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Creating forms in *Microsoft Access 2007*®

This is the fourth document in a series of five on using *Microsoft Access 2007*®
The aim of this guide is to provide information on using forms in *Microsoft Access 2007*®
Prior knowledge of how to set up a database in *Access*® is assumed.

Other documents in the series are:

USER 163	Introduction to <i>Microsoft Access 2007</i> ®
USER 164	Creating tables in <i>Microsoft Access 2007</i> ®
USER 165	Filters and queries in <i>Microsoft Access 2007</i> ®
USER 167	Producing reports in <i>Microsoft Access 2007</i> ®

What is a form?

Forms are linked to one or more *Microsoft Access*® tables and provide an easy to use interface for accessing, editing and creating records.

Student Reg No:	1
Surname:	Smith
Address:	James
Tel No:	
Date of birth:	01/05/1982
Award code:	

Benefits of using a form

- Consistency and accuracy when adding data
- An easy to use interface for editing, viewing and entering records

Creating a basic form

- Select the table that you want to base your form on

- From the **Create** tab, click the Form button



Access® will now create a form based upon the selected table. Note that if your form was based upon the Primary table in a relationship, *Access*® will create two forms – the main form for the Primary table and a smaller table for the Child table. The Child table would be the sub-form.

The Forms Wizard

If you wish to customise the form, the **Forms Wizard** allows you to select:

- which fields you require on the form
- fields from other tables

- background colours, styles and different layouts

Creating forms using the Form Wizard

- From the **Create** tab, click the **More Forms** button



- Select **Form Wizard**



- Follow the instructions

Note: choosing the Tabular or Columns style will display the data in table format. To display the data one record at a time, choose the Columns style

Constructing a form in Design View

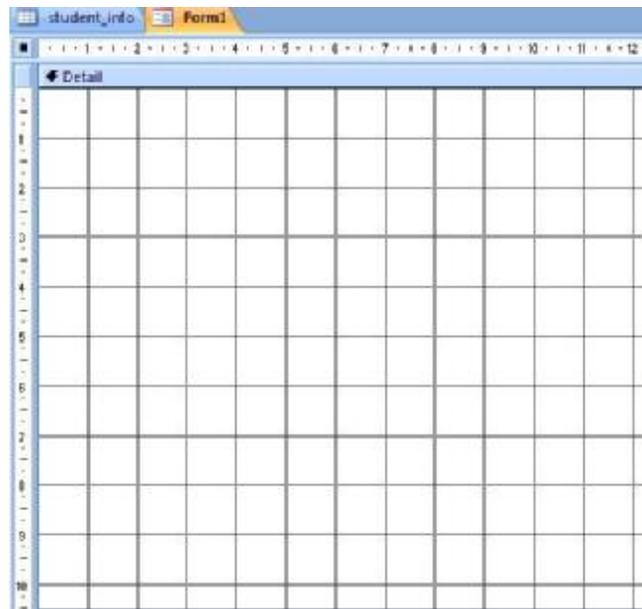
If you want to use your own graphical style and layout on a form, you need to create it in Design View. Design View offers greater flexibility and increased functionality.

- Select the table that you want to base your form on

- From the **Create** tab, choose the **Form Design** button



- A blank form will appear in Design View



- To construct the form, select the **Design** tab



- Click the **Add Existing Fields** button
- A list of field names from the table will appear. Click and drag the fields from the Field list on to the form area

Experiment with different types and styles of forms. If you are not happy with the results, you can always delete the form and start again.

Saving a form

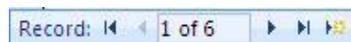
- Right-click on the tab above the form and select **Save**
- Enter a name for the form and click OK
- The name of the form will appear in the **All Tables** list on the left-hand side of the screen

Deleting a form

- Select the form from the **All Tables** list on the left-hand side
- Right-click on the name of the form and select **Delete**
- You will be asked to confirm if you wish to delete the form, click OK

Viewing records using a form

To navigate through records, use the control panel at the bottom of the form. The current record number is also displayed in the panel.



Entering data through forms

Any data entered through the form is automatically added and saved to the appropriate table.

- Type the data in the fields provided
- To move between fields, press the **Enter** or **Tab** keys
- Press **Enter** when you have completed the form. This sends the record to the table and the form displays a new blank record

Creating a new record through a form

- Click the button that has a triangle and a star 
- A new blank record will appear. Complete the appropriate fields

Deleting a record

- Display the record that you wish to delete
- From the **Home** tab, click the **Delete** button, then choose **Delete Record**
- You may be asked to confirm the deletion, if you are sure, click **Yes**

After you have deleted the records, you are advised to compact the database:

- Click the **Office** button 
- Click **Manage** then choose '**Compact and Repair Database**'

For further information on compacting databases, see the user guide USER 163 Introduction to *Microsoft Access 2007*®

Filtering data from a form

As with tables, you can filter data from a form. Ensure that you delete any data from the form that is not to be included in the search.

