

MICROSOFT ACCESS



Creating Forms

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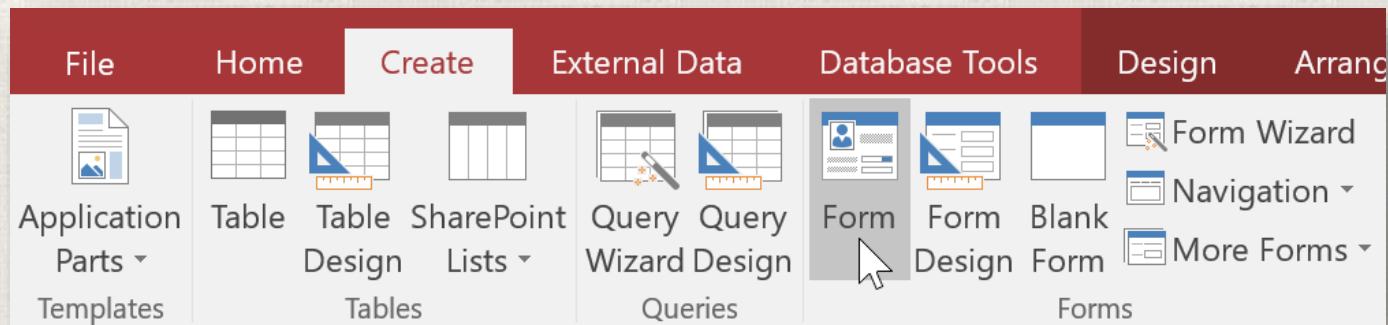
Introduction

- ▶ Creating **forms** for your database can make entering data more convenient. When you create a form, you can design it in a way that works with your database and that makes sense to you.
- ▶ In this lesson, you will learn how to **create** and **modify** forms. You'll also learn how to use form options like **design controls** and **form properties** to make sure your form works exactly the way you want.

Create a form

Access makes it easy to create a **form** from any table in your database. Any form you create from a table will let you **view the data** that's already in that table and **add new data**. Once you've created a form, you can modify it by adding additional fields and **design controls** like combo boxes.

1. In the Navigation pane, select the table you want to use to create a form. You do not need to open the table.
2. Select the **Create** tab, locate the **Forms** group, and click the **Form** command.



Create a form

3. Your form will be created and opened in **Layout view**.

The screenshot shows a CRM interface with a form for a customer record. The form is titled "Customers" and is in "Layout view". The form contains the following fields:

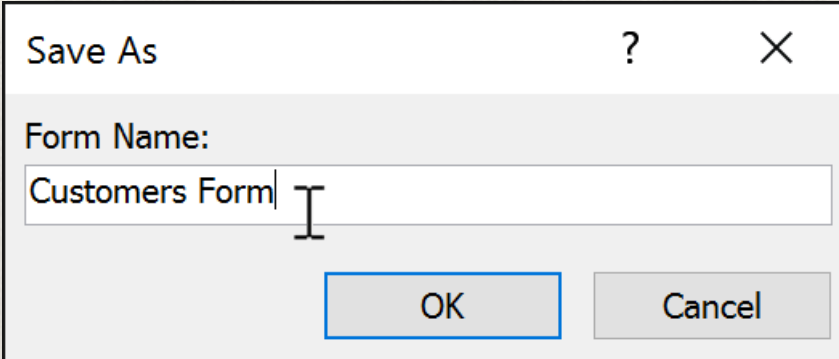
- ID: 1 (highlighted with a yellow border)
- Email: beck@email.com
- Search: (dropdown menu)
- Other Notes: (text area)
- First Name: Tracey
- Phone Number: 919-555-2314
- Last Name: Beckham
- City: Raleigh
- Add to Mailing List?: No (dropdown menu)
- Street Address: 7 East Walker Dr.
- Combo III: (dropdown menu)
- State: NC
- Other Notes: (text area)
- Zip Code: 27612

At the bottom of the form, there is a table with the following data:

ID	Paid	Pre Order	Notes	Pickup Date
38	Yes	No		12/24/13
(New)	No	No		

Create a form

4. To **save** the form, click the **Save** command on the **Quick Access Toolbar**. When prompted, type a **name** for the form, then click **OK**.



Save As ? X

Form Name:

Customers Form I

OK Cancel

About subforms

- If you created a form from a table whose records are linked to another table, your form probably includes a **subform**.
- A subform is a **datasheet form** that displays linked records in a table-like format. For instance, the subform included in the **Customers** form we just created displays linked customer **orders**.
- We probably don't need to include this subform because we just want to use the Customers form to enter and review contact information. If you find that you don't need a subform, you can easily **delete** it. To do this, simply click it and press the **Delete** key on your keyboard.

