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**ACCESS 2019
AND 365**

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...it's all about you

ACCESS 2019 AND 365

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INTRODUCTION AND OVERVIEW

Welcome to TeachUcomp, Inc.'s Mastering Access Made Easy™ tutorial. Microsoft Access is a popular relational database program. 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 fundamental aspects of relational data modeling.

Access can create desktop database files for internal networks. You can also use it as a front-end to access online data sources, like SharePoint or Microsoft Azure SQL. This course focuses on the creation and design of complete desktop database files in Access.

Access is a multi-featured relational database program that lets you store and manipulate data. It is a very useful program that has many features which can automate and simplify job tasks. Whether you want it to create reports, data entry forms, or access external data sources; Access can help you accomplish these tasks quickly and easily.

This tutorial starts by showing you how Access works, and the basic components needed to create a simple desktop database, like tables and queries. It then shows you how to create and use advanced query types, forms, and reports. You then learn how to automate the database tasks using macros and advanced tasks, like accessing external data.

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CHAPTER 1-

GETTING ACQUAINTED WITH ACCESS

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

GETTING ACQUAINTED WITH ACCESS

1.1- Creating a New Database:

When Access opens, it shows the “Home” window, which lets you either create a new database file or access a previously-opened database. An Access database file is a container that holds all the tables, forms, reports, queries, macros, and modules required by the database. You use Access to create database files for use on a single computer or to share on a local network. This course focuses on creating and designing database (.accdb) files in Access 2019 or Access for Microsoft 365.

After starting Access, you can create a new database file from scratch by using a blank database template or you can create a new database file that contains some basic database objects by selecting one of the other types of database templates. To create a new database file in Access, click the name of the type of database template to use as the basis for your new database file in the listing of templates shown in the “New” section of the “Home” screen. Alternatively, click the “New” button at the left side of the screen. Then click the type of database to create from the listing of templates that appears to the right. To create a new, blank database in either location, click the “Blank database” template choice.

At that point, a small window appears onscreen, where you can enter a name for the file into the “File Name” field. The default location where Windows will save the database file appears below the name. To change the save location, 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.

After naming the Access database and choosing where to save it, then click the “Create” button in the window to create it. The database then opens within the main Access user interface, where you create and design the database objects.

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 a “relational database” program. In a relational database, you store large amounts of data into the smallest possible increments in the tables. You then relate these tables together by joining common fields between them. This lets the database store less redundant data, which makes it operate more quickly and efficiently. When you relate tables, you can then access any data in the related tables.

A database file is designed to store information and retrieve it later. The many types of objects in a database file work together 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 main reasons learning relational database design is more difficult than learning many other types of applications. We will now examine the various types of database objects and their use in the overall scheme of database design.

The first and most fundamental database object is the **table**. A table is a collection of data about a certain subject or entity, like customers, vendors or suppliers. It contains columns and rows into which you store data. The columns all contain only one type of data and are called “fields.” For example, a “Customer” table may contain a “First_Name” field which stores only customer 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, a “Customer” table may contain a customer record storing all the field information about that specific customer in a row.

Tables are the building blocks of almost all other types of database objects. Tables contain all the information to store, manipulate, and retrieve. Therefore, almost everything in a database fundamentally

GETTING ACQUAINTED WITH ACCESS

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

depends on the tables and their structure. So, while new users often feel comfortable or familiar with the concept of database tables, it is important not to approach table design too quickly or haphazardly. Errors made during table creation and design often cause later design problems for the table's related objects, forcing you to go back and re-design or edit the tables and their related objects. Creating well-designed tables and joining them correctly is one of the most difficult aspects of relational database design. It is certainly the aspect new users have the most difficulty understanding. It is also the most important aspect of relational database design.

The next type of database object to discuss is the **query**. The purpose of a query is to extract only the data 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 needed by the other database objects, often working in the background. So mastering queries is an important part of creating a functional database. While you mainly use queries to extract data for reporting, they can also modify data, too.

The next type of database object to review is the **form**. Forms provide user interfaces for their 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 buttons that open reports and perform other database tasks. Forms are the “face” of your database, as they are often all the user will see and with which the users will interact when using a finished database.

The next type of database object to discuss is the **report**. Reports show data from queries or tables in a more printer-friendly format than the queries or tables provide. 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 the most common database processes. For example, if you wanted a user to click a button in a form to open a report, you could first create a macro that opens the report. You then attach the macro to the button's “OnClick” event in the form, so when a user clicks the form's button, it runs the macro which opens the report.

The final type of database object to discuss is the **module**. Modules have a similar purpose to macros. However, modules are created in a non-visual environment. When creating modules, you must type code into a separate “Microsoft Visual Basic” application window. Modules use a sister language of the Visual Basic language, called Visual Basic for Applications (or VBA), to create more complex programs than the ones created by visual design in the macros. Note that modules are rarely needed by the typical Access database designer. However, they are 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 stored in 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 let you view the information you requested. Once this system is in place, you can automate it 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.*

GETTING ACQUAINTED WITH ACCESS

1.3- The Access Interface:

Unlike many other Microsoft applications, there are three different areas in which you perform tasks in the Access interface. The first area to discuss is the “application window,” which is the outer frame of the program that contains the Ribbon. The application window also contains the Quick Access toolbar and the Status Bar, which appears at the bottom of the application window.

