

susanguggenheim-is.com presents:

Microsoft® Office Access™ Training

**Choose between Access
and Excel**

Course contents

- Overview: Which to choose when?
- Lesson: Right questions, right program

The lesson concludes with a short set of questions to test your understanding of the material.

Choose between Access and Excel

Overview: Which to choose when?



Confusion about when to use Microsoft Office Access™ or Microsoft Office Excel® is understandable, since on the surface the programs look alike.

To choose, ask yourself a few simple questions about how you want to organize your data, and about related issues such as the amount of data you want to store and manage.

Your answers can help you get more done in less time, so keep an open mind!

Choose between Access and Excel

Course goals

- Learn to choose the right program — Access or Excel
- Determine whether to use a relational or flat data structure.

Choose between Access and Excel

Lesson

Right questions, right program

Right questions, right program



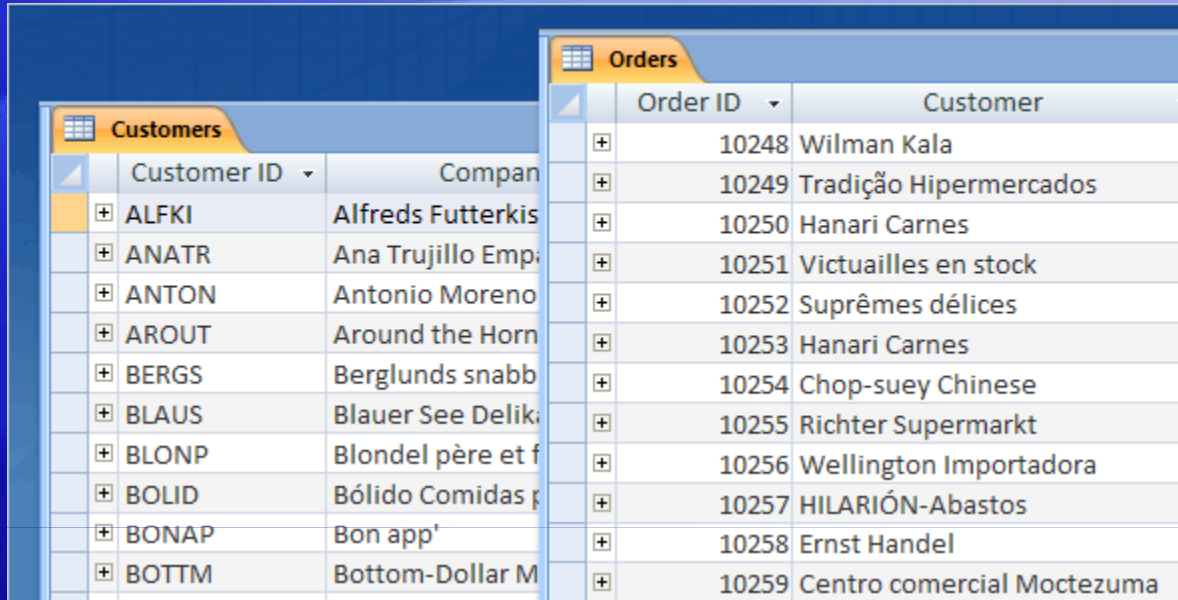
If you're having trouble choosing between Access and Excel, take a moment to answer an important question.

Do you need to organize your data into a relational data structure or a flat data structure?

Yes, those are geek terms, but don't let them intimidate you. Deciding on a structure isn't hard, and this course will walk you through each type of data structure and how to choose between the two.

Choose between Access and Excel

“Relational” means data in multiple tables



The screenshot shows two overlapping tables from a database application. The 'Customers' table is on the left, and the 'Orders' table is on the right. Both tables have a plus sign in the first column, indicating expandable rows.

Customer ID	Company Name
ALFKI	Alfreds Futterkiska
ANATR	Ana Trujillo Emparedados y helados
ANTON	Antonio Moreno
AROUT	Around the Horn
BERGS	Berglunds snabbköp
BLAUS	Blauer See Delikatessen
BLONP	Blondel père et fils
BOLID	Bólido Comidas preparadas
BONAP	Bon app' d'Amérique
BOTTM	Bottom-Dollar Meats

Order ID	Customer
10248	Wilman Kala
10249	Tradição Hipermercados
10250	Hanari Carnes
10251	Victuailles en stock
10252	Suprêmes délices
10253	Hanari Carnes
10254	Chop-suey Chinese
10255	Richter Supermarkt
10256	Wellington Importadora
10257	HILARIÓN-Abastos
10258	Ernst Handel
10259	Centro comercial Moctezuma

A relational data structure divides your information into logical pieces, and places each piece in a separate table.

