

Chapter 1

The 37-Minute Overview

In This Chapter

- ▶ Starting the program
 - ▶ Opening a database that's already there
 - ▶ Thumbing through the parts of a database
 - ▶ Finding a record
 - ▶ Changing a record
 - ▶ Printing a report
 - ▶ Saving your changes
 - ▶ Getting out when you're finished
-

It's confession time. This chapter probably takes longer than 37 minutes to finish. Then again, you may spend *less* time than that if you're somewhat familiar with the program or if you're a speed-reader. Either way, the chapter *does* give you a good overview of Access 2003 from start to finish (and I mean that literally).

Because the best way to get into Access is to literally *get into* it, this chapter leads you on a wild, galloping tour of the software, covering the highlights of what you and Access will probably do together on a daily basis. Think of the chapter as a "Day in the Life" story, designed to show you the important stuff.

If you're new to Access 2003, this chapter makes a good starting point. If you're familiar with older versions of Access, I recommend that you skim this chapter anyway to see the changes introduced in this new version. Enjoy the trip!

In the Beginning, There Was Access 2003

To start Access, click the Start button and choose Microsoft Access 2003 from the Start menu (see Figure 1-1). If Access is hiding from you, look for a program group with a name such as Office or Microsoft.

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Figure 1-1:
For a smart program, Access 2003 doesn't hide very well.

If you still can't find Access on the Start menu, you have to create your own shortcut (egads!). Follow these steps to create a shortcut:

1. Click the **Start** button. Then, depending on which version of Windows you use, choose **Find** ⇨ **F**iles or **F**olders or choose **Search** ⇨ **F**or files and folders.

The Find: All Files dialog box appears.

2. For the file name, type **msaccess.exe**, and then click **Find Now**.

Windows finds the program file.



If Windows finds two copies of the program (as Figure 1-2 shows), that usually means your system has both an older *and* a newer version of Access installed. To tell the two programs apart, right-click the first entry, and choose Properties from the pop-up menu. A little window appears, sharing all kinds of nifty information about the file. Click the Version tab along the top of the little window. For Access 2003, the file version number should start with 11. If it begins with something smaller than 11, close the window and repeat the process with the other file. If

neither file shows the right version number, Access 2003 apparently isn't installed on your machine (or at least Windows can't find it). In that case, haul out the CD-ROMs and install the little fellow.

3. Right-click (hold down the right mouse button) and drag the file from the Search Results window to the Start button.

The Start menu opens.

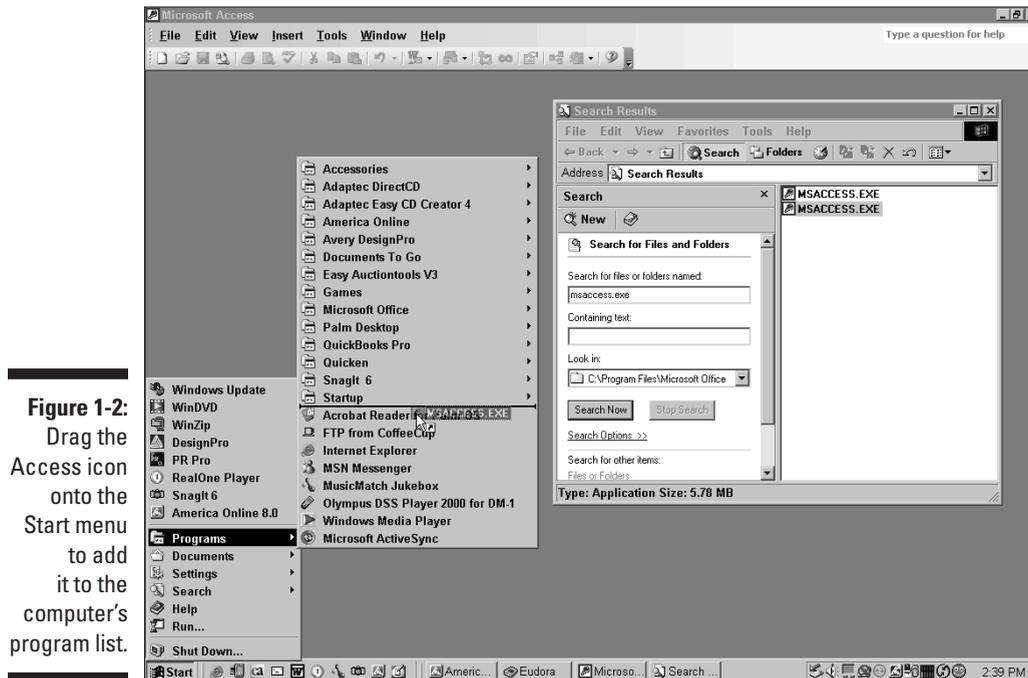
4. Drag the file to Programs and release the mouse button where you want Access to appear (see Figure 1-2).