After you open a database file, you then see the “Navigation Pane” at the left side of the application window, which displays all the database objects. If you created a blank database, then the Navigation Pane will not show any objects other than the new, blank table that appears by default after 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.

When you then open or design one of these database objects from the Navigation Pane, it appears to the right in the “Tabbed Documents” area, where you create, display, and edit the database objects in their own separate, tabbed windows. The object’s name appears within its respective tab. 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. To close any currently displayed tabbed window, click the small “x” at the right end of the tab to close.

1.4- Touch Mode:

Access has a “Touch Mode” that provides easier access to the buttons and commands in the Ribbon and Quick Access toolbar. When touch mode is enabled in Access, the Ribbon and Quick Access toolbar are enlarged. Extra space is also added around the buttons and commands within them, so you can more easily access them on a touch-based tablet.

To enable touch mode in Access, click the “Customize Quick Access Toolbar” drop-down arrow at the right end of the Quick Access toolbar to show its commands in a drop-down menu. Then click or tap the “Touch/Mouse Mode” command in the drop-down menu to add that button to the Quick Access toolbar.

Then click or tap the “Touch/Mouse Mode” button in the Quick Access toolbar. From the drop-down menu that then appears, select the mode to use: “Mouse” or “Touch.” When “Touch” mode is enabled, the buttons in the Ribbon and Quick Access toolbar appear larger and with more space surrounding them. To turn off touch mode, select the “Mouse” choice to restore the default size of the buttons onscreen.

1.5- Viewing Database Objects in the Navigation Pane:

As mentioned earlier, a database is the entire collection of tables, queries, forms, reports, macros, and modules. In Access, each database file you open appears within its own application window instance. So, you can only open one database file at a time within a single instance of Access, although you can open multiple instances of Access, if needed. Every time you open a database file in Access, its contents appear in its own Navigation Pane within its application window.

Each type of database object is represented within the Navigation Pane. However, the default view of the Navigation Pane may not let you easily view all the database objects. To show all the database objects in the Navigation Pane, click the drop-down arrow in the small title bar at the top of the Navigation Pane. Then choose the “Object Type” command. Then click the same drop-down arrow again. This time, the various types of database objects appear 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. Select this command to show all your

GETTING ACQUAINTED WITH ACCESS

1.5- Viewing Database Objects in the Navigation Pane- (cont'd.):

database objects, grouped by type in collapsible and expandable groupings, in the Navigation Pane. If you do not have any database objects yet, then this panel shows no groupings until you create objects of the various types.

After creating database objects, you can then click the name of the object category in the Navigation Pane to show the names of the related types of objects you created in the Navigation Pane. You can then right-click any object in the Navigation Pane and 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 you specified.

1.6- Opening and Closing Databases:

To reopen a database you have already created and saved, open Access to view its “Home” screen. In the listing at the right side of the window, click the name of the recently opened database to reopen, shown under the “Recent” tab. To open a database file in Access not listed here, click the “More databases” link towards the lower-right corner of this list or click the “Open” button at the left side of the screen.

At the right side of the backstage view, then select the general location of the saved file from the listing shown. If the file to open then appears in the listing at the far-right side of the screen, click it to open it. If not, then instead click the “Browse” button below the listing of general locations to launch the “Open” dialog box. Then use the “Open” dialog box to navigate to the folder where you saved the database file. When you can see the database file to open appear in the “Open” dialog box, click it to select it, and then click the “Open” button within the dialog box to open the selected file.

Using any of the previous techniques to open a database opens the database within the instance of Access you opened. An instance of Access is nothing more than the application window being opened without any specific database file opened. If needed, to open a second instance of Access so you can open a second database file at the same time, you must open another instance of Access and then open a database within it. Alternatively, you can also use the Windows File Explorer to open a second database file within a new instance of Access.

To close a database file within an instance of Access but leave the instance open, click the “File” tab within the Ribbon and then click the “Close” command at the left side of the backstage view. Alternatively, to close the current database and the Access instance entirely, click the “X” button 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 after starting Access, click the name of the type of database template to use as the basis for your new database file in the listing of templates shown in the “New” section of the “Home” screen.
2. Alternatively, click the “New” button at the left side of the screen.
3. Then click the type of database to create from the listing of templates that appears to the right.
4. To create a new, blank database in either location, click the “Blank database” template choice.
5. At that point, a small window appears onscreen, where you can enter a name for the file into the “File Name” field.
6. The default location where Windows will save the database file appears below the name.
7. To change the save location, 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.
8. After naming the Access database and choosing where to save it, then click the “Create” button in the window to create it.
9. The database then opens within the main Access user interface, where you create and design the database objects.

