# *Intermediate and Advanced*
# *Microsoft Access*

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# Creating Forms (Using the Form Wizard)

It is important to remember, that you must have tables already setup for the Access database. You do not need information in the tables; you just need the tables created with each of the column or “field” names. You can then use the form to enter the information or edit any current information in the tables. So your form is going to contain only fields for information that you want someone to manually enter the information for.

Once you have the tables set up you can then create the forms to help enter the information into the tables.

There are 2 ways to create a form. If you want to create a form using a wizard, click the CREATE tab, then click MORE FORMS. Then click FORM WIZARD. The next screen that appears will ask you which fields do you want to include on the form. You can choose fields from many different tables or just use 1 form for each table.

We are going to create 1 form to enter all the customer information, such as name, address, phone number, etc. Our CUSTOMERS table contains columns for CUSTOMER ID, NAME, ADDRESS, PHONE.

*Hint: When you are entering a mailing address into a table, it is suggested that you have different fields for the street address, another field for town, and another for zip. The reason it is suggested is so when you try to do a query for all customers within a certain town, you can do so easily if it is separated.*

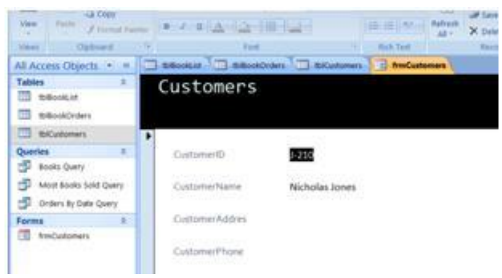
A screen will appear asking you what fields you want to include on the form. On the top of the screen, you see where you could choose which table or query to choose from. In this case we are using tblCustomers to grab the fields from.

Once you select the table you are going to use for the form, you then see a list of AVAILABLE FIELDS. You can select a field on the left and then click the single right arrow (>) symbol to add to the form. If you want all the fields from the table to be in the form you can click the double-arrow (>>). That will add all available fields to form. Once you add all the fields you want to include on the form, click NEXT.

The wizard will then ask what type of form do you want. It is asking how you want the fields to be laid out, in columns, tabs, just as a spreadsheet/table style (datasheet), or justified. Choose the style and click NEXT. It will then ask what style you would like to use, in this section you are choosing the coloring/patterns for the form. Choose the style and click NEXT.

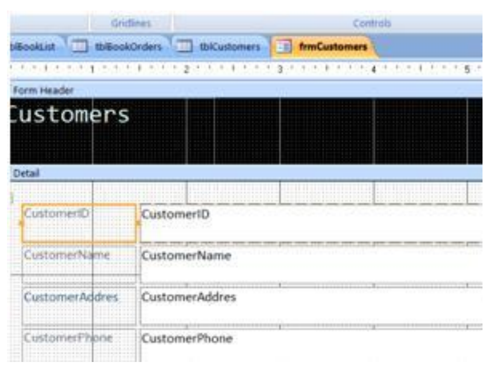
The wizard asks for a title of the form – You must delete the name that it uses (it uses the table name for the form name).

You also have to choose whether to just view the form to enter information or to edit the design. We are going to edit the design. Choose the “Modify the form’s design” option and click FINISH.




You will be brought to the next screen to modify the design of the form. You can make changes to any field on this screen. You can change the title on the top of the form. It used the name of the form, frmCustomers, to appear on the top of the form when user’s are going to enter the data. You would want a cleaner title. So you can create whatever title you would like. Click on the title, and type in the new title of the form.

You can easily switch between design view and form view (where you the users will enter the information). To switch between the views, you click the down arrow under VIEW on the HOME tab. You will be able to choose between DESIGN and LAYOUT and FORM views. You can then see the screen where users can enter the information.




Notice that the field names on the form are displayed as you entered them in the table. You can change the “caption” that appears for each field. So instead of a user seeing CustomerID, you can have it display a little nicer as Customer ID (with a space between words).

To change the captions that appear for the field names, click on the first field to change, to select it. Then right-click the field and click PROPERTIES.

In the section “CAPTION”, change it to Customer ID. You can then change the font style and coloring and size of lettering, etc.

Once you have made all of your changes, you can check the changes by clicking on the HOME tab and VIEW and switch to form view. When finish creating the form and it is displayed in the Navigation Pane on the left, you are able to make changes to it's design.

## To Change the Layout of the Forms:

Once you finish creating the form using the wizard, you are then able to change the design layout of the form. You should choose the LAYOUT view from the HOME tab. Once in layout view, you are then able to make changes. If you notice, the field names are displayed as the column headings were displayed in the table itself. Therefore, you can change the way it displays the title of fields. To change any properties of the fields, simply right click the field you would like to change. Choose Properties. On the right side of the screen, you will see a tab that says FORMAT. Click the FORMAT tab. In the CAPTION field on the tab, click on the right side of the caption field that contains the title, and type in a new name. You can also change the caption, simply by double-clicking on the field name and retyping it.

