on **Access 2013** on the **Apps** screen and clicking on **Pin to Start**. The new app will appear at the right end of the **Start** screen.



# STARTING ACCESS FROM THE DESKTOP

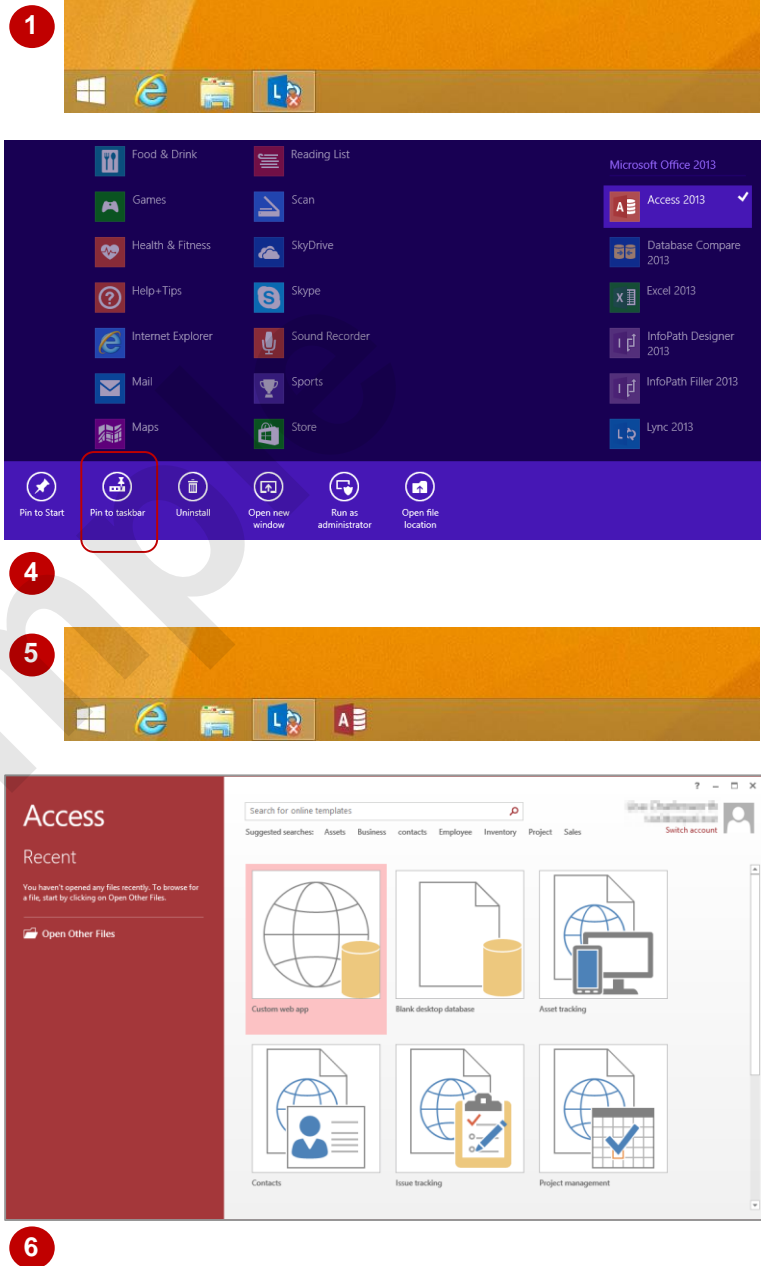
To create a new database or work with an existing one, the first thing you must do is to start Microsoft Access. If your computer defaults to the **Desktop** when switched on, you may need to

initially create an Access icon for future access. This icon can be saved to the taskbar, making Access readily accessible at all times.

## Try This Yourself:

*Before you begin, ensure that your computer is switched on and the Desktop is displayed...*

- 1 If you do not see an **Access** icon in the taskbar at the bottom of the desktop, press the **Windows** key  on the keyboard to display the **Start** screen
- 2 Move the mouse pointer to display the **down arrow** icon in the bottom left corner of the screen
- 3 Click on the arrow to display the **Apps** screen  
*From here you can view all of your apps, including Access...*
- 4 Locate the **Microsoft Office 2013** apps, then right-click on **Access 2013** to display the **Apps** bar and click on **Pin to taskbar**
- 5 Press the **Windows** key  twice to return to the desktop  
*You should now see an Access icon in the taskbar at the bottom of the screen. This icon will remain in the taskbar unless you unpin it...*
- 6 Click on the **Access** taskbar icon to open the program  
*The start screen will be displayed*



## For Your Reference...

To **pin Access** to the **taskbar**:

1. From the **Start** screen, click on the down arrow icon to display the **Apps** screen
2. Locate and right-click on **Access 2013**
3. Click on **Pin to taskbar**

## Handy to Know...

- To remove an icon from the taskbar, right-click on the icon in the taskbar and select **Unpin this program from taskbar**.