OVERVIEW OF A DATABASE:

1. A **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.
2. A **query** extracts records from a table to show only the records you need to see. Some types of queries can also manipulate data.
3. A **form** is a screen that provides a user interface in Access.
4. A **report** shows data from queries and/or tables. It can also provide additional calculations on the data.
5. A **macro** is a set of commands in Access saved as a single unit. You can run macros to perform multiple actions in Access. It is basically a small program.
6. A **module** is 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. There are three different areas in which you perform tasks in the Access interface.
2. The “**application window**” is the outer frame of the program containing the Ribbon.
3. The application window also contains the Quick Access toolbar and the Status Bar, which appears at the bottom of the application window.
4. After you open a database file, you then see the “**Navigation Pane**” at the left side of the application window, which displays all the database objects.
5. If you created a blank database, then the Navigation Pane will not show any objects other than the new, blank table that appears by default after you create a new, blank database in Access.
6. When you then open or design one of these database objects from the Navigation Pane, it appears to the right in the “**Tabbed Documents**” area, where you create, display, and edit the database objects in their own separate, tabbed windows.

(cont'd.)

ACTIONS-

GETTING ACQUAINTED WITH ACCESS

THE ACCESS INTERFACE- (CONT'D.):

7. The object's name appears within its respective tab.
8. The type of object is indicated by the small icon next to the name of the object in the tab.
9. You can click the tabs of the objects that you have opened to display their content.
- 10. To close any currently displayed tabbed window**, click the small "x" at the right end of the tab to close.

USING TOUCH MODE:

- 1. To enable touch mode in Access**, click the "Customize Quick Access Toolbar" drop-down arrow at the right end of the Quick Access toolbar to show its commands in a drop-down menu.
2. Then click or tap the "Touch/Mouse Mode" command in the drop-down menu to add that button to the Quick Access toolbar.
3. Then click or tap the "Touch/Mouse Mode" button in the Quick Access toolbar.
4. From the drop-down menu that then appears, select the mode to use: "Mouse" or "Touch."
5. When "Touch" mode is enabled, the buttons in the Ribbon and Quick Access toolbar appear larger and with more space surrounding them.
- 6. To turn off touch mode**, select the "Mouse" choice to restore the default size of the buttons onscreen.

VIEWING DATABASE OBJECTS IN THE NAVIGATION PANE:

1. In Access, each database file you open appears within its own application window instance.
2. So, you can only open one database file at a time within a single instance of Access, although you can open multiple instances of Access, if needed.
3. Every time you open a database file in Access, its contents appear in its own Navigation Pane within its application window.
4. Each type of database object is represented within the Navigation Pane.
5. However, the default view of the Navigation Pane may not let you easily view all the database objects.
- 6. To show all the database objects in the Navigation Pane**, click the drop-down arrow in the small title bar at the top of the Navigation Pane.
7. Then choose the "Object Type" command.
8. Then click the same drop-down arrow again.
9. This time, the various types of database objects appear in a listing at the bottom of the drop-down menu.
10. There is also the "All Access Objects" choice at the bottom of the drop-down menu.
11. Select the "All Access Objects" command to show all your database objects, grouped by type in collapsible and expandable groupings, in the Navigation Pane.
12. If you do not have any database objects yet, then this panel shows no groupings until you create objects of the various types.
13. After creating database objects, you can then click the name of the object category in the Navigation Pane to show the names of the related types of objects you created in the Navigation Pane.
14. You can then right-click any object in the Navigation Pane and 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 you specified.

ACTIONS-

GETTING ACQUAINTED WITH ACCESS

OPENING AND CLOSING DATABASES:

1. **To reopen a database you have already created and saved**, open Access to view its “Home” screen.
2. In the listing at the right side of the window, click the name of the recently opened database to reopen, shown under the “Recent” tab.
3. **To open a database file in Access not listed here**, click the “More databases” link towards the lower-right corner of this list or click the “Open” button at the left side of the screen.
4. At the right side of the backstage view, then select the general location of the saved file from the listing shown.
5. **If the file to open then appears in the listing at the far-right side of the screen**, click it to open it.
6. **If not**, then instead click the “Browse” button below the listing of general locations to launch the “Open” dialog box.
7. Then use the “Open” dialog box to navigate to the folder where you saved the database file.
8. When you can see the database file to open appear in the “Open” dialog box, click it to select it, and then click the “Open” button within the dialog box to open the selected file.
9. Using any of the previous techniques to open a database opens the database within the instance of Access you opened.
10. An instance of Access is nothing more than the application window being opened without any specific database file opened.
11. **If needed, to open a second instance of Access so you can open a second database file at the same time**, you must open another instance of Access and then open a database within it.
12. **Alternatively**, you can also use the Windows File Explorer to open a second database file within a new instance of Access.
13. **To close a database file within an instance of Access but leave the instance open**, click the “File” tab within the Ribbon and then click the “Close” command at the left side of the backstage view.
14. **Alternatively, to close the current database and the Access instance entirely**, click the “X” button in the upper-right corner of the application window.

EXERCISES-

GETTING ACQUAINTED WITH ACCESS

Purpose:

To find and use the basic objects in the Access application.

Exercises:

1. Open your Access application.
2. In the startup “Home” screen that then appears, click the “Blank database” template to select it.
3. In the small “Blank database” 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.