

Access Forms 2: SubForms and Menus



Access Forms 2: SubForms and Menus

1.0 hours

Employee Tabs – Tab Control.....	3
Notes about Tab Controls.....	4
Patient Visits - SubForm	5
Reformat Form w/SubForm.....	7
Main Menu – Navigation Form	8
Start Up Options.....	10
Auto Open Main Menu	10
Hide Navigation Pane	10

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



Pandora Rose Cowart

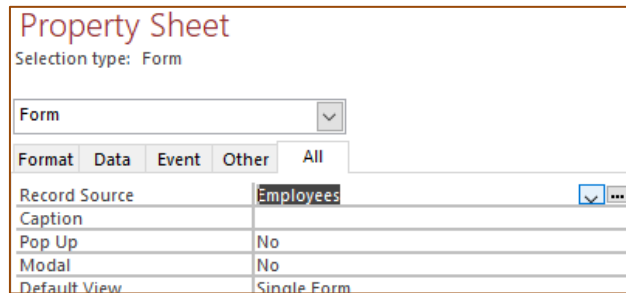
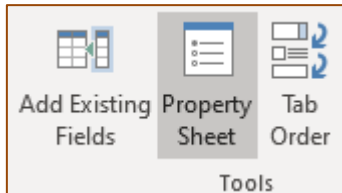
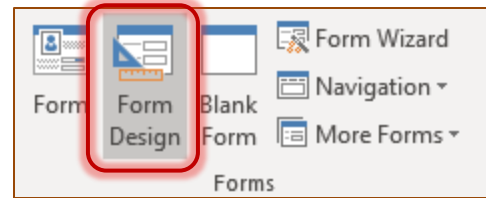
Education/Training Specialist II
Educational Technologies, UF Health IT Training

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

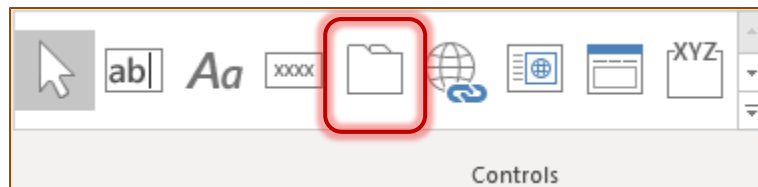
(352) 273-5051
prcowart@ufl.edu
<http://training.health.ufl.edu>

Employee Tabs – Tab Control

1. From the Create tab, click on Form Design
2. Open **Property Sheet** for the Form
 - a. **Record Source** to *Employees*



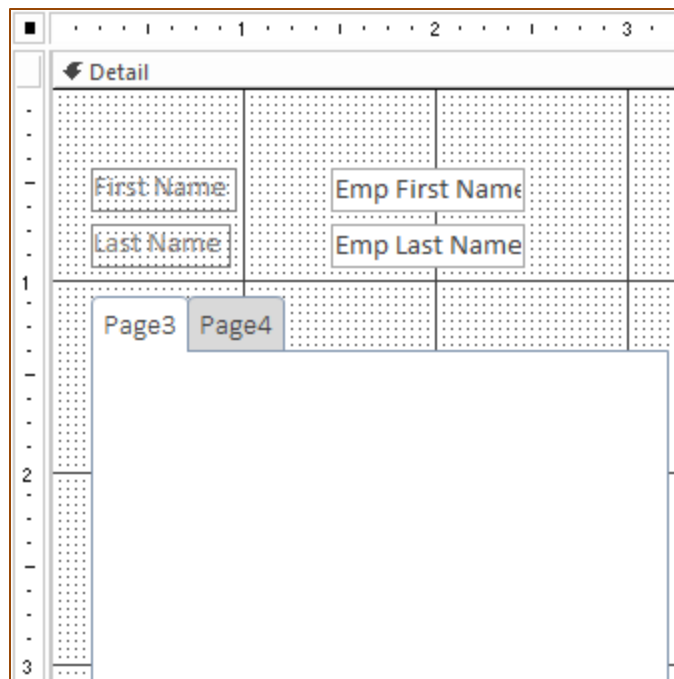
3. Open **Field List – Add Existing Fields**
 - a. Add **Emp First Name** and **Emp Last Name**



