

Access Forms 1: Building a Form



Access Forms 1: Building a Form

1.0 hours

Departments Form.....	3
Create an instant Form with Subdatasheet	3
Employees Forms.....	4
Create an instant Form with Split Form	4
Create an instant Form with Multiple Items	5
Create a Form with Wizard (Justified).....	6
Patients Form.....	7
Create a Form in Design view	7
Resizing	8
Moving with the Mouse.....	8
Moving with the Keyboard	8
Blank Text Boxes and Labels	8
Build a Form in Design view	8
Organize Form Controls.....	9
Making Multiple Selections	9
Arrange Size and Space	9
Aligning Objects	9
Navigating Records in the Form	10
Tab Order	10
Command Buttons	10



Pandora Rose Cowart

Education/Training Specialist II
Educational Technologies, UF Health IT Training

E-206, Professional Park
PO Box 100002
Gainesville, FL 32610-0002

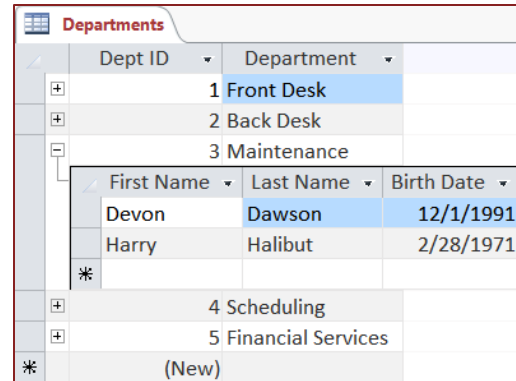
(352) 273-5051
prcowart@ufl.edu
<http://training.health.ufl.edu>

Class Evaluation: <https://go.ufl.edu/trainingeval>

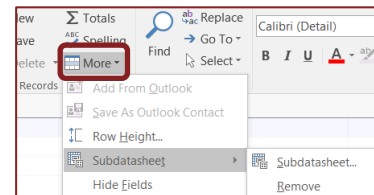
Departments Form

When you open the Departments table you can see that it is in a relationship by the expand (+) buttons at the beginning of each record. When you click on the button Access will show you the employees that work for that department. One department can have Many employees.

- If the table is participating in multiple relationships, the first time you click on the expand button, Access may ask you to choose the subdatasheet.
- The **Subdatasheet** can be changed or removed from the **More** menu in the **Records** group on the **Home** tab.
- The attached Subdatasheet will embed a copy of the table inside an instant Form. This is fine for simple data entry, but if you want to do anything beyond, you may be better off creating a subForm.