Now, wasn't that easy?

For example, a sales database typically puts information about customers — their names, addresses, and other key facts — in one table, and information about what those customers buy in another table.

Organizing your data that way can make it quite powerful.

Choose between Access and Excel

The advantages of relating



A relational structure has several advantages.

- It lets you answer important business questions, such as who bought the most (or least) of your product last week. The figure above shows you how this can work.
- Using separate tables can make your data easier to manage, because each table holds just part of your information.

Choose between Access and Excel

The advantages of relating

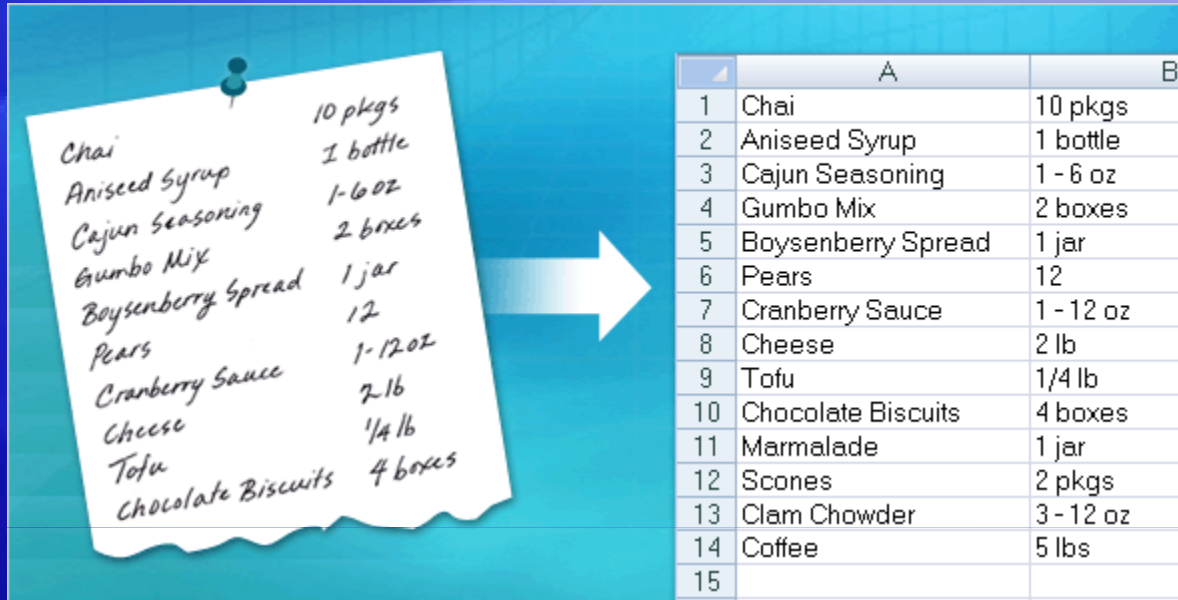


A relational structure has several advantages.

- Finally, a relational structure helps keep your information accurate, because you can prevent users from entering data in the wrong table.

Choose between Access and Excel

Flat keeps it all together



	A	B
1	Chai	10 pkgs
2	Aniseed Syrup	1 bottle
3	Cajun Seasoning	1 - 6 oz
4	Gumbo Mix	2 boxes
5	Boysenberry Spread	1 jar
6	Pears	12
7	Cranberry Sauce	1 - 12 oz
8	Cheese	2 lb
9	Tofu	1/4 lb
10	Chocolate Biscuits	4 boxes
11	Marmalade	1 jar
12	Scones	2 pkgs
13	Clam Chowder	3 - 12 oz
14	Coffee	5 lbs
15		

