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**INTRODUCTORY  
ACCESS**

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**TEACHUCOMP, INC.**

*...it's all about you*

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# INTRODUCTORY ACCESS

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# INTRODUCTION AND OVERVIEW

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Welcome to TeachUcomp, Inc.'s Introductory Access course. This class is the first of the Microsoft Access classes. Access is one of the most popular database programs available. This class is designed to familiarize the student with little or no knowledge of Access, or relational database design, with the basic components of the program and some of the fundamental aspects of relational data modeling.

Access can create either desktop database files, which can be used on internal networks, or web apps, which can be used through the Internet via a SharePoint or Office 365 for Business server. This course focuses on the creation and design of the desktop database files in Access.

Access is a multi-featured database program in which one creates powerful relational desktop databases or web-based apps that store and manipulate data. It is a very useful program and has many features that can automate and simplify job tasks. Whether you want it to create charts, reports, data entry forms, or data sources; Access can assist you in accomplishing these tasks quickly and easily.

The introductory segment of this course will focus on giving the student who possesses little to no knowledge of Access the basic overview of how Access works, the components needed to create a simple desktop database and knowledge of their function within a desktop database.

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# **CHAPTER 1-**

## **GETTING ACQUAINTED WITH ACCESS**

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**1.1- CREATING A NEW DATABASE**

**1.2- OVERVIEW OF A DATABASE**

**1.3- THE ACCESS INTERFACE**

**1.4- TOUCH MODE**

**1.5- VIEWING DATABASE OBJECTS IN THE NAVIGATION PANE**

**1.6- OPENING AND CLOSING DATABASES**

*Sample- for evaluation purposes only!*

# GETTING ACQUAINTED WITH ACCESS

## 1.1- Creating a New Database:

When Access opens, it displays a window which allows you to create a new database file that will contain either a desktop database or web app. A new Access database file is a container that will hold all of the tables, view definitions, forms, reports, queries, macros, and modules required by the desktop database or web app. Within Access, a desktop database is simply a database file that is intended to be used on a single computer or within a local network. A web app is a database application that is intended to be shared on the Internet using SharePoint or Office 365 for Business services. You must have an Office 365 subscription, or have access to a SharePoint server with Access Services installed, to be able to create web apps in Access 2013 or later. This course focuses on creating and designing desktop database (.accdb) files in Access 2016 or 2013.

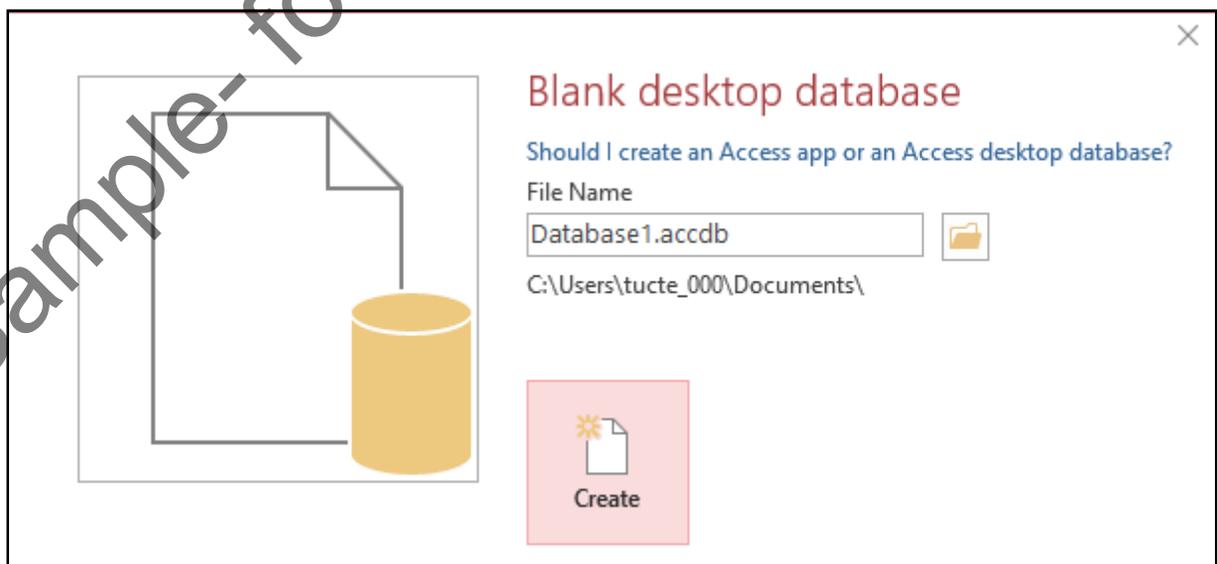
After starting Access, you can choose to create a new database file from scratch by using a blank desktop database or web app template or you can create a new database file that contains some basic database objects by selecting one of the other database templates shown.

