Microsoft Access 2000 for Windows

In this series of four handouts we will provide information to help you get started using Microsoft Access. This program has many capabilities and these handouts only provide a brief introduction. The first two handouts use the Database Wizard to quickly create the basic structure of a database and then discuss the use of queries and the switchboard as well as creating reports. Handouts 3 and 4 cover creating tables to start a database from scratch.

1. Opening Access for Windows

In the PC labs, from the Start menu: Select Programs → MSOffice 2000 → Microsoft Access
Otherwise, from the Start menu: Select Programs → Microsoft Access

2. Creating a Database

The Access program opens with the Database Wizard Screen.

- For this class, choose Access database wizards, pages, and projects.
- Click OK.
2. Creating a Database (cont.)

• Choose **Contact Management** and click **OK**.

![Database Wizard](image)

• Accept the suggested name: **Contact Management1.mdb**
• Navigate to the U: drive in the PC Labs or C: drive in your office and click **Create**.
• Wait a few seconds as the database tables are created.

**Database Wizard**

The database you've chosen requires certain fields. Possible additional fields are shown italic below, and may be in more than one table.

Do you want to add any optional fields?

<table>
<thead>
<tr>
<th>Tables in the database:</th>
<th>Fields in the table:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact information</td>
<td>Contact ID</td>
</tr>
<tr>
<td>Call information</td>
<td>First Name</td>
</tr>
<tr>
<td>Contact Types</td>
<td>Last Name</td>
</tr>
<tr>
<td></td>
<td>Dear</td>
</tr>
<tr>
<td></td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td>City</td>
</tr>
<tr>
<td></td>
<td>State/Province</td>
</tr>
<tr>
<td></td>
<td>Postal Code</td>
</tr>
<tr>
<td></td>
<td>Region</td>
</tr>
</tbody>
</table>

• Accept the two tables (Contact and Call Info) in this database and click **Next**.

• Select each table to see what fields are included in each. Note that you can add several fields in the Contact Information table if you needed them. Click **Next**.

• To use the simplest display for the database choose **Standard** and click **Next**.
2. Creating a Database (cont.)

- Choose a report layout such as Corporate and click Next.
- Keep the title of the database as Contact Management.
- Check the box to include a picture and click on the Picture button.

- To locate a picture navigate to: C:\Program Files\Microsoft Office\Clipart\Pub60Cor and choose an00790_.wmf and click OK. (This is a picture of an owl reading.)

**Note: the picture we added will only appear in the reports pages.**

- Click Finish and wait as the wizard creates tables, reports, and forms.
4. Entering Information

• Click on the button for **Enter/View Contacts** button in the Main Switchboard. The data entry form, **Contacts**, opens.

![Contacts Form]

- Enter this data in the first record.
- Click on the forward arrow button to enter a new record.

• Click on the Page 2 button to enter information in the email field.
• Enter the following people:

  *Note: after clicking the arrow for the second record, you will need to click on the number “1” to get back to the main entry screen.*

  Ms. Mary Cash  
  Fashions Galore  
  457 Broadway  
  Knoxville, TN 37001  
  Title: Owner  
  Work Phone: 423-555-5791  
  Mobile Phone: 423-555-3333  
  MCash@usit.com

  Ms. Sally Beck  
  International Exporting  
  3941 First Ave.  
  Nashville, TN 37661  
  Title: Associate Vice President  
  Work Phone: 615-555-6942 ext. 12356  
  Mobile Phone: 615-555-6824  
  Fax: 615-555-6385  
  SBeck@aol.com

  Mr. Jack Hart  
  Poly Plastics  
  3490 West Way  
  Memphis, TN 38888  
  Title: Engineer  
  Work Phone: 901-555-8984 ext. 400  
  Mobile Phone: 901-555-3546  
  Fax: 901-555-8865  
  JHart@PolyPlastics.com

  Mr. Wayne Smith  
  Dell Computers  
  1 Dell Way  
  Nashville, TN 37661  
  Title: Technical Support  
  Work Phone: 615-555-2124  
  Mobile Phone: 615-555-3321  
  Fax: 615-555-3322  
  WSmith@dell.com

• To exit the **Contacts** screen click on the close button in the upper part of that window.
5. Using Information in the Database, Reports

The power of an electronic database versus a paper database is the ability to search and sort information and to report that information in a quick organized fashion. This database includes several reports already created by the wizard.