You can also resize some of the fields on the form. To do so, in the form Layout view, either resize by dragging the sides of the fields. You can also automatically resize the field to fit the title of the field. To do so, click on the title of the field you want to change, click the ARRANGE tab in the banner. Then click SIZE TO FIT.

To move some of the fields around, move the mouse pointer to the field so that the pointer changes to the crosshatch, then drag the fields to where you would like them placed.

You can also change the caption at the top of each field. This will only change the title of the columns.

After you finished setting the form exactly the way you would like, make sure to save it.

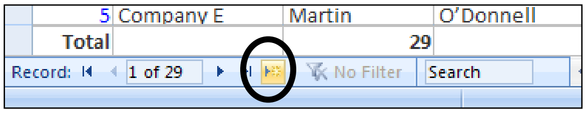
## To Enter Data via Forms:

When you first create the tables for your database, you do not necessarily need to enter the data into table. You can use forms to have users enter the data instead.

Forms help in keeping all the information uniform and to ensure that the information was entered correctly.

Once you have the forms layout completed, then you start having the data entered.

To open a form, click on the form name from the NAVIGATION PANE on the left side of the screen. Once the form is open, you will see a bar at the bottom of the screen on the right half of the window. The bar will tell you which record in the table you are looking at and the total number of records there are. There is an icon you can click on that will allow to you to add a new record to the table. CLICK on the picture of the >*****symbol on the bottom of that screen.




After you click that symbol, the insertion point will be placed in the first field. Enter the data there, and then press the tab key to get to the next field. Once you are finished entering all info for the customer, you should then be able to view the data by clicking on the table name in the Navigation pane on top TABLES section.

## To Validate Data in the Forms:

To validate data, we mean to make sure the data entered by the user meets certain criteria (i.e. if a field is required, we don't want to allow a user to leave that field blank or if it's a phone number, we want the phone number entered in a certain format). To do this validation, you need to this from the table itself.

An input mask allows you to give criteria on how data is to be entered to ensure consistency in the data entered.

Once you have the table selected in the Navigation Pane on the left of the screen. You must then be sure to be in DESIGN view. This next step will not work unless you are in design view.

Click the field that you want to change the properties of. If you want to require that they enter a name, for example, in the field that contains the name, down below on the GENERAL tab, where it says REQUIRED, it is automatically set to NO. You need to change that to YES, by clicking the down arrow on the right side of that line.

Also, you need to change the option that says "ALLOW ZERO LENGTH" to NO. This means that a user can't leave it blank.

If it is a field that has a phone number that you want entered in a certain format (with parenthesis for example), you can set an input mask. To do so, click the **…** symbol on the right side of the INPUT MASK line of the form. It will then bring up a wizard to help you create the “mask”. You can choose which format of a number you want. Click NEXT. Choose how you want the mask to look, or you can just leave the options there, and in the TRY IT box type in an example phone number to see how it will work. Click NEXT.
It asks how you want the data stored, with symbols. Choose your option and click NEXT. Click FINISH.

## Creating and Editing Reports:

You can create reports from the data you enter into the forms or tables. Reports display data gathered from query’s that you have created in the database.

To create a report from a query, select the query in the Navigation Pane. Click the CREATE tab. Click REPORT WIZARD. It will ask you which information to appear on the report. Choose one of the queries, then choose from the available fields and click NEXT.

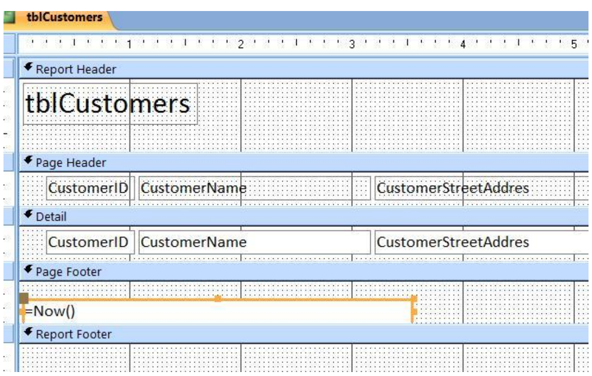
It will then ask you about any grouping. This screen is asking how do you want the results seperated (i.e. to sort by an id number and then by name). Choose the correct option for you, click NEXT. Next it asks how do you want the results sorted. Choose the fields to sort by and whether ascending or descending and click NEXT.

You are then asked about what type of layout for your report. You can choose the style and orientation and click NEXT. Choose the style next and click NEXT.

