

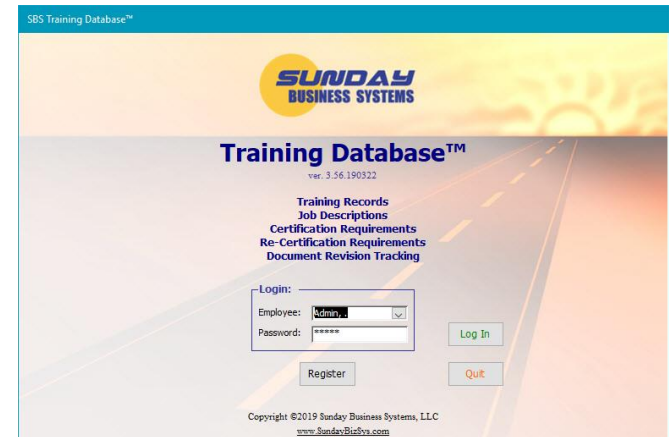


# Microsoft Access Tips and Tricks

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

The screenshot shows the 'Edit Training Event' form with the following fields and controls:

- Event ID:** 215
- Class Date:** 3/12/2016
- Time:** 11:00:00 AM
- Duration (hrs):** 1.00
- Scheduled:**  **Complete:**
- Class Description:** Certification - CMM operation (SCHEDULED)
- Instructor:** Buster P.
- Rev:** [empty]
- Location:** [empty]
- Category:** Certification
- Training Material:** [empty]
- Roster Link:** [empty]
- Filters:** Scheduled , Completed , Class: [empty]
- Buttons:** Apply Filter, Show All, Datasheet, Add New, Save, Event Report, Certificate, Close
- Attendees:** Recertification Required:  Date of Req. Re-cert. [empty] +1 Year

Employee Name	Employee ID	Pass	Score1	Score2	Score3	Evaluation / Comment	Test/Certificate link
Boama, Michelle		<input type="checkbox"/>					
Josot, Duely	11	<input type="checkbox"/>					
*		<input checked="" type="checkbox"/>					

- Record Selector:** Record: 1 of 2
- Global search:** Search

To delete an attendee, select the [arrow] to highlight the row and press "Del" on the keyboard.

# Form Navigation

The diagram illustrates a form navigation toolbar with the following components and callouts:

- Move to FIRST Record:** Callout for the first button on the left.
- Move to PREVIOUS Record:** Callout for the second button from the left.
- 1 of 2:** A text box indicating the current record number and total records.
- Move to NEXT Record:** Callout for the third button from the left.
- Move to LAST Record:** Callout for the fourth button from the left.
- ADD NEW Record:** Callout for the fifth button from the left, which features a star icon.
- Filter Indicator:** Callout for the sixth button from the left, which features a funnel icon.
- No Filter:** Text next to the filter icon, indicating the current filter status.
- Search:** A text box for entering search criteria.
- ...currently indicating the filter is OFF and all records are displayed:** A callout box pointing to the filter indicator and 'No Filter' text.

# 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

The Form View displays a detailed form for editing a training event. It includes fields for Event ID (215), Class Date (3/12/2016), Start and End times, Duration (1:00), and a Comment field. The Class Description is 'Certification - CMM operation' (SCHEDULED) with Instructor 'Buster P.'. There are filters for Scheduled, Completed, and Class. An Attendees table is visible at the bottom with columns for Employee Name, Employee ID, Pass, Score1-3, Evaluation/Comment, and Test/Certificate link. A 'Datashheet' button is located on the right side of the form.

## Datasheet View

The Datasheet View displays a list of training events in a spreadsheet format. The columns include Class Description, Instructor, Rev, Location, Category, Training Matc, Roster Link, Comment, and Date. The data is as follows:

Class Description	Instructor	Rev	Location	Category	Training Matc	Roster Link	Comment	Date
Certification - CMM operation	Buster P.			Certification				
100 - 5S Principles of workplace organization	DD			General	SOP1111			###
CMM Programming	F Foly			General				12
First article verification	F Foly			Doc/SOP	ACC0004	<a href="#">scan and link to</a>	First article verif	
Peachtree Accounting - Shipping	Mike Wong			Certification				###
Certification - CMM operation	SA			Certification				###
Certification - CNC operation	BNF Enterprise:		offsite	Certification		<a href="#">link roster here</a>		###
CNC Safety	FF			Safety		<a href="#">Data import form</a>		###
Certification - Bonding Tech I	hh			Certification	TRN0092	<a href="#">Data import form</a>		###
999 - Work Instruction use and approval	GG			General				1
999 - Work Instruction use and approval	GG			General				1
CNC Safety	BNF Enterprise:		offsite	Safety		<a href="#">Roster link</a>		1
Certification - CMM operation	DF			Certification				1/
100 - 5S Principles of workplace organization	A. Walters		room3	General	SOP1111	<a href="#">f TDRSetUp grs</a>		1/
Certification - Bonding Tech II	HR			Certification	TRN0093	<a href="#">Data import form</a>		1/
100 - 5S Principles of workplace organization	HR			General	SOP1111	<a href="#">Data import form</a>		1/
Certification - Bonding Tech I	D. Gilliam			Certification	TRN0092	<a href="#">add link to scan</a>		1/
Corporate Quality Policy and Practices	Joe Walter			Quality	QA0001			2/
SOP2121 - Product A Disassembly and cleani	Fred	A	rm746	Doc/SOP	SOP2121			2/
SOP2121 - Product A Disassembly and cleani	Fred	B	rm746	Doc/SOP	SOP2121			2/
Corporate Quality Policy and Practices	Bill Qualidad			Quality	QA0001	<a href="#">link to class rps</a>		
999 - Work Instruction use and approval	FF			General				2
S232 - Sexual Harassment Training for Non-Su	FF			General				2/
S232 - Sexual Harassment Training for Non-Su	dd			General				3
S232 - Sexual Harassment Training for Supervi	ff			General				3
QA0002 - Document Control Procedure	Jim Liikust			Doc/SOP	QA0002	<a href="#">add link to scan</a>		2/
General Safety Training	Sam Highler			Safety	SAF0001	<a href="#">add link to scan</a>		4
QA0011 - Packing Procedure	M. Jackson	8	training room1	Doc/SOP	QA0001	<a href="#">Link Roster here</a>	Be sure to notifi	4/
Company Policy & Procedures Orientation	George Zimmer			General	GEN0001			
Peachtree Accounting - Shipping	Hal Burton			Doc/SOP	ACC0004			
General Safety Training	dd			Safety	SAF0001			5
Lathe Safety	dd			Safety				5

