Teach Yourself VISUALLY™

Microsoft® Access® 2013

The Fast and Easy Way to Learn

Paul McFedries

Teach Yourself VISUALLY™ Access® 2013

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Microsoft®
Access® 2013

Visual

by Paul McFedries

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About the Author

Paul McFedries is a full-time technical writer. Paul has been authoring computer books since 1991 and has more than 80 books to his credit. His books have sold more than four million copies worldwide. These books include the Wiley titles *Teach Yourself VISUALLY Microsoft Excel 2013, Teach Yourself VISUALLY Microsoft Windows 8, Windows 8 Visual Quick Tips, iPhone 5 Portable Genius,* and *iPad 4th Generation and iPad mini Portable Genius*. Paul is also the proprietor of Word Spy (www.wordspy.com), a website that tracks new words and phrases as they enter the language. Paul invites you to drop by his personal website at www.mcfedries.com or follow him on Twitter at @paulmcf and @wordspy.

Author’s Acknowledgments

It goes without saying that writers focus on text, and I certainly enjoyed focusing on the text that you will read in this book. However, this book is more than just the usual collection of words and phrases. A quick thumb through the pages will show you that this book is also chock-full of images, including sharp screenshots. Those colorful images make for a beautiful book, and that beauty comes from a lot of hard work by Wiley’s immensely talented group of designers and layout artists. They are all listed in the Credits section on the previous page, and I thank them for creating another gem. Of course, what you read in this book must also be accurate, logically presented, and free of errors. Ensuring all of this was an excellent group of editors that included project editor and copy editor Dana Lesh and technical editor Vince Averello. Thanks for your exceptional competence and hard work. Thanks, as well, to Wiley executive editor Jody Lefevere for asking me to write this book.

How to Use This Book

Whom This Book Is For

This book is for the reader who has never used Microsoft Access. It is also for readers who want to expand their knowledge of Access and learn about the features of the latest version.

The Conventions in This Book

❶ Steps

This book uses a step-by-step format to guide you easily through each task. **Numbered steps** are actions you must perform; **bulleted steps** clarify a point, step, or optional feature; and **indented steps** give you the result.

❷ Notes

Notes give additional information — special conditions that may occur during an operation, a situation that you want to avoid, or a cross-reference to a related area of the book.

❸ Icons and Buttons

Icons and buttons show you exactly what you need to click to perform a step.

❹ Tips

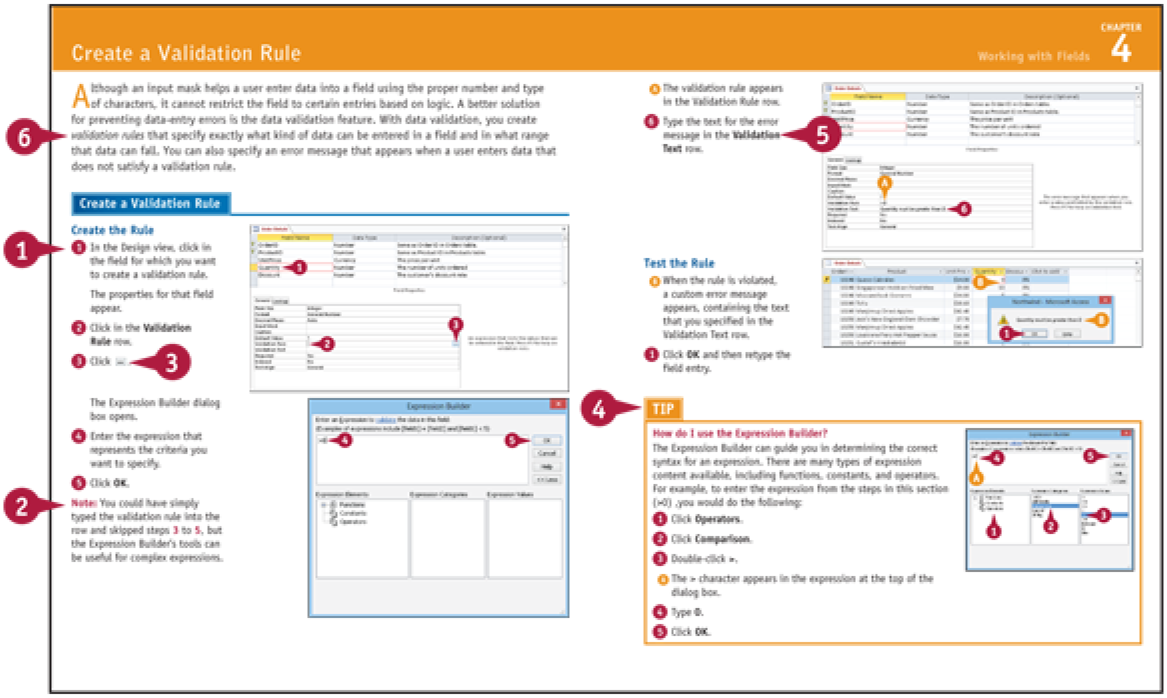
Tips offer additional information, including warnings and shortcuts.

❺ Bold

Bold type shows command names or options that you must click and text or numbers you must type.

⑥ Italics

Italic type introduces and defines a new term.



Create a Validation Rule

Although an input mask helps a user enter data into a field using the proper number and type of characters, it cannot restrict the field to certain entries based on logic. A better solution for preventing data-entry errors is the data validation feature. With data validation, you create *validation rules* that specify exactly what kind of data can be entered in a field and in what range that data can fall. You can also specify an error message that appears when a user enters data that does not satisfy a validation rule.

Create a Validation Rule

Create the Rule

1. In the Design view, click in the field for which you want to create a validation rule.

   The properties for that field appear.

2. Click in the **Validation Rule** row.
3. Click ....

   The Expression Builder dialog box opens.

4. Enter the expression that represents the criteria you want to specify.
5. Click **OK**.

Note: You could have simply typed the validation rule into the row and skipped steps 3 to 5, but the Expression Builder's tools can be useful for complex expressions.

A. The validation rule appears in the Validation Rule row.

6. Type the text for the error message in the **Validation Text** row.

Test the Rule

B. When the rule is violated, a custom error message appears, containing the text that you specified in the Validation Text row.

7. Click **OK** and then retype the field entry.

TIP

How do I use the Expression Builder?