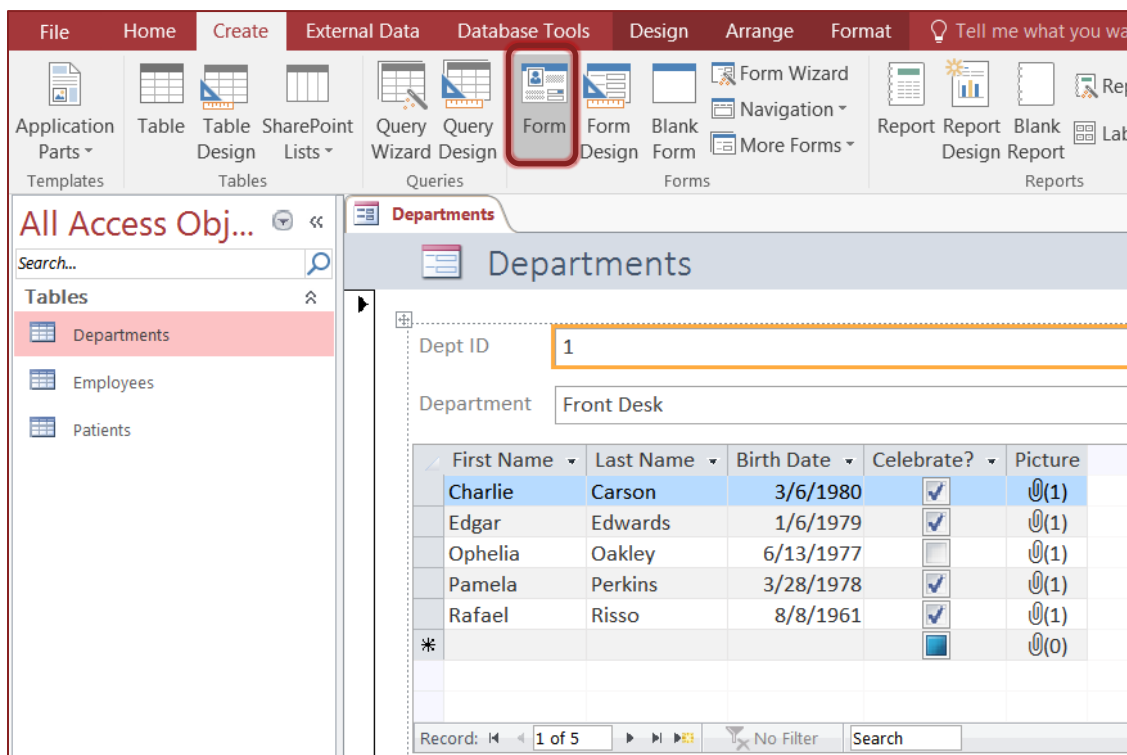


Dept ID	Department	First Name	Last Name	Birth Date
1	Front Desk	Devon	Dawson	12/1/1991
2	Back Desk			
3	Maintenance			
4	Scheduling			
5	Financial Services			
(New)				



Create an instant Form with Subdatasheet

1. Select Departments Table
2. From the **Create** Tab, in the **Forms** group, click the **Form** button
3. Close and Save as **Departments**



Dept ID	Department	First Name	Last Name	Birth Date	Celebrate?	Picture
1	Front Desk	Charlie	Carson	3/6/1980	<input checked="" type="checkbox"/>	0(1)
		Edgar	Edwards	1/6/1979	<input checked="" type="checkbox"/>	0(1)
		Ophelia	Oakley	6/13/1977	<input type="checkbox"/>	0(1)
		Pamela	Perkins	3/28/1978	<input checked="" type="checkbox"/>	0(1)
		Rafael	Risso	8/8/1961	<input checked="" type="checkbox"/>	0(1)
*					<input type="checkbox"/>	0(0)

Employees Forms

The Employees table has several data types. Looking at the design and the data we can see several differences.

First Name	Last Name	Birth Date	Celebrate?	Dept ID	Picture
Annie	Appleton	6/18/1965	<input checked="" type="checkbox"/>	Back Desk	📎(1)
Billie	Blackthorn	3/5/1962	<input type="checkbox"/>	Back Desk	📎(1)
Charlie	Carson	3/6/1980	<input checked="" type="checkbox"/>	Front Desk	📎(1)
Devon	Dawson	12/1/1991	<input checked="" type="checkbox"/>	Maintenance	📎(1)
Edgar	Edwards	1/6/1979	<input checked="" type="checkbox"/>	Front Desk	📎(1)
Frances	Fraser	10/13/1990	<input type="checkbox"/>	Back Desk	📎(1)
Greta	Garber	1/1/1980	<input type="checkbox"/>	Financial Services	📎(1)

Field Name	Data Type
Emp ID	AutoNumber
Emp First Name	Short Text
Emp Last Name	Short Text
Emp Birth Date	Date/Time
Emp Celebrate	Yes/No
Emp Dept ID	Number
Emp Picture	Attachment

General	Lookup
Field Size	255
Format	
Input Mask	
Caption	First Name
Default Value	

- Emp ID is the AutoNumber key in this table, but we don't see it in the Datasheet view. This is because the field has been hidden. Right-click on any fieldname in the Datasheet and choose **Unhide fields** to show and hide the columns of this view.
- Field Name vs. Caption – The titles showing in the Design view have "Emp" in front of each field name, but the titles in the Datasheet view do not. This is because of the *Caption* property, shown above.
- Yes/No fields appear as check boxes in the datasheet view.
- Attachment fields show as a paperclip with the number of attachments in parentheses.
- In the Datasheet view, the Dept ID is showing the name of the department, but in the Design view it's listed as a number. This is a clue that the field has Lookup properties.