4. Create a **Tab Control** from the controls on the *Design* tab

5. Open Properties, on the All tab of the properties, Rename tabs/pages
 - a. First Page (most likely *page 3*)
Name *PagePers*;
Caption *Personal Info*
 - b. Second Page (most likely *page 4*)
Name *PageDept*;
Caption *Dept Info*

6. Open **Add Existing Fields** from the Design tab, turn to the **Personal Info** Tab
 - a. Drag **Emp Birth Date** and **Emp Celebrate** to the **Personal Info** tab. Watch for the color of the page to change.



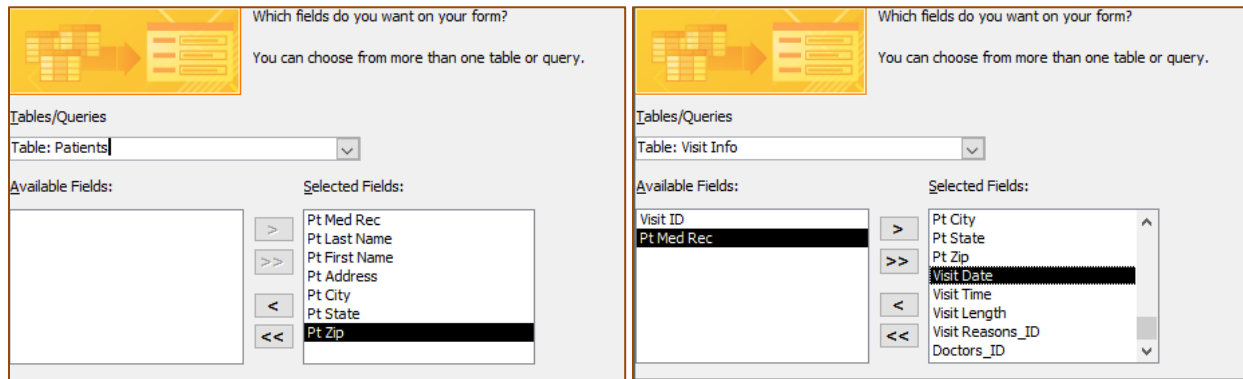
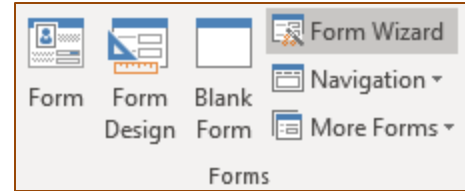
7. Turn to the Dept Info page
 - a. Drag Dept ID to Dept Info
 - b. Drag Dept ID to Dept Info Again
8. Fix the Dept ID fields
 - a. Right-click on the first Dept ID and change it to a text box
 - b. Change the label for the second Dept ID to be Dept Name
9. Right-click on page name and change **Page Order**
 - a. Dept Info to the front
10. Right-click on page name and add Page
 - a. **Name** *PagePict*; **Caption** *Picture*
 - b. Drag in Picture field
 - c. Delete Picture Label
11. Move to **Layout** view
 - a. Adjust field sized as desired
12. Save Form as "Employee Tabs"

Notes about Tab Controls

- Use Ctrl-Tab to switch between pages in the *Form* view
- If you right-click on the tab control you will see options to add, delete and reorder the pages.
- Each page in the tab control has its own tab order.
- To select the tab control, click at the top of the control where the new pages would appear.
- When you drag a field onto the page the page area will darken. Make sure the area is still dark when you drop your item to keep it in that page.

