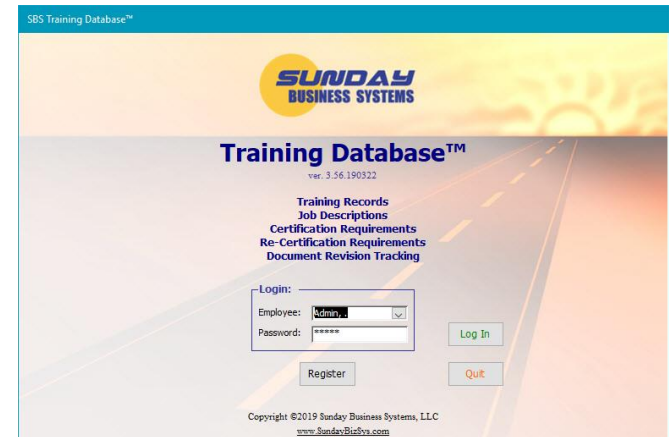# Microsoft Access Tips and Tricks

Using Access More Efficiently

The Basics

▸ SBS has built its QMS products on Microsoft Access Database

▸ Microsoft Access consists of
- ▸▸ Tables
  - • Where data is stored
- ▸▸ Queries
  - • Questions asked of the database
- ▸▸ Forms
  - • Displays data (or *records*)
  - • Controls the entry & editing of data
  - • *Records* are made up of *fields*
  - • Forms may have *subforms*
- ▸▸ Reports
  - • Based on queries
  - • Formats and organizes information

▸ Our software user interface
- ▸▸ Consists of forms and reports
- ▸▸ Tables, queries and code are hidden for simplicity

The SBS Training Database will be used to demonstrate Tips and Tricks

Form Basics

Form Navigation

Move to FIRST Record

Move to LAST Record

Filter Indicator

…currently indicating the filter is OFF and all records are displayed

Record: |◄   ◄ | 1 of 2 | ►   ►| ►✱   No Filter   Search

Move to PREVIOUS Record

Move to NEXT Record

ADD NEW Record

Two form views

▸ Data may be viewed in

  ▸▸ Form View

   ● one record at a time

  ▸▸ Datasheet View

   ● multiple records displayed like in a spreadsheet
   ● Subforms may be displayed by clicking the + on the left-hand side of the record
   ● Not all forms are designed for Datasheet view
   ● Some forms have buttons to select datasheet view

Form View

Datasheet View

Forms in Datasheet View

Datasheet View

▸ Drag column to re-arrange column order

▸ Drag column separator to change width (double-click to auto re-size)

▸ Sort and filter with a click on the right button

Sunday Business Systems

Return to Form View

‣ Right click tab - select *Form View* to return to form view

Sunday Business Systems

ADDING, EDITING, AND DELETING RECORDS

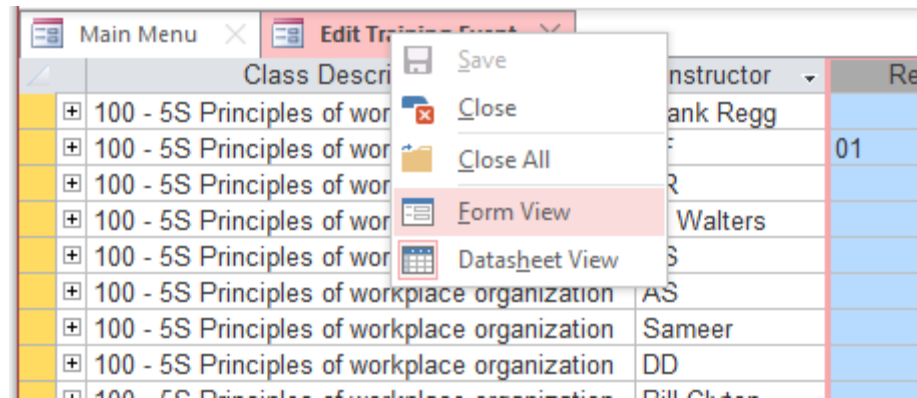# Editing a record

Record Selector changes to Pencil when record is being edited

…At this point the change may be cancelled by pressing the Esc key on the keyboard

To save a record:
- Click on the record selector,
- change records,
- click a save button, or
- close the form

…Once a record is saved or deleted, there is no way to cancel or *Undo* the change.