A pop-up menu appears, asking you what you want to do.

5. Choose Create Shortcut Here.

Congratulations. You just added a shortcut to the Start menu!

Granted, the shortcut's name needs some help (something called *shortcut to msaccess.exe* looks pretty geeky on your menu), but you can correct that with just another click or two. To rename the shortcut in your menu, right-click and choose Rename. Type a clever new name in the Rename dialog box, and then click OK.



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Opening an Existing Database

Access without a database file is like a CD player without a CD: Nice to look at, but you can't dance to it.

Database files fall into two distinct categories:

- ✓ **Database files that exist:** Odds are good that you're working with an existing database (after all, you build a database once, but use it forever). If so, read on — this section is for you.
- ✓ **Database files that don't exist:** If you're bound and determined to create a database, flip to Chapter 4 for detailed help on design and creation.



If you just started Access 2003, your screen looks like Figure 1-3. By default, Access opens with the task pane displayed. The task pane sits on your screen, looking quite handsome, waiting for you to open an existing database, create a new one, and so on. Opening an existing database takes only a moment — simply select it from the list in the Open section.

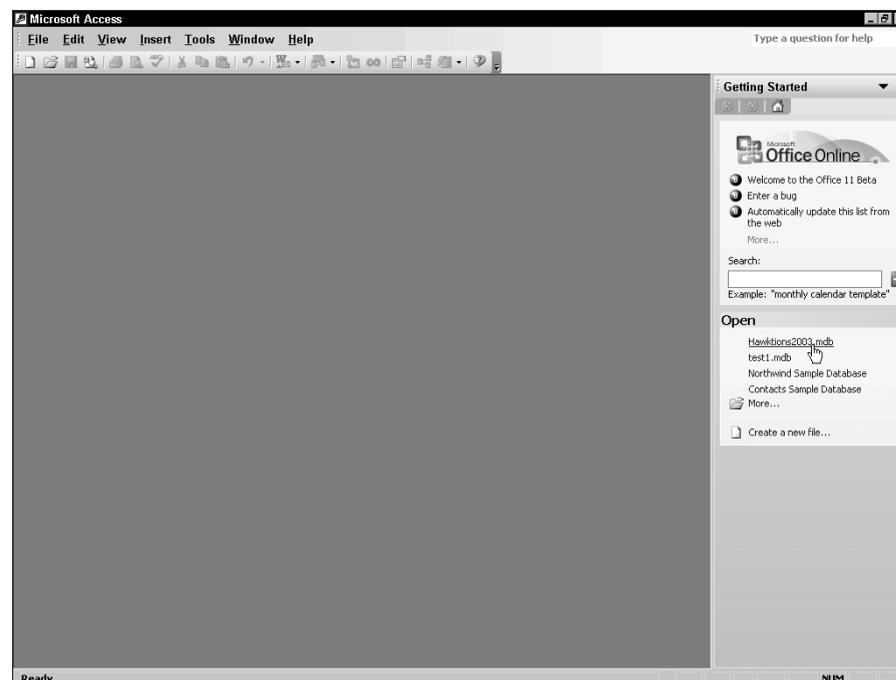


Figure 1-3:
Success at last — Access 2003 is running and displaying the task pane.