Patient Visits - SubForm

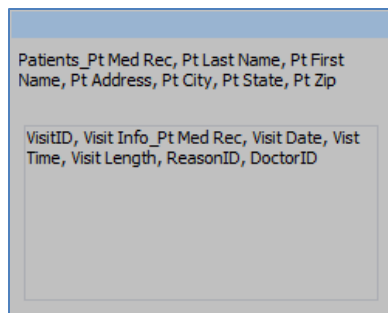
1. From the Create tab, click the **Form Wizard** button
2. Choose Table Patients from the drop-down menu
 - a. Use >> button to Select all the fields from Patients
3. Choose Table Visit Info from the drop-down menu
 - a. Bring over everything *except* the VisitID and Pt Med Rec fields



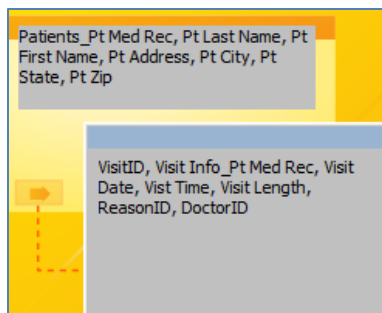
4. **Next** Step, view form options
 - a. By Patients – Form with Subform(s)
 - i. Creates two forms: a main Patient Form with an embedded Visit Info form that will display multiple visits for that one patient
 - b. By Patients – Linked Forms
 - i. Creates two forms: a main Patient Form and a separate Visit Info Form. The Patient Form will have a button that will open the Visit Info form that will only display the visits for the current Patient
 - c. By Visit Info
 - i. Creates one form – All Patient data and that one Visit data displayed on the same screen, i.e. a billing screen at the end of an appointment

5. Choose **by Patients -- Form with SubForm**

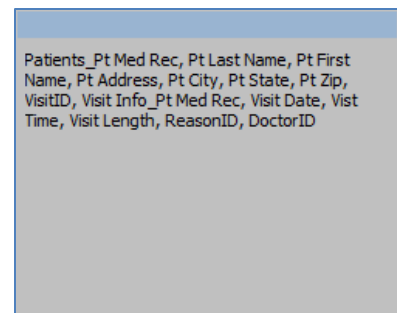
By Patients Form with Subform(s)



By Patients Linked Form



By Visit Info



6. **Next** Choose **Datasheet** layout for the SubForm

7. **Next** Title forms

a. Patient Visits

b. Patient Visits SubForm


c. Open to view the result

8. Adjust the column widths in the form view and Center the **Visit Length**

9. Turn to the Design view

The image shows two overlapping wizard dialog boxes. The top dialog, titled "What layout would you like for your subform?", has a preview of a datasheet layout and two radio buttons: "Tabular" (unselected) and "Datasheet" (selected). The bottom dialog, titled "What titles do you want for your forms?", has input fields for "Form:" (Patient Visits) and "Subform:" (Patient Visits Subform). It also includes a message: "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?" with two radio buttons: "Open the form to view or enter information." (selected) and "Modify the form's design." (unselected).

The image is a screenshot of the Microsoft Access design view for a form titled "Patient Visits". The form is divided into two main sections. The top section, labeled "Patient Visits", contains fields for "Med Rec", "Last Name", "First Name", "Address", "City", "ST", and "Zip". The bottom section, labeled "Patient Visits Subform", contains fields for "Visit Date", "Visit Time", "Visit Length", "Reason", and "Doctor". The form is designed in a tabular layout with a grid of cells. The "Visit Length" field is highlighted in yellow. The form is currently in Design view, as indicated by the "Design View" button in the bottom right corner.

- d. **Control Padding to Narrow**
- 
- The screenshot shows the Excel ribbon with the following groups and buttons:
- Gridlines**: Gridlines, Stacked, Tabular, Remove Layout
 - Rows & Columns**: Insert Above, Insert Below, Insert Left, Insert Right, Select Layout, Select Column, Select Row
 - Merge / Split**: Merge, Split Vertically, Split Horizontally
 - Move**: Move Up, Move Down
 - Position**: Control Margins, **Control Padding** (highlighted with a red box), Anchoring
 - Sizing & Ordering**: Size/Space (highlighted with a red box), Align, Bring to Front, Send to Back

- #### 4. Save and Close

Record: 1 of 2 No Filter Search

Main Menu – Navigation Form

Now that we have multiple forms navigation menu. We will not use this form to modify our data, so there will be no record source.