# UNDERSTANDING THE START SCREEN

Most times you open Access, a **start** screen will display. From this initial screen, you can choose what kind of database you want to work with. You can choose to work with one of your most

recently accessed files, open a database which has been saved to **Computer** or **SkyDrive** or create a new database using the available templates.

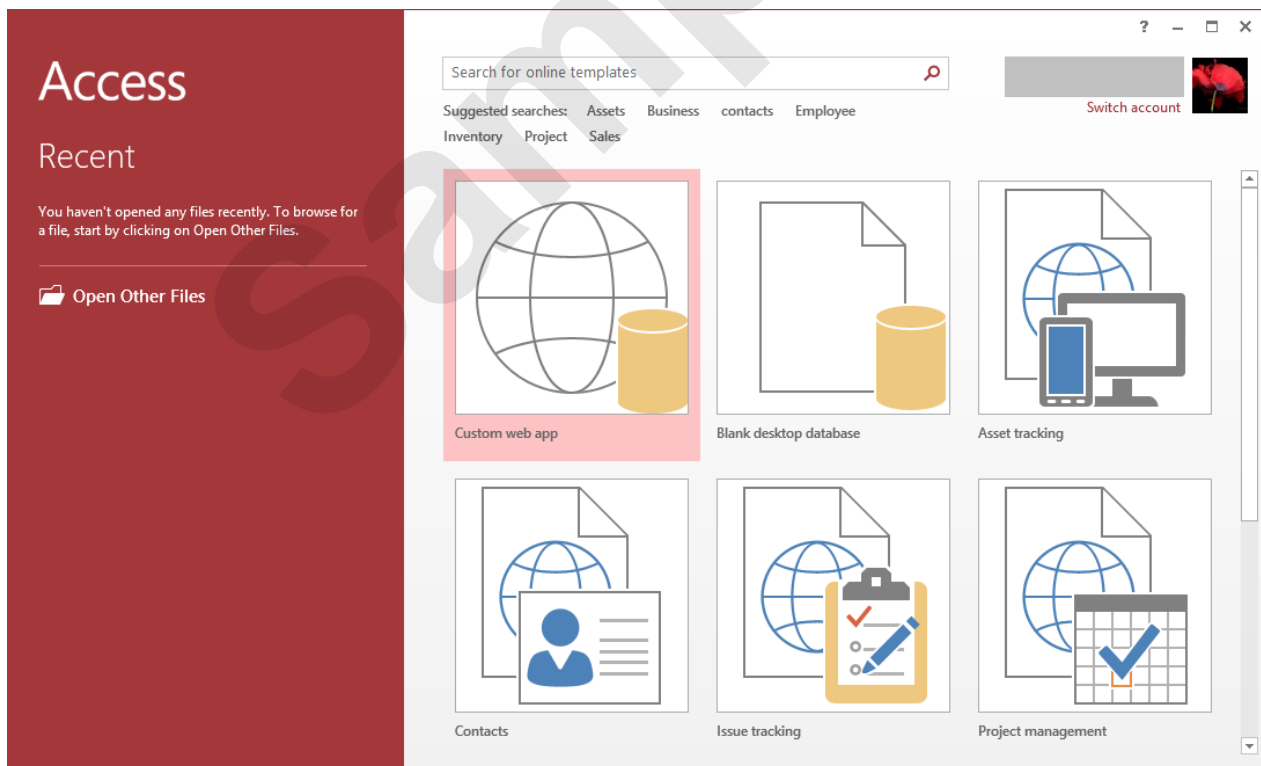
## Microsoft Access 2013 Start Screen

The Microsoft Access 2013 **start** screen is very helpful if you want to quickly access a database you have worked on recently or create a new database based on one of the available templates (including the default **Blank desktop database**).

If you have already worked on a database or several databases in Access, a list of recent databases will display below **Recent** in the brown pane to the left of the screen. If you haven't worked on any databases yet, you can still open existing databases by clicking on the link, **Open Other Files**, located below **Recent**. This lets you open an existing file from your computer or SkyDrive.

The main pane of the **start** screen displays available templates you can use to create a new database and a search box you can use to search the internet for additional templates. Templates are simply layouts that have already been created which you can customise to suit your needs and then enter relevant content. If you want to start with a clean slate you can choose the **Blank desktop database** template – you'll probably find this is the one you will use the most. Templates displaying the globe icon (e.g. **Asset tracking**) use the web-based SharePoint servers to host your database and make it available over the internet (note that these templates require subscriptions).

In the top right corner of the screen you'll see information about the account you've used to sign into **Windows** as well as **help**, **minimise**, **restore down**, and **close** tools.



The **start** screen will only display when you launch the **Access 2013** application directly – that is, by clicking on the Access tile on the Windows 8 **Start** screen, clicking on the application on the **Apps** screen or under search results, or clicking on the taskbar icon if the application has been pinned to the **taskbar**.

**Access 2013** can also be started in Windows 8 by double-clicking on an Access database in **File Explorer**. When this occurs **Access 2013** will start with the database open on the screen and the **start** screen shown above will be bypassed.