To create a new database file in Access, click the name of the type of template you want to use as the basis for your database file within the listing of templates shown in the startup screen. At that point, a small window will appear onscreen where you can enter a name for the file into the “File Name” or “App Name” field.

For desktop database files, the default location where Windows will save the file will be shown below the name. To change this location you can click the small folder button at the right end of the “File Name” field to open a “File New Database” window where you can change the directory into which to save the file.

If you are saving a web-based app, enter the URL address of the SharePoint site or Office 365 for Business site to which you will save the file to by entering the URL into the “SharePoint or Office 365 site URL” field. The easiest way to select a SharePoint or Office 365 for Business site associated with your Microsoft User ID is by clicking one of the online locations shown in the “Available Locations” list.

Once you have given your Access file a name and decided where to save it, then click the “Create” button within the window to create the Access database file. Once you have created a new Access file, you will then see the main Access user interface where you will design the objects within the desktop database or web-based app.



# GETTING ACQUAINTED WITH ACCESS

## 1.2- Overview of a Database:

In Access, you are manipulating a contained collection of smaller objects within the database file. Although the terms “database” and “table” are often used interchangeably, you should refer to the entire collection of tables, queries, forms, reports, macros, and modules as the “database” and only refer to tables as “tables” for clarity’s sake.

Access is also what is referred to as a “relational database” program. In a relational database, you store large amounts of data into the smallest possible increments within tables. You then relate these tables together by joining common fields between them. In this way, you store less redundant data and your database will operate more quickly and efficiently. When you relate tables, you are then able to access any data in the related tables.

A database file is designed to store information and retrieve it at a later point in time. The many types of objects within a database file work together to allow you to do this. However, to create an effective and useful database file, you must learn how to design and create many different types of objects. This is one of the primary reasons that learning database design is more difficult than learning many other types of applications. Now you will examine the various types of objects in a basic database file and what their purpose is within the overall scheme of database design.

The first and most fundamental object type within a database is the **table**. A table is a collection of data about a certain subject: like customers, vendors or suppliers. It consists of columns and rows into which you store data. The columns all contain only one type of data, and are called “fields.” For example, within a customer table you might have a “First\_Name” field into which you place only your customer’s first names. The rows in a table all contain one set of related field information for a single entry and are called “records.” For example, in a customer table, you will have a customer record that contains all of the field information about that customer contained within a row.

Tables are the building blocks of almost all other types of database objects. Tables contain all of the information that is to be stored, manipulated and retrieved. Therefore, almost everything in a database is fundamentally dependent on the tables and their structure. So, while tables are often the database objects with which new users are most familiar, it is important not to approach table design haphazardly. Errors made during the creation and design of the tables will often cause problems in the functionality of the related objects, forcing you to go back and re-design or edit the tables, as well as the other related objects, if you proceed with your database design too quickly. Creating well-designed data tables and joining them appropriately is one of the most difficult aspects of database design. It is certainly the aspect many new users have the most difficulty understanding. It is also the most important aspect of database design.

The next type of database object to discuss is the **query**. The purpose of a query is to extract only the data that you want or need to view from the tables. These objects are the “heart” of database design and the whole point of using databases. The queries provide the data that is needed by the other database objects, often working in the background. So mastering queries will also be an important part of creating a functional database. While queries are mainly used to extract data for reporting, you will also learn how they can be used to modify data, as well.

The next type of database object to review is the **form**. Forms are often used as user interfaces for the associated, underlying tables. They are also used to control the flow of the database program for users. A form typically allows database users to edit data or click other buttons that launch reports and perform other user-related tasks within the database. Forms are the “face” of your database, as they are often all the user will see and interact with when using a finished database application. Within web-based applications in Access, the **view** is also used to serve the purpose of forms within the app.