# Forms in Datasheet View

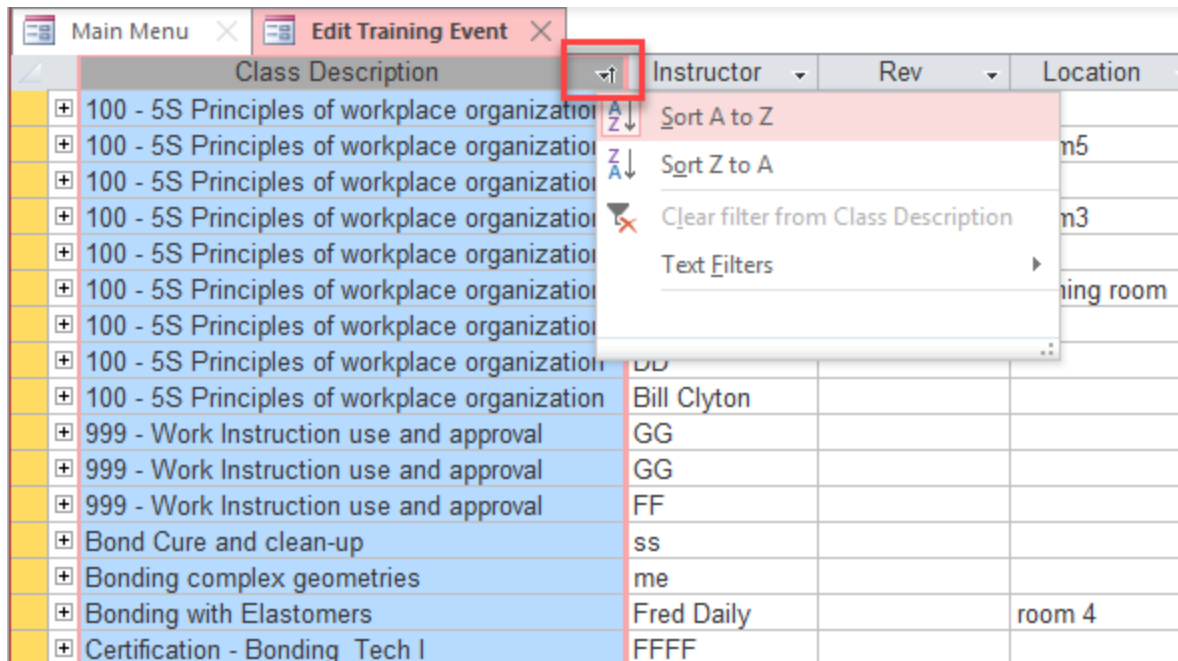
1) Right Click

2) Select Datasheet View

Class Description	Rev	Location	Category	Train
Certification - CMM operation			Certification	
Certification - CMM operation			Certification	
Certification - CNC operation		offsite	Certification	
Certification - Bonding Tech I			Certification	TRN
Certification - CMM operation			Certification	
Certification - Bonding Tech II			Certification	TRN
Certification - Bonding Tech I			Certification	TRN
Certification - Bonding Tech I			Certification	TRN
Certification - Bonding Tech I			Certification	TRN
Certification - Bonding Tech I			Certification	TRN
Certification - Bonding Tech I			Certification	TRN
Certification - Bonding Tech I	01	12	Certification	TRN
Certification - Lathe operation			Certification	

# 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

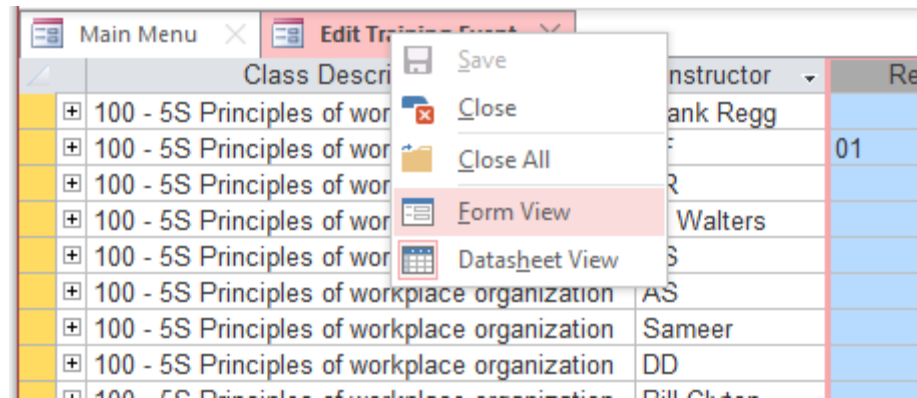


The screenshot shows a software window titled 'Edit Training Event' with a table. The table has columns for 'Class Description', 'Instructor', 'Rev', and 'Location'. A context menu is open over the 'Class Description' column header, showing options: 'Sort A to Z', 'Sort Z to A', 'Clear filter from Class Description', and 'Text Filters'. The table data is as follows:

Class Description	Instructor	Rev	Location
100 - 5S Principles of workplace organization	DD		
100 - 5S Principles of workplace organization	Bill Clyton		
100 - 5S Principles of workplace organization	GG		n5
100 - 5S Principles of workplace organization	GG		n3
100 - 5S Principles of workplace organization	FF		ing room
100 - 5S Principles of workplace organization	DD		
100 - 5S Principles of workplace organization	Bill Clyton		
999 - Work Instruction use and approval	GG		
999 - Work Instruction use and approval	GG		
999 - Work Instruction use and approval	FF		
Bond Cure and clean-up	ss		
Bonding complex geometries	me		
Bonding with Elastomers	Fred Daily		room 4
Certification - Bonding Tech I	FFFF		

# Return to Form View

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





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# **ADDING, EDITING, AND DELETING RECORDS**

# Editing a record

Main Menu Edit Training Event

Event ID: 215

Class Date:\* 3/12/2016

Date	Time
Start: 3/12/2016	11:00:00 AM
End:	

Duration (hrs): 1.00

Scheduled:  Complete:

Comment:

Recertification Required:  De

**Attendees:**

Employee Name	Employee ID	Pass	Sc
Boama, Michelle		<input type="checkbox"/>	
Josot, Duely	11	<input type="checkbox"/>	
*		<input checked="" type="checkbox"/>	

Record: 1 of 2 No Filter Search

To delete an attendee, select the ► to highlight the row and press "D"

Main Menu Edit Training Event

Event ID: 215

Class Date:\* 3/12/2018

Scheduled:  Complete:

**Attendees:**

Employee Name	Employee ID	Pass	Score1	Sc
Boama, Michelle		<input type="checkbox"/>		
Josot, Duely		<input type="checkbox"/>		
*		<input checked="" type="checkbox"/>		

Record: To delete an attendee, select the ► to highlight the row and press "D"

**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

The screenshot displays the 'Edit Training Event' window in the SBS Training Database. The main form contains fields for Event ID (267), Class Date (2/15/2019), Class Description (100 - 5S Principles of workplace organization), Instructor (Frank Regg), and Location. A confirmation dialog box is overlaid on the form, asking '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?' with 'Yes' and 'No' buttons. The 'Attendees' table at the bottom shows a single record with a blue selection bar. A vertical toolbar on the left contains a 'Record Selector' icon. A 'Filters' panel on the right includes checkboxes for 'Scheduled' and 'Completed', a 'Class' dropdown, and buttons for 'Apply Filter', 'Show All', and 'Datasheet'. 'Add New' and 'Save' buttons are also visible.