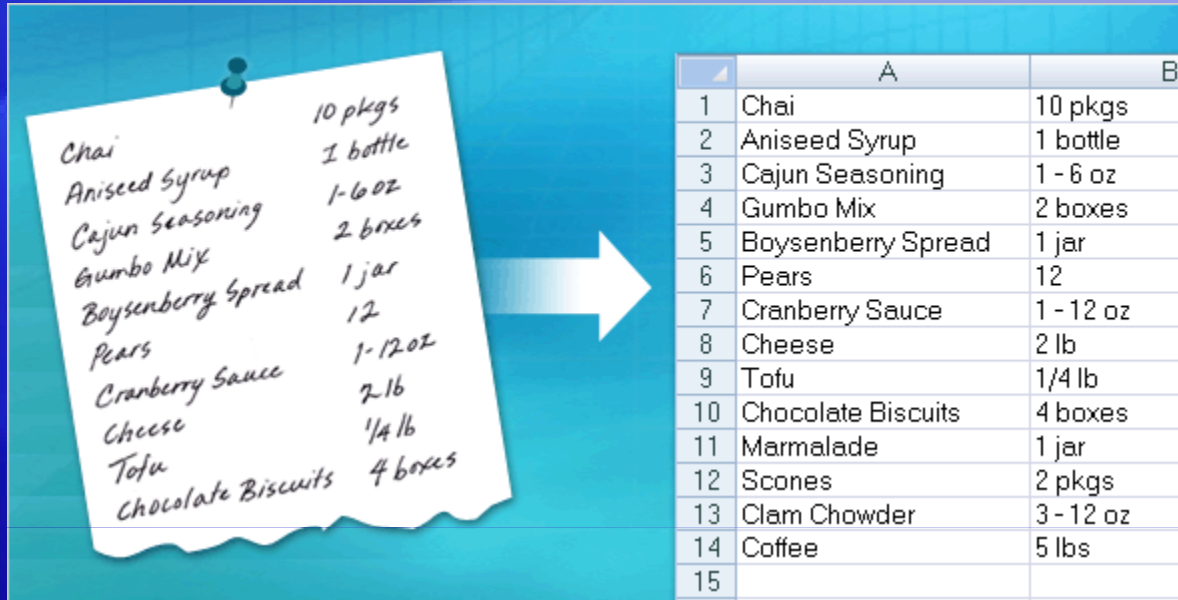
In contrast to a relational data structure, a flat data structure is a simple list that isn't related to other data.

For example, a grocery list is a flat file, and so is a list of your friends and relatives.

Flat data structures are easy to create, and they're also easy to maintain, as long as you don't have too much information.

Choose between Access and Excel

Flat keeps it all together



	A	B
1	Chai	10 pkgs
2	Aniseed Syrup	1 bottle
3	Cajun Seasoning	1 - 6 oz
4	Gumbo Mix	2 boxes
5	Boysenberry Spread	1 jar
6	Pears	12
7	Cranberry Sauce	1 - 12 oz
8	Cheese	2 lb
9	Tofu	1/4 lb
10	Chocolate Biscuits	4 boxes
11	Marmalade	1 jar
12	Scones	2 pkgs
13	Clam Chowder	3 - 12 oz
14	Coffee	5 lbs
15		

Simple lists work nicely in Excel. In fact, Excel is designed to create and maintain flat files.

In case you're wondering, each table in a relational structure is also a flat file.

The only real difference between the types of structures is that with flat files, you don't need to relate the data in one list to the data in another. Each list is useful by itself.

Choose between Access and Excel

To relate, or not to relate?

Customer ID	Company Name	Contact Name
GROSR	GROSELLA-Restaurante	Manuel Pereira
HANAR	Hanari Carnes	Mario Pontes
HILAA	HILARIÓN-Abastos	Carlos Hernández
HUNGC	Hungry Coyote Import Store	Yoshi Latimer

Order ID	Customer	Employee	Order Date
10248	Hanari Carnes	Peacock, Margaret	08-Jul-1996
10249	Tradição Hipermercados	Suyama, Michael	05-Jul-1996
10250	Wilman Kala	Buchanan, Steven	04-Jul-1996
10251	Hanari Carnes	Leverling, Janet	10-Jul-1996
10252	Suprêmes délices	Peacock, Margaret	09-Jul-1996
10253	Victuailles en stock	Leverling, Janet	08-Jul-1996

So how can you tell if you need a relational structure?