Create an instant Form with Split Form

Split Forms shows the Form view and datasheet view in the same window. The split settings can be adjusted in the Form properties. This includes where the datasheet appears (*orientation*), and if you can edit the data in the datasheet portion.

Property Sheet	
Selection type: Form	
Form	
Format	Data
Split Form Size	2.25"
Split Form Orientation	Datasheet on Bottom
Split Form Splitter Bar	Yes
Split Form Datasheet	Allow Edits
Split Form Printing	Datasheet Only
Save Splitter Bar Position	Yes

1. Select Employee Table
2. From the **Create** Tab, in the **Forms** group, click the **More Forms** option, choose **Split Form**.
 - The top half of the window will vary based on your window/screen size.

3. Close and save as Employee Split Form

Employee Split

Employees

First Name: Annie Picture: 📎(1)

Last Name: Appleton

Birth Date: 6/18/1965

Celebrate? ☒

Dept ID: Back Desk

First Name	Last Name	Birth Date	Emp Celebrate	Emp Dept ID	📎
Annie	Appleton	6/18/1965	<input checked="" type="checkbox"/>	Back Desk	📎(1)
Billie	Blackthorn	3/5/1962	<input type="checkbox"/>	Back Desk	📎(1)
Charlie	Carson	3/6/1980	<input checked="" type="checkbox"/>	Front Desk	📎(1)

Create an instant Form with Multiple Items

Multiple Items Forms show multiple records like a datasheet, but each record can have Form objects, such as a button on each record, and can display Formatting you would not see in the datasheet view, such as images instead of the attachment paperclip.

- The Form Wizard calls this a *Tabular* layout.
- To modify a single record Form into a multiple items Form change the Form property **Default View** to *Continuous*.



1. Select Employee Table
2. From the **Create** Tab, in the **Forms** group, click the **More Forms** option, choose **Multiple Items**
3. Close and save as **Employee Multiple Items**

Employees Multiple Items						
Employees						
	First Name	Last Name	Birth Date	Celebrate?	Dept ID	Picture
▶	Annie	Appleton	6/18/1965	<input checked="" type="checkbox"/>	Back Desk	
	Billie	Blackthorn	3/5/1962	<input type="checkbox"/>	Back Desk	
	Charlie	Carson	3/6/1980	<input checked="" type="checkbox"/>	Front Desk	
	Devon	Dawson	12/1/1991	<input checked="" type="checkbox"/>	Maintenance	
	Edgar	Edwards	1/6/1979	<input checked="" type="checkbox"/>	Front Desk	
	Frances	Fraser	10/13/1990	<input type="checkbox"/>	Back Desk	
	Greta	Garber	1/1/1980	<input type="checkbox"/>	Financial Services	
	Harry	Halibut	2/28/1971	<input checked="" type="checkbox"/>	Maintenance	
	Ingrid	Ingalls	7/22/1959	<input type="checkbox"/>	Scheduling	

Create a Form with Wizard (Justified)

The wizard allows us to pick the fields from one or more (related) tables and queries, set a layout, and automatically saves the result.



1. Select Employee Table.
2. From the **Create** Tab, in the **Forms** group, click the **Form Wizard**.
3. Use the double arrow to bring over all the fields from the employee table, then use the single arrow to exclude the Dept ID.
4. Choose the **Justified** layout.
This layout will try to fit fields on the same row whenever possible.

- Columnar – Single Form



- Tabular – Multiple Items



- Datasheet – Table view



5. Title the Form **Employees Justified**.

Access looks at the field size property to decide the size of the text box. If you look in the table, you'll see the field size for the names is set to 255.