Delete a Single Record

1) Click Record Selector to highlight the record

2) Press DELETE on the keyboard
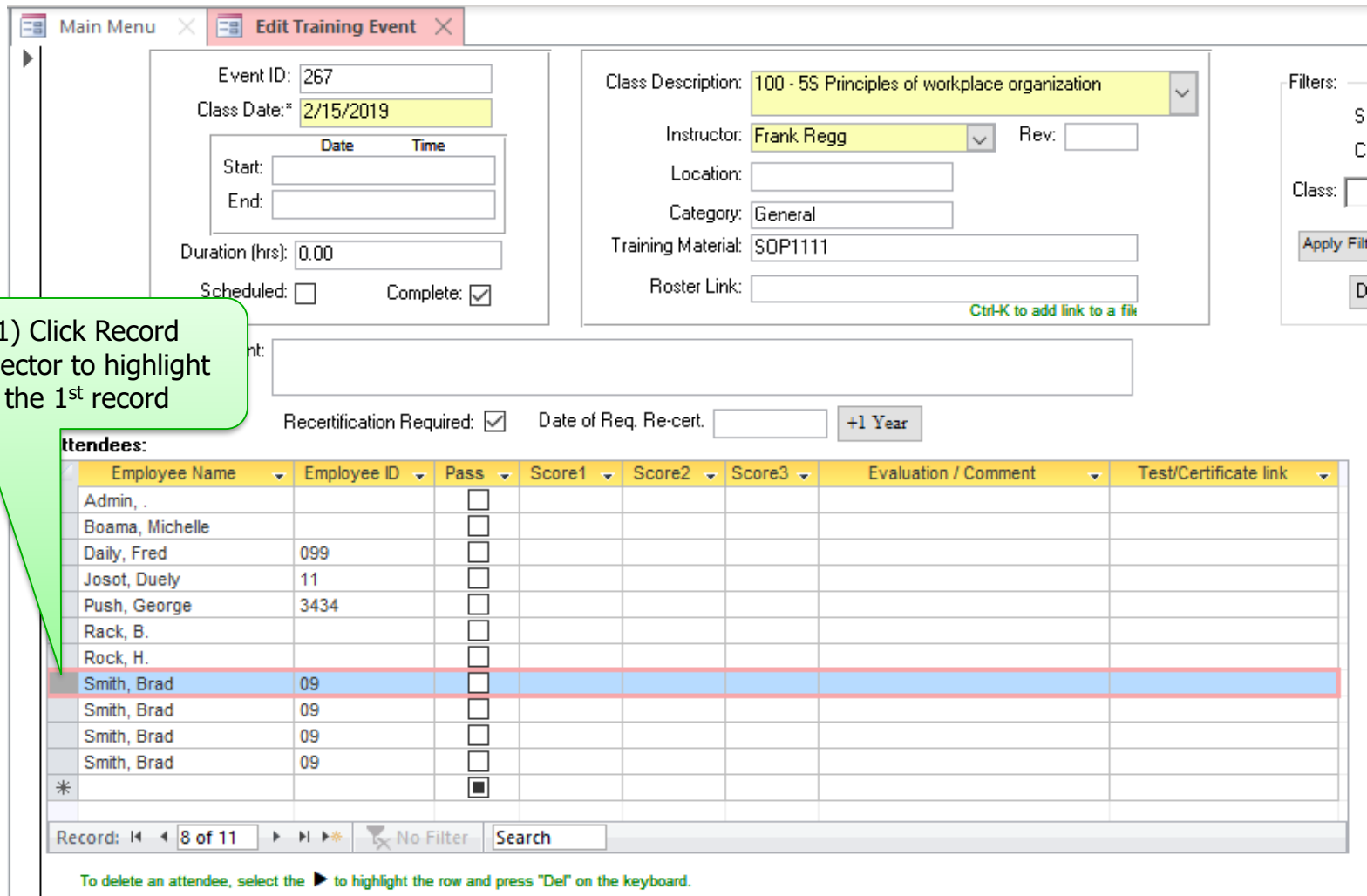
3) Confirm Record Deletion