1. From the Create tab, click on the **Form Design** button
2. Create **Command Buttons** by using the controls on the Design tab
 - a. Be sure to give the buttons unique names



- b. Each Open Form button should return ALL the records
 - i. Departments
 - ii. Employees
 - iii. Patients
 - iv. Patient Visits

Sample: What action do you want to happen when the button is pressed?

Different actions are available for each category.

Categories:	Actions:
Record Navigation	Apply Form Filter
Record Operations	Close Form
Form Operations	Open Form
Report Operations	Print a Form
Application	Print Current Form
Miscellaneous	Refresh Form Data

Sample: What form would you like the command button to open?

Departments
Employee Tabs
Employees
Patient Visits
Patient Visits SubForm
Patients

Sample: Do you want the button to find specific information to display in the form?

For example, the button can open a form and display the data for a specific employee or customer.

☐ Open the form and find specific data to display.

☒ Open the form and show all the records.

Sample: Do you want text or a picture on the button?

If you choose Text, you can type the text to display. If you choose Picture, you can click Browse to find a picture to display.

☒ Text: Departments

☐ Picture: MS Access Form

☐ Show All Pictures

Sample: What do you want to name the button?

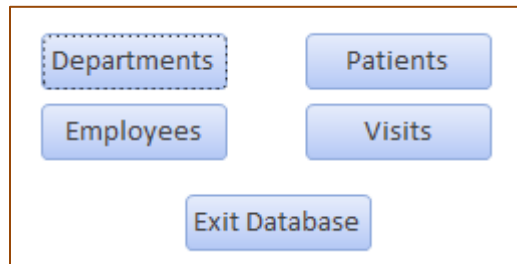
A meaningful name will help you to refer to the button later.

cmdOpenDeptForm

That's all the information the wizard needs to create your command button. Note: This wizard creates embedded macros that cannot run or be edited in Access 2003 and earlier versions.

- c. Create a button to Exit Access
 - i. Application category -> Quit Application

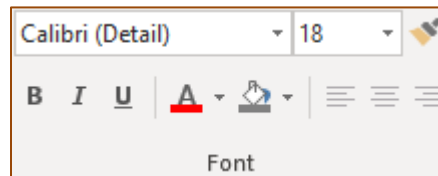
-
3. Test each of the buttons to make sure they are opening the forms you wanted



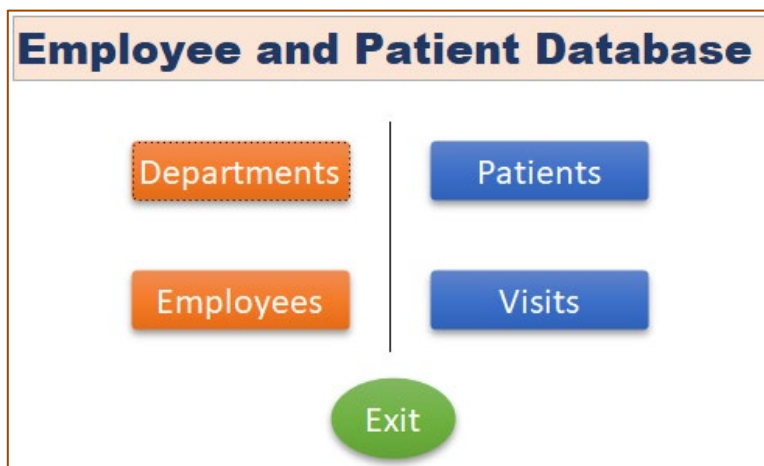
4. Format as you'd like. Some suggestions:
- a. Add Controls from the *Design* tab
 - i. Create a Label to make a title
 - ii. Use a Line or Rectangle to separate your buttons



- b. Use the **Font** group on the *Format* or *Home* tab to modify the text



- c. Use the Quick Styles and Change Shape on the *Format* tab
 - d. Use Align and Size tools on the *Align* tab