Finally you are asked for a title for the report. Enter the title and whether you want to view the report or edit the design. If you choose to view the report, you can then go back to edit the report by clicking on the report name in the Navigation pane and switch to design view on the HOME tab.

If you want the report to print out with gridlines, click in the report. Click the FORMAT tab. Click gridlines, and choose the type of gridlines you would like from the list.

You can create custom headers and headers for the pages of the report or for the report itself. In other words, you can have something appear at the top of each page and bottom of each page of the report or you can you have something appear at the top of the entire report and the end of the report.




To create the custom headers and footers you must be in design mode of the form. You will see a screen similar to the illustration. You can enter information into the fields by using the Design tab of the banner and choose any of the controls you see in the CONTROL section of the banner.

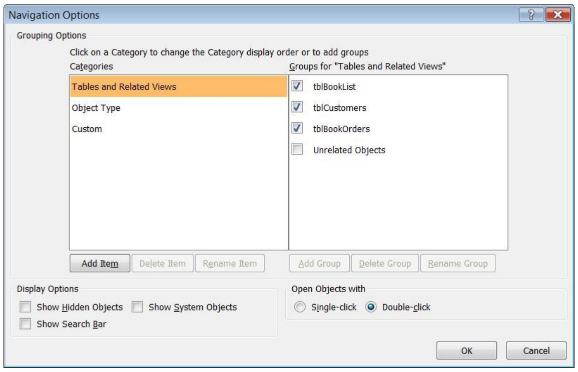
## To Customize the Navigation Pane:

The navigation pane on the left can be customized so that instead of having everything separated into groups like “tables”, “queries”, or “reports”, you can have it broken down into different groups that make it easier for the user to find certain things. For example, if your users need to enter customer information and sometimes print out a customer list, you may want the tables, queries, reports that have to do with your customers, all in one group.

To customize the navigation pane on the left of the screen, you first need to right-click in any white space of the navigation pane. Make sure you are not pointing to any words in the navigation pane.

From the menu, choose NAVIGATION OPTIONS.

On the left side of the Navigation Options screen (under the categories section) click CUSTOM. If you want to rename CUSTOM, you can by clicking once on Custom and choose RENAME ITEM. Type in whatever name you want to appear there. It is popular to place the company name there (for example, type in WIDGETS as a company name).




On the right side of screen click ADD GROUP. A new group name called "Custom Group 1" gets add and highlighted on the right. Just start typing a new name. For example, type in CUSTOMERS.

If you want to add another group, simply click ADD GROUP once again and repeat above steps. Once finished adding all the groups click the OK button.

Once you are back to the main screen, you must then click the down arrow next to where it says All Access Objects on the top of the Navigation Pane. Select whatever name you typed in the previous steps (i.e. WIDGETS). You will now see separate groups for all the groups you created above. for the above example, you should CUSTOMERS instead of TABLES. Then under the group UNASSIGNED OBJECTS – you should see a list of all of your tables, forms, queries, and reports. You can simply click on each one of those items and drag them to the appropriate group. You may want to drag anything having to do with customers, the form, the reports, the queries, etc into the CUSTOMERS group. Drag the remaining "unassigned objects" into whichever group they should belong.

## To Create a Switchboard for Users:

Access allows you to create what's called a switchboard which allows you the users to navigate around the database a little easier then the Navigation Pane.

To create a switchboard, first click the DATABASE TOOLS tab of the banner at the top of the screen. Click SWITCHBOARD MANAGER. You will get a message it cannot find a valid switchboard, create one? Click YES.

You will see a screen that lists all of the pages for the switchboard. Click EDIT on the main page. It will bring up a screen that has a spot for you to enter Text. It says "NEW SWITCHBOARD COMMAND" by default. To change that, click in that field and delete that text and replace with your text(i.e. Add New Customer).

The next line says COMMAND. For command you have to select a command from the drop down menu. In this case, we want to OPEN FORM IN ADD MODE. Choose the form you want to open in the next line. In this case, we want to choose CUSTOMERS form.

Repeat these steps for every item you want to appear on the switchboard. In this example, I would also want to add an item that would open the Customers form in EDIT mode as well. Then I would add an item to run the reports as well.

When you are done adding items to the switchboard, click the CLOSE button. Click Close one last time to get back to the database.

To view the switchboard, double-click SWITCHBOARD in the Navigation Pane.

To have the switchboard open automatically when the database is opened, click the OFFICE BUTTON in the top left of the screen. Click ACCESS OPTIONS on the bottom right corner of that menu. Click CURRENT DATABASE on the left of the screen to make changes.

You can then give this application a name where it says APPLICATION TITLE. Next you can choose what to display on startup, where it says DISPLAY FORM: Choose the form you want to start with, in this case, since we created a switchboard, that is the item we want opened when we open the database. So choose SWITCHBOARD from the drop down menu.