Note: Once the DELETE action is confirmed, the records are permanently deleted

SBS Training Database™

You are about to delete 1 record(s).

If you click Yes, you won't be able to undo this Delete operation. Are you sure you want to delete these records?

Yes   No

Delete Multiple Records

1) Click Record Selector to highlight the 1st record

Delete Multiple Records

FINDING AND FILTERING RECORDS

Finding records using global search

The 1st instance of the search string is displayed

...Press ENTER on the keyboard to find the next occurrence

Enter a text string into the search field

Finding records with advanced search

▸ Click on the form field that you want to search

▸ Click on the Magnifying Glass in the Ribbon
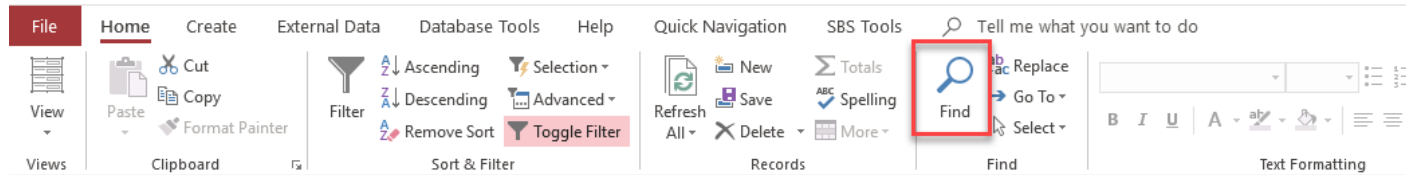
▸ Enter search criteria

⇥ Find What: (enter your search string)

⇥ Look In

- Current field or
- Current document (form) – same as global search

⇥ Match

- Any Part of Field
- Whole Field (exact match)
- Start of field
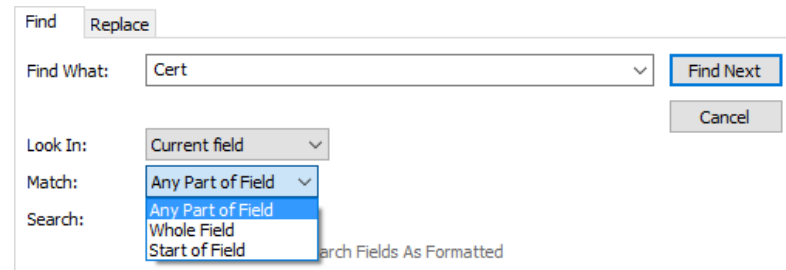
Using Form Filters

▸ Display or Find one instance of the string you want in the filter's results.

▸ 1) Select the string

▸ 2) In the "Sort & Filter" ribbon section, Click "Selection"

 ⇉ 3) Choose filter type:

 • String "Begins with"
 • String "Does NOT begin with"
 • String "Contains"
 • String "Does NOT contain"
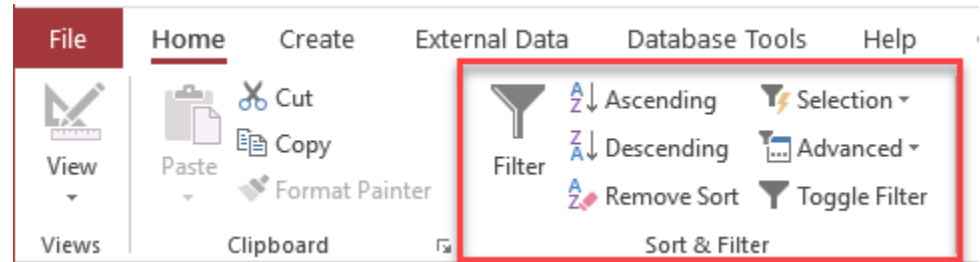
▸ Filtered forms will display a limited set of records