1) Click Record Selector to highlight the record

2) Press DELETE on the keyboard

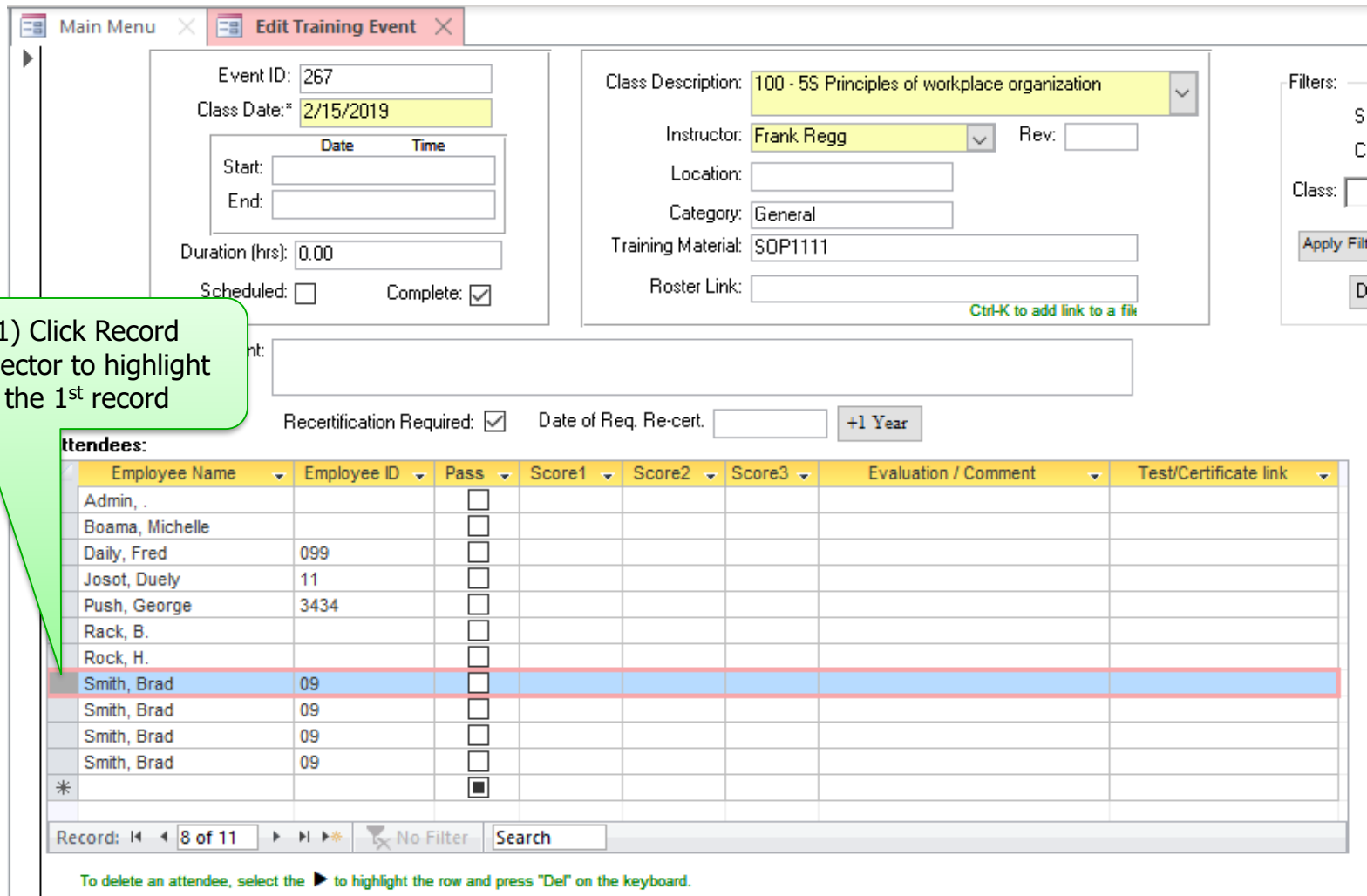
3) Confirm Record Deletion

**Attendees:**

Employee Name	Employee ID	Pass	Score1	Score2	Score3	Test/Certificate link
*		<input type="checkbox"/>				

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

# Delete Multiple Records



1) Click Record Selector to highlight the 1<sup>st</sup> record

Attendees:

Employee Name	Employee ID	Pass	Score1	Score2	Score3	Evaluation / Comment	Test/Certificate link
Admin, .		<input type="checkbox"/>					
Boama, Michelle		<input type="checkbox"/>					
Daily, Fred	099	<input type="checkbox"/>					
Josot, Duely	11	<input type="checkbox"/>					
Push, George	3434	<input type="checkbox"/>					
Rack, B.		<input type="checkbox"/>					
Rock, H.		<input type="checkbox"/>					
Smith, Brad	09	<input type="checkbox"/>					
Smith, Brad	09	<input type="checkbox"/>					
Smith, Brad	09	<input type="checkbox"/>					
Smith, Brad	09	<input type="checkbox"/>					
*		<input type="checkbox"/>					

Record: 8 of 11 No Filter Search

To delete an attendee, select the [arrow icon] to highlight the row and press "Del" on the keyboard.

# Delete Multiple Records

Event ID: 267  
Class Date: 2/15/2019  
Start:    
End:   
Duration (hrs): 0.00  
Scheduled:  Complete:

Class Description: 100 - 5S Principles of workplace organization  
Instructor: Frank Regg Rev:   
Location:   
Category: General  
Training Material: SOP1111  
Roster Link:

Filters: S C  
Class:   
Apply Filter

Comment:

Recent

**Attendees:**

Employee Name	Emp				Test/Certificate link
Admin, .					
Boama, Michelle					
Daily, Fred	099				
Josot, Duely	11				
Push, George	3434				
Rack, B.					
Rock, H.					
Smith, Brad	09				
Smith, Brad	09				
Smith, Brad	09				
Smith, Brad	09				
*					

Record: 14 Search

To delete an record press

2) Hold SHIFT key down and select last record selector

3) Press DELETE on the keyboard

4) Confirm Record Deletion

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# **FINDING AND FILTERING RECORDS**

# Finding records using global search

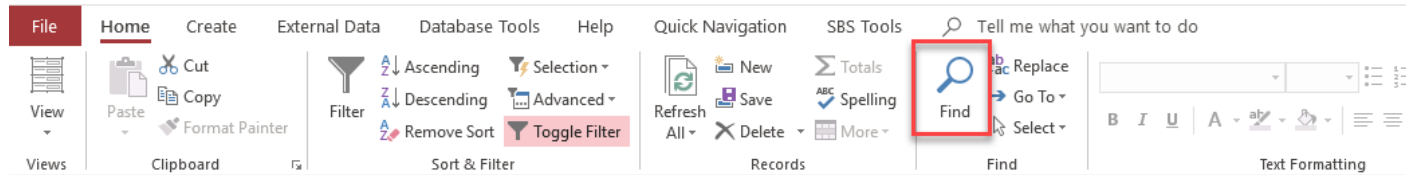
The screenshot shows the 'Edit Training Event' window. The 'Class Description' dropdown is set to 'Certification - CMM operation'. A callout points to this dropdown with the text: 'The 1<sup>st</sup> instance of the search string is displayed'. Another callout points to the 'Attendees' table with the text: '...Press ENTER on the keyboard to find the next occurrence'. A third callout points to the search field at the bottom with the text: 'Enter a text string into the search field'. The search field contains the text 'cert' and is labeled 'Filtered'. The 'Attendees' table has the following data:

Employee Name	Employee ID	Pass	Score1	Score2	Score3	Evaluation / Com
Josot, Duely	11	<input checked="" type="checkbox"/>				
Stolpah, Jack	1999	<input type="checkbox"/>				
*		<input type="checkbox"/>				

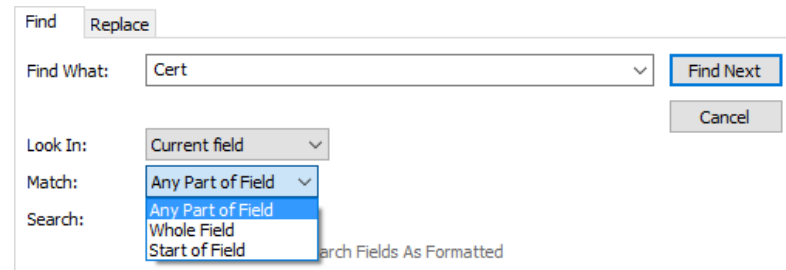
At the bottom of the window, the status bar shows 'Record: 5 of 59' and 'Filtered cert'.