The Expression Builder can guide you in determining the correct syntax for an expression. There are many types of expression content available, including functions, constants, and operators. For example, to enter the expression from the steps in this section (>0) ,you would do the following:

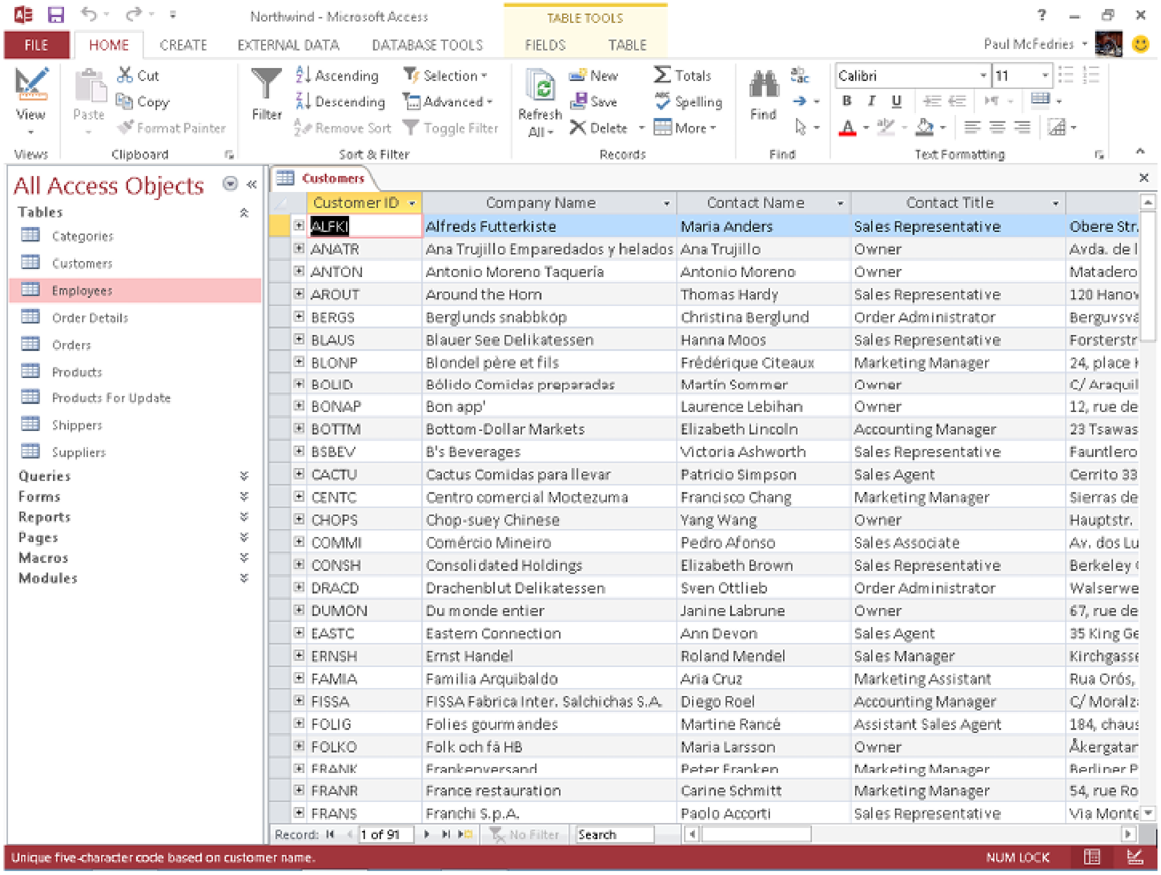
1. Click **Operators**.
2. Click **Comparison**.
3. Double-click >.

A. The > character appears in the expression at the top of the dialog box.

4. Type **0**.
5. Click **OK**.

Chapter 1: Getting Started with Access

Are you new to Microsoft Access or upgrading to the latest version of the program? This chapter introduces you to Access and to some useful database concepts. You also learn how to create and open a database as well as how to navigate through the Access interface.


Northwind - Microsoft Access
TABLE TOOLS
FILE
HOME
CREATE
EXTERNAL DATA
DATABASE TOOLS
FIELDS
TABLE
Paul McFedries
View
Paste
Cut
Copy
Format Painter
Filter
Ascending
Descending
Remove Sort
Selection
Advanced
Toggle Filter
Refresh All
New
Save
Delete
Totals
Spelling
More
Find
Calibri
11
Views
Clipboard
Sort & Filter
Records
Find
Text Formatting
All Access Objects
Tables
Categories
Customers
Employees
Order Details
Orders
Products
Products For Update
Shippers
Suppliers
Queries
Forms
Reports
Pages
Macros
Modules
Customers

Customer ID	Company Name	Contact Name	Contact Title	
ALFKI	Alfreds Futterkiste	Maria Anders	Sales Representative	Obere Str.
ANATR	Ana Trujillo Emparedados y helados	Ana Trujillo	Owner	Avda. de l
ANTON	Antonio Moreno Taquería	Antonio Moreno	Owner	Matadero
AROUT	Around the Horn	Thomas Hardy	Sales Representative	120 Hanov
BERGS	Berglunds snabbköp	Christina Berglund	Order Administrator	Berguvsvä
BLAUS	Blauer See Delikatessen	Hanna Moos	Sales Representative	Forsterstr
BLONP	Blondel père et fils	Frédérique Citeaux	Marketing Manager	24, place
BOLID	Bólido Comidas preparadas	Martín Sommer	Owner	C/ Araquil
BONAP	Bon app'	Laurence Lebihan	Owner	12, rue de
BOTTM	Bottom-Dollar Markets	Elizabeth Lincoln	Accounting Manager	23 Tsawas
BSBEV	B's Beverages	Victoria Ashworth	Sales Representative	Fauntlero
CACTU	Cactus Comidas para llevar	Patricio Simpson	Sales Agent	Cerrito 33
CENTC	Centro comercial Moctezuma	Francisco Chang	Marketing Manager	Sierras de
CHOPS	Chop-suey Chinese	Yang Wang	Owner	Hauptstr.
COMMI	Comércio Mineiro	Pedro Afonso	Sales Associate	Av. dos Lu
CONSH	Consolidated Holdings	Elizabeth Brown	Sales Representative	Berkeley
DRACD	Drachenblut Delikatessen	Sven Ottlieb	Order Administrator	Walserwe
DUMON	Du monde entier	Janine Labrune	Owner	67, rue de
EASTC	Eastern Connection	Ann Devon	Sales Agent	35 King Ge
ERNSH	Ernst Handel	Roland Mendel	Sales Manager	Kirchgasse
FAMIA	Familia Arquibaldo	Aria Cruz	Marketing Assistant	Rua Orós,
FISSA	FISSA Fabrica Inter. Salchichas S.A.	Diego Roel	Accounting Manager	C/ Moralz
FOLIG	Folies gourmandes	Martine Rancé	Assistant Sales Agent	184, chaus
FOLKO	Folk och fä HB	Maria Larsson	Owner	Åkergatan
FRANK	Frankenversand	Peter Franken	Marketing Manager	Berliner P
FRANR	France restauration	Carine Schmitt	Marketing Manager	54, rue Ro
FRANS	Franchi S.p.A.	Paolo Accorti	Sales Representative	Via Monte

Record: 1 of 91
No Filter
Search
NUM LOCK

Unique five-character code based on customer name.

