

# MICROSOFT ACCESS



Working with Forms

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# Introduction

- ▶ While you can always enter data directly into database tables, you might find it easier to use **forms**.
- ▶ Forms ensure you're entering the right data in the right location and format. This can help keep your database accurate and consistent.

# Why use forms?

- Many of us fill out forms so often that we hardly notice when we're asked to use them.
- Forms are so popular because they're useful to the person asking for the information and to the person providing it.
- They are a way of requiring information in a specific format, which means the person filling out the form knows exactly which information to include and where to put it.

**Employee Time Sheet**

EMPLOYEE \_\_\_\_\_  
EMPLOYEE NUMBER 3047 DEPARTMENT A1-002  
PAYROLL ENDING DATE Nov 23, 20\_\_\_\_

WEEK	SUN	MON	TUE	WED	THUR	FRI	SAT	TOTAL
FIRST WEEK								
SECOND WEEK			7	8				15
GRAND TOTAL								

I certify that the Employee has completed the hours indicated on the work sheet.

SUPERVISOR \_\_\_\_\_  
DATE \_\_\_\_\_

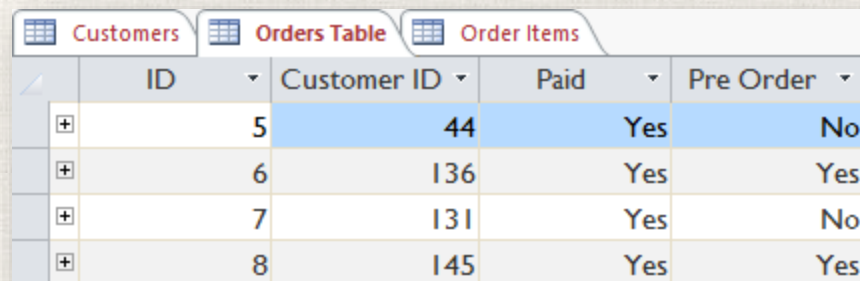
The hours recorded above are an accurate representation of the total hours worked for the work period shown.

EMPLOYEE \_\_\_\_\_  
DATE Nov 23

**FORMS SUBMITTED AFTER THE DEADLINE WILL RESULT IN A DELAYED PAYCHECK**

# Why use forms?

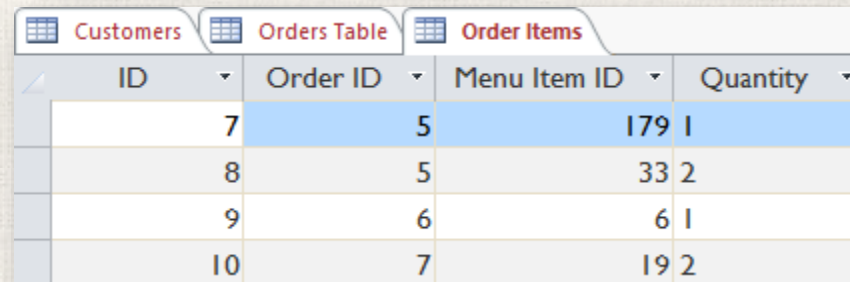
- This is just as true of forms in Access. When you enter information into a form in Access, the data goes exactly where it's supposed to go: into one or more related tables.
- While entering data into simple tables is fairly straightforward, data entry becomes more complicated as you start populating tables with records from elsewhere in the database.
- For instance, the **orders table** in a bakery's database might link to information on customers, products, and prices drawn from related tables. For example, in the Orders Table below the Customer ID field is linked to the Customers table.



	ID	Customer ID	Paid	Pre Order
+	5	44	Yes	No
+	6	136	Yes	Yes
+	7	131	Yes	No
+	8	145	Yes	Yes

# Why use forms?

- In fact, in order to see the entire order you would also have to look at the **Order Items table**, where the menu items that make up each order are recorded.