About subforms

Customers1

Customers

Street Address: 7 East Walker Dr. Add to Mailing List? No

State: NC Other Notes:

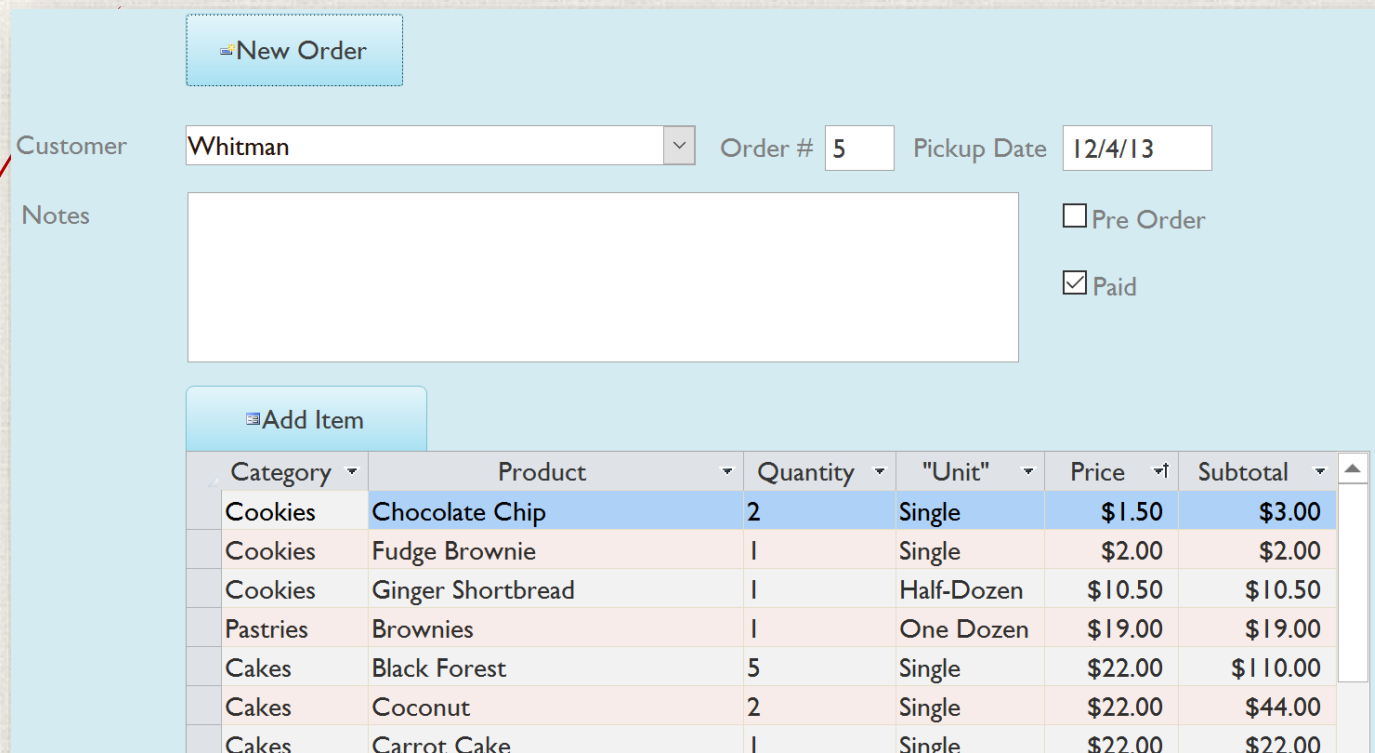
Zip Code: 27612

ID	Paid	Pre Order	Notes	Pickup Date
38	Yes	No		12/24/13
*(New)	No	No		

Record: 1 of 1 No Filter Search

About subforms

However, subforms are often quite helpful. Depending on the content and source of your form, you might find that the subform contains useful information, like in the example below. In our **Orders** form, the subform contains the name, quantity, and price of each item contained in the order, which is all useful information.

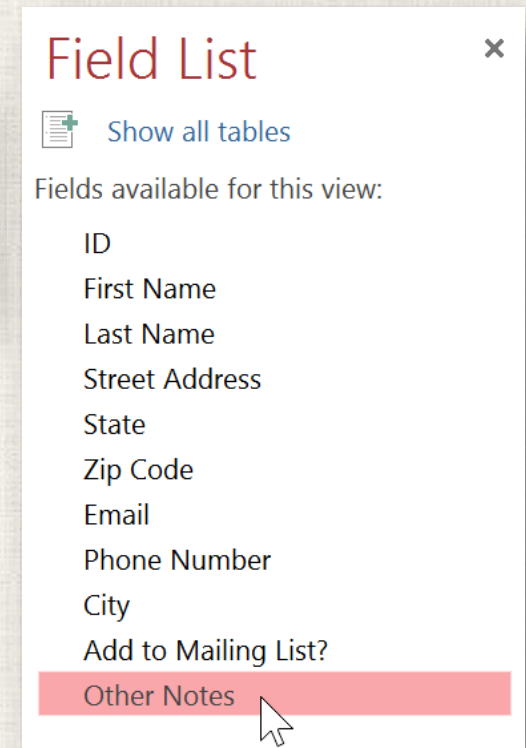
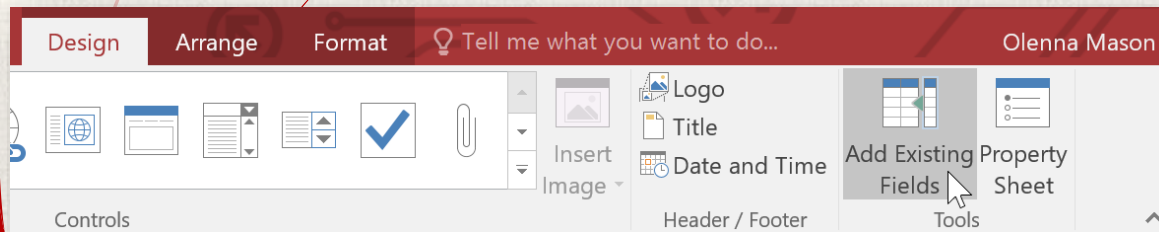