The next type of database object to discuss is the **report**. Reports are a commonly used way of showing data extracted from the tables by the queries in a more “printer-friendly” format than the query itself

# GETTING ACQUAINTED WITH ACCESS

## 1.2- Overview of a Database- (Cont'd.):

provides. Reports can also perform secondary calculations and analysis on the query data, making them very powerful data analysis tools.

The next type of database object to examine is the **macro**. Macros are small bits of visually-created programming that help automate processes within a database. For example, if you wanted a user to click a button in a form to launch a report, you could create a macro that automatically runs a report. You could then attach the macro to the button's "OnClick" event, so that when a user clicks the button within the form it runs the macro- thus running the report.

The final type of database object to discuss is the **module**. Modules are similar in purpose to macros. However, they are created in a non-visual environment. When creating modules, you actually have to type code into a separate, "Microsoft Visual Basic" application window. It uses a sister language of the Visual Basic language, called Visual Basic for Applications (or VBA), to create programs that can be much more complex in nature than the ones created by macros. However, many improvements have been added to the functionality of the macros in Access so that the usage of modules will rarely be needed by the typical Access database designer. Many database designers will not make much use of modules, but they can be valuable for the professional database designer.

A database should be simple, logical, and straightforward in its design. In general, you use **forms** to enter information into **tables**. The data is then stored into these tables, which are *related* to each other as necessary. You can then use **queries** to pull specific information from the **tables** in the database. The **queries** often form the basis for **reports**, which will then allow you to view the information you requested.

Once this system is in place, you can automate it by using **macros** and **modules** to simplify and streamline the processes involved in entering, storing and retrieving data. *This is the main reason that you use databases: to enter, store, and retrieve data.*

## 1.3- The Access Interface:

Unlike many other Microsoft applications, you have three different areas in which you will perform tasks within the Access interface: the "Application Window," which is the outer frame of the program that contains the Ribbon; the "Navigation Pane," which displays all of the various objects in the database; and the "Tabbed Documents" area where you create, display, and edit database objects in their own separate, tabbed windows.

Inside the main application window, you will see the "Navigation Pane" at the left side of the application window. As you select objects from the Navigation Pane to open and edit them, they appear in their own tabbed windows to the right of the Navigation Pane. The application window contains the Quick Access toolbar, the Ribbon, and the Status Bar at the bottom of the application window.

The "Navigation Pane" organizes and displays the objects within the database. If you created a blank database, you will not have any objects other than the new, blank table that is opened by default when you create a new, blank database in Access. You can change the way the navigation pane organizes and displays its database objects. However, that will be covered in a separate lesson. For now, it is enough to understand what this object is called and what its purpose is within the program.

Each object you open or edit from within the Navigation Pane appears in its own tabbed window to the right of the Navigation Pane. In each tab, you will see the object's name. The type of object is indicated by the small icon next to the name of the object in the tab. You can click the tabs of the objects that you have opened to display their content. You can close any currently displayed tabbed window by clicking the small "x" at the right end of the list of opened tabbed windows.

# GETTING ACQUAINTED WITH ACCESS

## 1.4- Touch Mode:

Access uses “Touch Mode” to allow for easier access to the buttons and other commands within the Ribbon and Quick Access toolbar. When you enter touch mode within Access, the Ribbon and Quick Access toolbar are enlarged and extra space is added around the buttons and commands within them, so that you can more easily access the buttons and commands on your touch-based tablet.

To enable touch mode within Access, click the small drop-down arrow at the right end of the Quick Access toolbar to display a listing of the most commonly used commands. Then click or tap the “Touch/Mouse Mode” command in the drop-down menu to add that button to the Quick Access toolbar.

You can then enable or disable touch mode in Access by clicking or tapping the “Touch/Mouse Mode” button within the Quick Access toolbar. From the drop-down menu that then appears, you can select the mode you prefer to use: “Mouse” or “Touch.” When “Touch” mode is enabled the buttons within the Ribbon and Quick Access toolbar will appear larger and with more space surrounding them onscreen. You can select the “Mouse” choice to toggle touch mode off, restoring the default size of the buttons onscreen.

## 1.5- Viewing Database Objects in the Navigation Pane:

As mentioned earlier, a database is really the entire collection of tables, queries, forms, reports, macros, and modules. In Access, you can only work with one database file at a time. Every time you open a database file in Access, its contents will appear in its own Navigation Pane.