ID	Order ID	Menu Item ID	Quantity
7	5	179	1
8	5	33	2
9	6	6	1
10	7	19	2

- The records in these tables include **ID numbers** of records from other tables. You can't learn much just by glancing at these records because the ID numbers don't tell you much about the data they relate to. Plus, because you have to look at two tables just to view one order, you might have a difficult time even finding the right data. It's easy to see how viewing or entering many records this way could become a difficult and tedious task.

# Why use forms?

- A form containing the same data might look like this:

The screenshot shows a web application interface for managing orders. At the top, there are tabs for 'Customers', 'Orders Table', 'Order Items', and 'Orders'. The main heading is 'Orders'. Below this, there is a 'New Order' button. The form includes fields for 'Customer' (Tappen), 'Order #' (64), and 'Pickup Date' (6/22/16). A 'Notes' field contains the text: 'For a kindergarten party. Write, "Happy 6th Birthday, Matthew!" on the cake and draw a rabbit in icing next to the text.' There are two checkboxes: 'Pre Order' and 'Paid', both of which are checked. Below the notes is an 'Add Item' button. A table lists the items in the order:

Category	Product	Quantity	"Unit"	Price	Subtotal
Cookies	Butter Pecan	1	One Dozen	\$14.00	\$14.00
Cookies	Oatmeal Raisin	1	One Dozen	\$14.00	\$14.00
Cakes	Cookies n' Cream	1	Single	\$22.00	\$22.00
*					
<b>Total</b>					<b>\$50.00</b>

At the bottom of the form, there is a status bar showing 'Record: 14', '3 of 3', and a search field.

# Why use forms?

Customers Orders Table Order Items Orders

## Orders

Customer:  Order #:  Pickup Date:

Notes:   Pre Order  Paid

Category	Product	Quantity	"Unit"	Price	Subtotal
Cookies	Butter Pecan	1	One Dozen	\$14.00	\$14.00
Cookies	Oatmeal Raisin	1	One Dozen	\$14.00	\$14.00
Cakes	Cookies n' Cream	1	Single	\$22.00	\$22.00
*					
<b>Total</b>					<b>\$50.00</b>

Record: 1 of 3 | No Filter | Search

- As you can see, this record is much easier to understand when viewed in a form.
- Modifying the record also would be easier because you wouldn't have to know any ID numbers to enter new data.
- When you're using a form, you don't have to worry about entering data into the right tables or in the right format—the form can handle these things itself. There's no need to go back and forth between tables because forms bring all of the information you need together in one place.

# Why use forms?

The screenshot shows a web application interface for managing orders. At the top, there are navigation tabs for 'Customers', 'Orders Table', 'Order Items', and 'Orders'. The main heading is 'Orders'. Below this, there is a 'New Order' button. The form includes a 'Customer' dropdown menu set to 'Tappen', an 'Order #' field with '64', and a 'Pickup Date' field with '6/22/16'. A 'Notes' text area contains the text: 'For a kindergarten party. Write, "Happy 6th Birthday, Matthew!" on the cake and draw a rabbit in icing next to the text.' There are two checkboxes: 'Pre Order' (checked) and 'Paid' (unchecked). Below the notes is an 'Add Item' button. A table lists the items in the order:

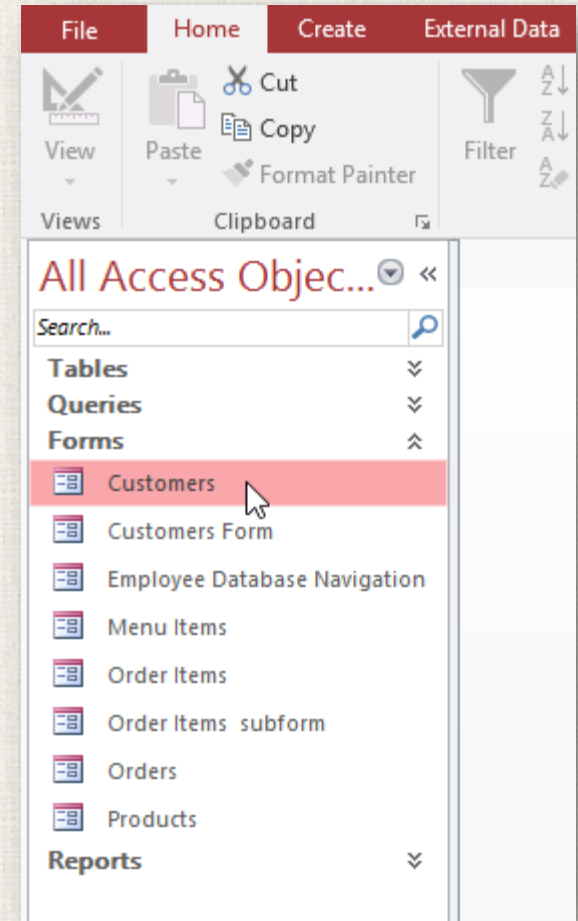
Category	Product	Quantity	"Unit"	Price	Subtotal
Cookies	Butter Pecan	1	One Dozen	\$14.00	\$14.00
Cookies	Oatmeal Raisin	1	One Dozen	\$14.00	\$14.00
Cakes	Cookies n' Cream	1	Single	\$22.00	\$22.00
* Total					\$50.00

At the bottom of the form, there is a record navigation bar showing 'Record: 1 of 3' and a search field.

- Not only do forms make the data entry process easier for the user, but they also keep the database itself working smoothly.
- With forms, database designers can control exactly how users are able to interact with the database.
- They can even set restrictions on individual form components to ensure all of the needed data is entered and that it's all entered in a valid format. This is useful because keeping data consistent and organized is essential for an accurate and powerful database.

