

Access Forms



Instructional Services at KU Libraries A Division of Information Services

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Abstract: This document introduces users to Forms. Forms provide a better interface for users to enter data into a database and work with other objects in a database. Participants will learn how to create Forms via AutoForm and the Form Wizard. They will also learn how to design and modify forms in design view with the help of the Toolbox toolbar, add subforms to main forms, and sort, filter, and work with conditionally formatting data in forms.

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Introduction

Microsoft Access XP is a relational database management system. This type of database allows a user to store, retrieve, manage and analyze data quickly and effectively. This workshop introduces a new database object: forms. Forms allow you to customize your database interface and help you maintain the integrity of your data.

Objectives

The goal of this workshop is to introduce participants to forms in *Access*. After today's workshop, participants will be able to:

- Create a form from a table or query using AutoForm
- Create a form from a table or query using the Form Wizard
- Create a form directly in the Design View
- Modify a form in the Design View
- Add subforms to main forms
- Sort and filter for records in a form
- Format controls conditionally

Prerequisites

It is assumed that the participants in this workshop are familiar with tables, queries and relationships in Microsoft *Access*; have taken *Access: Introduction* and *Access: Intermediate*; or have equivalent skills.

Related Training Available from Instructional Services

All workshops offered by Instructional Services are free to KU students, staff, faculty, and [approved affiliates](#).

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit www.lib.ku.edu/instruction/workshops. For further workshop related questions, please email training@ku.edu.

ACCESS: REPORTS

This three-hour, hands-on workshop introduces creating reports via AutoReport and the Report Wizard. Students will also create and modify a report in design view and learn how sort, group, format, and perform calculations in a report.

Introducing Forms

In *Access*, forms can be used to create a friendly data-entry interface to enter information into tables and/or queries; to create custom dialog boxes to carry out actions; or to create switchboards for users to open other forms and/or run reports. **Bound** forms are forms that are created from other database objects, such as tables or queries. **Unbound** forms

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are forms created to carry out user's action, such as opening other forms or running reports.

Many forms provide a customized interface for you to enter new records into tables and allow you to format and print individual records. With the help of queries and relationships, they allow you to enter data into more than one table at a time. As a customized interface, fields on a form can offer you a predetermined list of valid values, which not only ensures consistency from record to record, but also speeds the creation of new records. In addition, if your database tables are linked with relationships that enforce referential integrity, forms allow you to look up records and data from the primary table (main form) and add or edit data in the related table (subform), so you can easily maintain referential integrity.

Note: Forms can contain **bound** and **unbound** controls. A **bound** control is one that receives its data directly from a table or query. If the information in a **bound** control is changed in a form, it will change in the table or query. An **unbound** control is one that is only available in the form and is **not** found in a table or query. Labels are **unbound** controls.

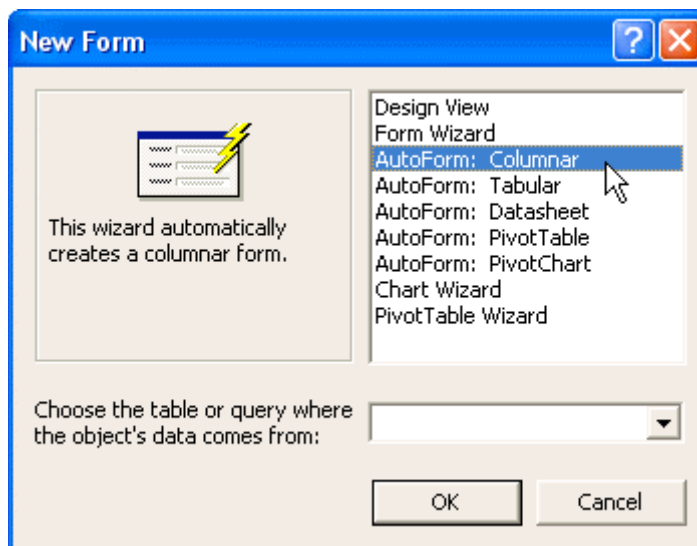
Using AutoForm

There might be times when you want to concentrate on just one record at a time. Making an **AutoForm** can help you do this. When you create an **AutoForm**, *Access* will automatically add all of the fields to the form from the table or query you create the form from. Here is one way you can create an **AutoForm** in *Access*:

1. Click on the **Forms** button in the object bar in the database window.
2. Click on the **New** button directly above the object bar.



3. When the **New Form** dialog box opens, choose which of the **AutoForm** options you want in which to create your new form. The options are as follows:



AutoForm: Columnar: Creates a new form in a column type format for viewing one record at a time. This is the default format.