If you don't see the database you're looking for, follow these steps:

1. In the Open list, click More.

The Open dialog box appears, as shown in Figure 1-4.

2. Double-click the database you're interested in.

The database loads, and you're ready to work.

If you still can't find the database you want, it's probably in another directory folder. Skip to the sidebar in Chapter 6 for help with tracking down the database in your hard drive or network.

If you've worked with Access for a while (printing reports, checking out a form or two, and generally keeping yourself busy) and now want to open another database, follow these steps:



1. Choose File→Open or click the Open button on the toolbar.

The Open dialog box (still appearing for your viewing pleasure in Figure 1-4) pops onto the screen.

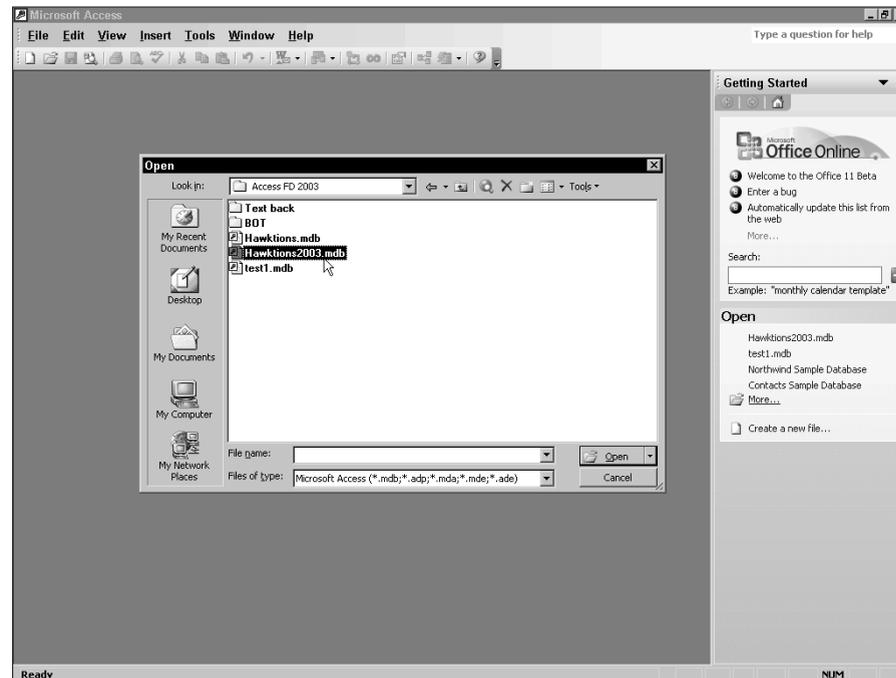


Figure 1-4:
The Open dialog box,
in all its
glory.

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2. Double-click the name of the database you want to use.

If the database isn't listed, it's probably in some other folder. Skip to the sidebar in Chapter 6 for help with tracking down the database in your hard drive or network.

If you see an ominous-looking message asking whether you want to *convert* or merely *open* your file, it means that the database file you want to use came from an older version of Access. Access 2003 wants to convert your existing files to the current database file format — and you probably want it to do that, too. Follow the on-screen instructions for turning the database into a cool, new Access 2003 table, and everything should turn out just fine. Remember to back up the file before converting it (just in case something goes wrong)!

Touring the Database Window

When a database opens, it usually looks like Figure 1-5. Although Access stores all the parts of your database in one big file, it organizes them inside that file by what they are: tables, queries, forms, and so on. Access refers to all these things as *objects*, because it just can't bring itself to use the term *stuff*. To list a particular kind of object in your database, click one of the buttons under the Objects bar (on the left side of the window). The right side of the window changes to show all the stuff — er, objects — in the category, along with a few extra entries for making new objects and fiddling with the ones already there.