 ⇉ The total number of records will change

 ⇉ The filter indicator will change to "Filtered"

Using Form Filters

Using Form Filters

‣ To reset the filter,

    ⇥ Click the "Toggle Filter" on the "Sort & Filter" ribbon
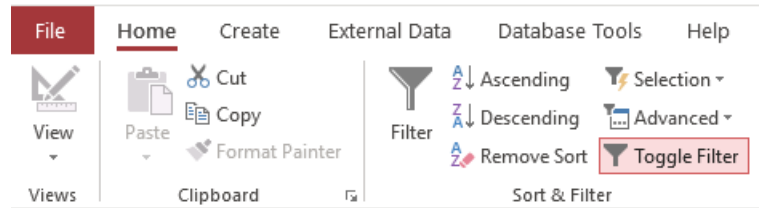
    ⇥ Or Click the "Filtered" button at the bottom of the form

    ⇥ Note that the button changes to   No Filter   and the record count will change

SORTING RECORDS

Sort Records

▸ Click on the field you want to sort

▸ Click on the sort Ascending or Descending button in the ribbon

Finding data in Datasheet View

‣ Sort and filter with a click on the right button

TIME SAVING TRICKS

Time saving tricks

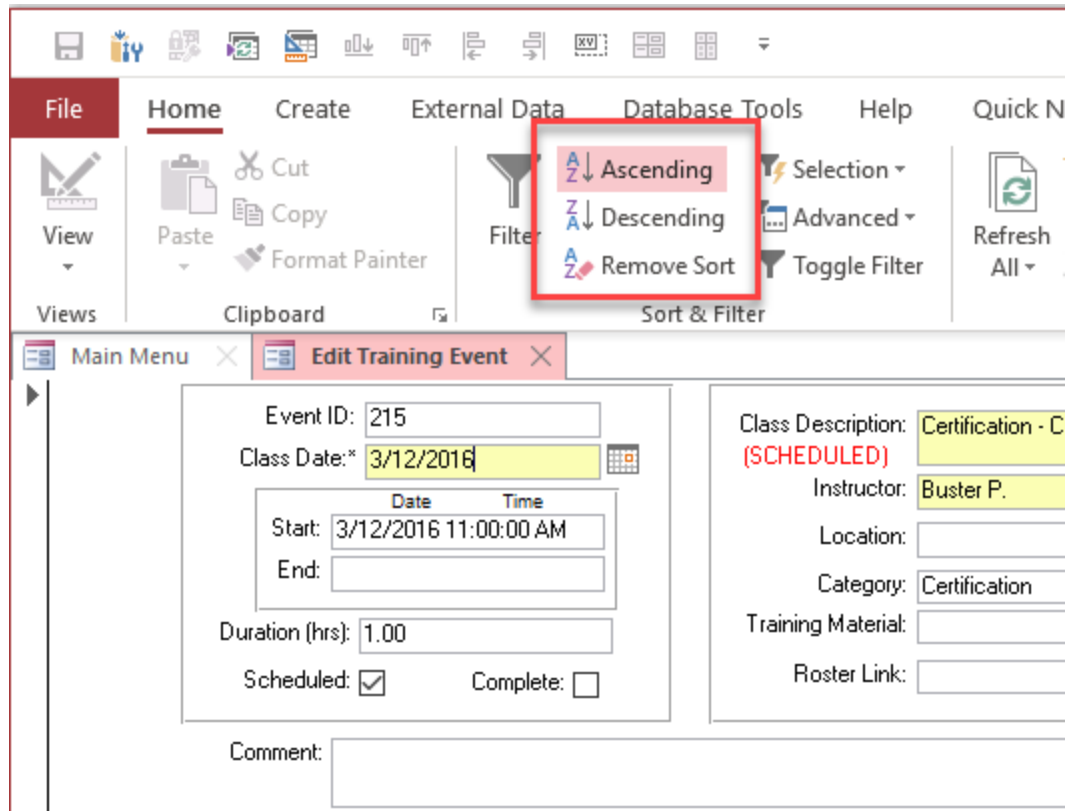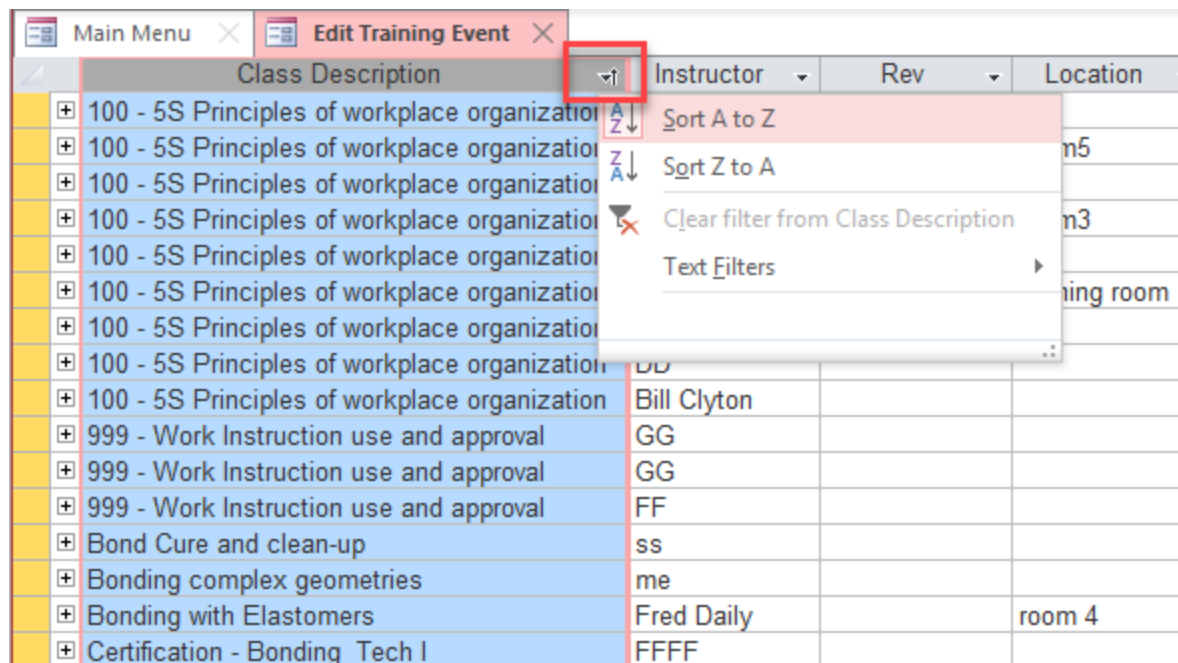| Action	Keyboard combination
Enter the current date	Ctrl + ;
Enters the current time	Ctrl + Shift + :
Enters the previous value in the field	Ctrl + `
Search for records (find)	Ctrl + F
Move to the next field	Tab key
Move to the previous field	Shift+Tab
Open the **Print** dialog box for reports	Ctrl+P
Open the **Find and Replace** dialog box	Ctrl+H
Add a new record	Ctrl+Plus Sign (+)
Exit Access	Alt+F4