[An Introduction to Access]

[Start and Exit Access]

[Create a Blank Database]

Create a Database by Using a Template

Open a Database

Close a Database

Understanding the Access Interface

Customize the Quick Access Toolbar

Customize the Ribbon

Change the Navigation Pane View

Open and Close an Object

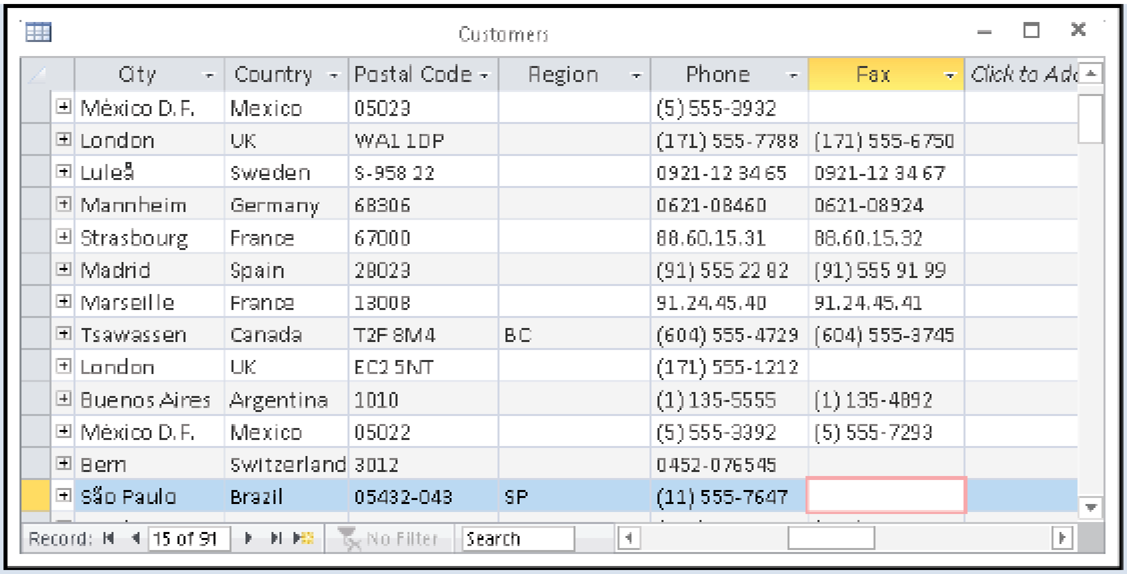
Change an Object’s View

An Introduction to Access

Microsoft Access is a program for creating and working with special files called *databases,* which are designed to store collections of related information. For example, one database might store business data such as customers, invoices, and inventory, whereas another might store personal data such as contacts, movies, and household items. You can use Access to create, retrieve, and manage large or small collections of information.

To get the most out of Access, you need to understand basic concepts such as tables, records, and fields; database objects such as datasheets and forms; and database tools such as filters, queries, and reports.

Tables, Records, and Fields



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Mannheim	Germany	68306		0621-08460	0621-08924	
Strasbourg	France	67000		88.60.15.31	88.60.15.32	
Madrid	Spain	28023		(91) 555 22 82	(91) 555 91 99	
Marseille	France	13008		91.24.45.40	91.24.45.41	
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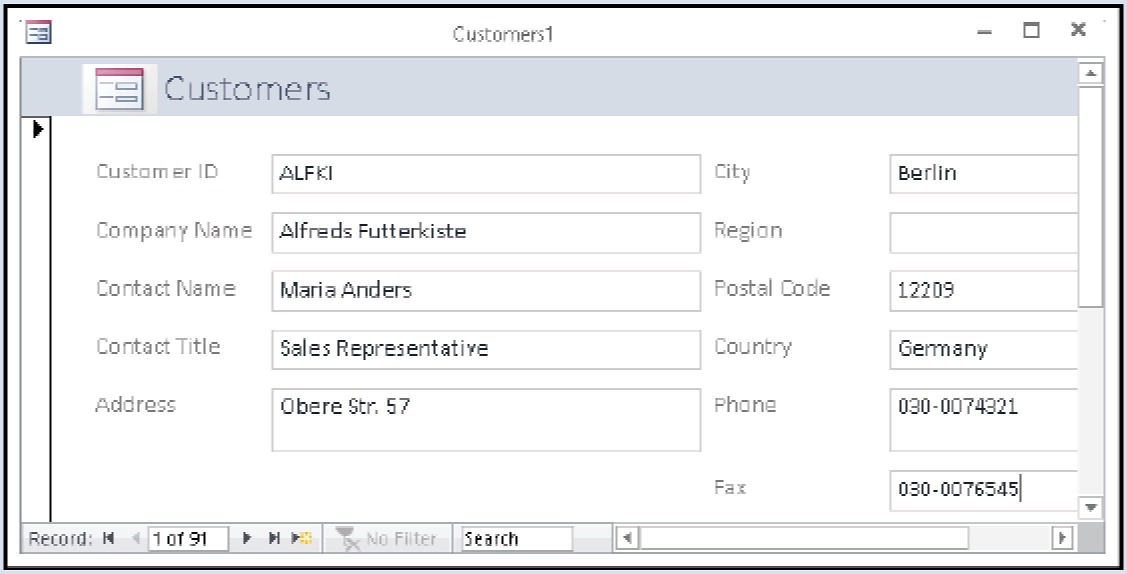
Buenos Aires	Argentina	1010		(1) 135-5555	(1) 135-4892	
México D.F.	Mexico	05022		(5) 555-3392	(5) 555-7293	
Bern	Switzerland	3012		0452-076545		
São Paulo	Brazil	05432-043	SP	(11) 555-7647		

In Access, data is stored in *tables,* and each individual entry in a table is called a *record.* For example, in a Customers table, the information about each customer is a separate record. Each record is composed of one or more *fields* that contain individual pieces of data. In this example, customer fields may include Name, Address, City, State, and Zip Code.

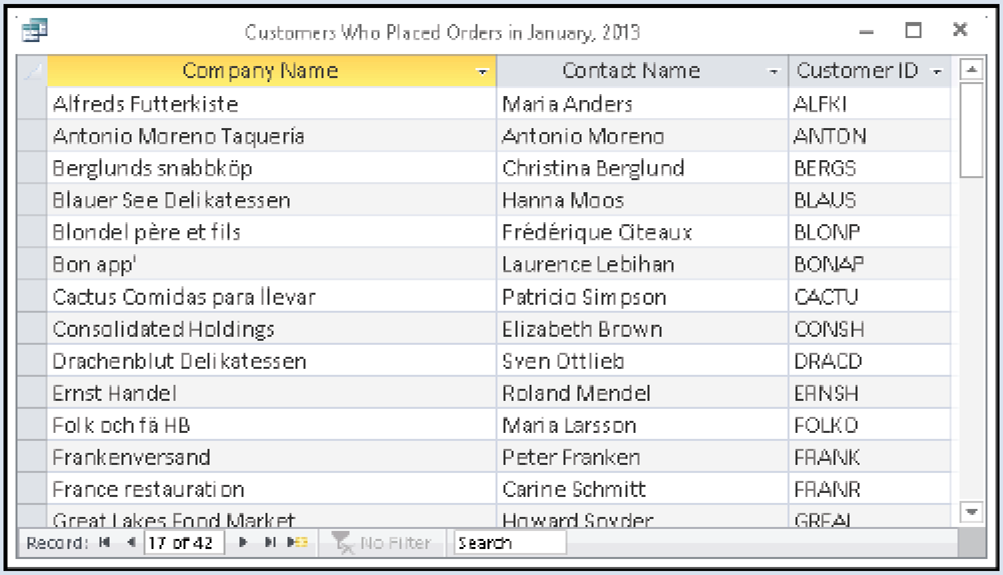
Datasheets and Forms



Customer ID	ALFKI	City	Berlin
Company Name	Alfreds Futterkiste	Region	
Contact Name	Maria Anders	Postal Code	12209
Contact Title	Sales Representative	Country	Germany
Address	Obere Str. 57	Phone	030-0074321
		Fax	030-0076545

By default, each table appears as a spreadsheet grid called a *datasheet.* You can type directly into a datasheet. To make data entry more convenient, some people choose to create on-screen *forms,* which are like dialog boxes that prompt for field entries. An attractively formatted form is easier and more pleasant to use to enter new records than a plain datasheet.