Form Wizard

Which fields do you want on your form?
You can choose from more than one table or query.

Tables/Queries
Table: Employees

Available Fields:
Emp ID

Selected Fields:
Emp First Name
Emp Last Name
Emp Birth Date
Emp Celebrate
Emp Dept ID
Emp Picture

Form Wizard

What layout would you like for your form?

☐ Columnar
☐ Tabular
☐ Datasheet
☒ Justified

Form Wizard

What title do you want for your form?
Employees Justified

That's all the information the wizard needs to create your form.

Do you want to open the form or modify the form's design?

☒ Open the form to view or enter information.
☐ Modify the form's design.

Cancel < Back Next > Finish

Employees Justified

Employees Justified

First Name
Annie

Last Name
Appleton

Birth Date
6/18/1965

Celebrate?
☒

Dept ID
Back Desk

Picture

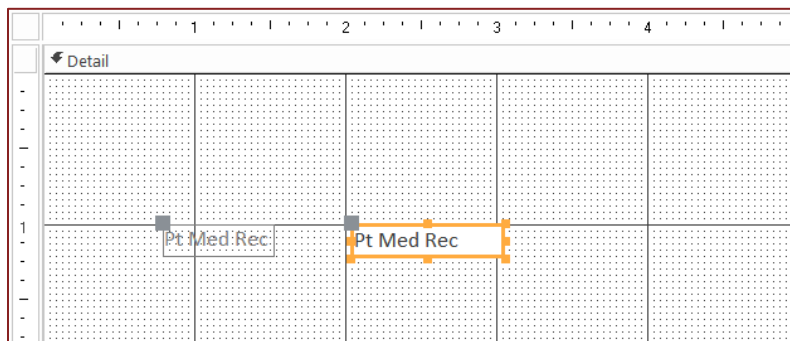
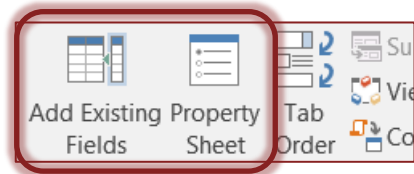
Patients Form

The wizard and instant Forms are a good starting point, but there's nothing quite like building your own.

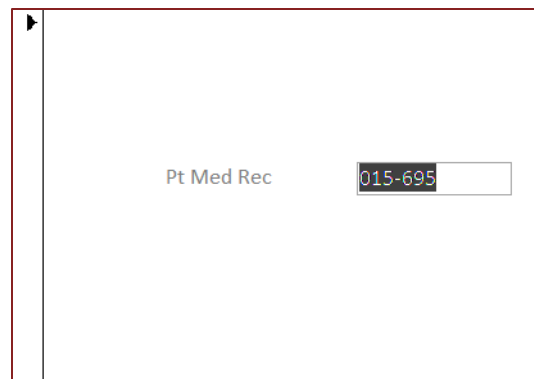
Create a Form in Design view



- From the **Create** Tab, in the **Forms** group, click the **Form Design**.
- Open the property sheet.
 - Button on the far right of the Design tab
 - Right-click menu (almost anywhere)
 - Double-click (almost anywhere)
 - Keyboard shortcuts – Alt-Enter and Function key F4
- Click in the Grid to see the *Section Detail* properties.
 - Change the *Height* property to 2"
- Click outside the grid to see the *Form* properties.
 - Change the *Width* property to 5"
 - Change the *Record Source* property to **Patients**
 - Allow Datasheet View: No; Allow Layout View: No*
- Open the field list with the **Add Existing Fields** button on the Design tab.
 - If you need a field that is not showing on the Field List you need to adjust your record source. The field has to exist in a table or Query to be on this list. Avoid using the "Show All Tables" option, as that will embed a hidden Query and may cause issues later.
- Drag field **Pt Med Rec** from Field List onto the Form approximately 1" down, 2" across.