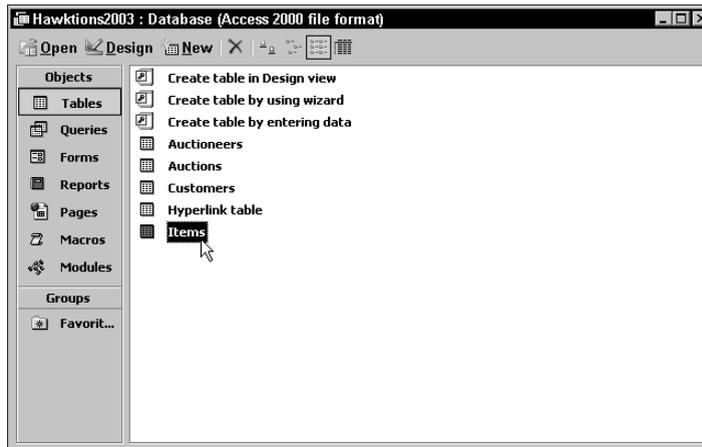
The top of the database window tells you the file format. In Figure 1-5, the format is Access 2000. You can use Access 2003 to open prior file versions (such as Access 2000 or Access 97), but you can't use anything older than Access 2000 to open an Access 2003 file. That's why everyone you work with should use the same software version!

After opening the database, you can fiddle with its parts:

- ✓ To open a table, click the Tables item under Objects, and then double-click the table you want to see.
- ✓ To run a report, query, or form, click the appropriate item in the Objects section and then double-click the item you want to work with.
- ✓ When you get tired of a database, close it by clicking the Close button (the X box in the upper-right corner of the window) or by choosing **File**⇨**C**lose. If you're a keyboard fan, Ctrl+W does the deed without disturbing the mouse. (No, I don't know how they got Ctrl+W from the word *Close* either. I guess all of the good letters were taken.)

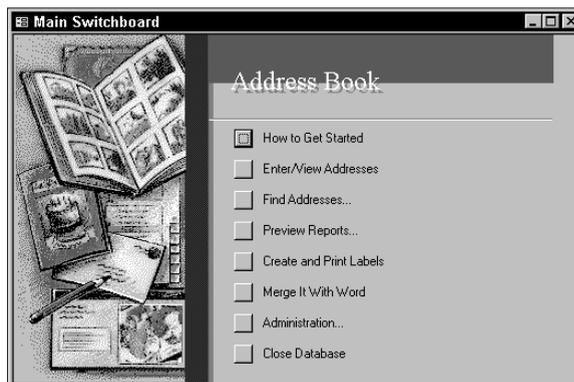
If you want to know more about working with the cool Access 2003 interface, check out Chapter 2.

Figure 1-5:
The database window gives you access to everything that makes up your, um, database.



If some kind soul invested the time to make your life a little easier, a startup screen (or *switchboard*) resembling Figure 1-6 appears automatically when you open the database. The switchboard is basically a glorified menu of things to do with the database. Chapter 4 has more information about startup screens.

Figure 1-6:
A database fronted by a fancy switchboard screen.



Finding Information Amongst the Grass Clippings

If you want preschoolers to eat something, just let them take it outside and drop it into the yard first, preferably right after you cut the lawn with a mulching mower. Finding specific information in your Access table is a little

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like a toddler's method of sifting through sticky grass in search of candy. Whether you're looking for last names, first names, part numbers, or postal codes, Access makes finding your target records a whole lot easier — and infinitely less messy.

Here's one way to find records:

1. Open the table that you want to search.

If you don't know how to open a table, go back to the preceding section.

2. Click the column you want to search.

The blinking toothpick cursor leaps into the column, showing that Access really heard you.



3. Choose **Edit**→**Find** or click the Find toolbar button.

The Find and Replace dialog box appears, as shown in Figure 1-7. Access displays the name of the current field in the Look In section of the dialog box. To look in the entire table, click the down arrow next to the field name, and then choose the table entry from the drop-down list.