If you don't want the users to navigate around too much on their own, you can choose not have the navigation pane displayed. You can choose that in the NAVIGATION section of CURRENT DATABASE. Click on the CHECKBOX next to DISPLAY NAVIGATION PANE. Before you do this, be sure you have all the proper items listed in the switchboard; otherwise there will be some items not accessible to the user.

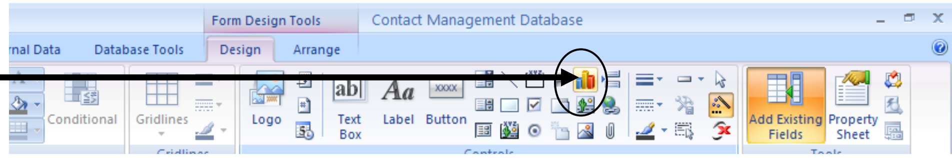
## To Create a Chart for Your Data:

We are going to use an example that we want to chart the book orders to find out which books sold we sold the most of and which the least of.

To create a chart, first you need to create a blank new form. To do that, click on the CREATE tab and click BLANK FORM in the form section of the banner.

Make sure the form is open in DESIGN VIEW.

On the DESIGN TAB, click on the picture of the CHART.




Press and hold left button of the mouse and draw a box. Once you draw the box the Chart Wizard dialog box appears.

On the next screen select the tables or queries you want to chart (i.e. tblBookOrders) and add whichever fields of data you want to chart. In our table of orders, we want the book id and the quantity to be charted to see which book sold the most. Once you have the data fields you want to include, click NEXT.

Choose the chart style you want, click NEXT.

The next screen is supposed to preview the chart. You then have to click the picture of the magnifying glass that says preview, to see a preview of the chart. Click NEXT.

The next screen allows you to enter a chart title. Type the title you would like and then choose if you want to display a legend with the chart. In this case we don't want to. Click FINISH.

You will be brought back to the form but it will be generic data, not your data. To change the name of the form with the chart on it, right-click FORM1 tab and click SAVE. A Save As dialog box will appear for you to enter a name. Type in a name and click OK. To see your chart, click the X to close this form/chart.

If you want to see your chart on the form, instead of the generic chart, click the X to the right of the tab for the chart. Then to open the chart, double-click on the chart name you created, that appears in the NAVIGATION PANE. You then have to click VIEW on the HOME TAB to see the chart on the screen (this is a bug with Access 2007 and Windows Vista).

To make changes to the chart, make sure you change to design view before doing the following steps.

If you want to change any items in the chart, i.e. make the chart wider, change to DESIGN VIEW. Right-click the chart. Go to CHART OBJECT then EDIT. You can change the size of the chart by dragging one of the 8 controls along the border of the chart. You can also change font styles and sizes. To change anything with the chart itself, right click the chart area and click on FORMAT CHART AREA on the menu. You can choose a background color for the chart by choosing a color in the AREA section of the screen. Then click on the FONT tab and choose your font. When complete, click OK.

If you want to change any object on the chart, for example, if you want to change the color of the columns of the line chart, right-click the columns and choose FORMAT DATA SERIES. On the PATTERNS tab, choose the color you want to change the columns to. When done making changes, click OK. Click the X on the right side of the tab and click YES to saving the changes.

To add titles to the x and y axis on the chart, right-click on the chart and click on CHART OPTIONS. On the titles tab of the chart options dialog box, make sure the title appears the way you want. Then where it says X axis, enter the title that you want to display along the horizontal axis. In the box for Y axis, enter the text that you want to display along the vertical axis of the chart. Click OK.

To close the chart, click the X. It will ask if you want to save the changes to the form, click YES. You can then open the chart by using the task pane once again.

## To Create a One-To-One Relationship Between Tables:

Relationships, in Access, allows you to pull up information from various tables or queries and display the results in one place.

Under DATABASE TOOLS, click on RELATIONSHIPS. The SHOW TABLE dialog box should appear. If it doesn't, in the Relationships group click on SHOW TABLE. The show table dialog box appears. Choose which tables or queries you want to create a relationship with. You can hold down shift and click each of the tables/queries to add at once. Then click ADD.

A relationship between tables normally is formed between two identical fields in 2 separate tables. To create the relationship all you need to do is to click and hold the button down on the field in one table and drag to the identical field in the second table. You will get an EDIT RELATIONSHIPS dialog box. Click OK. To close this relationship click CLOSE button in the Relationships group. You will get a message about saving the layout of the relationships, click YES.

Once you create the relationship, then you can create 1 query to grab all of the information you need from both tables. Refer to the Beginner Access manual on how to create a query.