# CREATING A NEW BLANK DATABASE

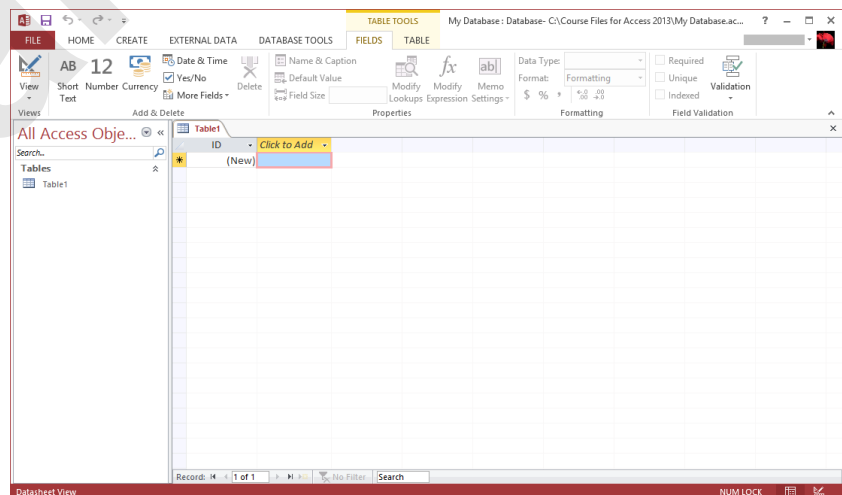
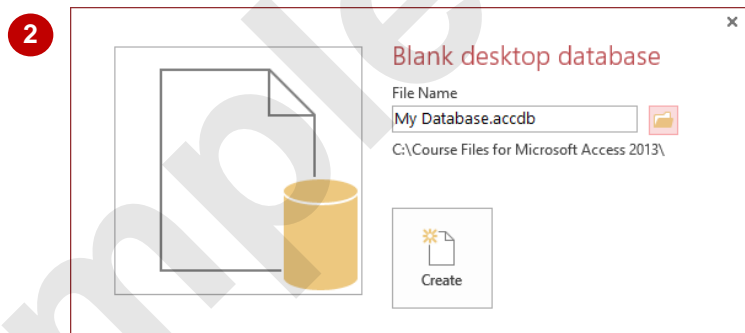
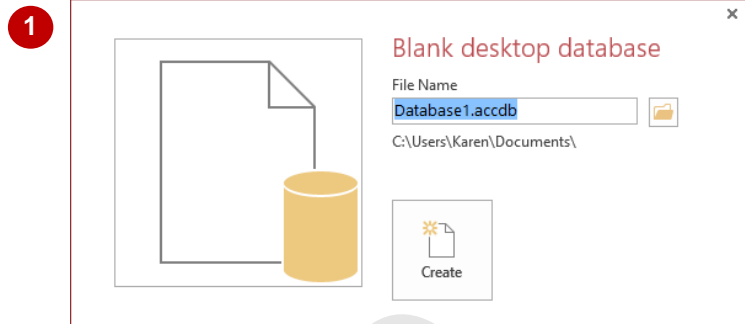
When you launch Microsoft Access 2013, you will be presented with the **start** screen, which enables you to open an existing database or create a new one based on one of a multitude of

available templates. Most of the templates shown are web-based and may involve a subscription to Office 365. You can also simply create a new, blank desktop database which is free.

## Try This Yourself:

*Before starting this exercise you MUST ensure that the Access 2013 Start screen is displayed...*

- 1 In the right pane, click on **Blank desktop database**  
*You will be asked to name the database...*
- 2 Type **My Database** in **File Name**, then click on **Browse**, locate and click on **C:/ Course Files for Microsoft Access 2013** and click on **[OK]**  
*You could click on the Next arrow to display the other built-in templates and use one of those instead, but we will stay with the blank template...*
- 3 Click on **[Create]** to open the new blank database in Access  
*Access has created a single blank table for you to begin with...*



## For Your Reference...

To **create** a **new blank database**:

1. In the **start** screen, click on **Blank desktop database**
2. Type a **File Name**, click on **[Browse]** and select a save in location
3. Click on **[OK]** then click on **[Create]**

## Handy to Know...

- If you already have a database open and want to create a new one, click on the **FILE** tab to open the **Backstage**, then click on **New** and click on **Blank desktop database**.