# Finding records with advanced search

- ▶ Click on the form field that you want to search
- ▶ Click on the Magnifying Glass in the Ribbon



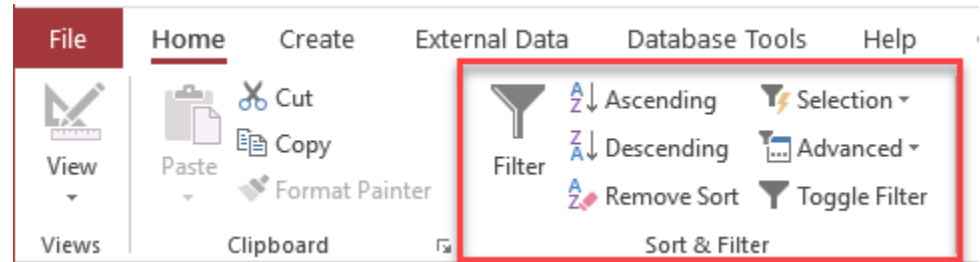
- ▶ Enter search criteria
  - ▶▶ Find What: (enter your search string)
  - ▶▶ Look In
    - Current field or
    - Current document (form) – same as global search
  - ▶▶ Match
    - Any Part of Field
    - Whole Field (exact match)
    - Start of field





# 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

The screenshot displays the 'Edit Training Event' form in the Sunday Business Systems application. The form includes the following fields and values:

- Event ID: 215
- Class Date: 3/12/2016
- Start: 3/12/2016 11:00:00 AM
- End: (empty)
- Duration (hrs): 1.00
- Scheduled:
- Complete:
- Class Description: Certification - CMM operation (SCHEDULED)
- Instructor: (empty)
- Location: (empty)
- Category: Certification
- Training Material: (empty)
- Roster Link: (empty)

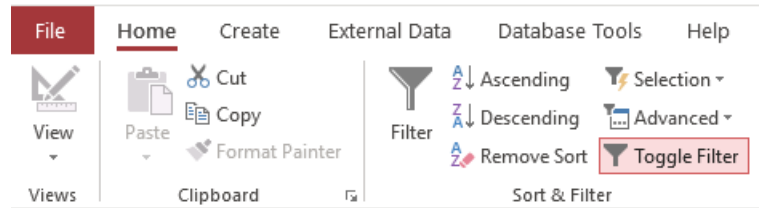
The 'Selection' dropdown menu is open, showing the following filter options:

- Begins With "Certification"
- Does Not Begin With "Certification"
- Contains "Certification"
- Does Not Contain "Certification"

The 'Class Description' field is highlighted in yellow, and the 'Certification' text is also highlighted in yellow. The 'Scheduled' checkbox is checked. The 'Event ID' is 215. The 'Class Date' is 3/12/2016. The 'Duration (hrs)' is 1.00. The 'Instructor' field is empty. The 'Location' field is empty. The 'Category' is Certification. The 'Training Material' field is empty. The 'Roster Link' field is empty. The 'Comment' field is empty.

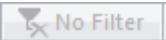
# Using Form Filters

- ▶ To reset the filter,
  - ▶▶ Click the "Toggle Filter" on the "Sort & Filter" ribbon



- ▶▶ Or Click the "Filtered" button at the bottom of the form



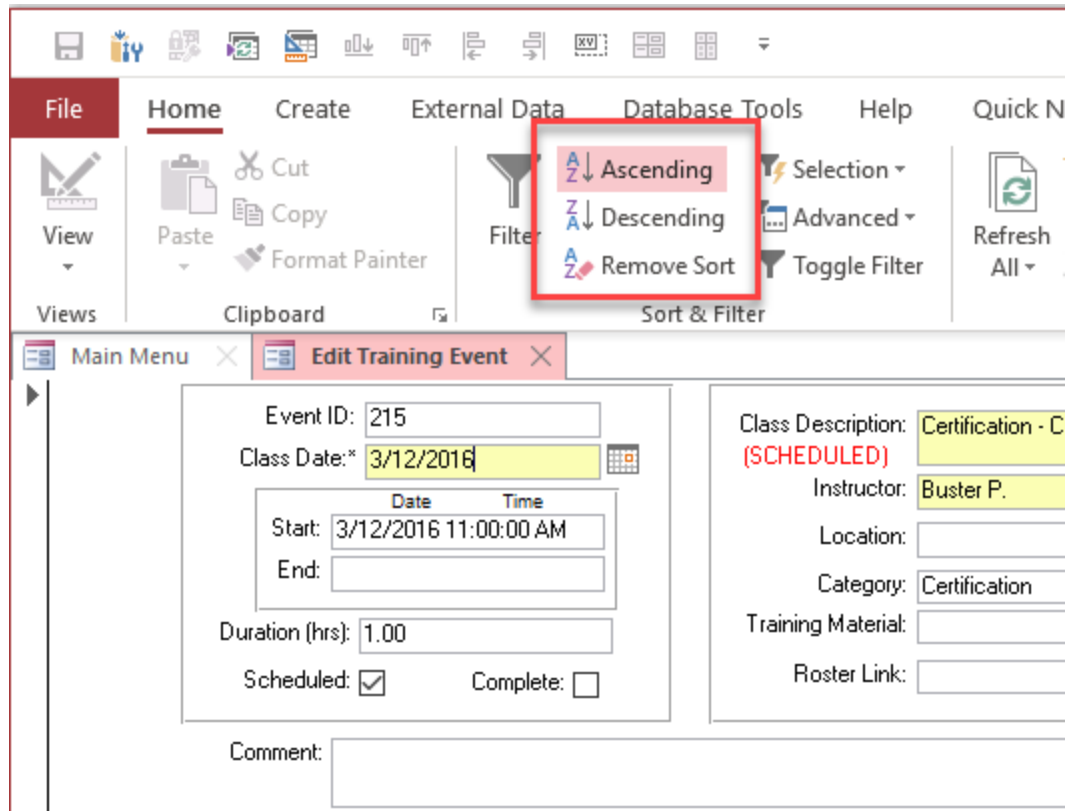
- ▶▶ Note that the button changes to  and the record count will change