- From the **Home** tab, click the **Advanced** button, then choose '**Filter by Form**'
- Click in the field that you wish to search
- Click the arrow to the right of the field to reveal a list of data

- Select the data you wish to search for
- At the bottom of the form there is a **Look for** tab and at least one **Or** tab. **Look for** is the standard option; to set a condition for two or more types of data, click the **Or** tab
- Click the **Toggle Filter** button to run the filter
- The filtered records are displayed at the bottom of the form. Use the buttons on the control panel to view the records retrieved
- Click the **Toggle Filter** button again to remove the filter

Subforms – forms within forms

With a relational database (contains one or more related tables) a form can be used to add data to the related tables. For example, a form used for Award details could contain a subform to student information.

Subforms are created automatically when you create a form based upon a Primary table.

Creating subforms using the Forms Wizard

To create subforms using the Forms Wizard, you need to choose an additional table when the wizard prompts you to choose a table to add fields from. When the wizard asks how you would like to view form data, there will be a choice of three options:

- present the data all in one form
- present it as a subform, which will have two sets of record and navigational controls
- use linked forms – the main form will have a button that links to the related form

Adding extra functionality to a form

Changing the appearance or adding extra functionality to a form is done within Design View. Examples of changes that you can make to a form are:

- adding command buttons, e.g. navigational or Find buttons
- linking to other forms or tables
- applying your own colour schemes or using pictures
- changing the form layout

To modify the appearance of an existing form

- Open the form
- Click the **View** button and select **Design View**
- The form will open in Design View. The Design toolbar will appear at the top of the screen with buttons for modifying the appearance of the form

Form Header	
	student_info

Detail	
Student Reg No:	Student Reg No
Surname:	Surname
Address:	Address
Tel No:	Tel No
Date of birth:	Date of birth
Award code:	Award code

Form Footer	

A basic form has a Detail section which contains the main components of the form, and a Header and Footer section for holding repeated elements such as text and graphics. The sections are identified by a blue bar which can be dragged up or down to provide extra space on the screen.

Inserting text in Design View



Text can be inserted using the Text Box button.

There are two types of text box – bound and unbound.

- A bound text box is connected to a field category on a table, e.g. surname
- An unbound text box is not linked to a field category and can be used to hold the results of a calculation

To insert a text box



- Click the Text Box button
- Move the mouse to the point on the form that you wish to put the text box. Click and drag to create the text box
- You can then enter and format text
- All new text boxes are unbound text boxes. To convert a text box to bound, see the section *Changing a text box from unbound to bound*.

Changing the content of a text box

- Click the text box
- Move the mouse over the text box and click next to any text that needs to be edited
- Edit the text as required

Moving and resizing a text box

- Select the text box
- A number of black squares appear on the label with a larger black square in the top-left corner

- Ignore the larger square and drag one of the other squares to move or resize the text box

Note: if your changes have had an undesired effect, or if you move something accidentally, click the **Undo** button 

Aligning objects in Design View

- Hold down the Shift key and click on the objects that you wish to align
- Right-click and select **Align** then choose a style of alignment

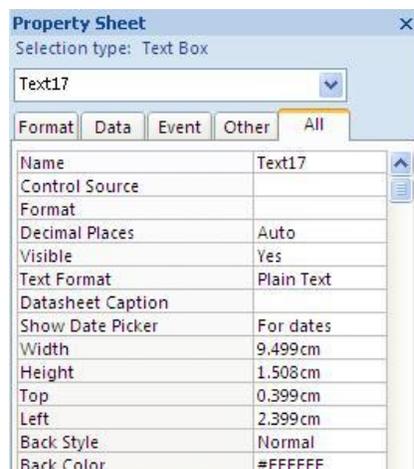
Form properties

To add extra functionality, form elements such as text boxes have properties.

To view the properties of a text box:

- Double-click on the text box
- or
- Right-click on the text box and select **Properties**

The Properties Window will appear on the right of the screen



Any of the properties can be edited, by highlighting the property and entering the new one.