# UNDERSTANDING THE BACKSTAGE VIEW

Before you can properly enter Microsoft Access 2013, you must have a **database file** open. A database file is where your database objects (*tables, forms, reports, queries* etc) for a

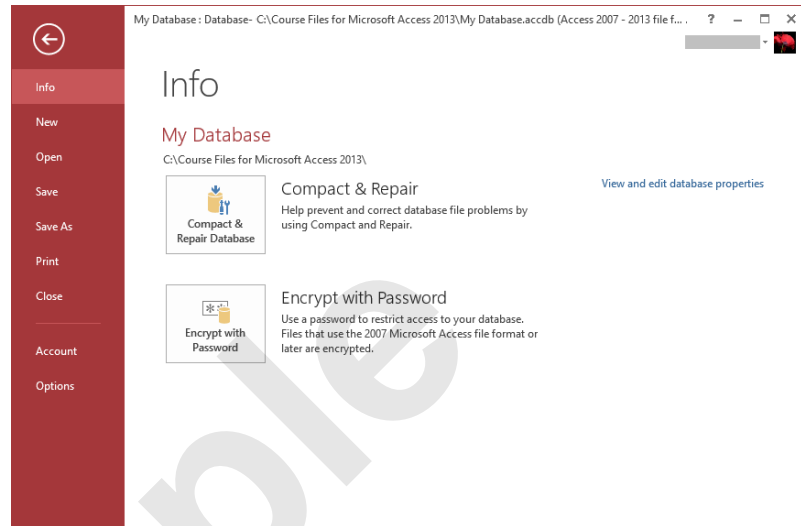
particular system or project you are working on are located. The **Backstage view** is accessed using the **FILE** tab and provides you with file information and enables you to print, save and more.

## The Backstage

The **FILE** tab on the ribbon is not a standard tab – as you can tell by the fact that it is coloured. Clicking on the **FILE** tab launches a mini-program within Microsoft Access called **Backstage view**, also called simply **Backstage**.

A navigation pane occupies the left side of the **Backstage**. The options in this pane enable you to access a number of operations, such as printing and saving and can also provide you with information about your database such as size.

Click on the options in the navigation pane to change the display in the pane on the right.



## The Backstage Options

<b>Info</b>	Provides status information about the current database and lets you compact and repair the database and encrypt it with a password.
<b>New</b>	Enables you create a new database and provides access to inbuilt templates as well as ready access to a range of online templates.
<b>Open</b>	Provides a list of recent documents as well as the option to search through your Computer, SkyDrive or other place, to find what you are looking for.
<b>Save</b>	Saves your current object (table, query, form etc).
<b>Save As</b>	Enables you to save the current database in a different format (e.g. as a.mdb, compatible with versions earlier than 2007) and/or in a different location.
<b>Print</b>	Enables you to print the current object and preview it.
<b>Close</b>	Closes your current database.
<b>Account</b>	Contains product and user information.
<b>Options</b>	Displays the <b>Access Options</b> dialog box, which presents you with options for setting up how Access works in general and options (preferences) for the current database.





# OPENING AN EXISTING DATABASE FILE

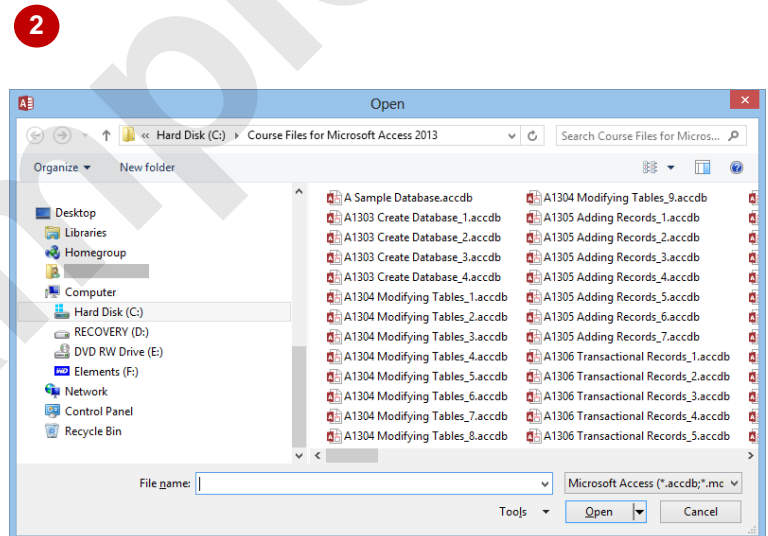
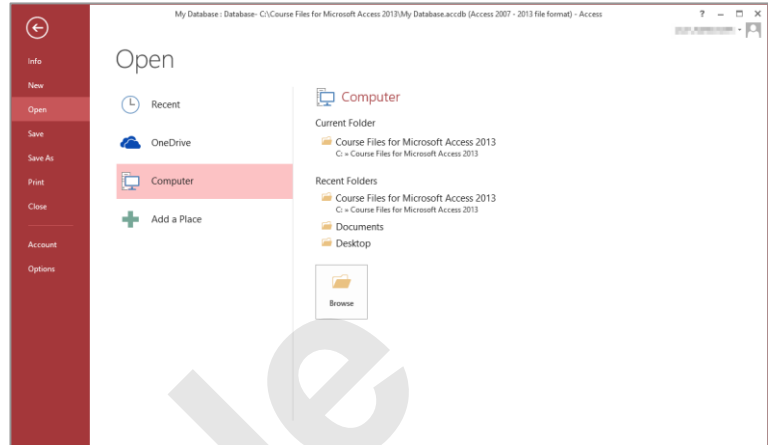
A good way to see how Access 2013 works is to open an existing database file. To open a database file, you need to use the **Open** option in the **Backstage**. If the database file has recently

been opened, it may appear in the **Recent Database** list. However, if it doesn't appear there, you will need to use one of the other **Open** options to search for and open it.