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# **SORTING RECORDS**

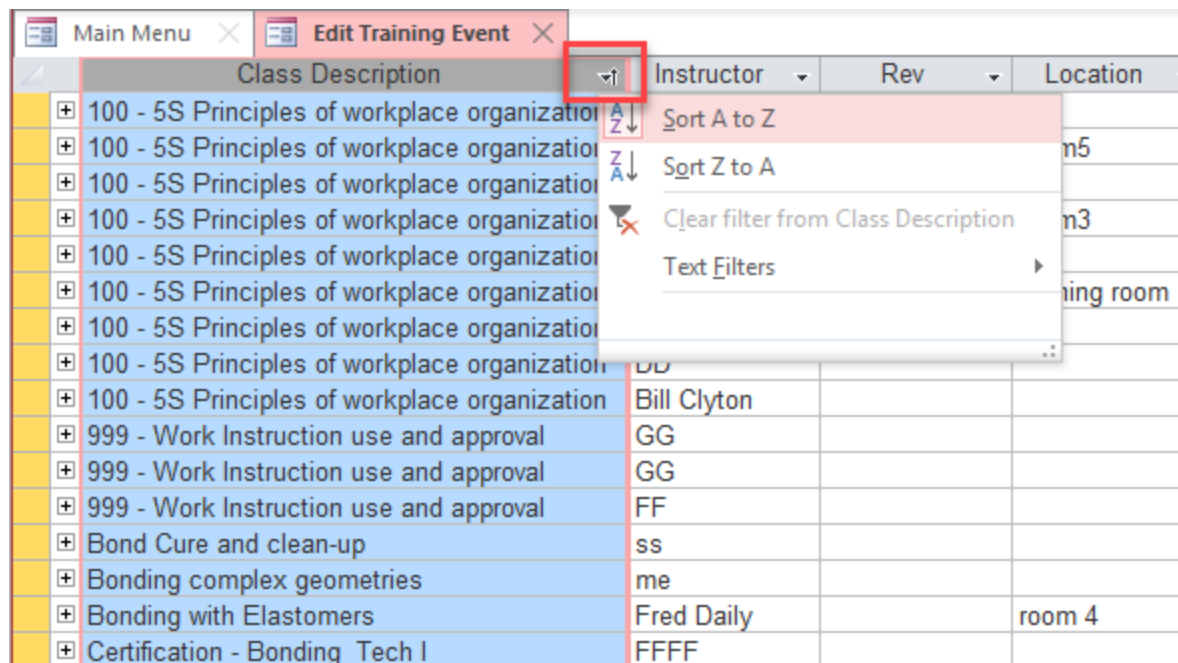
# Sort Records

- ▶ 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



The screenshot shows a software window titled "Edit Training Event" with a table. The table has columns for "Class Description", "Instructor", "Rev", and "Location". A context menu is open over the "Class Description" column header, showing options: "Sort A to Z", "Sort Z to A", "Clear filter from Class Description", and "Text Filters".

Class Description	Instructor	Rev	Location
100 - 5S Principles of workplace organization	DD		
100 - 5S Principles of workplace organization	Bill Clyton		
999 - Work Instruction use and approval	GG		
999 - Work Instruction use and approval	GG		
999 - Work Instruction use and approval	FF		
Bond Cure and clean-up	ss		
Bonding complex geometries	me		
Bonding with Elastomers	Fred Daily		room 4
Certification - Bonding Tech I	FFFF		

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# **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 <b>Print</b> dialog box for reports	Ctrl+P
Open the <b>Find and Replace</b> dialog box	Ctrl+H
Add a new record	Ctrl+Plus Sign (+)
Exit Access	Alt+F4