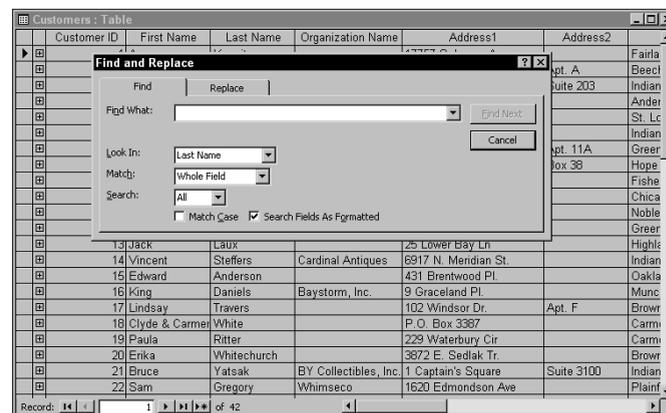


Figure 1-7:
The Find and Replace dialog box, at your service.

4. In the appropriately named **Find What** text box, type the text you want to find.

Spell carefully because Access looks for *exactly* what you type!

5. To start the search, press **Enter** or click the **Find Next** button.

The search begins — and probably ends before you know it. If the program finds a matching record, Access highlights the data, as shown in Figure 1-8.

If no record matches your criteria, a big, officious dialog box informs you that Microsoft Access finished searching the records but found no matches. (If the Office Assistant is on the screen, you are quietly told the

search results rather than whacked by the big dialog box.) Click OK and smile as the dialog box disappears; then double-check what you typed in the Find What text box. You probably just mistyped something. If so, correct it and try the search again.

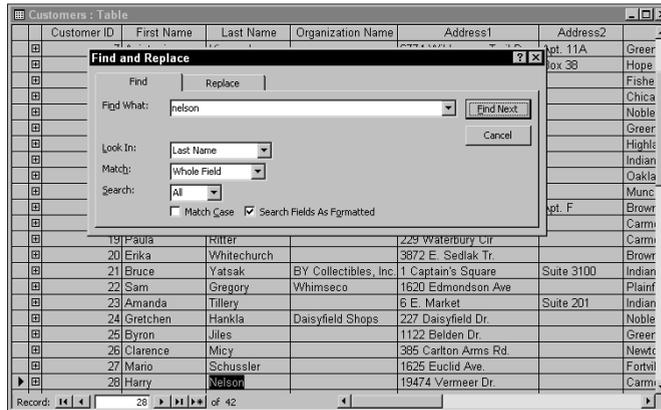


Figure 1-8:
Customer
Nelson is
found!



Access automatically tries to match an entire field in the table with what you typed. So, if you type *Kaufeld* in the Find dialog box, Access *won't* find a record containing *Kaufeld School of Creative Writing*. Why? Because that entry is not an exact match for *Kaufeld* — it's only a partial match. To make Access accept partial matches as well as full ones, change the Match setting in the Find and Replace dialog box from Whole Field to Any Part of Field.

If you *still* can't find the record, Chapter 10 provides more details about the Find dialog box.

6. When you're finished, click Cancel or press Esc to close the Find dialog box.



The right mouse button also provides some devious ways to find records, but I'm saving those tricks for Chapter 10.

Making a Few Changes

Unfortunately for fruit growers and dairy farmers, life isn't always peaches and cream. Your customers move, the phone company changes an area code, or the digital gremlins mess up your typing skills. Whatever the cause, your job probably includes correcting the various problems in your database. Lucky you.

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Changing the stuff in your tables isn't hard. In fact, making changes is almost too easy. The follow list outlines the precise steps you need. Keep in mind that Access 2003 *automatically* saves your changes. When you finish working on a record, Access writes the new information to the database *right then*. If you make a mistake, *immediately* press Ctrl+Z to undo your changes — don't put it off until later.



Here's a quick word from the Society of the Perpetually Nervous: Be *very* careful when changing the records in your database. Making changes is easy; recovering from them can be tough. Access can help you undo only the *last change you made*.

When you're ready to change a record, follow these steps:

1. Open the table by double-clicking it in the database window.

Your table appears, with its data hanging out on the screen and generally looking cool.