## Try This Yourself:

*Before starting this exercise ensure that Access has started...*

- 1 Click on the **FILE** tab to open the **Backstage**, then click on **Open** to display the **Open** options
- Let's change the folder location to display our existing database files...
- 2 Click on **Computer** under **Open** in the middle pane
- This will display the current folder and any recent folders. Let's assume these are not the folders that we need...
- 3 Click on **[Browse]** to display the **Open** dialog box
- 4 Double-click on the icon for **C:** drive, then double-click on the **Course Files for Microsoft Access 2013** folder
- 5 Click on **A Sample Database.accdb** and click on **[Open]** to open the database
- 6 If a security warning displays in the yellow info bar just below the ribbon, click on **[Enable Content]** to close the info bar



## For Your Reference...

To **open** an **existing database file**:

1. Select **Open** in **Backstage** view
2. Move to the folder that contains the file
3. Click on the file to select it
4. Click on **[Open]**

## Handy to Know...

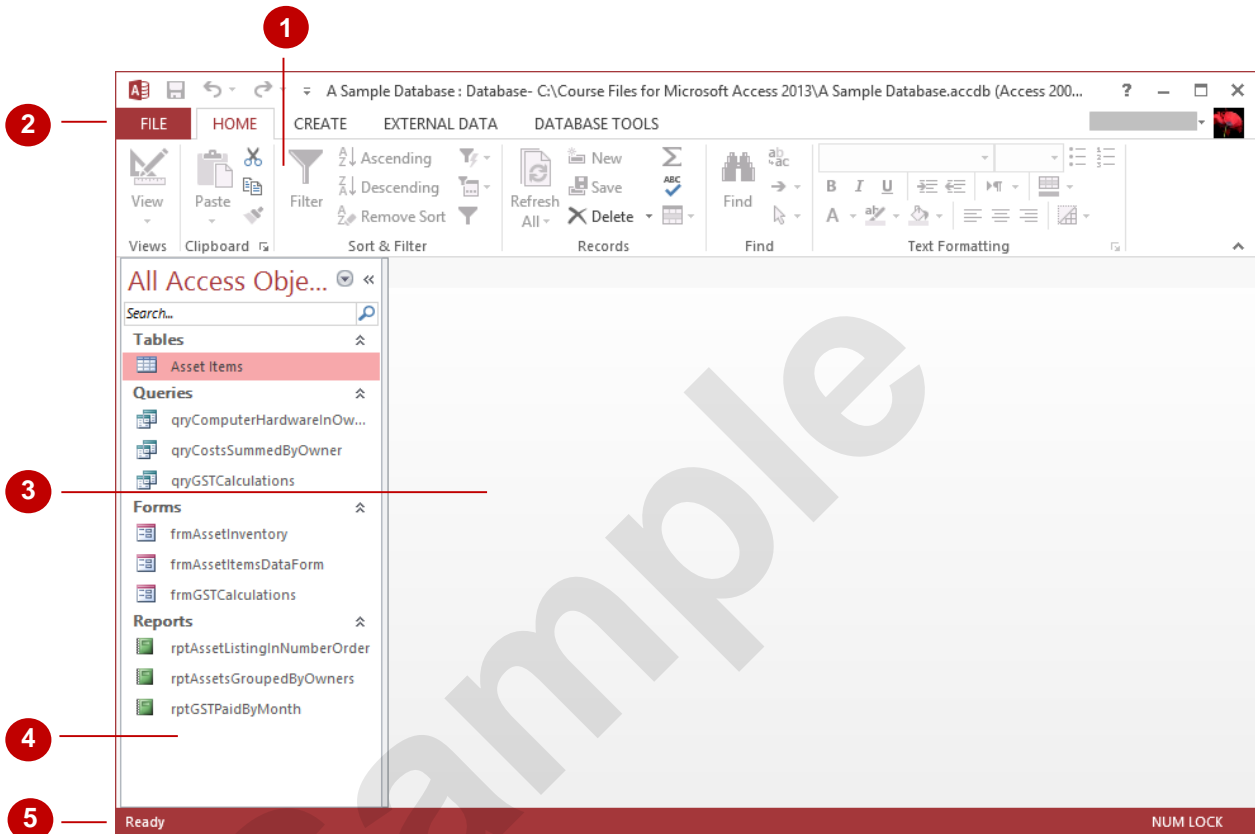
- You can use the keyboard shortcut **Ctrl** + **O** at any time to display the **Open** area in **Backstage** view.



# UNDERSTANDING THE ACCESS 2013 SCREEN

At first glance there's not much to an Access 2013 database screen. The screen really only gives you access to either *create*, *modify*, or *run* one of the **database objects** in a database file

(tables, forms, reports, queries, etc). It isn't until you choose to perform one of these operations that the screen really becomes more intricate.