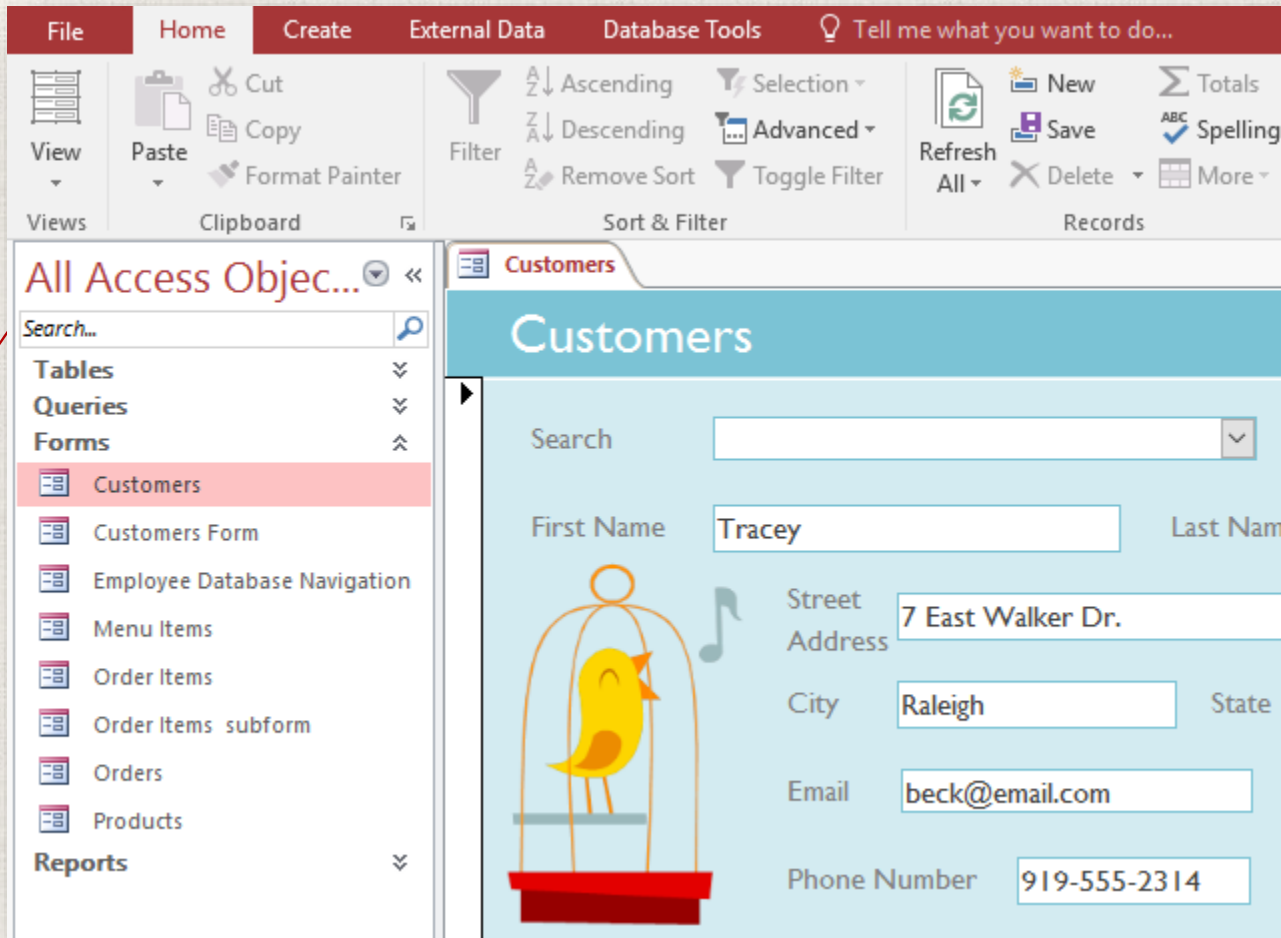
# Open an existing form

1. Open your database, and locate the **Navigation pane**.
2. In the Navigation pane, locate the form you want to open.
3. Double-click the desired form.



# 11 Open an existing form

4. It will open and appear as a **tab** in the **Document Tabs bar**.



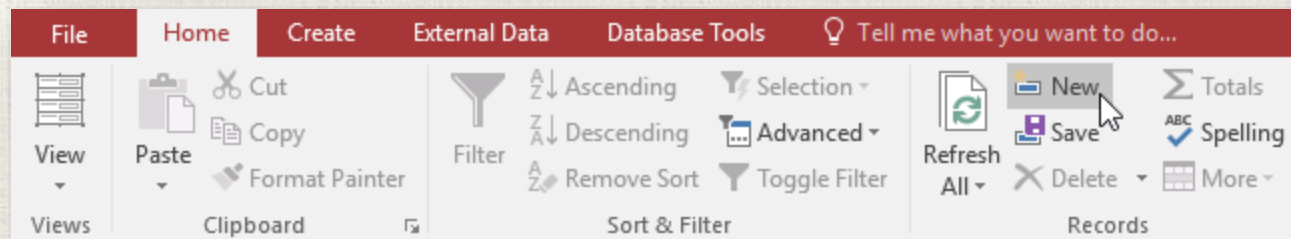
# Entering and modifying data

- Depending on the database you're using, the forms you work with may include special tools and features that let you perform common tasks with one click of a button.
- No matter what type of form you're working with, you can follow the same procedures for carrying out certain basic tasks.

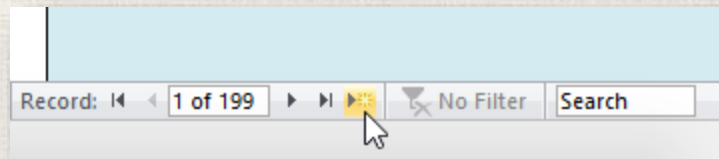
# Add a new record

There are two ways to add a new record to a form:

- ➔ In the **Records** group on the **Home** tab of the **Ribbon**, click the **New** command.