- Access drops two boxes on the Form. The left box is called the **Label**, the right is a **Text Box**.
- Labels** appear the same in every view, and will show the caption property if one was set in the table.
- Text boxes** show the field name in the Design view and the data in the Layout and Form views.
- Be aware that the label always drops over an inch away from the text box, so when you add the fields from the field list, remember to give yourself a buffer of space.



Resizing

When you place your mouse on the any of the selected objects sizing handles – the small boxes at the top, bottom, left right, and corners of your selection – you will get a double arrow (↔↕↔↕↔↕). Click and drag the mouse and the box will resize the selected items. Access anchors in the upper left corner, so you will resize your object from this corner.

The Shift key used in conjunction with the arrow keys on the keyboard, allow you to adjust the size of your object. Using Shift and Ctrl will resize a quarter of a grid point at a time. The Arrange has a Size group where you can adjust the objects relative to each other.

Moving with the Mouse

When you place your mouse anywhere on the edge of the text box, between the sizing handles, your mouse arrow will turn into the move pointer (↔↕↔↕↔↕). This pointer also appears when you click and hold on an unselected object. When you click and drag the mouse while the pointer shows this arrow, both the label and the text box will move. Watch the shadow in the ruler to see your selection.

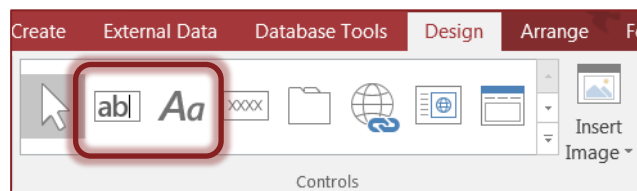
The upper left corner of the label and the text box both show a square larger than the sizing handles, this is to identify the link between the text box and its label. When you place the mouse in this large square, your pointer will still show the moving pointer (↔↕↔↕↔↕), however when you drag from this corner the item will move independently of its partner text/label box. To separate a label from its text box, you can cut and paste the label. Again, watch the shadow in the ruler to see your selection.

Moving with the Keyboard

You can move items one grid point at a time by using the arrows on the keyboard; you can move an object a quarter of a grid point by pressing **Ctrl** in conjunction with the arrow keys.

Blank Text Boxes and Labels

The Text Box and Label controls can be found in the **Controls** group on the Design tab. Click once on the option, then click where you would like the control to be placed on the Form. The text boxes will be unbound because they are not linked to the datasource or a Formula.



Build a Form in Design view

1. In the Design view, delete the Pt Med Rec text box and use the Field List (Add Existing Fields) to create this Form:
 - Try to keep the Form 5"x2"
 - Make sure you can view all the labels in the Form view
 - Save as **Patients**

Organize Form Controls



1. In the Design view, try to clean up the Form. Use the tools on the Arrange tab to Align and space the fields. Many of the Align, Size, Position, and Layout groups can be found through the right-click menu.

Making Multiple Selections

- **Shift Key:** To select more than one item in the design view, click on the first item and then hold down the shift key on the keyboard and click on each subsequent item you wish to select. If you mean to include the labels, don't forget to click on them as well.
- **Items in a Line:** When the objects you would like to select are all in a row or column, you can click in the ruler and Access will select everything in the path of that selection.
- **Selection Box:** If you click in a part of the grid that is unoccupied by any objects and drag the mouse over the objects you would like to select, you will see a selection box being drawn. Any items that the selection box touches will be selected be careful with this, especially in Reports where there are so many lines.

Arrange Size and Space

Size - The **To Fit** option is the same as double-clicking on the sizing handles, it will fit all the selected objects to their own best fit. It will always adjust the height, but for controls bound to a control source, Access will only adjust the height, not the width.

Tallest and **Shortest** are the vertical sizes, **Widest** and **Narrowest** are the horizontal sizes. As you move and align objects it's possible they will shift off the grid. The **To Grid** option helps keep controls lined up.