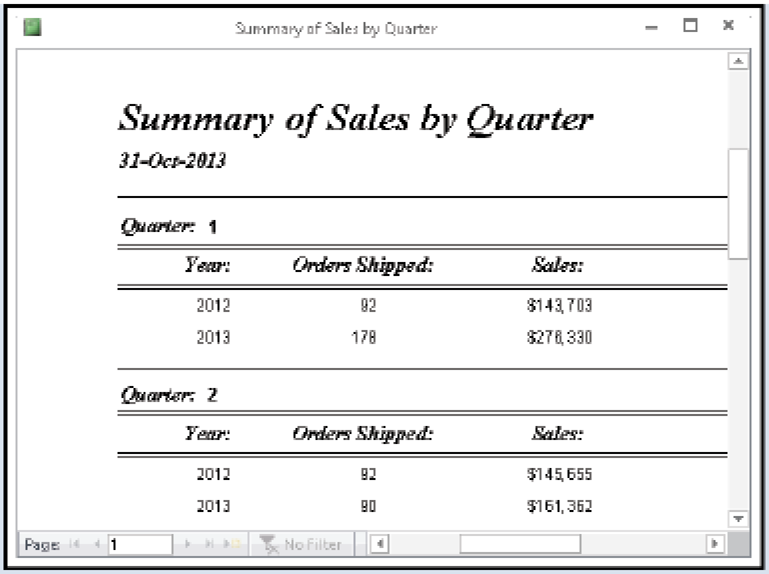
Filters and Queries



Company Name	Contact Name	Customer ID
Alfreds Futterkiste	Maria Anders	ALFKI
Antonio Moreno Taquería	Antonio Moreno	ANTON
Berglunds snabbköp	Christina Berglund	BERGS
Blauer See Delikatessen	Hanna Moos	BLAUS
Blondel père et fils	Frédérique Citeaux	BLONP
Bon app'	Laurence Lebihan	BONAP
Cactus Comidas para llevar	Patricio Simpson	CACTU
Consolidated Holdings	Elizabeth Brown	CONSH
Drachenblut Delikatessen	Sven Ottlieb	DRACD
Ernst Handel	Roland Mendel	ERNSH
Folk och fä HB	Maria Larsson	FOLKO
Frankenversand	Peter Franken	FRANK
France restauration	Carine Schmitt	FRANR
Great Lakes Food Market	Howard Snyder	GREAL

It is often useful to display a filtered view of a table. You can filter a table to show only certain records, only certain fields, or both. You can run a one-time filter, or you can create a *query,* which is like a saved filter. Queries also enable you to combine data from multiple related tables into a single datasheet of results.

Reports


Summary of Sales by Quarter
Page: 1
No Filter

Summary of Sales by Quarter

31-Oct-2013

Quarter: 1

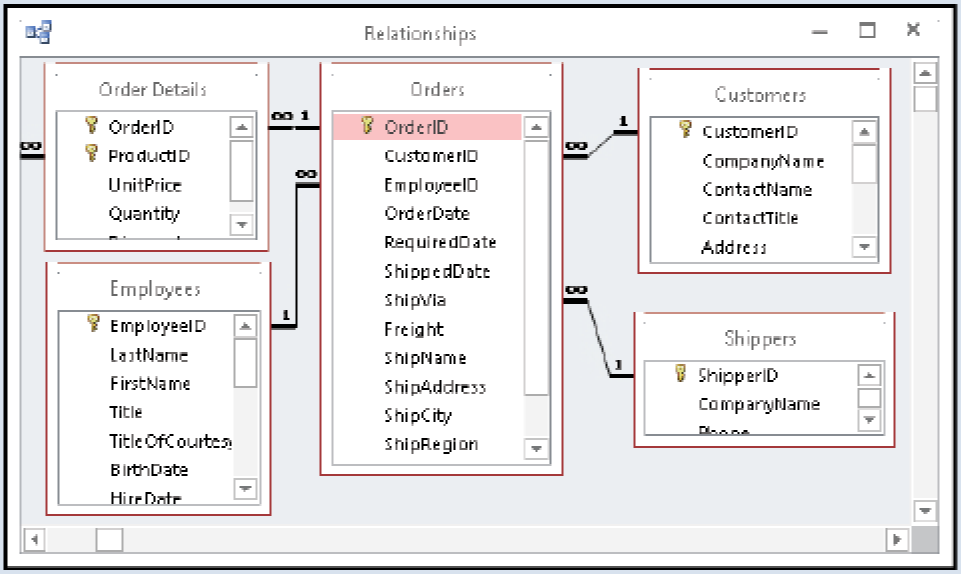
Year:	Orders Shipped:	Sales:
2012	92	$143,703
2013	178	$278,330

Quarter: 2

Year:	Orders Shipped:	Sales:
2012	92	$145,655
2013	90	$161,362

Tables and query results appear in plain datasheets, which are not very attractive when printed. Reports present data from tables and queries in an attractive, customizable format — complete with titles, headers and footers, and even logos and graphics.

Relational Databases


Relationships
Order Details
OrderID
ProductID
UnitPrice
Quantity
Orders
OrderID
CustomerID
EmployeeID
OrderDate
RequiredDate
ShippedDate
ShipVia
Freight
ShipName
ShipAddress
ShipCity
ShipRegion
Customers
CustomerID
CompanyName
ContactName
ContactTitle
Address
Employees
EmployeeID
LastName
FirstName
Title
TitleOfCourtesy
BirthDate
HireDate
Shippers
ShipperID
CompanyName
∞
1

Microsoft Access creates *relational databases* — that is, databases that can contain multiple tables with links between them. For example, a business may have a Customers table for storing customer contact information and an Orders table for storing information about orders placed. Each customer in the Customers table has a unique ID, and each order in the Orders table references a specific customer ID.