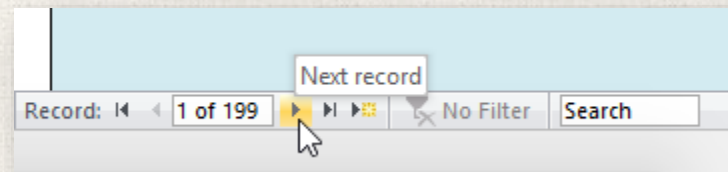
- ➔ On the **Record Navigation bar** at the bottom of the window, click the **New Record** button.



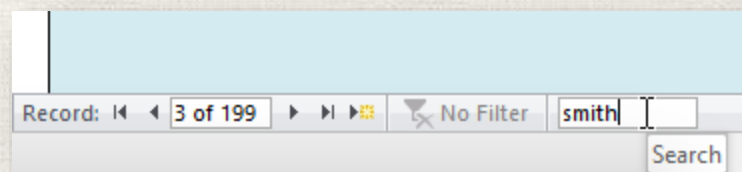
## Find an existing record to view or edit

There are two ways to find and view an existing record using a form, and they both use the **Navigation bar** at the bottom of the screen:

- ➔ To look through records one at a time, click the **navigation arrows**. The right arrow will take you to the next record, and the left arrow will take you to the previous one.

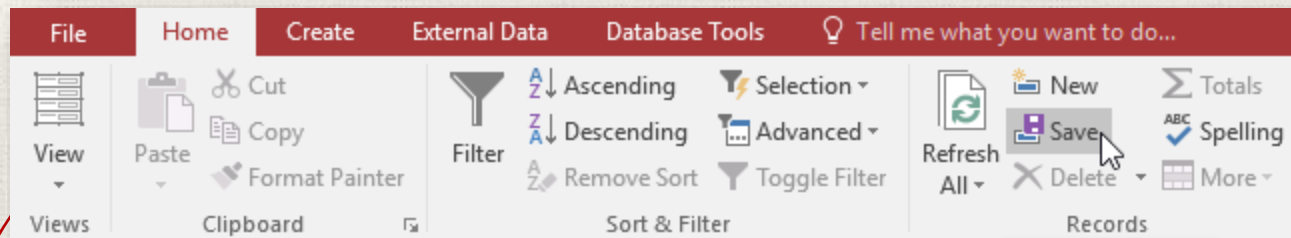


- ➔ To **search** for a record, type a word you know is contained in that record in the **navigation search box**.



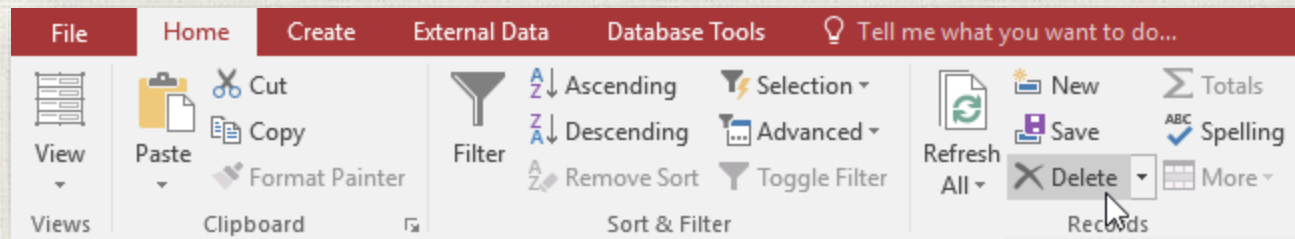
# Save the current record

1. Select the **Home** tab and locate the **Records** group.
2. Click the **Save** command. The current record will be saved.