Each type of database object is represented within the Navigation Pane. However, the view that is displayed by default within the Navigation Pane may not allow you to view all of the objects easily. To be able to show the objects within the database, click drop-down arrow in the small title bar at the top of the Navigation Pane and then choose the “Object Type” command. You can then click the same drop-down arrow again. Notice that this time you will see the various types of database objects that you can show in a listing at the bottom of the drop-down menu. There is also the “All Access Objects” choice shown at the bottom of the drop-down menu. Ensure that this command is selected in order to display all objects in your database, grouped by category in collapsible and expandable groupings within the Navigation Pane. If you do not have any objects in your database yet, then this panel will show no groupings until you have created objects of the various types.

Once you have objects created within your database, then you can click on the name of the object category shown in the Navigation Pane to show the names of the objects that you have created. You can right-click on any object shown in the Navigation Pane and then select either the “Open” or “Design View” command in the pop-up menu that appears to open the selected object in its own tabbed window using the view that you specified.

# GETTING ACQUAINTED WITH ACCESS

## 1.6- Opening and Closing Databases:

To re-open a database you have already created and saved, first launch Access. In the listing at the side of the initial window you can simply click on the name of the recently opened database that you wish to reopen shown under the “Recent” section.

To open a database file that is not listed here in Access, click the “Open Other Files” link shown within the startup screen or click the “File” tab within the Ribbon when a database file is opened and then click the “Open” command. At the right side of the backstage view that appears, select the general location of the saved file from the listing shown. If the file you want to open is shown in the listing at the far right side of the screen, you can click it to open it. If not, click the “Browse” button that appears below the listing of general locations to launch the “Open” dialog box. Use the “Open” dialog box to navigate to the folder where the database file is located. When you can see the database file you wish to open within the dialog box, click it to select it and then click the “Open” button within the dialog box to open the selected file.

To close a database file in Access, click the “File” tab within the Ribbon and then click the “Close” command at the left side of the backstage view. If you want to close Access entirely, click the “X” in the upper right corner of the application window.

# ACTIONS-

## GETTING ACQUAINTED WITH ACCESS

### CREATING A NEW DATABASE FILE:

1. **To create a new database file**, click the name of the type of template you want to use as the basis for your database file within the listing of templates shown in the startup screen.
2. Enter a name for the file into the “File Name” or “App Name” field in the small window that appears onscreen.
3. **For desktop database files, to change the default location where the file is saved**, click the small folder button at the right end of the “File Name” field to open a “File New Database” window where you can change the directory into which to save the file.
4. **If you are saving a web-based app**, select a SharePoint or Office 365 for Business site associated with your Microsoft User ID by clicking one of the online locations shown in the “Available Locations” list or enter the URL address of the SharePoint site or Office 365 for Business site directly into the “SharePoint or Office 365 site URL” field.
5. **To create the Access database file**, click the “Create” button within the window.

### OVERVIEW OF A DATABASE:

Name:	Description:
Table	Contains and displays information stored in its columns and rows. Each data type is stored in a column called a FIELD. A set of data is stored in a row called a RECORD. The table is the basic data storage object in a database.
Query	Used to extract particular records and data types from a table. A way of pulling only the records that you need/want to see.
Form	A screen that is used for providing user interfaces in Access. Much like a <b>view</b> in a web app.
Report	A way of displaying data from your tables for others to use. Reports can perform calculations on field information, and are generally used to display data from queries and then perform data analysis on these results.
Macro	A set of commands in Access that are stored together as a single unit. You can run macros to perform multiple actions in Access. It is basically a small program.
Module	A stored procedure that is written in Visual Basic. You can write and run modules to enhance the power of Access with additional programming.

### THE ACCESS INTERFACE:

1. The three main areas where you will perform tasks in Access are the “Application Window,” the “Navigation Pane,” and the “Tabbed Documents” area.
  2. When Access opens, it displays a window which allows you to create a new, blank (empty) database or create a database from one of the templates shown. Once you create a database, you will then see the main Access user interface where you will design the database.
  3. The “Application Window” consists of the Quick Access toolbar, the Ribbon, and the Status Bar at the bottom of the application window.
  4. The “Navigation Pane” is located at the left side of the application window. It organizes and displays the objects within the database.
  5. Each object you open or edit within the Navigation Pane appears in its own tabbed window to the right of the Navigation Pane. Each tabbed window shows the object’s name. The type of object is indicated by the small icon next to the name of the object in the tab.
  6. **To display the content of a tabbed window**, click the tab of the object to display.
- (cont’d.)