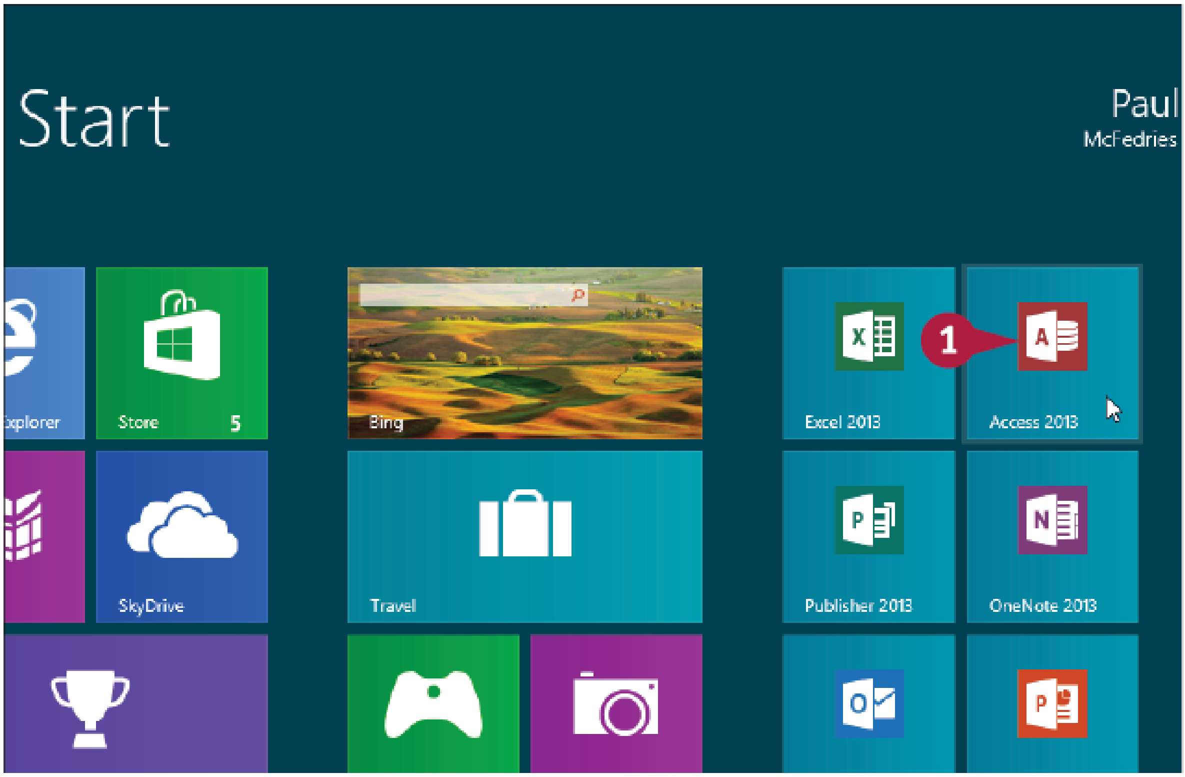
Start and Exit Access

Before you can create or open a database file, you must first start Access. This brings the Access window onto the Windows desktop so that you can then begin using the program.

How you start Access depends on which version of Windows you are using. In this section, you learn how to start Access 2013 in Windows 8 and in Windows 7. When you are finished working with Access, you should exit the program.

Start and Exit Access

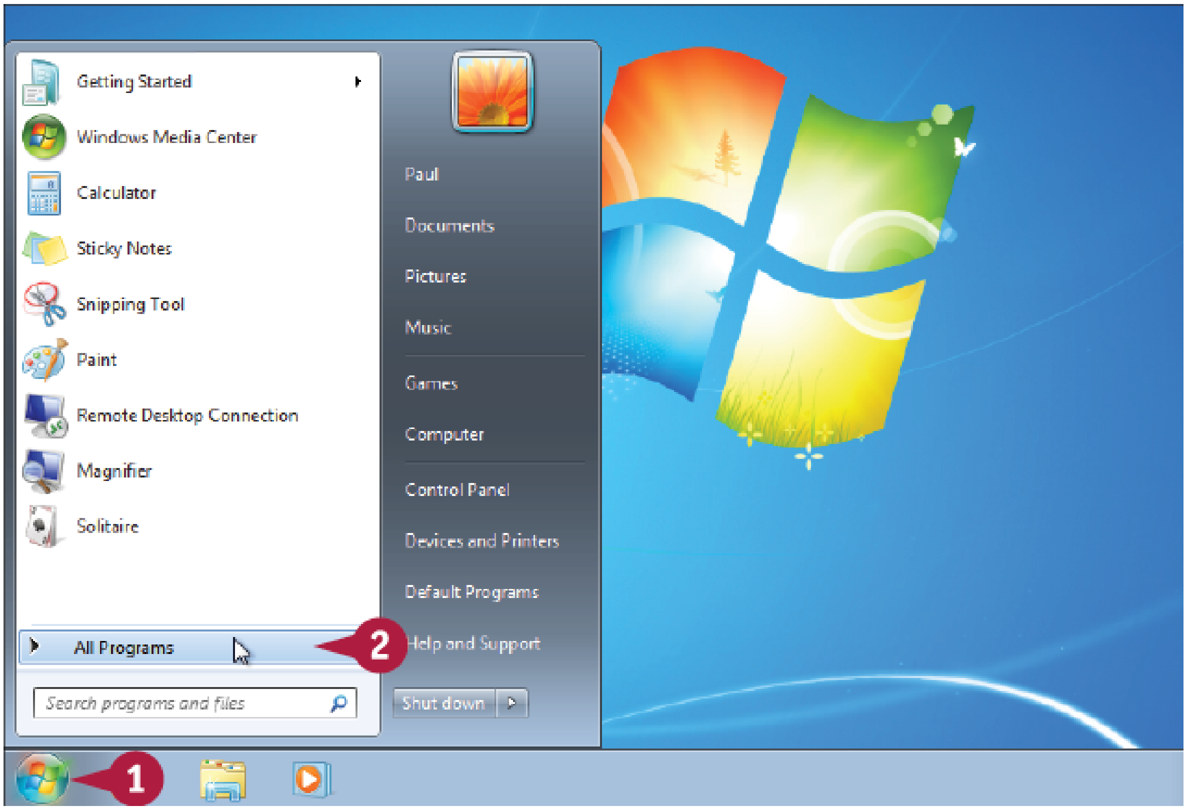
Start Access in Windows 8


Start
Paul
McFedries
xplorer
Store
5
Bing
Excel 2013
1
Access 2013
SkyDrive
Travel
Publisher 2013
OneNote 2013

❶ On the Windows 8 Start screen, click **Access 2013**.