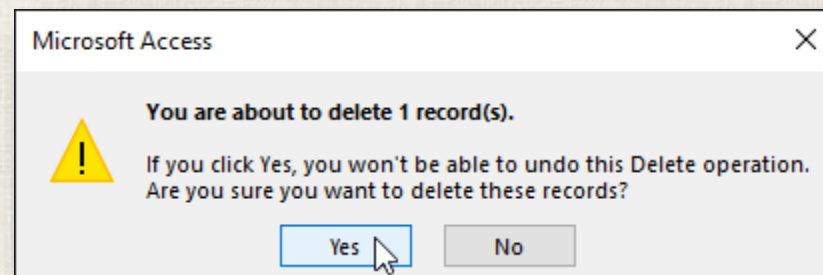


# Delete the current record

1. Select the **Home** tab and locate the **Records** group.
2. Click the **Delete** command.



3. A dialog box will appear. Click **Yes**.



4. The record will be permanently deleted.

# Using form features

## Text Box

Most data entry using forms is done with labeled **text boxes**. A text box is the Access equivalent of the blank space where you would write your information on a paper form. To enter data into a text box, simply click the text box and begin typing.

## Drop-Down Search Box

The **drop-down search box** allows you to search for existing records. Simply begin typing, and records that match your search will appear in the drop-down list. You can also browse existing records. Just click the drop-down arrow and scroll through the list of records.

## New Record Button

Clicking the **New Record** button will create a new record with all fields cleared except for fields with a default value.

The screenshot shows the 'Customers' form in Microsoft Access. The form has a light blue header with the title 'Customers'. Below the header is a search bar with a drop-down arrow. To the right of the search bar is a 'New Record' button. The form contains several text boxes for data entry: 'First Name' (containing 'Tracey'), 'Last Name' (containing 'Beckham'), 'Street Address' (containing '7 East Walker Dr.'), 'City' (containing 'Raleigh'), 'State' (containing 'NC'), 'Zip Code' (containing '27612'), 'Email' (containing 'beck@email.com'), and 'Phone Number' (containing '919-555-2314'). There is also a dropdown menu for 'Add to Mailing List?' with the value 'Yes-- Weekly & Events'. At the bottom of the form are three icons: a printer, a delete button, and a refresh button. Red callout boxes highlight the search bar, the 'New Record' button, and the 'First Name' text box.

# Using form features

## More Form Buttons

Form buttons can provide quick and easy ways to carry out common tasks instead of using the commands on the Ribbon. From left to right, the buttons here allow a user to **save**, **delete**, and **print** the current record.

## Text Box with Validation Rule

If the database designer has created any rules specifying what type of data can be entered into each field, these rules will be reflected in the related forms. If you encounter a message like this one, click OK and re-enter the data following the instructions in the dialog box.

## Combo Box

In order to guarantee that users only enter valid responses, the database designer may use a **combo box**. A combo box allows you to enter data by choosing from a drop-down list of choices.

The screenshot shows a 'Customers' form with the following fields and features:

- Search**: A search box with a dropdown arrow.
- New Record**: A button with a dashed border.
- First Name**: Tracey
- Last Name**: Beckham
- Street Address**: 7 East Walker Dr.
- City**: Raleigh
- State**: NC (highlighted with a red box and arrow)
- Zip Code**: 27612
- Email**: beck@email.com
- Add to Mailing List?**: Yes-- Weekly & Events (highlighted with a red box and arrow)
- Phone Number**: 919-555-2314
- Buttons**: Three buttons at the bottom (Save, Delete, Print) are highlighted with a red box and arrow.

Red lines and arrows indicate the flow of information from the text boxes to the corresponding form elements in the screenshot.

# Using form features

## New Order Button

This customized button will create a **new record** with all fields cleared. Note that the subform is also totally cleared.

## Drop-Down List

This allows you to select an existing customer from the Customers table. Simply begin typing, or select a name from the drop-down list. This form requires each order to be linked to an existing customer record, which helps to preserve the integrity of the database. If a customer is not in our database, we can add them with the Customers form.

Orders

New Order

Customer Whitman Order # 5 Pickup Date 12/4/13

Notes I'm not sure what he meant, but he said our goods are for anyone who wants to "grow in the open air and eat and sleep with the earth."