- At the Main Switchboard, click Preview Reports
- Select Preview the Alphabetical Contact Listing Report at the next screen.

This is a simple report screen that allows you to see a listing of those individuals entered in your database. Note: this screen is not modifiable.

6. Call Tracking and Call Reports

One of the functions of this database is call tracking. To enter some sample calls, return to the Main Switchboard and click on the Enter/View Contacts button.

- Under Tony Smith click on the Calls... button.
- Hit the Tab key twice and notice that the date and time are automatically entered.
- Type the subject of his call: Returned call with price info
- Click on the Close button to close out the Calls windows.

Now add these messages. Be sure to click on the Calls button from the correct individual’s record.

<table>
<thead>
<tr>
<th>Name</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mary Cash</td>
<td>Called asking about prices for shipping</td>
</tr>
<tr>
<td>Jack Hart</td>
<td>New mobile phone number, already updated</td>
</tr>
<tr>
<td>Wayne Smith</td>
<td>Called asking about job opportunities</td>
</tr>
</tbody>
</table>

Once the information is entered you can view it in a report format.

- Close the Contacts window, returning to the Main Switchboard.
- Click on the Preview Reports button to enter the Reports Switchboard.
- Choose Preview the Weekly Call Summary Report.

The Weekly Call Summary window will appear. The Begin and Ending call dates will change from week to week and are modifiable so you could choose multiple weeks or a single day.

- Click on Preview to view this weeks call summary.
7. Using the Find Command

The **Find** Command allows one to find specific records by entering in search parameters and allowing Access to search any or all fields in the records.

- At the **Main Switchboard** click **Enter/View Contacts**.
- From the menu, select **Edit → Find**

The **Find** window will by default look in whichever **Contacts** field your cursor was in. Unless you moved your cursor ours is currently looking in ‘First Name’.

- Beside Find What: type **Mary**
- Click **Find Next**.

- Beside Find What: type **Smith**
- Select Look in: **Contacts**.
- Click **Find Next**.

![Find and Replace window](image)

8. Simple Queries

One of the best ways to view data in Microsoft Access is by using **Queries**. A **Query** is a specialized searching tool, similar to **Find**, except that you do not need to redefine the search each time you run it.

- From the menu, select **Window → Contact Management: Database**
  which will bring up the design view of the database.

- Click on the **Queries** button under **Objects** (see illustration on next page).
- Select **Create query by using wizard** in the listed options.
- Select **New** in the toolbar at the top of the window.

- This will bring up the **Queries** window and allow you to:
  use the **Simple Query Wizard**
  create a query from scratch in **Design View**
  or create other useful queries, such as **Find Duplicates Query Wizard**
At the **New Query** window:

- Choose **Simple Query Wizard**
- Click **OK**.

In the **Simple Query Wizard** window click on the drop down box and select **Table: Contacts**.

- In Available Fields select **LastName**
- Click the **arrow button** to add it to Selected Fields.

- Do the same for **FirstName** and **WorkPhone**.

- Click **Next**
- Click **Finish**.

- View the results of your query in spreadsheet form and then click the close button to close.
9. Exiting

To exit the program:

- Select File → Exit or use the close box x in the upper right corner.

Note: Changes you make to the data in your database are automatically updated as you work. Access only needs to be saved when you make a change to the layout, create a new report, query, etc. If Access needs to save it will ask you if you would like to save your changes when you try to exit.

10. Getting Help

One of the easiest ways to get help with Microsoft Access is the comprehensive online help included with it.

- From the menu, select Help → Microsoft Access Help
- Click on the Index tab

- For instance, to see samples of expressions type in the search box: Examples of expressions

→ Should you have a question that the online help does not address. There are several books available at your local bookstore that will aid you, such as: Microsoft Access 2000 for Windows for Dummies and various Microsoft reference books.