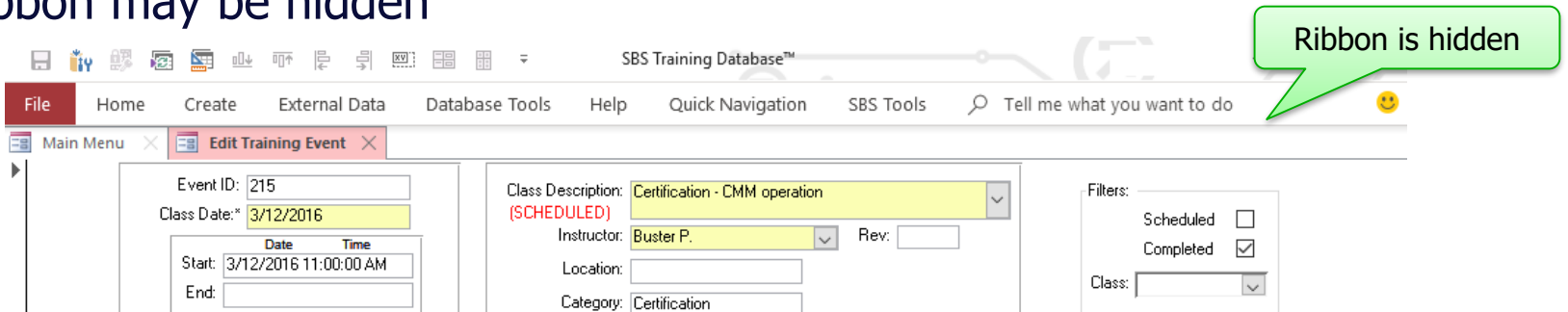


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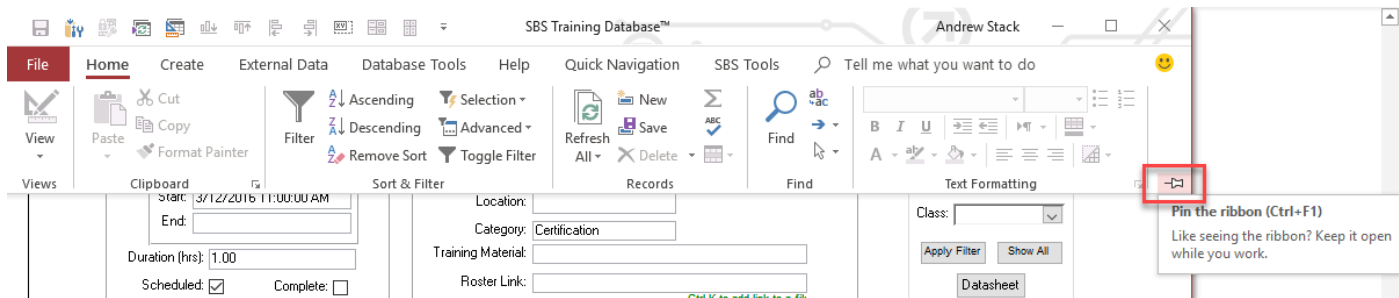
# **CUSTOMIZE ACCESS**