Actions and repeated data need a relational structure.

Take the example pictured here:

1. The customer Hanari Carnes...
2. ...places an order on July 8...
3. ...and another on July 10. One customer, many actions.

Choose between Access and Excel

To relate, or not to relate?

The screenshot shows two tables in Microsoft Access. The 'Customers' table has columns: Customer ID, Company Name, and Contact Name. The 'Orders' table has columns: Order ID, Customer, Employee, and Order Date. Red boxes highlight the following data:

Customers	Orders
GROSR	10248
HANAR	10249
HILAA	10250
HUNGC	10251
	10252
	10253

Red arrows indicate that the 'HANAR' customer is associated with orders 10249 and 10251.

To know for sure, ask yourself these questions.

- First, do you have a lot of repeated data? If so, you can put that repeated data into another table and create a relational structure. Doing so can save you time and effort because you don't have to reenter the same information each time you create a new record.

Choose between Access and Excel

To relate, or not to relate?

Customer ID	Company Name	Contact Name
GROSR	GROSELLA-Restaurante	Manuel Pereira
HANAR	Hanari Carnes	Mario Pontes
HILAA	HILARIÓN-Abastos	Carlos Hernández
HUNGC	Hungry Coyote Import Store	Yoshi Latimer

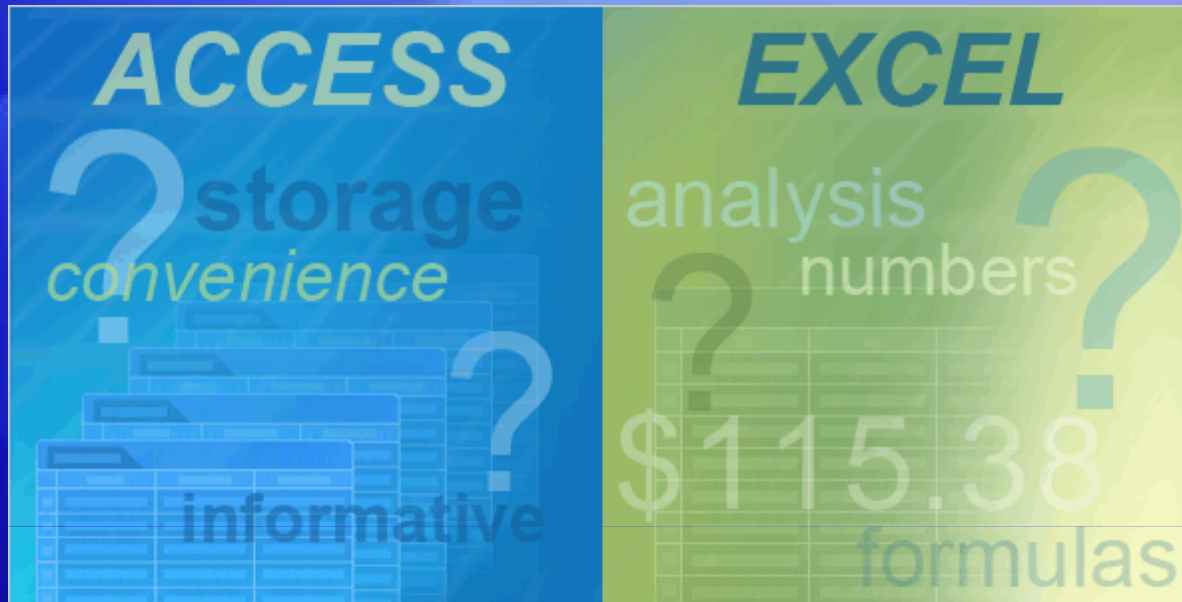
Order ID	Customer	Employee	Order Date
10248	Hanari Carnes	Peacock, Margaret	08-Jul-1996
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10250	Wilman Kala	Buchanan, Steven	04-Jul-1996
10251	Hanari Carnes	Leverling, Janet	10-Jul-1996
10252	Suprêmes délices	Peacock, Margaret	09-Jul-1996
10253	Victuailles en stock	Leverling, Janet	08-Jul-1996

To know for sure, ask yourself these questions.

- Second, do you want to track actions or events? For example, do you want to track sales or customer complaints? Any time you want to track an action, a relational data structure usually works best.