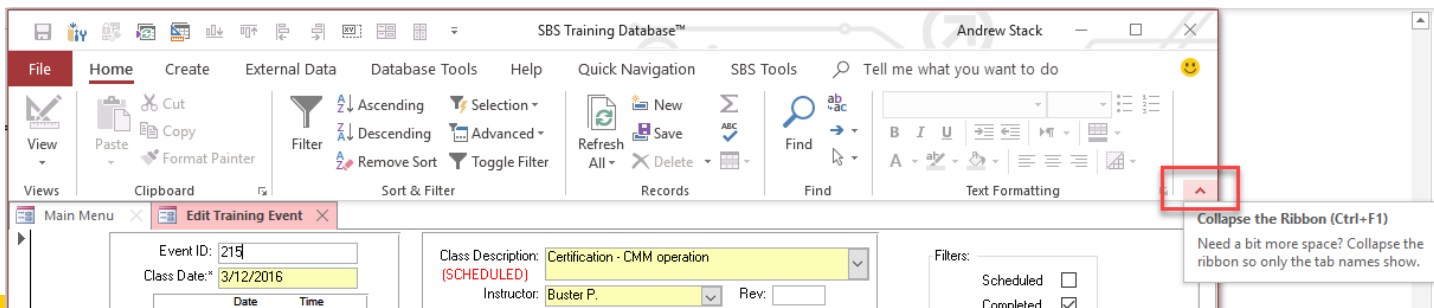# CUSTOMIZE ACCESS

Hide or Display the Access Ribbon

▸ Ribbon may be hidden

Ribbon is hidden
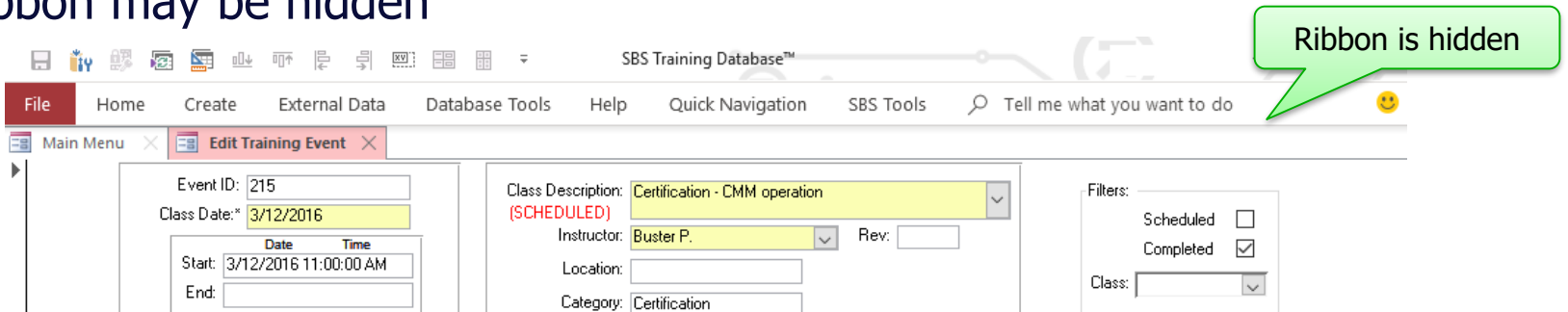
▸ Pin the ribbon
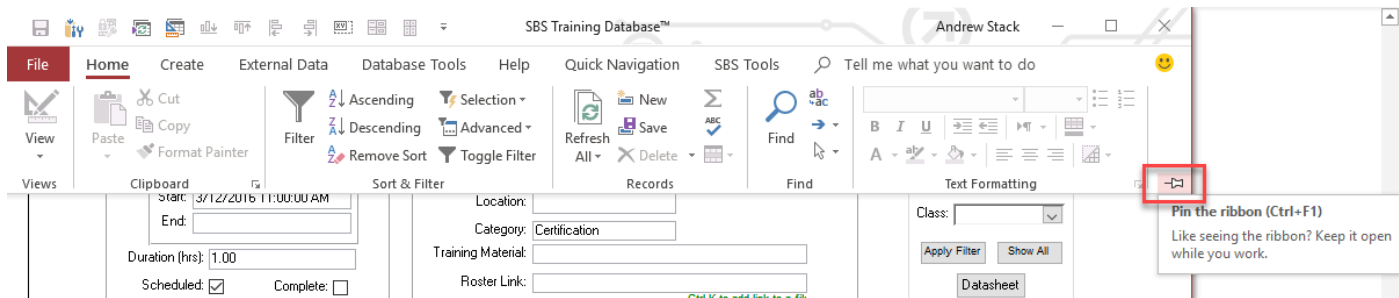
▸ Collapse the ribbon