# ACTIONS-

## GETTING ACQUAINTED WITH ACCESS

### THE ACCESS INTERFACE- (CONT'D.):

7. **To close any currently displayed tabbed window**, click the small “x” at the right end of the list of opened tabbed windows.

### USING TOUCH MODE:

1. **To enable touch mode**, click the small drop-down arrow at the right end of the Quick Access toolbar to display a listing of the most commonly used commands.
2. Click or tap the “Touch/Mouse Mode” command in the drop-down menu to add that button to the Quick Access toolbar.
3. **To enable or disable touch mode**, click or tap the “Touch/Mouse Mode” button within the Quick Access toolbar.
4. From the drop-down menu that then appears, select the mode you prefer to use: “Mouse” or “Touch.”
5. When “Touch” mode is enabled the buttons within the Ribbon and Quick Access toolbar will appear larger and with more space surrounding them onscreen.
6. You can select the “Mouse” choice to toggle touch mode off, restoring the default size of the buttons onscreen.

### VIEWING DATABASE OBJECTS IN THE NAVIGATION PANE:

1. **To show the objects within the database**, click drop-down arrow in the small title bar at the top of the Navigation Pane and then choose the “Object Type” command.
2. Click the same drop-down arrow again. This time you will see the various types of database objects you can show in a listing at the bottom of the drop-down menu. There is also the “All Access Objects” choice at the bottom of the drop-down menu. Ensure that this command is selected in order to display all objects in your database, grouped by category in collapsible and expandable groupings within the Navigation Pane. If you do not have any objects in your database yet, then this panel will show no groupings until you have created objects of the various types.
3. Once you have objects created within your database, then you can click on the name of the object category shown in the Navigation Pane to show the names of the objects that you have created.
4. You can right-click on any object shown in the Navigation Pane and then select either the “Open” or “Design View” command in the pop-up menu that appears to open the selected object in its own tabbed window using the view that you specified.

### OPENING AND CLOSING DATABASES:

1. **To re-open a database you have already created and saved**, first launch Access.
2. In the listing at the side of the initial window shown, simply click on the name of the recently opened database you wish to reopen shown under the “Recent” section.
3. **To open a database file that is not listed here in Access**, click the “Open Other Files” link shown within the startup screen or click the “File” tab within the Ribbon when a database file is opened and then click the “Open” command.
4. At the right side of the backstage view that appears, select the general location of the saved file from the listing shown.  
(cont'd.)

# ACTIONS-

## GETTING ACQUAINTED WITH ACCESS

### OPENING AND CLOSING DATABASES- (CONT'D.):

5. **If the file you want to open is shown in the listing at the far right side of the screen**, you can click it to open it.
6. **If the file you want to open is NOT shown in the listing at the far right side of the screen**, click the “Browse” button that appears below the listing of general locations to launch the “Open” dialog box.
7. Use the “Open” dialog box to navigate to the folder where the database file is located.
8. When you can see the database file you wish to open within the dialog box, click it to select it and then click the “Open” button within the dialog box to open the selected file.
9. **To close a database file in Access**, click the “File” tab within the Ribbon and then click the “Close” command at the left side of the backstage view.
10. **To close Access entirely**, click the “X” in the upper right corner of the application window.

Sample- for evaluation purposes only!

# EXERCISES-

## GETTING ACQUAINTED WITH ACCESS

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### Purpose:

1. To be able to find and use the basic objects in the Access application in Access.
- 

### Exercises:

1. Open your Access application.
2. In the startup screen, click the “Blank desktop database” template to select it.
3. In the small window that then appears onscreen, type “test” into the “File Name:” field and then click the “Create” button.
4. Find the “Navigation Pane” at the left side of the Access window.
5. Click the small “x” button at the far right end of the “Table1” tab to close the tabbed window.
6. Click the “File” tab in the Ribbon.
7. Click the “Close” command at the left side of the Backstage View.
8. Click the “File” tab in the Ribbon.
9. Click the “Open” command at the left side of the Backstage View.
10. Under the “Recent” section that appears to the right of the “Open” command, click the “test” entry to reopen the database you just created.
11. Click the “X” button in the far upper-right corner of the Access application to exit the program.