- 1 The **ribbon** is the tabbed band that appears across the top of the window. It is the command control centre of Access 2013. You use the **tabs** on the ribbon to access **commands** which have been categorised into **groups**. Commands can be buttons or sometimes include **galleries** of formatting options that you can select from. This area really comes to life when a database object is opened.
- 2 The **FILE** tab of the ribbon is used to access file management functions such as saving, opening, closing, printing, etc. *Access Options* are also available so that you can set your working preferences and options for Access 2013.
- 3 The main part of the screen is the data area. Here a **database object** will appear either in design or in preview mode. The database object must first be opened before it will appear so, even though **Asset Items** in the screen above is selected, it hasn't yet been opened.
- 4 The **Navigation** pane is used to list and navigate the various database objects (*tables, forms, reports, queries*, etc) that exist in the database. By default, all objects are displayed (as shown above) but it is possible to filter the pane to show, for instance, only objects of one type (e.g. tables).
- 5 The **Security and Message** area displays information about the database object that is currently open. Since there are no objects open the area is not showing much at the moment other than the fact that it is *ready* for you to begin.



# USING THE RIBBON

The **ribbon** is the command centre for Access. It provides a series of commands organised into **groups** that are placed on relevant **tabs**. Tabs are activated by clicking on their name to display

the command groups. **Commands** are activated by clicking on a button, tool or gallery option. Although there are often several ways to access an option, the ribbon provides a simple, direct approach.

## Try This Yourself:

Continue using the previous file with this exercise, or open the file *A Sample Database.accdb...*

- 1 In the **Navigation** pane, double-click on **Asset Items** under **Tables** to open the object – examine the **groups** on the **HOME** tab

When an object is open, more options on the ribbon become active. The **HOME** tab contains commonly used commands...

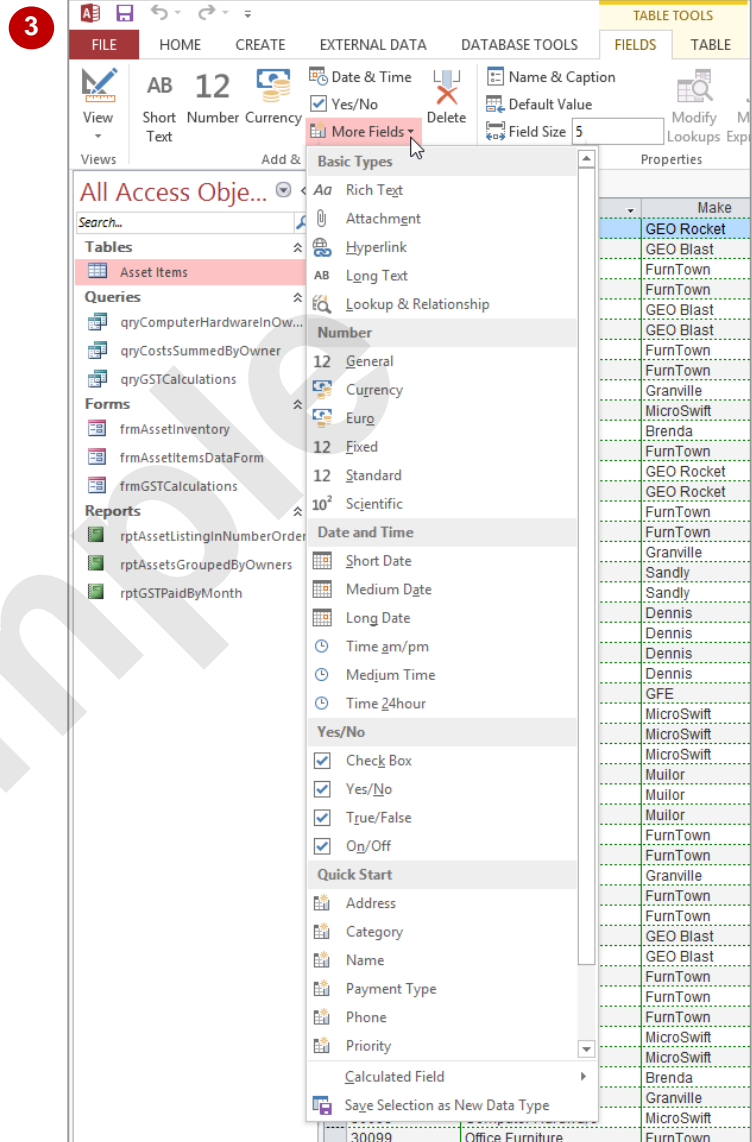
- 2 Click on the **CREATE** tab  
These commands are used to create new objects (tables, queries etc)...
- 3 Click on the **TABLE TOOLS: FIELDS** tab, then click on **More Fields** in the **Add & Delete** group

A down arrow indicates the option will display a gallery...

- 4 Click on each of the **tabs** and examine the **commands**  
Some commands open dialog boxes...