Choose between Access and Excel

More questions, more clarity



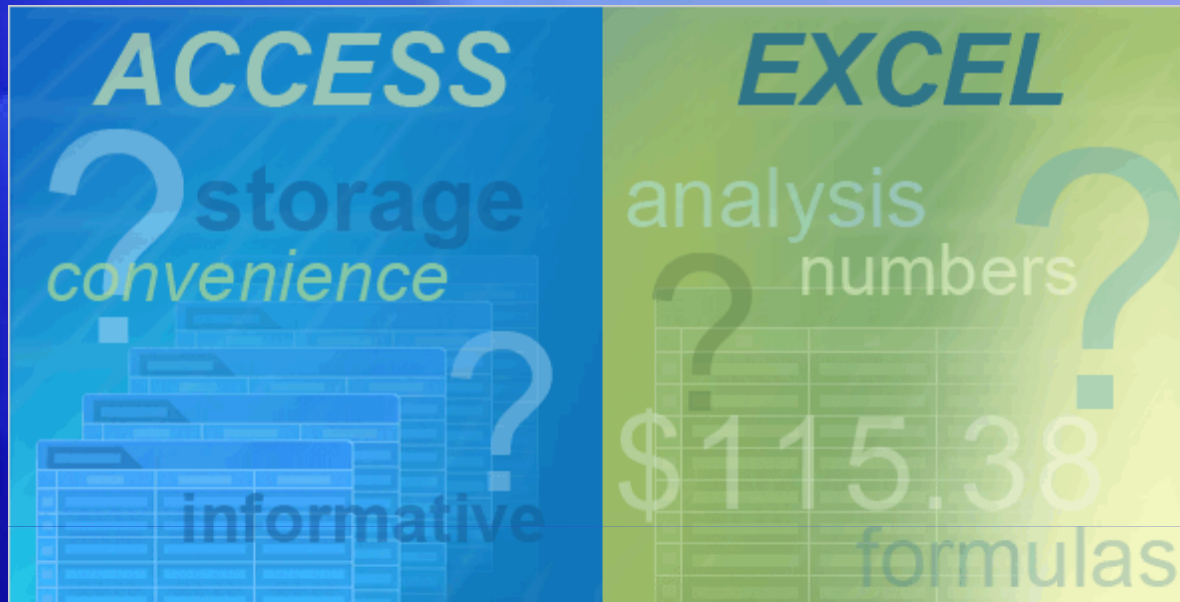
While data structures are important, they aren't the only reasons to choose Access or Excel.

A few more questions can help you decide between the two.

- First, do you need to store and manage your data, or do you need to analyze that data? If storage is your primary goal, then use Access. But for analysis, use Excel.

Choose between Access and Excel

More questions, more clarity



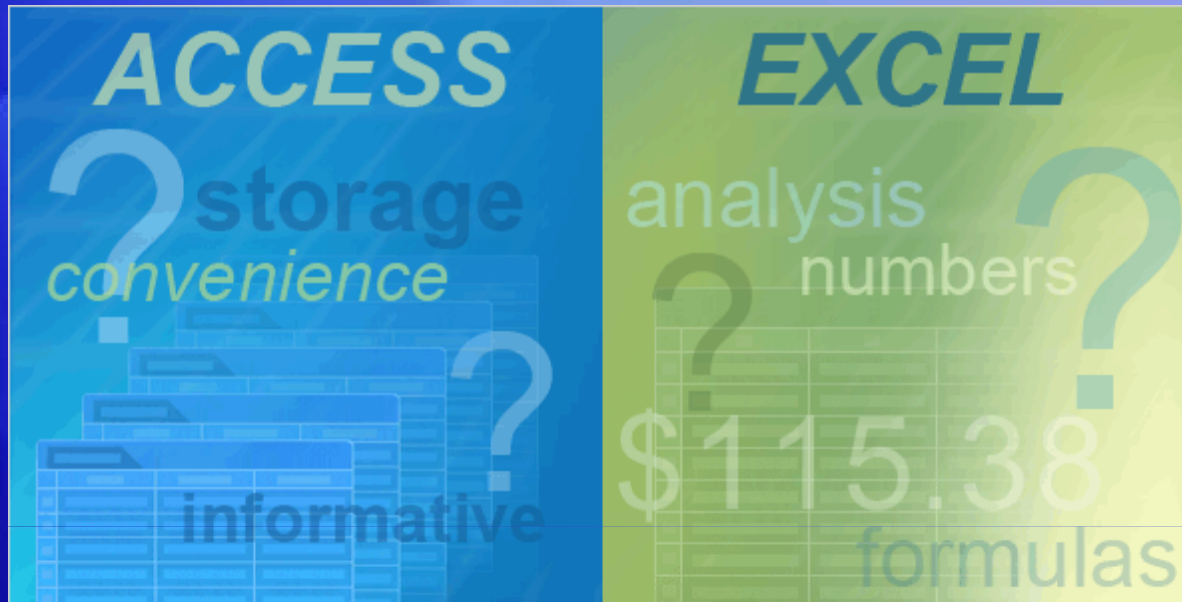
While data structures are important, they aren't the only reasons to choose Access or Excel.