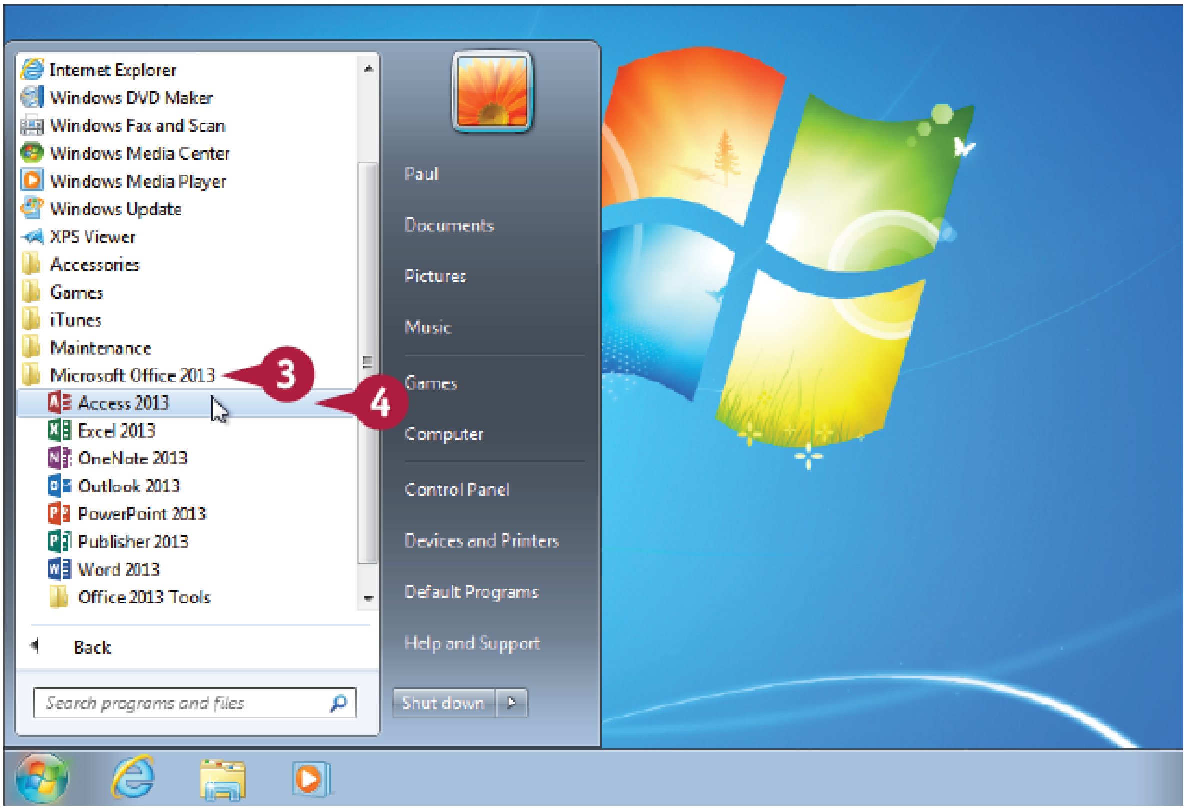
The Microsoft Access window appears on the desktop.

Start Access in Windows 7


Getting Started
Windows Media Center
Calculator
Sticky Notes
Snipping Tool
Paint
Remote Desktop Connection
Magnifier
Solitaire
All Programs
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down
1
2

❶ Click **Start**.

❷ Click **All Programs**.

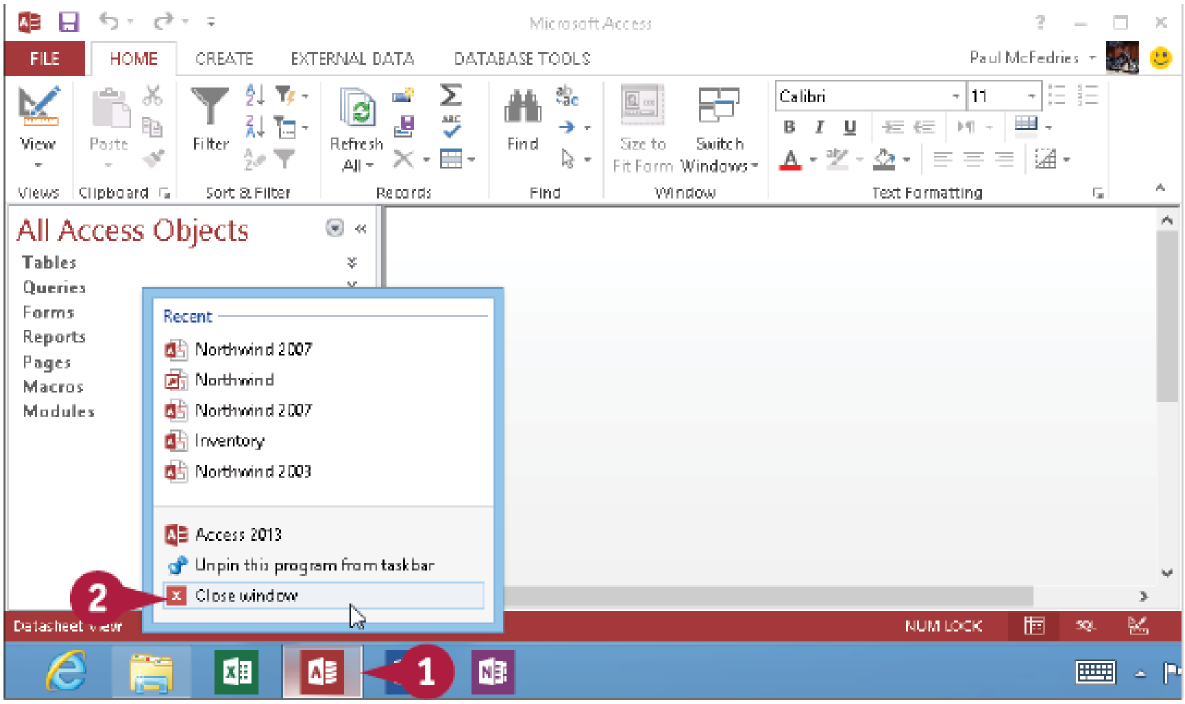

Internet Explorer
Windows DVD Maker
Windows Fax and Scan
Windows Media Center
Windows Media Player
Windows Update
XPS Viewer
Accessories
Games
iTunes
Maintenance
Microsoft Office 2013
3
Access 2013
4
Excel 2013
OneNote 2013
Outlook 2013
PowerPoint 2013
Publisher 2013
Word 2013
Office 2013 Tools
Back
Search programs and files
Paul
Documents
Pictures
Music
Games
Computer
Control Panel
Devices and Printers
Default Programs
Help and Support
Shut down

③ Click **Microsoft Office 2013**.

④ Click **Access 2013**.

The Microsoft Access window appears on the desktop.

Exit Access


Microsoft Access
FILE
HOME
CREATE
EXTERNAL DATA
DATABASE TOOLS
Paul McFedries
View
Paste
Filter
Refresh All
Find
Size to Fit Form
Switch Windows
Calibri
11
Views
Clipboard
Sort & Filter
Records
Find
Window
Text Formatting
All Access Objects
Tables
Queries
Forms
Reports
Pages
Macros
Modules
Recent
Northwind 2007
Northwind
Northwind 2007
Inventory
Northwind 2003
Access 2013
Unpin this program from taskbar
Close window
Datasheet View
NUM LOCK
1
2

❶ Right-click the Access taskbar button (A⃞).

❷ Click **Close window**.