The screenshot shows a form titled "New Order" with a light blue background. At the top left is a button labeled "New Order". Below it, the "Customer" field is a dropdown menu showing "Whitman". To the right are fields for "Order #" with the value "5" and "Pickup Date" with the value "12/4/13". Below the customer field is a large white "Notes" text area. To the right of the notes are two checkboxes: "Pre Order" (unchecked) and "Paid" (checked). At the bottom left is a button labeled "Add Item". Below this button is a table with 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

Add a field to a form

1. Select the **Design** tab, then locate the **Tools** group on the right side of the Ribbon.
2. Click the **Add Existing Fields** command.
3. The **Field List** pane will appear. Double-click the desired field(s).

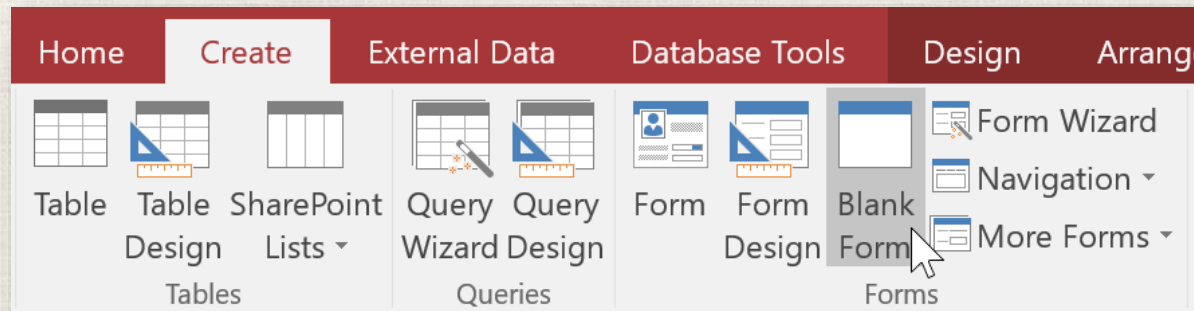


Add a field to a form

4. The field will be added.

The screenshot shows a Microsoft Access form titled "Customers". The form has a light blue header bar. Below the header, there are several data entry fields arranged in a grid. The fields are: ID (with a value of "1"), Email (with a value of "beck@email.com"), Other Notes (highlighted with a yellow border), First Name (with a value of "Tracey"), Last Name (with a value of "Beckham"), Phone Number (with a value of "919-555-2314"), and City (with a value of "Raleigh").

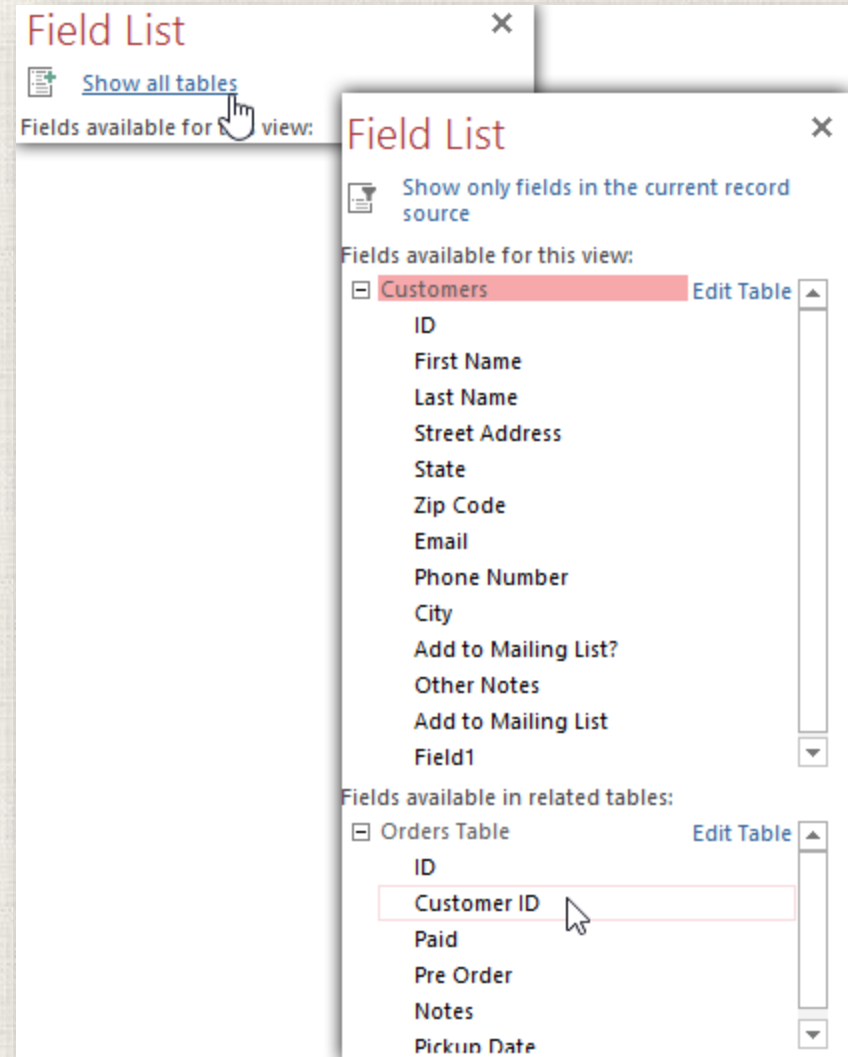
❖ You can also use the above procedure to add fields to a totally blank form. Simply **create a form** by clicking the **Blank Form** command on the **Create** tab, then follow the above steps to add the desired fields.