# Hide or Display the Access Ribbon

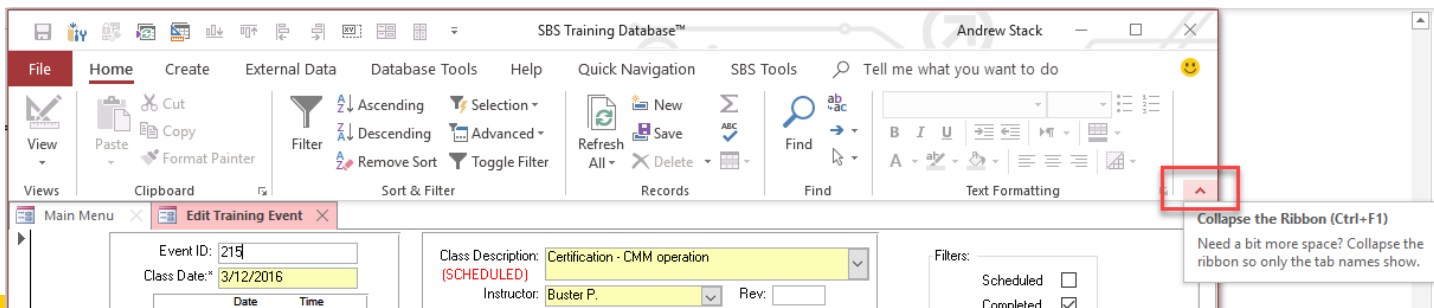
## ▶ Ribbon may be hidden



## ▶ Pin the ribbon

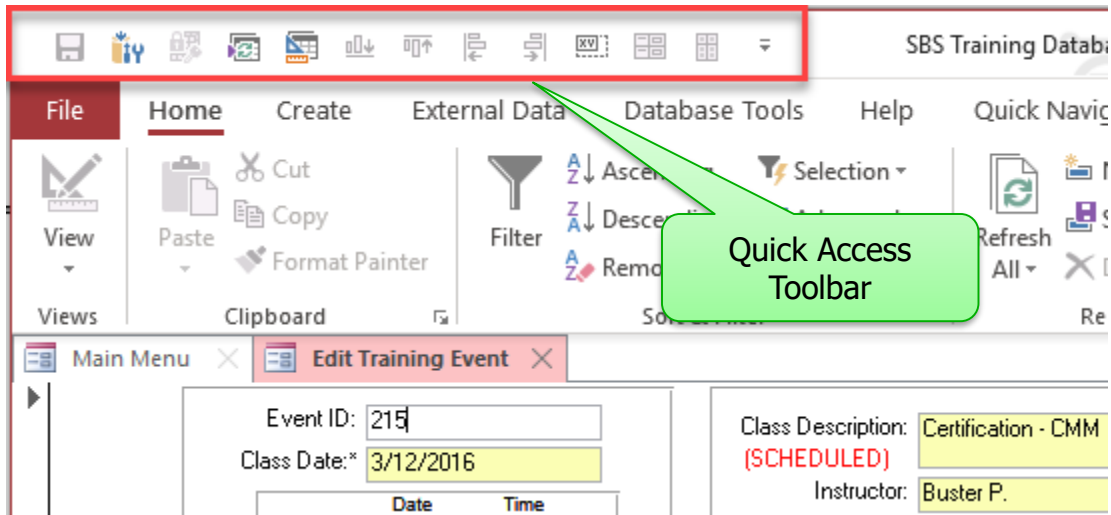


## ▶ Collapse the ribbon



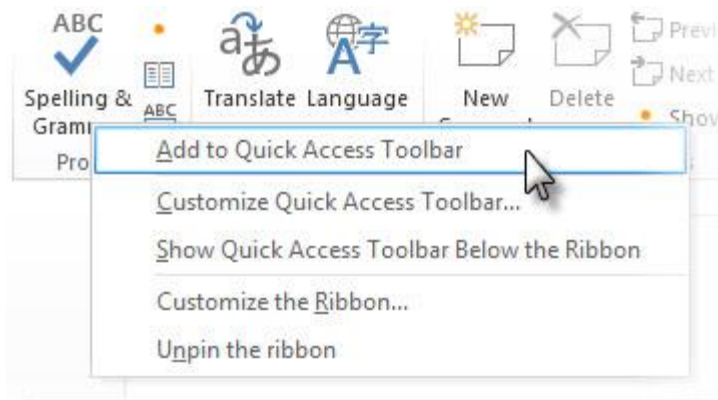
# Quick Access Toolbar

- ▶ Quick Access Toolbar is great for commonly used functions

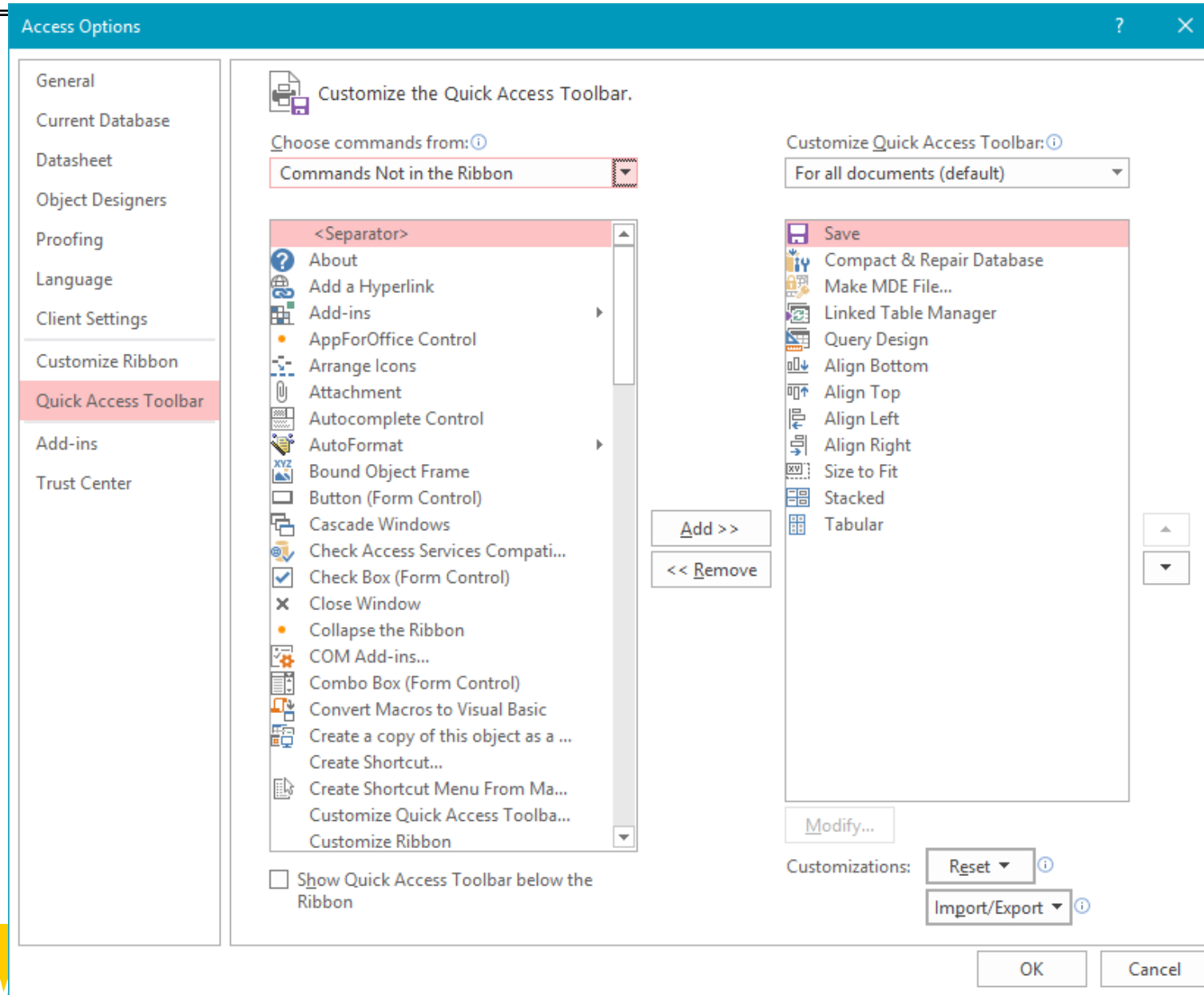


# Quick Access Toolbar

- ▶ 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



ibbon

## 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
- Preventive Maintenance

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