Note: If you have two or more database files open, click **Close all windows** instead.

Access closes, returning you to your desktop view.

TIP

Are there faster methods that I can use to start Access?

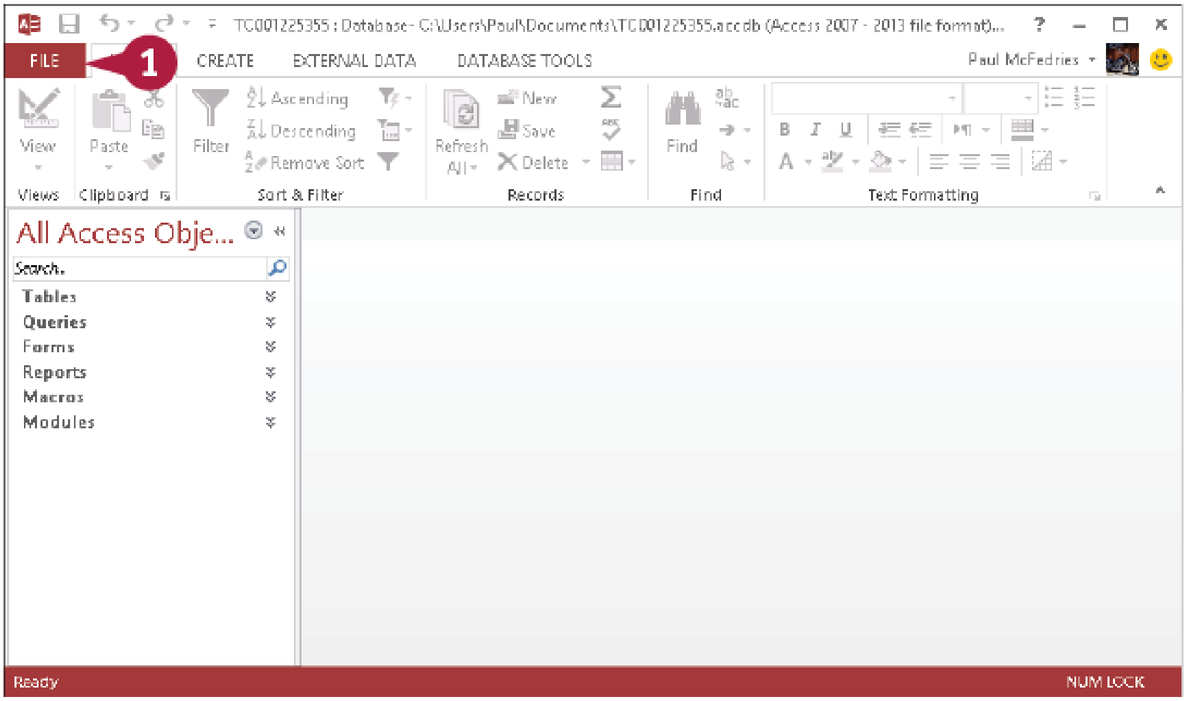
Yes. After you have used Access a few times in Windows 7, it should appear on the main Start menu in the list of your most-used programs. If so, you can click that icon to start the program. You can also force the Access icon onto the Start menu by following steps 1 to 3 in the “Start Access in Windows 7” subsection, right-clicking the **Microsoft Access 2013** icon, and then clicking **Pin to Start Menu**. If you are using Windows 8, you can right-click the **Access 2013** tile and then click **Pin to Taskbar** to add the Access icon to the desktop taskbar.

Create a Blank Database

The simplest way to get started with Microsoft Access is to create a blank database. A blank database contains only a single, empty table and no other database objects, such as queries, forms, or reports. A blank database provides the freedom to create exactly the objects that you want for your project.

If another person or your company has provided you with a database file, you should open that file instead; see the section “Open a Database.”

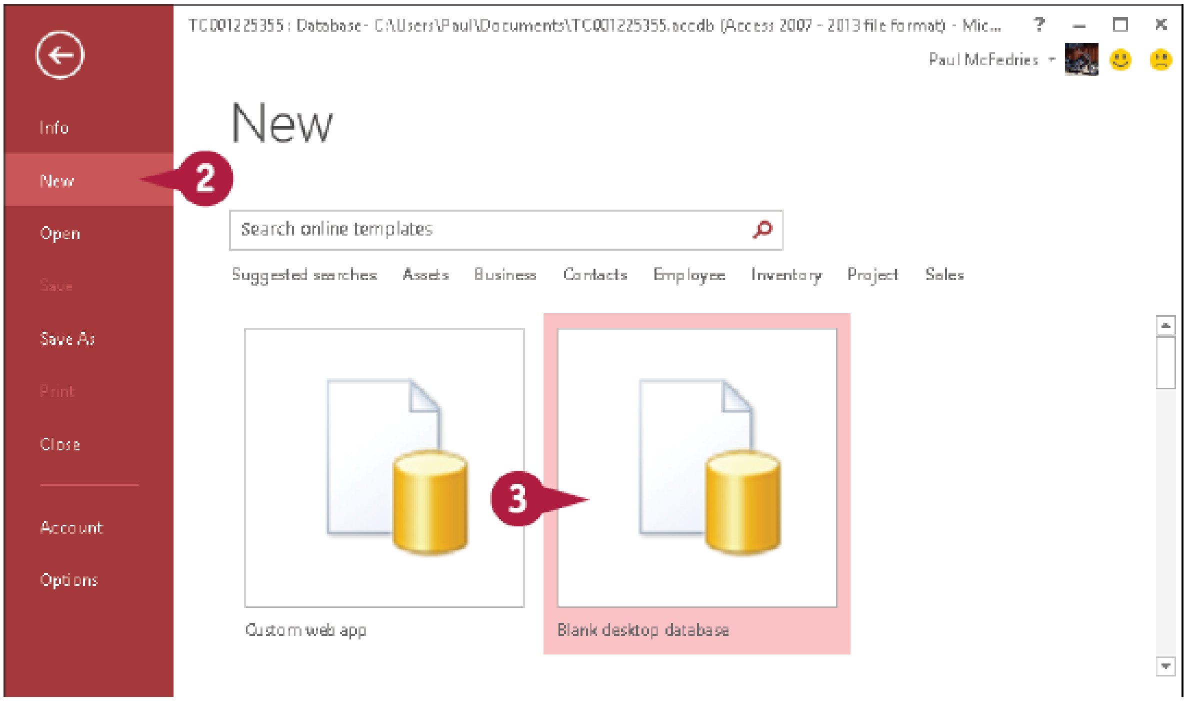
Create a Blank Database


TC001225355 : Database- C:\Users\Paul\Documents\TC001225355.accdb (Access 2007 - 2013 file format)...
FILE
1
CREATE
EXTERNAL DATA
DATABASE TOOLS
Paul McFedries
View
Paste
Filter
Ascending
Descending
Remove Sort
Refresh All
New
Save
Delete
Find
Views
Clipboard
Sort & Filter
Records
Find
Text Formatting
All Access Obje...
Search...
Tables
Queries
Forms
Reports
Macros
Modules
Ready
NUM LOCK

① Click **File**.