AutoForm: Tabular: Creates a form where the fields for each record appears on one line with the field labels at the top of the form.

AutoForm: Datasheet: Creates a form that has the same datasheet appearance of a table.

4. Next, click in the drop down list, **Choose the table or query where the objects data comes from:**
5. Once you choose the table or query you want to base the form off of, click **OK**.
6. Access will make the **AutoForm** and add all of the fields to the form for you.



Creating Forms with the Form Wizard

The **Form Wizard** is another way to create a form quickly in *Access*. The **Form Wizard** allows you many different options, such as, choosing multiple tables and/or queries to create a form, selecting which fields you want to appear in the form, choosing the type of layout you want your form to be in (this includes the three mentioned with the AutoForm as well as a justified layout), and what kind of background you want on your form. Here is how to use the **Form Wizard**:

1. Click on the **Forms** button on the object bar.
2. Double click Create form by using wizard.
3. Click on the **Tables/Queries** drop down arrow to choose the first table or query you want to include in your form.

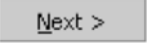
Note: If you are building a form from a query of related tables with a **one-to-many** relationship, the Wizard asks:

- How you want to view your data (in terms of one table or another)
- How to build the form: A form with a subform or two linked forms.




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4. Under the **Available Fields:** column on the left side, there are several ways you can choose to bring a field into the **Selected Fields:** column on the right:
 - a) Double click on each field name.
 - b) Select each field name one at a time, and click on the single arrow button. 
 - c) If you want **ALL** of the fields, click on the double arrow button. 

d)

Note: If you want most of the fields in the list, click on the double arrows to pull them all over. Once they are in the **Selected Fields:** list on the right, either double click or click on each field name and click on the single arrow pointing to the left to send back fields you do not want to the **Available Fields:** list on the right. This might save you some time.

5. Repeat steps 3 and 4 for each table and/or query.
6. Click on the **Next** button. 
7. Choose one of the layouts for your form:
 - a) Columnar
 - b) Tabular
 - c) Datasheet
 - d) Justified
8. Click on the **Next** button.
9. Choose the **Style** or form background you would like. **Standard** is the plain gray background.
10. Click on the **Next** button.
11. Type in the **Title** you want for your form. This will be the name of the form that will be displayed in the database window. Click on either one of the following options you want before clicking finish:
 - a) **Open the form to view or enter information** (default).
 - b) **Modify the form's design.**
12. Click **Finish**. *Access* will create your form and open it in the view you chose.

Viewing and Editing

As with all objects in Access, there is a button on the tool bar allowing you to switch back and forth between **Form View** (data entry view) of the form  and **Design View** . If you want to make changes to the form, such as changing text in labels, adding additional labels or controls, deleting controls, or resizing labels or controls, click the **Design View**  button to edit the form.

Creating a Form in Design View

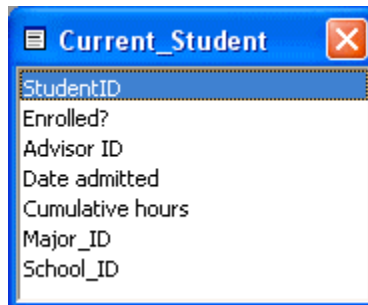
You also have the option to create forms in **Design View**. This allows you to create the form from scratch, so that you can choose your fields, formats, and layout your information however you like.