Add a field from a different table

You can also add fields from **different tables** in your database to the form.

1. From the **Field List** pane, click **Show All Tables**.
2. Click the plus sign **+** next to the table that contains the field you want to add, then double-click the desired field. The new field will be added.

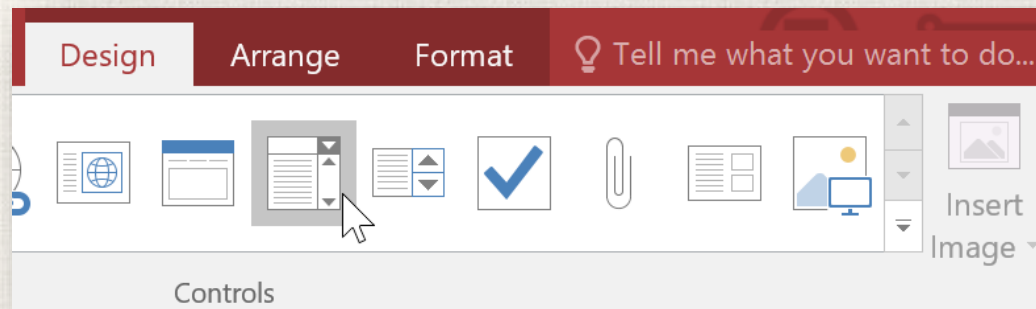


Adding design controls : **Combo boxes**

- A **combo box** is a drop-down list you can use in your form in place of a field. Combo boxes **limit** the information users can enter by forcing them to select only the **options** you have specified.
- Combo boxes are useful for fields that have a limited number of possible valid responses. For instance, you might use a combo box to make sure people only enter a valid U.S. state while entering an address, or that they only choose products that already exist in your database while placing an order.



Create a combo box

1. In **Form Layout** view, select the **Design** tab, then locate the **Controls** group.
2. Select the **Combo Box** command, which looks like a drop-down list.



Create a combo box


3. Select the desired location for the combo box. A line will appear to indicate the location where your combo box will be created. In our example, we'll place it between the **City** field and the **Add to Mailing List?** fields.

Phone Number	919-555-2314
City	Raleigh
Add to Mailing List?	No  

Create a combo box

4. The **Combo Box Wizard** dialog box will appear. Select **I will type in the values that I want**, then click **Next**.

Combo Box Wizard



This wizard creates a combo box, which displays a list of values you can choose from. How do you want your combo box to get its values?

I want the combo box to get the values from another table or query.

I will type in the values that I want.

Find a record on my form based on the value I selected in my combo box.

Cancel < Back Next > Finish

Create a combo box

5. Type the choices you want to appear in your drop-down list. Each choice should be on its own row. In our example, we are creating a combo box for the **Add to Mailing List?** field in our form, so we will enter all of the possible valid responses for this field. Users will be able to select one of three choices from our finished combo box: **No**, **Yes - Weekly**, and **Yes - Special Events and Offers**.

Combo Box Wizard

What values do you want to see in your combo box? Enter the number of columns you want in the list, and then type the values you want in each cell.

To adjust the width of a column, drag its right edge to the width you want, or double-click the right edge of the column heading to get the best fit.

Number of columns:

Col1				
No				
Yes - Weekly				
Yes - Special Events and Offers				
*				

Cancel < Back Next > Finish

Create a combo box

6. If necessary, **resize** the column so all of your text is visible. Once you are satisfied with your list, click **Next**.

Combo Box Wizard

What values do you want to see in your combo box? Enter the number of columns you want in the list, and then type the values you want in each cell.

To adjust the width of a column, drag its right edge to the width you want, or double-click the right edge of the column heading to get the best fit.

Number of columns:

Col1		
No		
Yes - Weekly		
Yes - Special Events and Offers		
*		

Cancel < Back **Next >** Finish

Create a combo box

7. Select **Store that value in this field**, then click the drop-down arrow and **select** the **field** where you want selections from your combo box to be recorded. After making your selection, click **Next**.

Combo Box Wizard

Microsoft Access can store the selected value from your combo box in your database, or remember the value so you can use it later to perform a task. When you select a value in your combo box, what do you want Microsoft Access to do?

Remember the value for later use.

Store that value in this field:

- ID
- First Name
- Last Name
- Street Address
- State
- Zip Code
- Phone Number
- City
- Add to Mailing List?

Cancel < Back **Next >** Finish

Create a combo box

8. Enter the **label**—or **name**—that will appear next to your combo box. Generally, it's a good idea to use the name of the field you chose in the previous step.