- 5 On the **HOME** tab, click on **Find** in the **Find** group to open the **Find and Replace** dialog box

- 6 Click on **[Cancel]**



## For Your Reference...

To **use** the **ribbon**:

1. Click on a **tab** to display the **commands**
2. Click on a **tool** to activate a **command**, display a **gallery** or display a **dialog box**

## Handy to Know...

- Additional tabs, known as **contextual tabs**, appear in specific circumstances. For instance, if you open a table, the **TABLE TOOLS: FIELDS** and **TABLE TOOLS: TABLE** tabs appear. This provides quick access to all of the tools you may need to work with tables.



# WORKING WITH THE NAVIGATION PANE

The **Navigation** pane is an essential part of Access 2013 as it provides you with access to the database objects that are in your database file. The pane itself can be filtered to show you

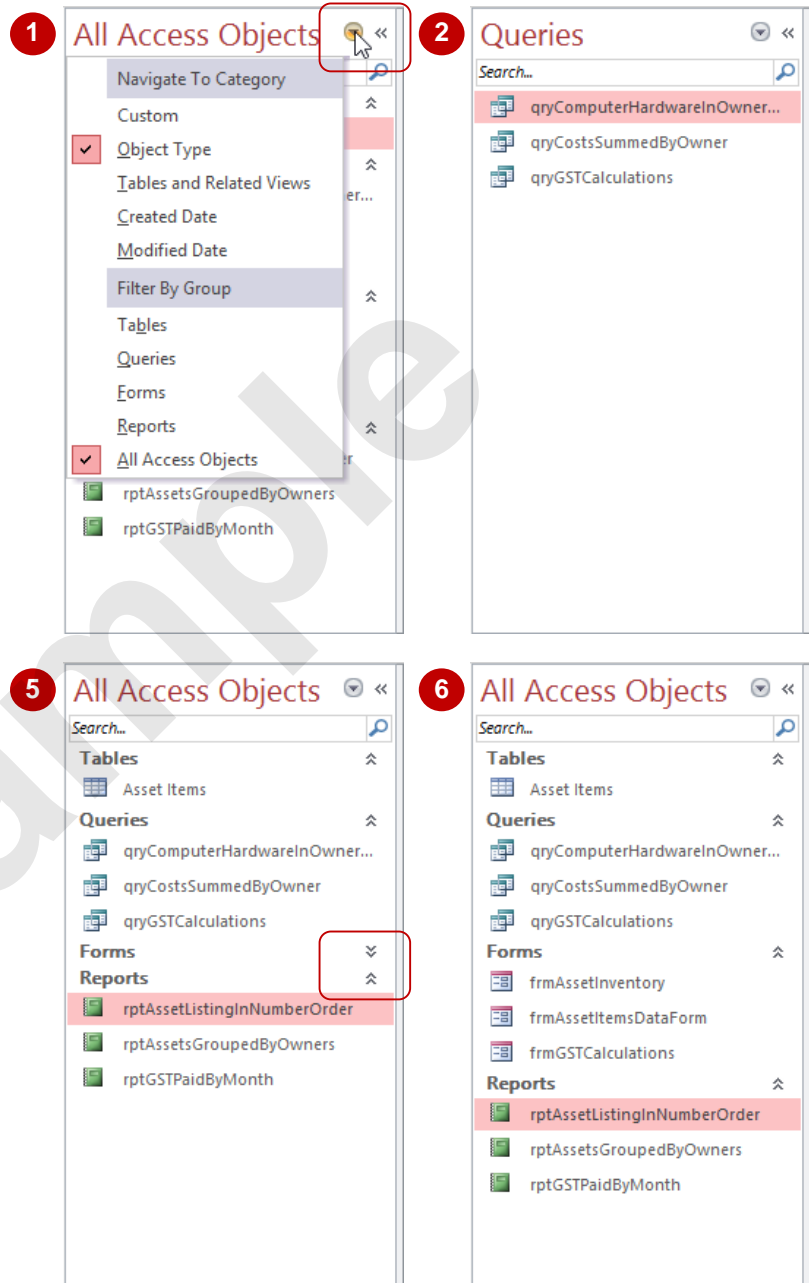
more or less objects and you should get a pretty good grasp on how it operates before you begin to create tables and other database objects.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *A Sample Database.accdb...*

- 1 Click on the **All Access Objects** drop arrow for in the **Navigation** pane, as shown  
A menu will display...
- 2 Select **Queries** under **Filter By Group** to see only the saved query objects in the database
- 3 Click on the drop arrow again and select **Reports** to see only the reports
- 4 Click on the drop arrow again and select **All Access Objects** to see all of the database objects
- 5 Click on the double up arrow to the right of **Forms** in the **Navigation** pane  
The forms will be hidden and the arrows will change to double down arrows...
- 6 Click on the double down arrow to the right of **Forms** to display the forms again



## For Your Reference...

To **filter database objects** in the **Navigation pane**:

1. Click on the **All Access Objects** drop arrow for the object type in the **Navigation** pane
2. Select the desired filter option

## Handy to Know...

- The **Navigation** pane menu is quite complex. Once you've become proficient with it you can list the objects by date created or modified. However, the best option is to list objects grouped according to their type.