2. Click the field you want to change.

A flashing toothpick cursor appears in the field, and the mouse pointer changes to an I-beam.

3. Perform whatever repairs the field needs.

All the standard editing keys (Home, End, Backspace, and Delete) work when you're changing the contents of a field in Access. See Chapter 6 for the key-by-key details.

4. When the field looks *just right*, press Return to save the changes.

As soon as you press Return, the data is saved — and I do mean *saved*. If you immediately decide that you like the old data better, press Ctrl+Z or choose Edit→Undo Saved Record.



Reporting the Results

Capturing all those wonderful details in your tables is nice, but seeing those records fill a printed page looks even nicer. That's where the Access report system comes into play.



Making your database look wonderful on paper is a cinch with Access. The program has all kinds of report options, plus a reasonably strong report wizard to walk you through the hard stuff. Part IV tells you all you could ever want to know about the really cool report features.

Because printing a report is one of the most common things people do with database programs, here's a quick look at how it works in Access:



Help is always just a few clicks away

No matter where you are in Access, help is always nearby. Chapter 3 covers all your help options in gory detail, but here's one to get you started.

If you're stumped for what to do next, press the F1 key; this is the Windows universal *help me* key. The F1 key displays a task pane that's jam-packed with help topics ranging from an overview of the newest, coolest features of

Access 2003 to phenomenally trivial explorations of macros. If your computer has a live Internet connection, the Help task pane also connects you a multitude of online Office assistance, too.

Unless you're in the mood to browse, pose your question to the Office Assistant or type your search topic into the box at the top of the window and see what the Help system offers. Either way, your answer is only a moment away!

1. In the database window, click the Reports button.

Access lists all of the reports available in this database, as shown in Figure 1-9. If the list shows only the two Create report options, no reports exist yet. In that case, flip ahead to Part IV for help building and using reports.

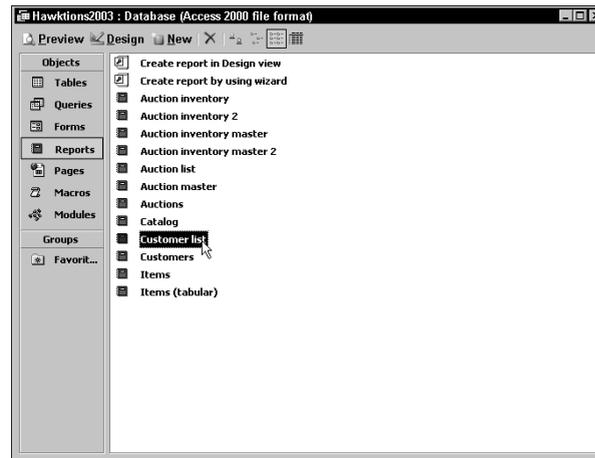


Figure 1-9:
Click the Reports button to access your reports.

2. Right-click the report you want to print.

A menu pops up next to your mouse pointer.

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3. Choose Print from the pop-up menu, as shown in Figure 1-10.

Access puts a little dialog box in the middle of the screen to tell you how the print job is going. When the print job is finished, the dialog box vanishes without a trace.

If you change your mind while the report is printing, click Cancel in the Print dialog box to stop the process.