Combo Box Wizard

What label would you like for your combo box?



Add to Mailing List?

Those are all the answers the wizard needs to create your combo box.

Cancel < Back Next > Finish

Create a combo box

9. Click **Finish**. Your combo box will appear on the form. If you created your combo box to **replace** an existing field, you should **delete** the first field. In our example, you might notice that we now have two fields with the same name. These two fields send information to the same place, so we don't need them both. We'll **delete** the one without the combo box.

Phone Number	919-555-2314
City	Raleigh
Add to Mailing List?	No 
Add to Mailing List?	No 
Other Notes	

Create a combo box


10. Switch to **Form** view to **test** your combo box. Simply click the drop-down arrow and verify that the list contains the correct choices. The combo box can now be used to enter data.

Phone Number	919-555-2314
City	Raleigh
Add to Mailing List?	<div>No</div> <div>No</div> <div>Yes - Weekly</div> <div>Yes - Special Events and Offers</div>
Other Notes	

Create a combo box

- ❖ If you want to include a drop-down list with a long list of options and don't want to type all of them out, create a combo box and choose the first option in the Combo Box Wizard: **I want to get the values from another table or query.** This will allow you to create a drop-down list from a table field.

Combo Box Wizard



This wizard creates a combo box, which displays a list of values you can choose from. How do you want your combo box to get its values?

I want the combo box to get the values from another table or query.

I will type in the values that I want.

Find a record on my form based on the value I selected in my combo box.

Cancel

Search			
Other Notes	Tracey	Beckham	919-555-2314
	Lucinda	George	919-555-4534
	Jerrold	Smith	919-555-4564
	Brett	Newkirk	919-555-7653
	Chloe	Jones	919-555-8658
	Quinton	Boyd	919-555-5112
First Name	Alex	Hinton	919-555-5460
	Nisha	Hall	919-555-5753

Customizing form settings with Property Sheet

- The **Property Sheet** is a pane containing **detailed information** on your form and each of its components. From the Property Sheet, you can make changes to every part of your form, both in terms of function and appearance.
- The best way to familiarize yourself with the Property Sheet is to **open** it and **select** various options. When you select an option, Access will display a brief description of the option on the **bottom-left border** of the program window.

Customizing form settings with Property Sheet

The screenshot displays the Microsoft Access interface. On the left, the 'Navigation Pane' shows a list of objects under 'Forms', including 'Customers', 'Customers Form', 'Employee Data...', 'Menu Items', and 'Order Items'. The main window shows a form titled 'Customers' with fields for 'ID', 'Search', 'Other Notes', and 'First Name'. The 'ID' field contains the letter 'I' and the 'First Name' field contains 'Tracey'. The 'Property Sheet' is open on the right, showing the 'Text Box' selection type. The 'Format' tab is active, and the 'Visible' property is selected. A red box highlights the 'Make object visible?' button at the bottom left of the Property Sheet.

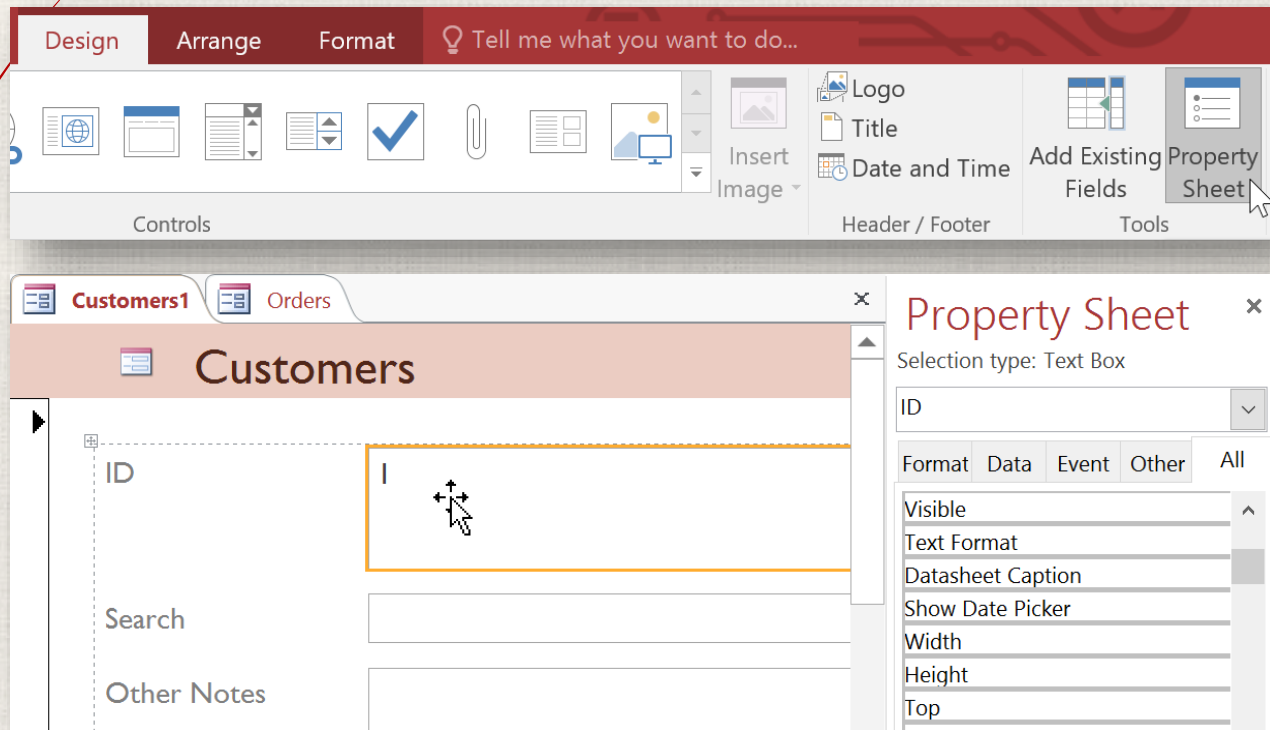
Pay close attention as you modify your form and its fields. It's possible to make subtle changes with the Property Sheet. Because there are so many options, it can sometimes be difficult to remember which one you used to modify each aspect of your form.