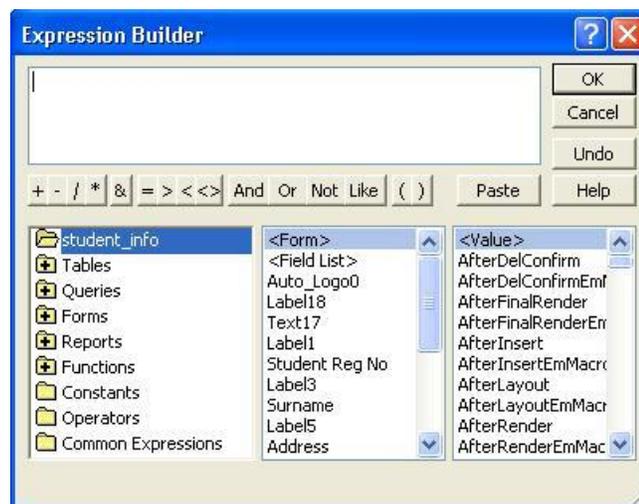
Changing a text box from unbound to bound

- Open the text box properties
- Click the **All** tab
- Click in the space next to **Control Source**
- Click the arrow and select a field to attach to the text box
- Close the Properties window

Using an unbound text box in a calculation

An unbound text box used to display the result of a calculation is called a Calculated Control. To perform a calculation, your form must contain at least two fields containing values. The unbound box will contain an expression that uses these values to perform the calculation.

- Create an unbound text box and display the properties
- Click the **All** tab
- Click in the space next to **Control Source** and click the button containing three dots. The **Expression Builder** will open – this contains a range of mathematical functions for developing calculations.



The syntax to perform a simple multiplication would be:

=[name of first value text box]*[name of second value text box]

For example, if your form contains a text box named 'quantity' and the contents are to be multiplied with those of a text box named 'price', the expression would be:

=[Quantity]*[Price]

To test a calculation, switch to Form View

Changing field/text box colour

- Select the field or text box that you wish to change
- Click the **Fill/Back Colour** button  and choose a new colour

To remove a fill colour:

- Select the field or text box
- Click the **Fill/Back Colour** button and choose **Transparent**

Changing the colour of text

- Select the field or text box
- Click the **Font Colour** button  and choose a new colour

Changing the background colour of a form

- Click the bar labelled **Detail**
- Click the **Fill/Back Colour** button  and choose a new colour

Using properties to enhance a form

Like text boxes, the form has its own set of properties that can change the appearance.

To open the properties of a form:

In the top-left of the form window, where the two rulers meet, is a blue box. The box may also contain a small black square.



Double-click the box to open the properties of the form.

Setting the form properties to use a background image

Note: you are advised to use GIF or JPEG images as these have relatively small file sizes. To create a patterned background, set the **Picture Tiling** property.

- Display the Form properties
- From the tabs across the top of the box, click the **All** tab
- Scroll down the list of properties and select the **Picture** property
- Click the button containing 3 dots
- From the window that appears, locate and select an image
- Click OK

To remove a picture background from a form

- Display the Form properties
- Locate the **Picture** property and delete the file associated with it

Applying headers and footers to a form

Headers and footers are useful places to put text, logos and command buttons, e.g. add/delete record.

Placing objects inside the header or footer will place them at the top or bottom of a form.

- Right-click on the form
- Choose Form Header/Footer
- The appropriate header and footer will be added to the form. You may need to resize the form window

To change the size allocated to your header or footer:

- Position the mouse over the Detail bar to change the height of the header, or over the Footer bar to change the footer
- When the pointer changes to the black 'up and downward' arrow, hold down the mouse button and drag the bar

Command buttons

A Command button is an object on a form that represents a shortcut to a menu option. Command buttons are commonly used for inserting and deleting records from a form. You could also use the form as an introductory page, with Command buttons linked to all forms within the database.

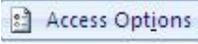
Adding a Command button in Design View

- Ensure that the **Use Control Wizards** button is selected 

- Click **Button** on the toolbar 
- Click the point on the form where you wish to insert the Command button
- The **Command Button Wizard** will open. Follow the instructions to assign an action that will occur when the Command button is selected

Displaying a form on Startup

To display a form when the database is opened, instead of the Database window:

- Click the **Office button** 
- Click the **Access Options** button 

- Select **Current Database**
- Click the arrow next to **Display Form**
- Select the form that you wish to display on Startup
- Click OK

Where next

Once you have learned how to create and customise a database, the next step is to generate printed information from the database for analysis. For further details of how to do this, see USER 167 Producing reports from *Microsoft Access 2007*®

Where to go for more help or information

You can get further help from the Information Services Help Desks at:

Thompson Library: 01782 294771

Brindley IT Centre: 01782 294135

Octagon IT Centre: 01785 353339

Online: www.staffs.ac.uk/ishelp

Email: libraryhelpdesk@staffs.ac.uk (for all IT and Library queries)

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