Note: If you have just started Access, skip to step 3.

The File options appear.

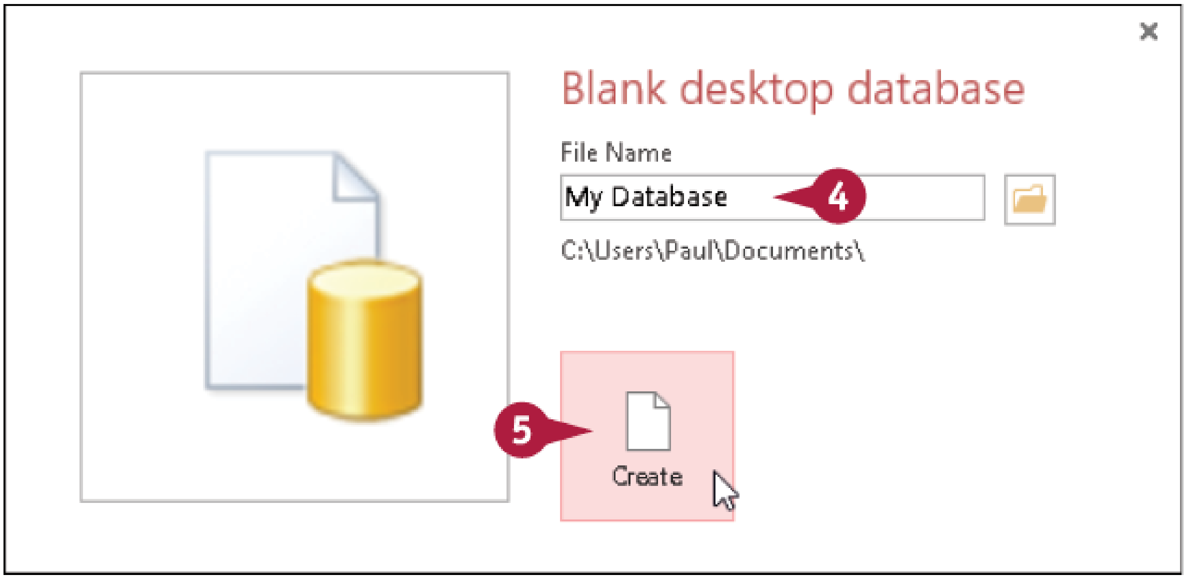

TC001225355 : Database- C:\Users\Paul\Documents\TC001225355.accdb (Access 2007 - 2013 file format) - Mic...
Paul McFedries
Info
New
Open
Save
Save As
Print
Close
Account
Options
New
Search online templates
Suggested searches
Assets
Business
Contacts
Employee
Inventory
Project
Sales
Custom web app
Blank desktop database
2
3

② Click **New**.

The New options appear.

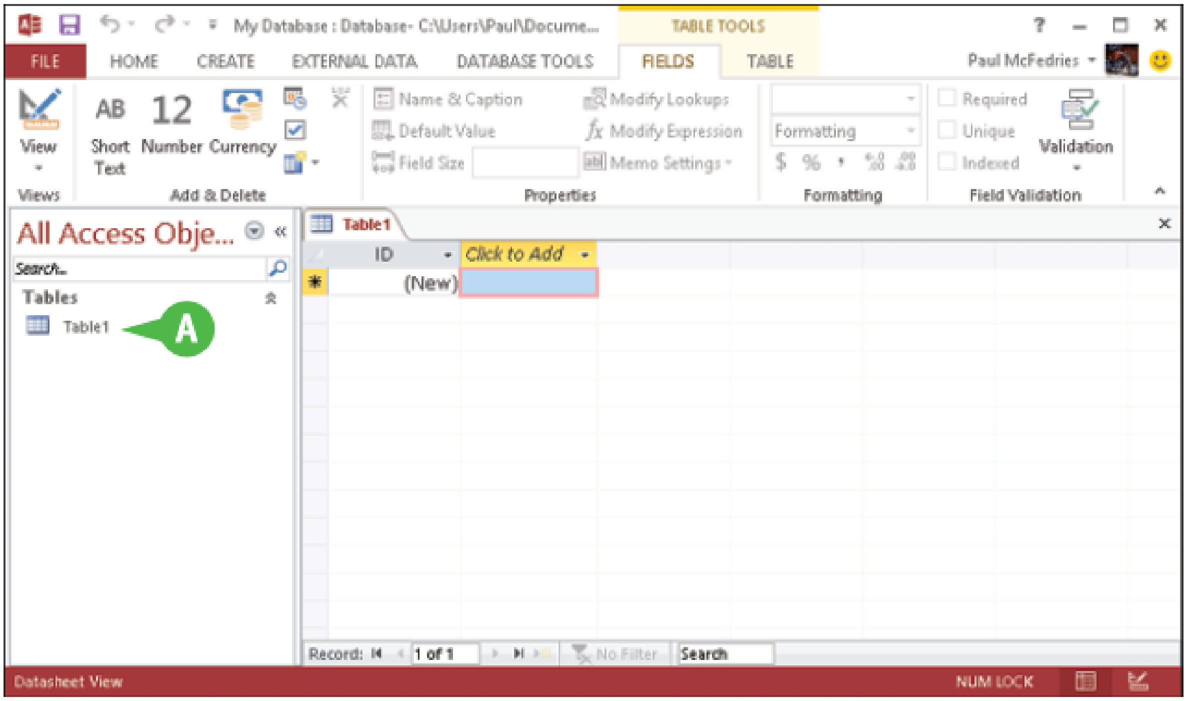
③ Click **Blank desktop database**.

The Blank Desktop Database dialog box appears.


Blank desktop database
File Name
My Database
C:\Users\Paul\Documents\
Create
4
5

④ Type a filename for the database.

⑤ Click **Create**.


My Database : Database- C:\Users\Paul\Docume...
TABLE TOOLS
FILE
HOME
CREATE
EXTERNAL DATA
DATABASE TOOLS
FIELDS
TABLE
Paul McFedries
View
AB
Short Text
12
Number
Currency
Name & Caption
Default Value
Field Size
Modify Lookups
Modify Expression
Memo Settings
Formatting
Required
Unique
Indexed
Validation
Views
Add & Delete
Properties
Formatting
Field Validation
All Access Obje...
Search...
Tables
Table1
A
Table1
ID
Click to Add
(New)
Record: 1 of 1
No Filter
Search
Datasheet View
NUM LOCK

A A new database opens, with a new blank table started.

TIP

Are there shortcuts that I can use to create a blank database?

Yes, Access offers a couple of techniques that you can use to shorten the process of creating a blank database. First, you can quickly display the New tab by pressing Ctrl + N. Second, if you prefer to use your mouse to begin the process of creating a blank database, you can add the New command to the Quick Access Toolbar. After you have done this, you can click **New** on the Quick Access Toolbar to go directly to the New tab. See the section “Customize the Quick Access Toolbar” to learn how to add commands to this toolbar.

Create a Database by Using a Template