Modifying form settings

- ▶ There are far too many options in the Property Sheet to discuss them all in detail. We'll review two useful ones here: **hiding** fields and setting fields with **dates** to **automatically fill in the current date**. Practicing these procedures should also give you a sense of how to work with other Property Sheet settings.

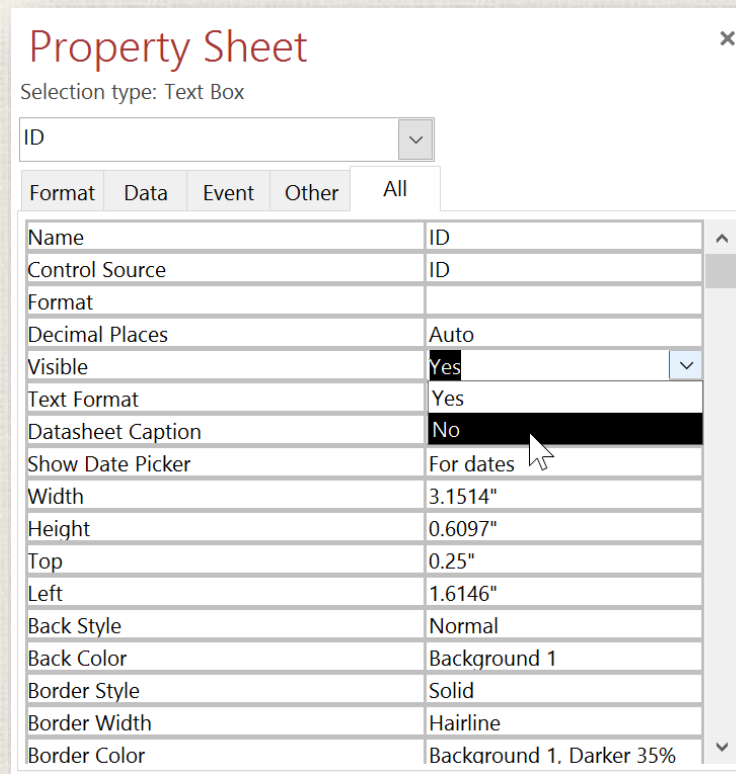
Hide a field

1. In either **Layout** or **Design** view, select the **Design** tab, then locate the **Tools** group. Click the **Property Sheet** command.
2. The **Property Sheet** will appear in a pane on the right. On the form, **select** the field you want to hide. In our example, we'll hide the **Customer ID** field because we don't want any of our users to try to edit it.



Hide a field

3. In the **Property Sheet**, click the **All** tab, then locate the **Visible** option on the fifth row.
4. Click the drop-down arrow in the column to the right, then select **No**.
5. Switch to **Form** view to verify that the field is hidden.