Pre-order  
 Paid

Add Item

Category	Product	Quantity	"Unit"	Price	Subtotal
Cookies	Chocolate Chip	2	Single	\$1.50	\$3.00
Cookies	Fudge Brownie	1	Single	\$2.00	\$2.00
Cookies	Ginger Shortbread	1	Half-Dozen	\$10.50	\$10.50
Pastries	Brownies	1	One Dozen	\$19.00	\$19.00
Cakes	Black Forest	5	Single	\$22.00	\$110.00
Cakes	Coconut	2	Single	\$22.00	\$44.00
Cakes	Carrot Cake	1	Single	\$22.00	\$22.00
Cupcakes	Caramel Mocha Latte	2	Single	\$22.00	\$44.00
Cakes	Carrot Cake	1	Single	\$22.00	\$22.00
Cakes	Black Walnut	2	Single	\$22.00	\$44.00
<b>Total</b>					<b>\$368.50</b>

Record: 1 of 11 No Filter Search

## Calendar Button

Because the Pickup Date field on the related form only accepts information formatted as a date, the Pickup Date text box includes a **calendar** button to ensure users can only enter a date in the desired format. Requiring dates to be entered in a consistent format ensures that the database will recognize each entry in this field as a date.

# Using form features

## Yes/No Checkboxes

There are only two valid responses for the Pre Order and Paid **fields** in our related table: **yes** and **no**.

Checkboxes give users an easy way to input this data. Simply click the checkbox for **yes** or leave it unchecked for **no**.

## Add Item to Subform

This button launches the **subform** that allows you to add a new record to the embedded table. When using a subform like this, enter the data as you would in a normal form, then click **Save and Close**. The new record will be displayed in the embedded table.

## Subform and Embedded Table

In our database, order items are stored in a separate table from the orders themselves. In order to enter and display order data, this form includes an embedded **subform** and **table**. This orders table can be viewed and searched like a normal table, but it only includes data linked to this particular order.

The screenshot shows an 'Orders' form with the following fields and values:

- Customer: Whitman
- Order #: 5
- Pickup Date: 12/4/12
- Notes: I'm not sure what he meant, but he said our goods are for anyone who wants to "grow in the open air and eat and sleep with the earth."
- Pre Order:
- Paid:

The embedded table below the form contains the following data:

Category	Product	Quantity	Unit	Price	Subtotal
Cookies	Chocolate Chip	2	Single	\$1.50	\$3.00
Cookies	Fudge Brownie	1	Single	\$2.00	\$2.00
Cookies	Ginger Shortbread	1	Half-Dozen	\$10.50	\$10.50
Pastries	Brownies	1	One Dozen	\$19.00	\$19.00
Cakes	Black Forest	5	Single	\$22.00	\$110.00
Cakes	Coconut	2	Single	\$22.00	\$44.00
Cakes	Carrot Cake	1	Single	\$22.00	\$22.00
Cupcakes	Caramel Mocha Latte	2	Single	\$22.00	\$44.00
Cakes	Carrot Cake	1	Single	\$22.00	\$22.00
Cakes	Black Walnut	2	Single	\$22.00	\$44.00
<b>Total</b>					<b>\$368.50</b>

# Practice

- Open **practice database**.
- Open the **Orders Form**.
- **Create a new record** with the following data:
  - Customer:** Eric Oglesby
  - Pickup date:** February 14, 2017
  - Order items:** Cakes: Coconut (1)
  - Notes:** Write "Happy Valentine's Day!" with pink frosting.
  - Pre Order:** Yes
  - Paid:** Yes
- Open the form named **Customers Form**.
- **Find** the record for customer **Dwight Parker** and make the following changes:
  - Street Address:** 190 Cook Street
  - City:** Chapel Hill
  - Zip Code:** 27514
  - Email:** dwightp@email.com



**THE END**  
THE END