A few more questions can help you decide between the two.

- Second, do you have a lot of data? For example, is your Excel worksheet so large that it's hard to use? If so, even if you have flat data, Access can make your information easier to find.

Choose between Access and Excel

More questions, more clarity



While data structures are important, they aren't the only reasons to choose Access or Excel.

A few more questions can help you decide between the two.

- Is your data mostly text, or is it numeric? Access can store a large amount of text — up to two gigabytes in a single database — while Excel is designed to store numbers and perform sophisticated calculations on them.

Choose between Access and Excel

Solid reasons to use Access



Access equals greater “access” to data.

So here are a few more reasons to use it.

- Do you need to help users enter data? For example, some users find it hard to enter data in a grid of cells. With Access, you can work around that problem by creating data entry forms that make it easier to enter data accurately.

Choose between Access and Excel

Solid reasons to use Access



Access equals greater “access” to data.

So here are a few more reasons to use it.

- Do your users need reports? With Access, you can create reports that users can run at any time.

Choose between Access and Excel

Solid reasons to use Access



Access equals greater “access” to data.

So here are a few more reasons to use it.

- Access is also a better choice when you need to have multiple users working on the data at the same time. Several users can work on the same data, because Access locks a record only while a user changes it.

Choose between Access and Excel

Solid reasons to use Access



Access equals greater “access” to data.

So here are a few more reasons to use it.

- If you need to connect to several data sources and edit the data directly in those sources, then Access is your choice.

Choose between Access and Excel

Solid reasons to use Excel



Where does Excel shine?

With numbers! You can run sophisticated what-if models and cost-benefit analyses that you can't with Access.

Do you need PivotTable reports? These are interactive tables that allow you to rotate rows and columns and see different summaries of your data.

Excel makes it easier to work with PivotTable reports and PivotChart reports — charts based on those tables.

Choose between Access and Excel

Solid reasons to use Excel



Where does Excel shine?

With numbers! You can run sophisticated what-if models and cost-benefit analyses that you can't with Excel.

Do you want to convey information visually, by using charts or data bars? Excel is your tool.

Finally, not everyone has Access, and not everyone knows how to use it. Your coworkers may prefer Excel.

Choose between Access and Excel

Test question 1

Relational data structures don't contain flat data. (Pick one answer.)

1. True.
2. False.

Choose between Access and Excel

Test question 1: Answer

False.

Each table in a relational data structure is a flat file. You put them into a relational structure because the data in each table is related in some way, such as customers to sales.

Choose between Access and Excel

Test question 2

Excel is an ideal tool for editing data contained in a separate database. (Pick one answer.)

1. True.
2. False.

Choose between Access and Excel

Test question 2: Answer

False.

You can use Excel to display charts contained in a separate database, but only Access allows you to edit the data.

Choose between Access and Excel

Test question 3

**You should use Access in which of the following scenarios?
(Pick one answer.)**

1. You need a relational data structure.
2. Multiple users need to work on the data simultaneously.
3. You have a large amount of text data.
4. All of the above.

Choose between Access and Excel

Test question 3: Answer

All of the above.

Choose between Access and Excel

Quick Reference Card

For a summary of the tasks covered in this course, view the [Quick Reference Card](#).

Choose between Access and Excel