Set a field to autofill with the current date

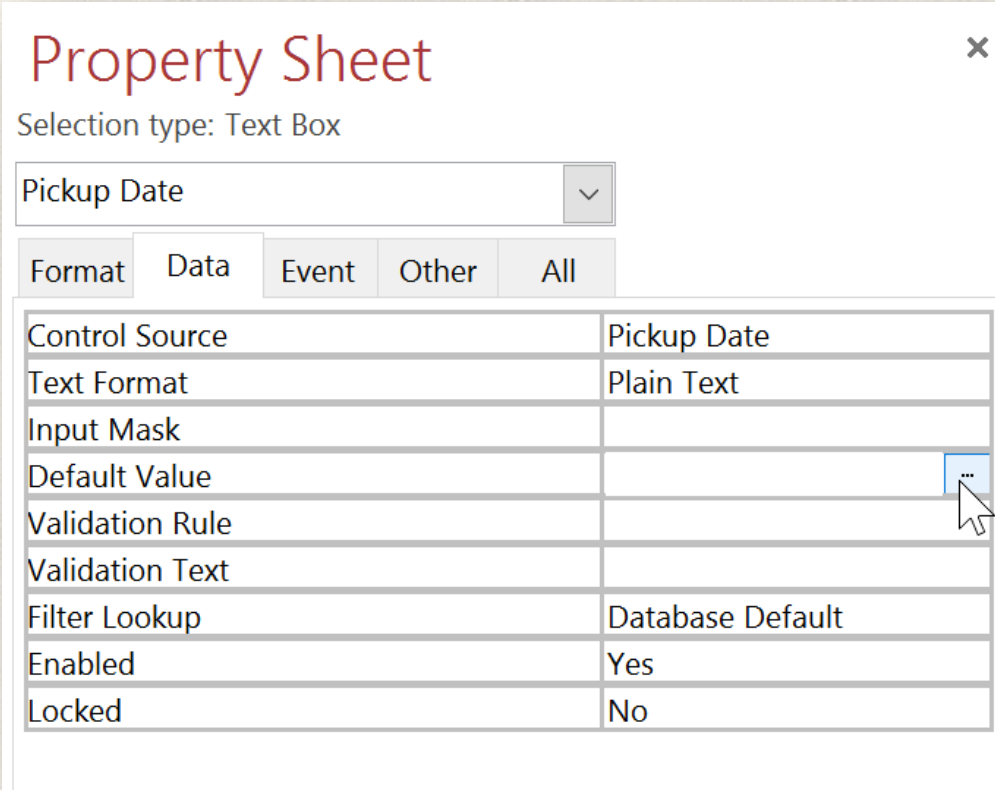
1. In either **Layout** or **Design** view, select the **Design** tab, then locate the **Tools** group. Click the **Property Sheet** command.
2. The **Property Sheet** will appear in a pane on the right. On the form, **select** the field you want to automatically fill in the current date. This **must** be a field with the **date** data type. For our example, we'll select the **Pickup Date** field on our **Orders** form.

The screenshot displays the Microsoft Access interface. On the left, the 'Orders' form is visible in Design View. A text box labeled 'Pickup Date' with a mask '####' is selected, indicated by a yellow border and a mouse cursor. To the right, the 'Property Sheet' pane is open, showing the 'Text Box' selection type. The 'Pickup Date' field is selected in the dropdown menu. The 'All' tab is active, displaying a list of properties and their values:

Property	Value
Visible	Yes
Text Format	Plain Text
Datasheet Caption	
Show Date Picker	For dates
Width	0.8333"
Height	0.25"
Top	1"
Left	6.125"
Back Style	Normal
Back Color	Background 1
Border Style	Solid
Border Width	Hairline

Set a field to autofill with the current date

3. In the **Property Sheet**, click the **Data** tab, then select the **Default Value** field in the fourth row. Click the **Expression Builder** button that appears in the column to the right.



Property Sheet

Selection type: Text Box

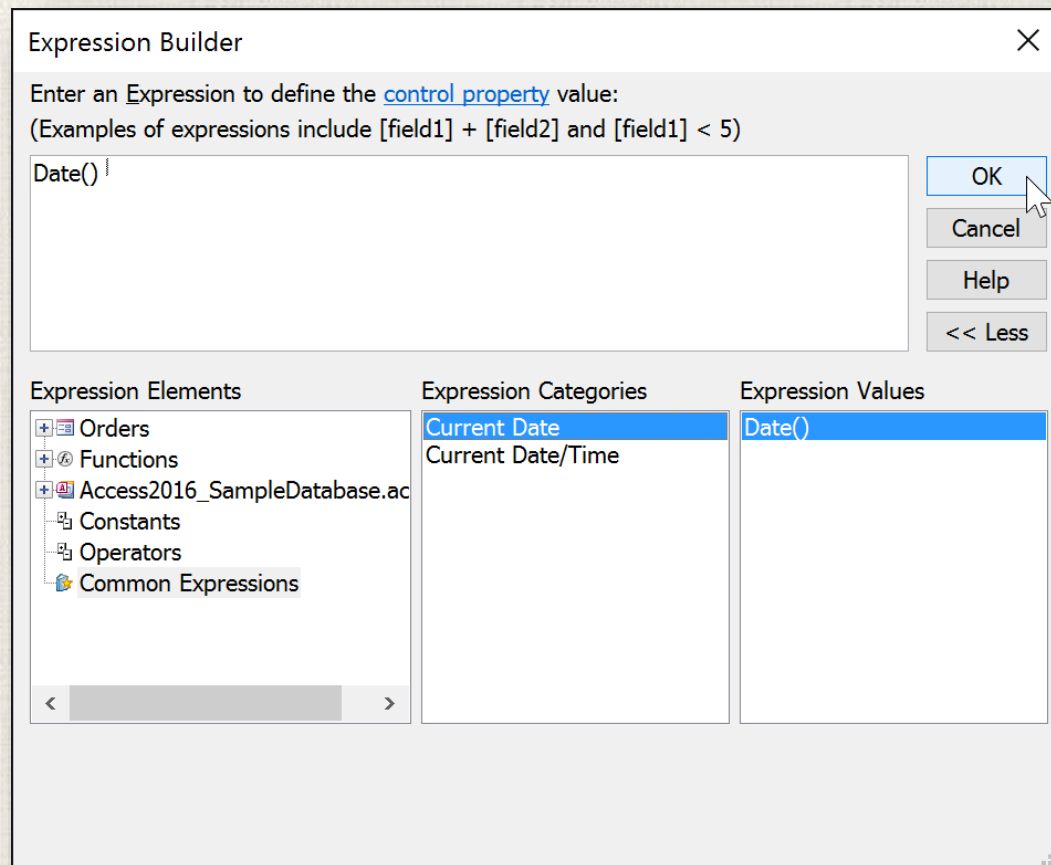
Pickup Date

Format Data Event Other All

Control Source	Pickup Date
Text Format	Plain Text
Input Mask	
Default Value	...
Validation Rule	
Validation Text	
Filter Lookup	Database Default
Enabled	Yes
Locked	No