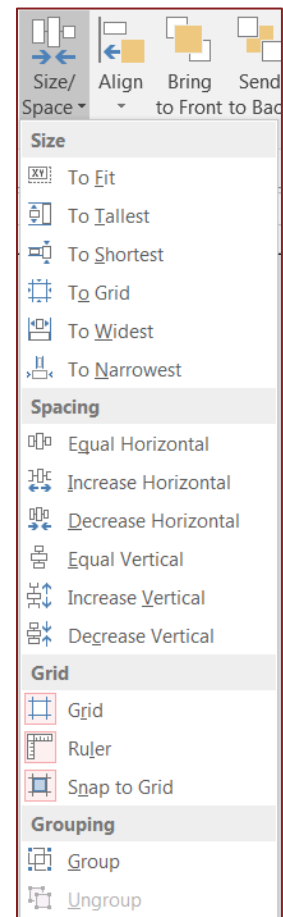
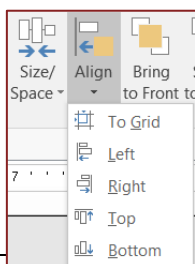
Space - The spacing options will only be available when you have multiple items selected. We use this instead of "align center" to adjust the spacing between the selected objects. Text boxes will often move their labels with them. To adjust the spacing of the text boxes, use your shift key to ONLY select those controls before you change the spacing.

Grid - The **Grid** helps give us a visual alignment, but when a Form/Report becomes complicated, sometimes it's nice to turn off the Grid so you can see more details. The **Snap to Grid** option will help line up objects as you move them around the Form/Report.

Grouping - Several objects can be grouped together so when they are moved or deleted, Access will take the whole 'group'.

Aligning Objects

These options will only be available if more than one object is selected. Unlike the other Microsoft Office products, Access's **Align** feature has no Center or Middle, to adjust your controls it would be better to use the vertical/horizontal spacing found under the Size/Space button.



Navigating Records in the Form

Tab Order

The Tab Order button opens a window to help you adjust the order the keyboard will move through the controls in the Form View, using the Tab, Enter, or Arrow keys.

If the Form is aligned properly, you can usually press the Auto Order button at the bottom of the window. To customize the order use the small gray select box in front of each control name. This window can be frustrating because those little gray boxes are all you can click on in the fields.



1. In the Form view, navigate through the fields (text boxes) using the keyboard.

- Enter, Tab, Down, Right -> Forward
- Shift-Tab, Up, Left -> Backwards
- F2 to edit, or click inside

2. In the Design view, switch the placement of the First Name and Last Name. Drag, Drop, Align.

3. In the Form View, navigating through the fields we can see the tab order is out of sync.

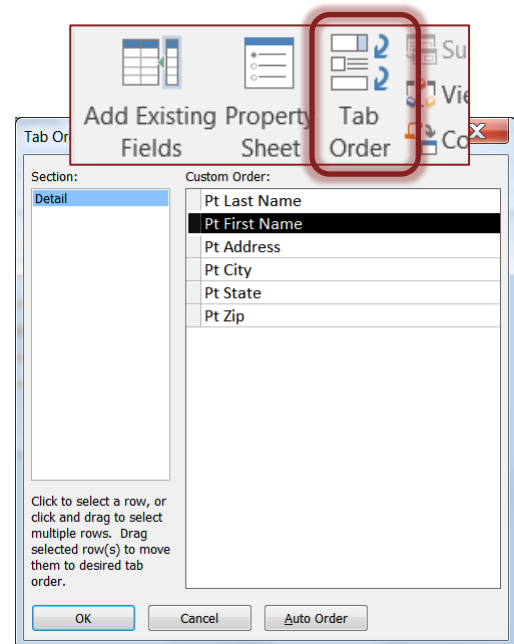
4. In the Design view, adjust the **Tab Order**.

- Tab Order can be found on the Design tab or by right-clicking in the Detail section grid.

5. Try to rearrange the fields into alphabetical order.

- Address through Zip
- Click on the box in the front of the field name. Click in the same box and drag. Think "*Select Then Move*".