# ADDING COMMANDS TO THE QAT

The **QAT (Quick Access Toolbar)** is a small toolbar that appears at the top left corner of the Access window and is a handy location to place the commands from the ribbon that you use most

frequently. Adding commands from the ribbon involves locating the command, right-clicking on it and selecting **Add to Quick Access Toolbar**.

## Try This Yourself:

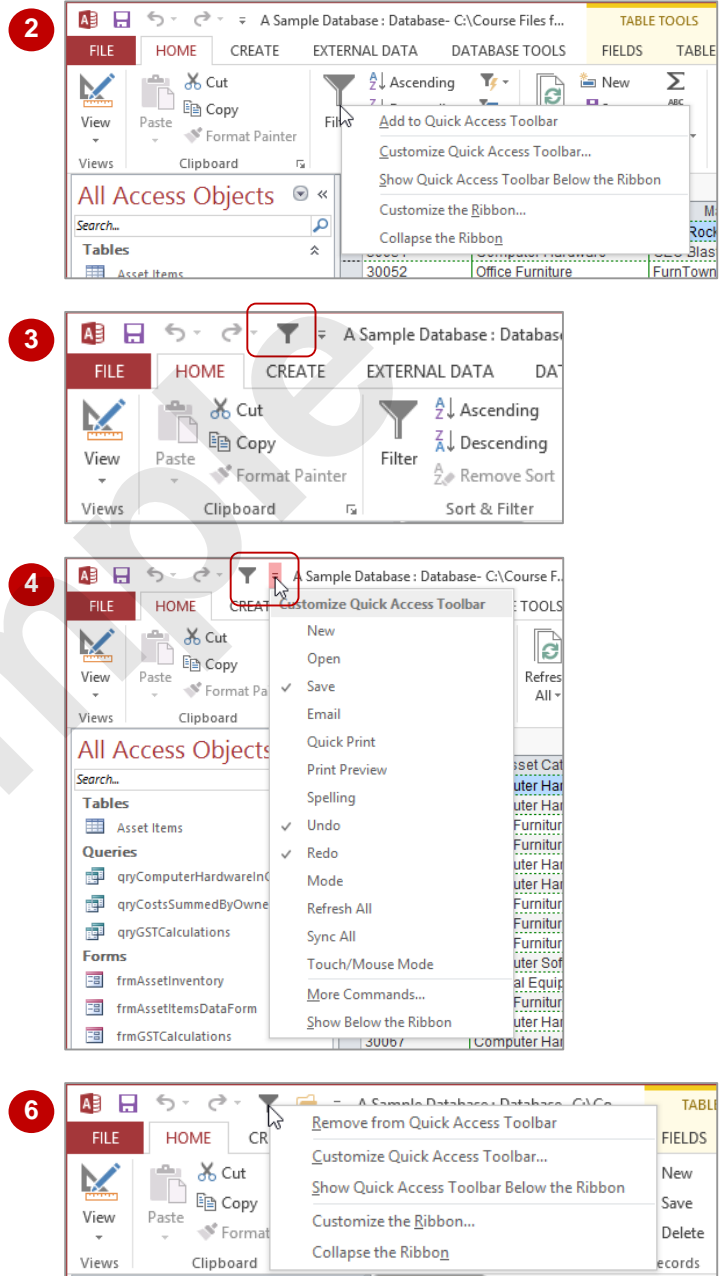
Same File

Continue using the previous file with this exercise, or open the file *A Sample Database.accdb*...

- 1 Point to the first button on the **Quick Access Toolbar** to see the name of the tool and its shortcut

In our case it's the **Save** tool – by default, only three tools appear in the QAT (**Save**, **Undo** and **Redo**)...

- 2 On the **HOME** tab, right-click on **Filter** in the **Sort & Filter** group to display a shortcut menu
  - 3 Select **Add to Quick Access Toolbar** to add the **Filter** tool to the **QAT**
  - 4 Click on **Customise Quick Access Toolbar**, as shown, to display a menu
  - 5 Select **Open** to add the **Open** tool to the **QAT**
- It is just as easy to remove tools you don't want from the QAT...
- 6 Right-click on the **Filter** tool in the **QAT** and select **Remove from Quick Access Toolbar**
  - 7 Repeat step 6 to remove the **Open** tool from the **QAT**



## For Your Reference...

To **customise** the **Quick Access Toolbar**

1. Right-click on the command you want to add and select **Add to Quick Access Toolbar**, or  
Click on **Customise Quick Access Toolbar** and select a command

## Handy to Know...

- You can position the **QAT** under the ribbon by clicking on **Customise Quick Access Toolbar** and selecting **Show Below the Ribbon**. This puts the tools that you use most frequently closer to your workspace making it quicker to access them.