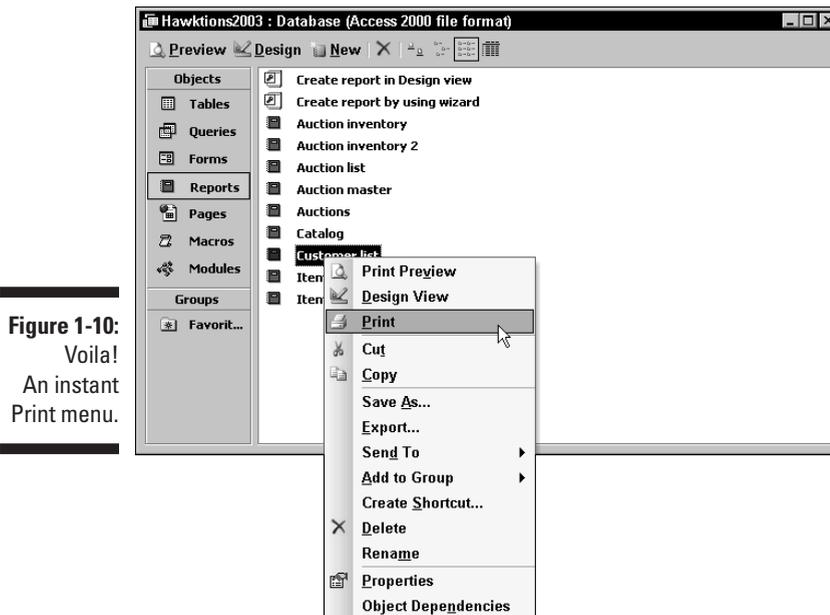


Figure 1-10:
Voila!
An instant
Print menu.

Saving Your Hard Work

The Access 2003 automatic save feature is good because it's one less detail left lying around to clutter up your life. Whether you entered a bunch of new records or simply corrected a couple that were ever-so-slightly wrong, your work is automatically safe and sound.

On the other hand, the automatic save feature *isn't* so good because Access doesn't pay any attention to what it saves — it just saves everything in the database file. If you accidentally wipe out 237 records and then make a few errant clicks, you can say *good-bye records, hello backups*.



I said it before, but it bears repeating: When you change the records in your tables, *please* be careful. Messing up a record takes only a second. Don't let this tragedy happen to you.

The Great Backup Lecture

I know you've probably heard this before, but the PC support nerd in me won't let the chapter close without a few words about backing up your databases. Although I joke about it, regular backups are a *vital* part of using Access (or any program, for that matter).

Why is backing up so important? Take a minute and imagine life without your computer. Don't reminisce about business in the Good Old Days of the 1970s — think about what would happen if you walked in one morning and found *no* computer awaiting your arrival. None. Zippo. The desk is empty — no business letters, no receivables, no customer list, nothing. Everything was on the computer, but now the computer is history.



Unless you want to wave good-bye to your business, you need a formal backup plan. Even if it's just you and your computer, make some notes about how your backup process works:

- ✓ **How often is the computer backed up?** A better question is “How much data can you afford to lose?” If your information changes daily (an accounting system, for example), you need to make backups every day or two. If you mainly play adventure games on your machine and use Access as infrequently as possible, back up every week or two. No universal rule is right for everyone.
- ✓ **Where are the backup disks or tapes stored?** If the backups are conveniently stored right next to the computer, they'll be conveniently destroyed along with the computer in the event of a fire, tornado, or hurricane. Keep your backups in another building, if possible, or at least in another room.
- ✓ **How do you back up the data?** Write down a step-by-step procedure, along with a method for figuring out what tape or disk set to use in the backup process.
- ✓ **How do you restore the data?** Again, create a step-by-step process. Your mind won't be particularly clear if tragedy strikes and you have to restore destroyed data, so make the steps simple and understandable.

After you settle into the backup routine, try restoring your data once to make sure that your system works. You're *much* better off finding out before the disk dies rather than afterward. Set aside a few hours to ensure that your efforts pay off on that fateful day when the disk drive dies. You'll thank me later.



If you're in a corporate environment, it's possible that your local Department of Computer People automatically backs up your data. To find out for sure, give them a call.

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Making a Graceful Exit

When it's time to shut down for the day, do so the right way:

1. **If you have a database open, choose File→Close or click the Close button in the upper-right corner of the database window.**



I'm old-fashioned enough not to trust my program to close everything by itself without screwing something up. Whenever possible, I save and close my work manually before shutting down the program.

2. **Close Access by choosing File→Exit.**



Go ahead and shut down Windows as well if you're finished for the night. To do so, click the Start button and then click Shut Down. When Windows asks whether you're serious about this shutdown, click Yes. After Windows does whatever it is that software does just before bedtime, turn off your computer and make your escape to freedom.