Quick Access Toolbar
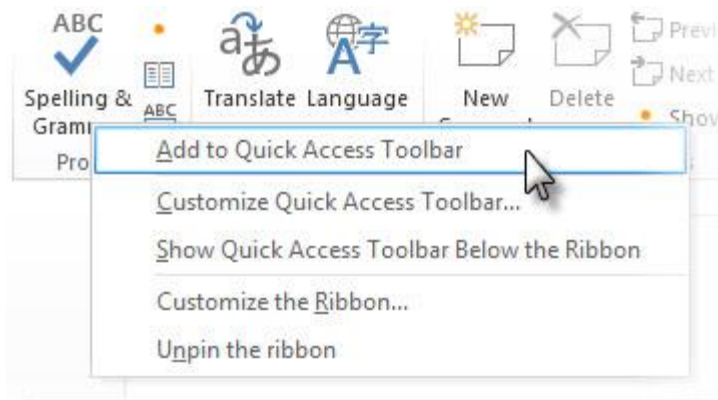
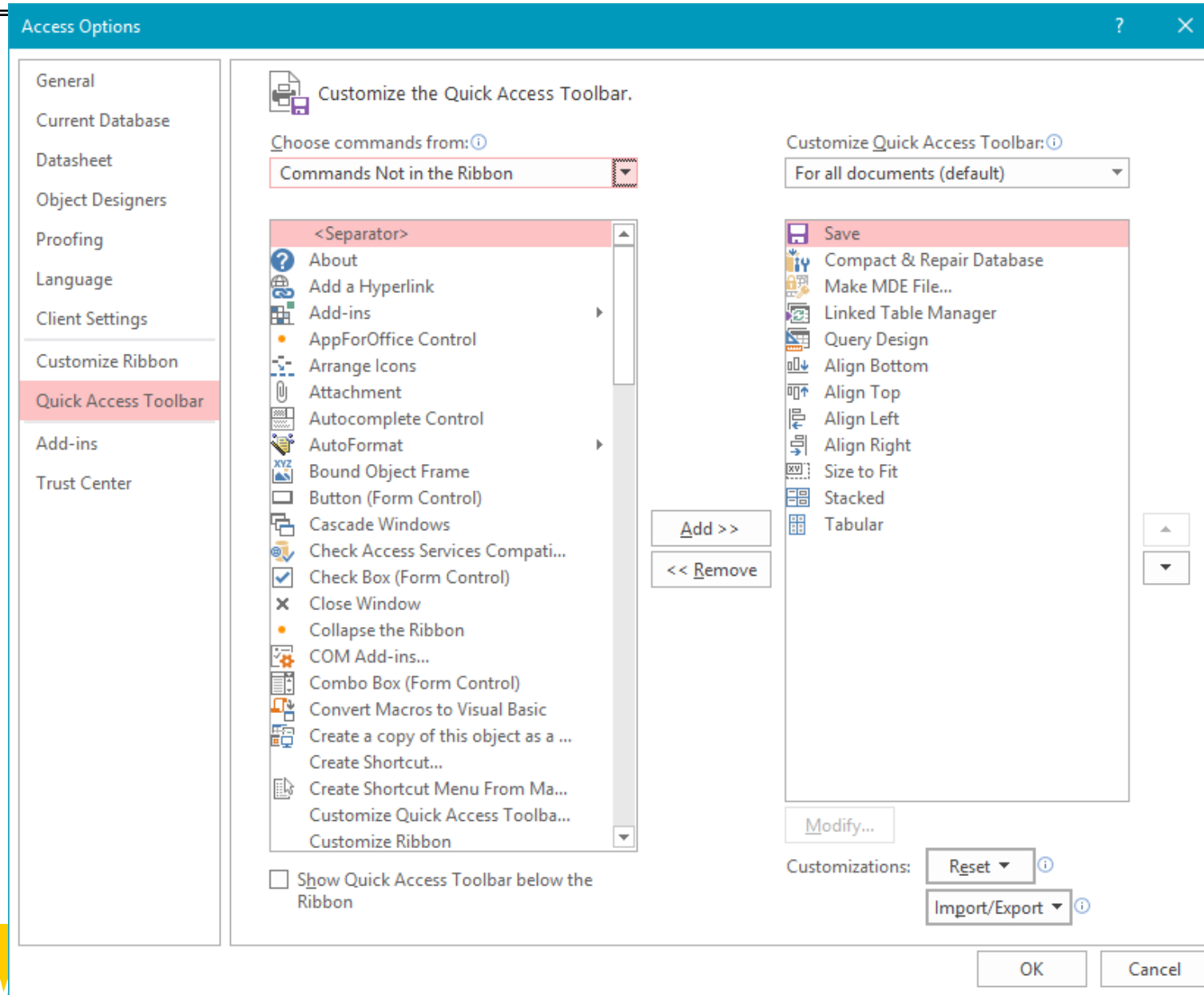▸ Quick Access Toolbar is great for commonly used functions
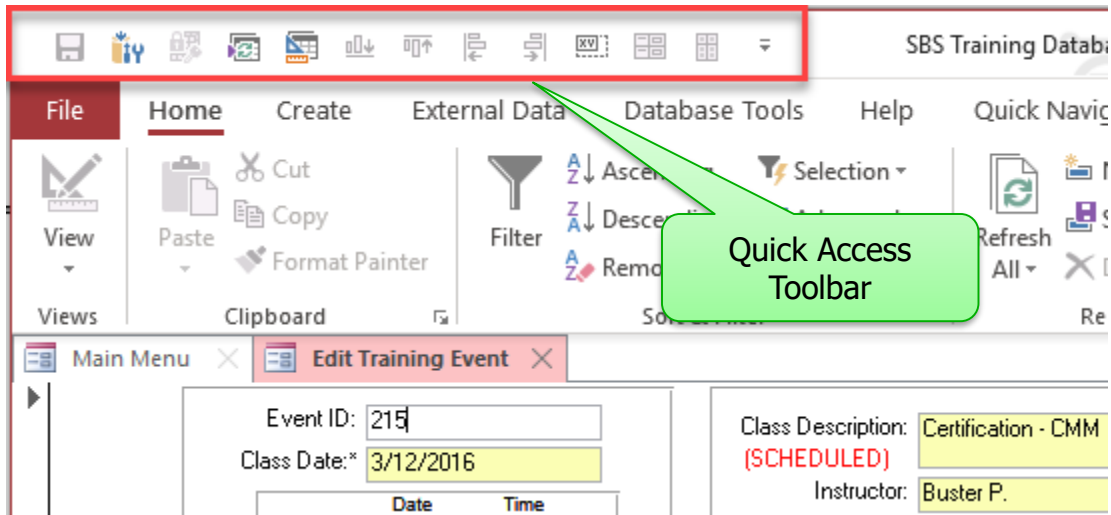
Quick Access Toolbar

▶ Add a command to the Quick Access Toolbar (from the ribbon)

 ⤷ On the ribbon, click the appropriate tab or group to display the command that you want to add to the Quick Access Toolbar

 ⤷ Right-click the command,

 ⤷ then click Add to Quick Access Toolbar on the shortcut menu

Quick Access Toolbar

QMS Software solutions for

- Document control
- Corrective and preventive action management
- Non-conformance tracking
- Audit Management
- Control of calibrated equipment
- Employee training management
- Supplier management
- FMEA / Risk management
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