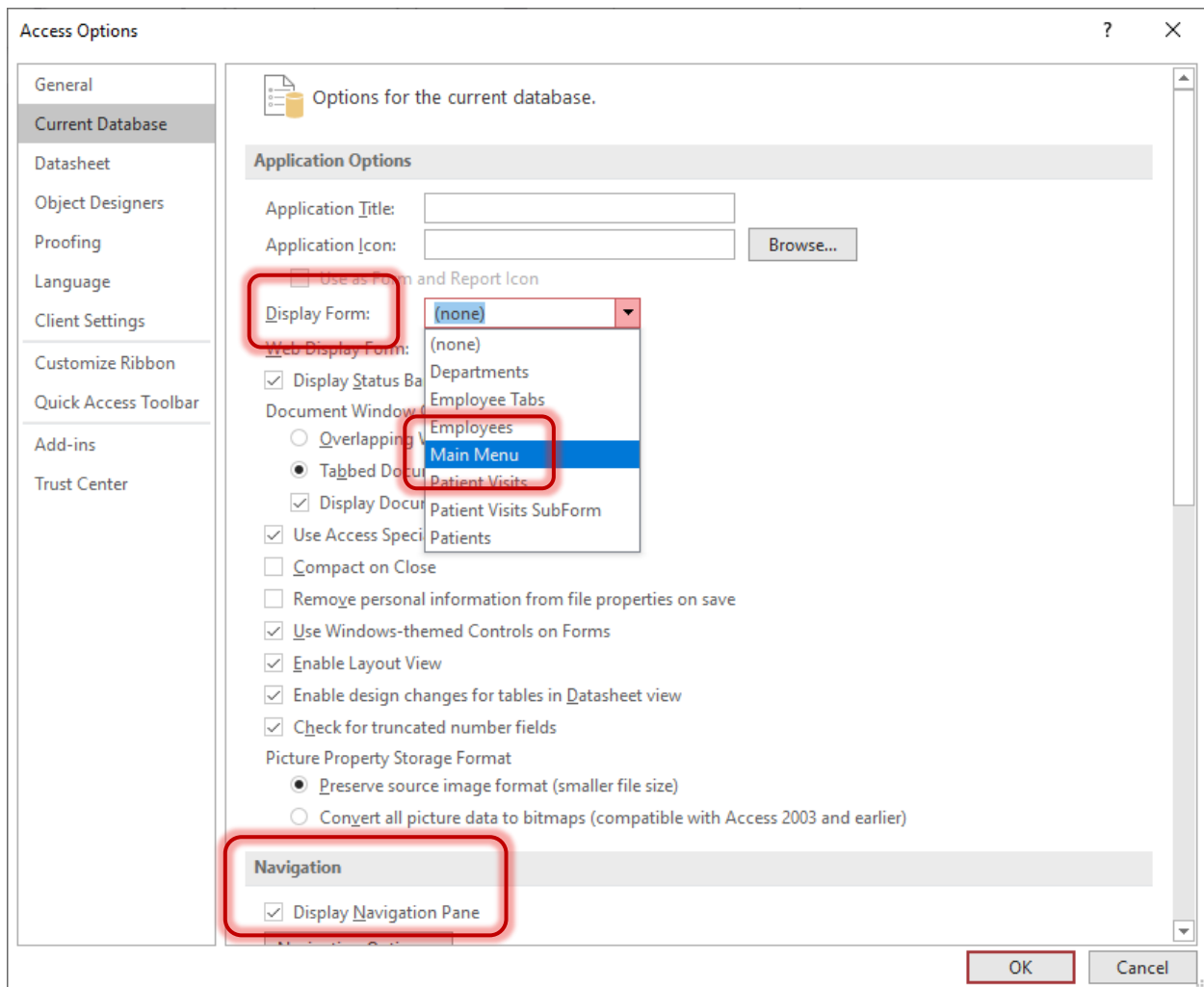
5. Save Form as "Main Menu"

Start Up Options

Auto Open Main Menu

When we first start this database, it would be helpful if the Main Menu form opened automatically.

1. Open the **File** menu
2. Choose **Options** near the bottom of the menu
3. Choose **Current Database** from the pane on the left
4. In the **Application Options** –
 - a. Change the **Display Form** to **Main Menu**



Hide Navigation Pane

1. In the **Navigation** options Uncheck the **Display Navigation Pane**
 - a. Remember F11 will always make the pane reappear