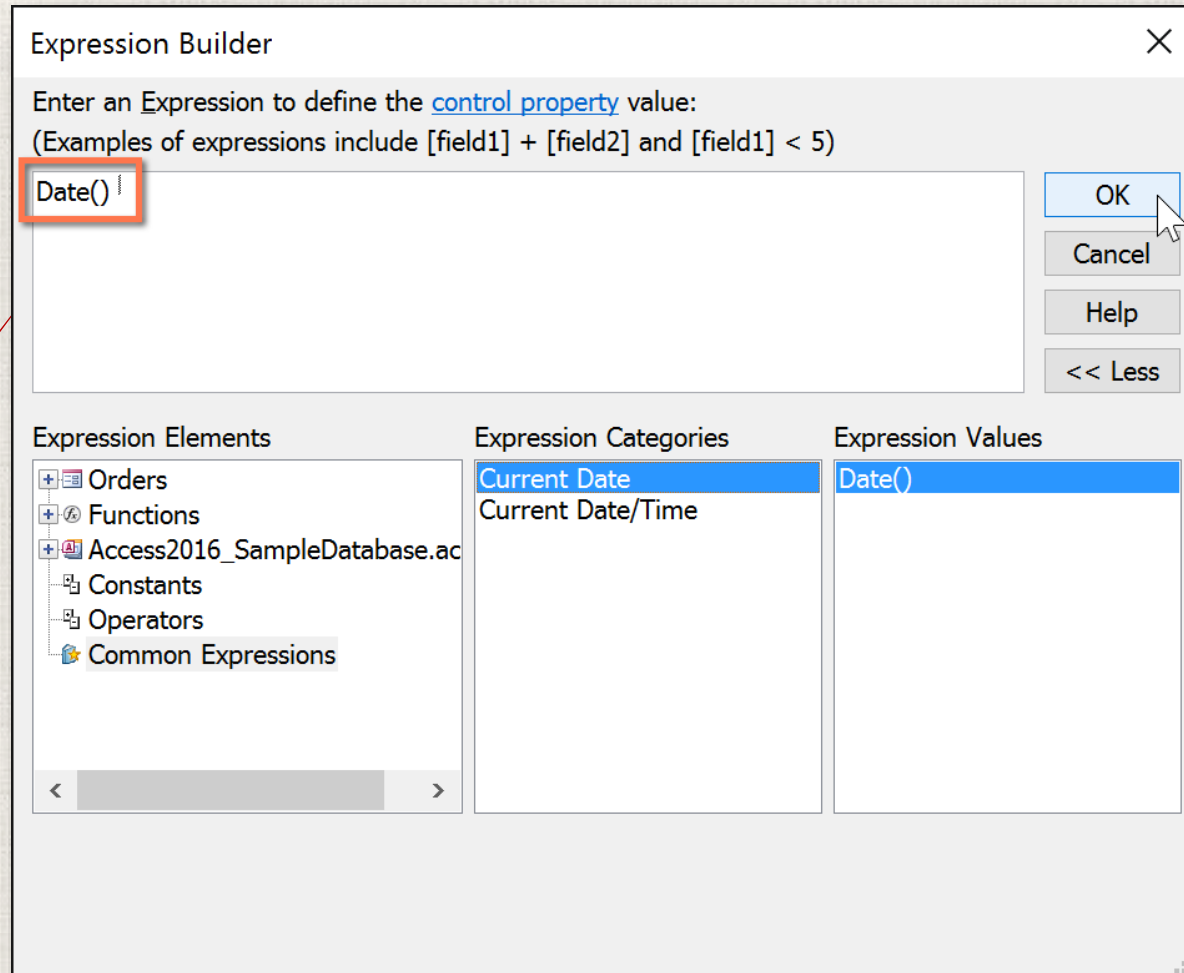
Set a field to autofill with the current date

4. The **Expression Builder** dialog box will appear. In the **Expression Elements** list, click the words **Common Expressions**.
5. In the **Expression Categories** list, double-click **Current Date**.



Set a field to autofill with the current date

6. The expression for **Current Date** will be added. Click **OK**.



Set a field to autofill with the current date

7. Switch to **Form** view to verify that the expression works. When you create a **new record** with that form, the date field you modified will automatically fill in the current date.

New Order

Customer Order # Pickup Date

Notes

Pre Order

Paid

Practice

- Open **practice database**.
- **Create** a form from the **Customers** table.
- **Delete** the subform.
- Create a **combo box**. Add the following choices to the combo box:

Raleigh
Durham
Hillsborough
Cary
Chapel Hill
Garner
Charlotte

Store the value in the **City** field, and label the combo box **NC City List**.
Click **Finish** when you are done with the Combo Box Wizard.

- Switch to **Form** view, and click the drop-down arrow in the combo box you created. You should see a list of cities.



THE END
THE END