6. Click on the **Auto Order** button. If necessary, adjust the fields.



Command Buttons



1. In the Design View, expand the height of the detail section to around 2.5".

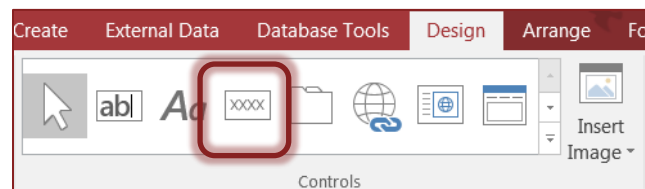
2. Click the Command Button option in the controls listed on the Design tab.

3. Click on the Form where you want the button to appear. Remember you are dropping the top left corner of the button to be. This should launch a Command Button Wizard.

- If a button is created, but the wizard does not appear, open the control gallery and choose the **Use Control Wizards** option

4. Create three buttons.

- Go to Next Record
- Go to Previous Record
- Close Form



Command Button Wizard

Step 1: What do you want to happen?

Record Navigation – Moving between or searching for records

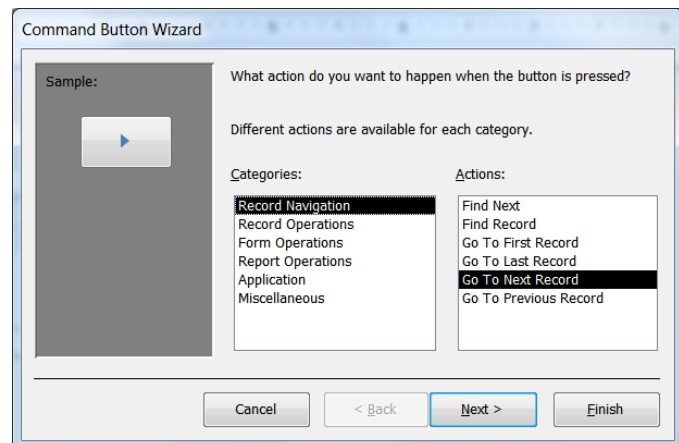
Record Operations – Adding, deleting, duplicating records

Form Operation – Close Forms, Open Forms (this is how we make menus, open Form buttons!), Filter Forms

Report Operations – Print Reports, Preview Reports, Email Reports

Application – Exit Access

Miscellaneous – Run Queries and Macros

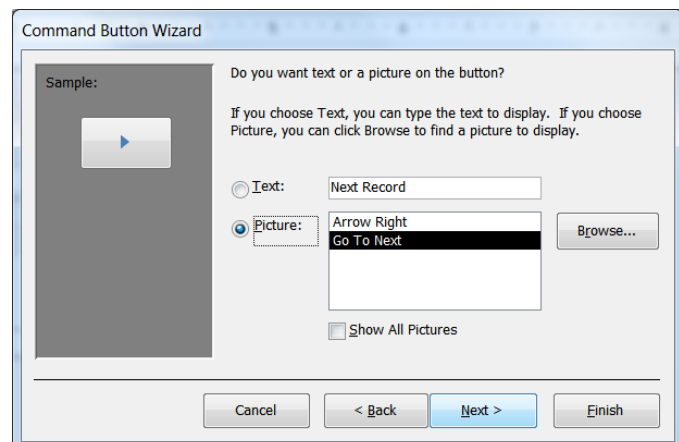


Step 2: How do you want the button to look?

Text – You can put text on the buttons. If you want a Hot Key option, like the Back and Next button in this wizard, put an & in front of the letter you want.

Picture – The wizard will offer you common images used with the action you chose. You can click on the Show All Pictures button to see all the images in the button library. You can put any BMP image on a button, use the Browse button to find your picture.

*Both?! – Yes, you can put a picture and words on the same button, but not through the wizard. Look for the **Picture Caption Arrangement** property after the button is created.*



Step 3: What do you want to name it?

Access doesn't care what you name your database objects, again naming is for our convenience. The name you choose here will be what appears on the object list in the properties and in the Tab Order window. Make your life easier and use a good name!