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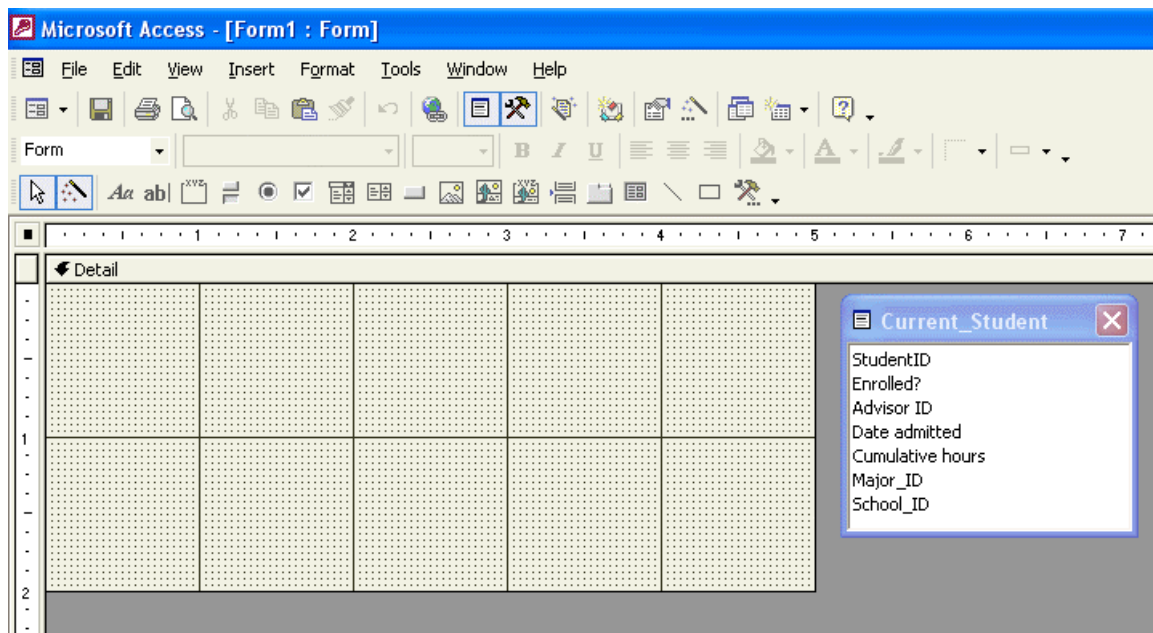
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To start creating your form in **design view** you can do the following:

1. Click on the **Forms** button on the object bar.
2. Click on the **New** button above the object bar.
3. In the **New Form** dialog box, choose **Design View**.
4. Click on the drop down arrow beside **Choose the table or query where the objects data comes from:** to pick the table or query you want.
5. Click **OK**.
6. Your new form will open up into **Design View** with the **Field List** displayed.




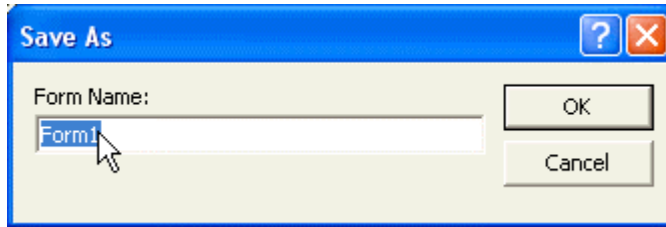
7. Click and drag on the name of the field that you want to add to the form. It will look like a block when you drop it onto your form. To add more than one field at a time, you can use the **Ctrl** key for non-adjacent fields or the **Shift** key for adjacent ones.




Note: By default, *Access* creates two controls. The control that is bound to the table or query that allows the user to input and change information in the form will appear on the left and a label for that control will appear on the right. The controls are linked together and can be moved around the form as a unit.

8. Repeat step 7 for each field you want to add to your form.

9. Click on the **Save** button or **File** → **Save**. 



10. Type the name you want to give to your new form over the default name of **Form1**.

11. Click on the **Form View**  button to view, add, or edit the records in your form.

Sections of a Form

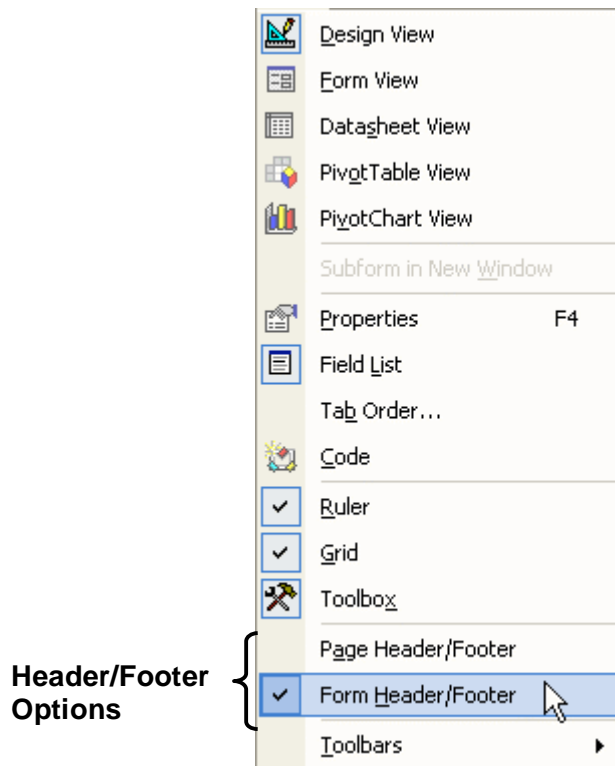
When you start to create your form in design view, you first need to figure out where to place your controls. There are several **sections** you'll find in design view of a form. To turn these sections on choose the word **View** on the menu bar, and then choose **Page Header/Footer** or **Form Header/Footer** dependent upon which sections you want to show. Each **section** has a specific purpose. They are as follows:

Section	What it Does
Detail	The detail section is used to display records.
Form Header	This section is used for displaying information that remains the same for every record, such as a title for the form and the date and/or time. The information in this section appears on your screen when in Form View, but only appears at the top of the first page of a printed form.
Form Footer	The form footer is used to display information that is the same for every record, such as a command button (this could be a button that is a print record button, which would only print the record you're on). The information in this section also appears on your screen when in Form View, but only appears at the bottom of the last page of a printed form.
Page Header	The page header section can display things such as column headings or titles. The information in this section will not appear in Form View. It will only appear at the top of each page when printed.
Page Footer	The page footer section can display things such as page numbers. The data in this section will not appear in Form View either. It will only appear at the bottom of each page when printed.

Adding and Removing Sections

To add the **Form Header/Footer** or **Page Header/Footer** section to your form, you can do the following:

1. Make sure you are in **Design View** of your form.
2. Click **View** → **Page Header/Footer** to turn on those sections.
3. Click **View** → **Form Header/Footer** to turn on those sections.

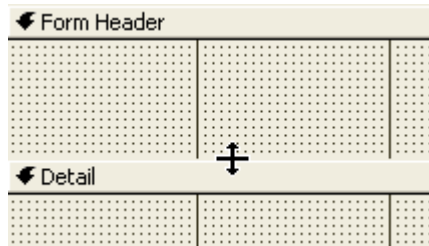


4. *Access* will place a check beside the sections you turn on.
5. To turn either of those sections **off**, click on the **View** menu again, and click on the name of the one you no longer need.

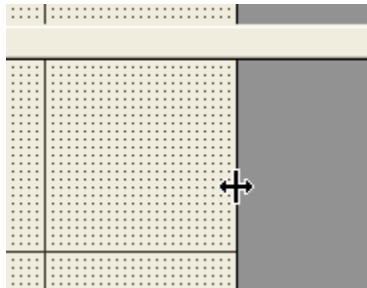
Note: You can also **right click** with your mouse on the grid in the **Detail section** and click on the name of either section to turn them on or off.

Resizing Sections


Sometimes you might need to make a section larger or smaller. Increasing the size of a section can allow you to make labels larger or include more fields in your form. To increase the **height** of a section, simply place the mouse pointer on the bottom edge of the section until a double-headed arrow appears with a horizontal perpendicular bar. Click and drag up or down to increase or decrease the section's height.

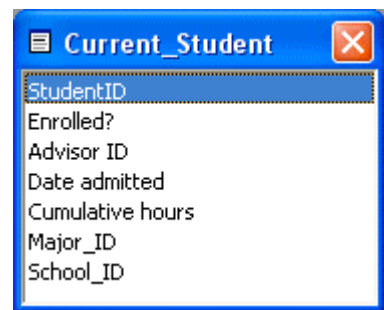


You can also increase the **width** of all of the sections. To do this, place the mouse pointer along the right edge of the form's background (it doesn't matter which section because this will adjust the entire **width** of the form) until a double-headed arrow appears with a vertical perpendicular bar. Click and drag left or right to increase or decrease the form's width.



Adding Controls

In order to be able to view and edit record information in a form, you'll need to add controls to your form from the **Field List**. The field list contains the fields from the table or query that your form is based on. To add fields from your field list, you'll first have to view the list. You can use the field list  button to turn your field list on and off. Once, the field list is turned on, you are then ready to start selecting controls to add to your form.

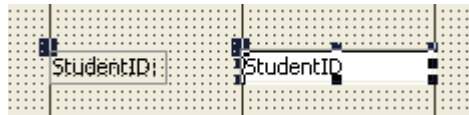


Selecting Controls

Whenever you need to rearrange, resize, or format a control in a form, you must first select the control. You'll find that there are several different ways to select a control or multiple controls dependent upon what you need to do. To select a control and/or the control's label, simply click one time on the control or the label. To select multiple controls, try one of the following methods:

- Select the first control, hold the **Shift** key on your keyboard, and select the remaining control(s).
- Place your mouse in the vertical or horizontal ruler and watch the white pointer change to a black arrow. Click and drag in the ruler to select multiple controls.
- Place your mouse anywhere in the dotted grid in the detail section (or whichever section the controls you're selecting are in). Click and drag with the mouse to box in the controls you want. Once you've boxed in the controls you want, release the mouse click and those fields will be selected.

Once the control is selected, small square boxes (also known as **handles**) will appear around the outside of the selected control with one large square in the upper left corner.



Resizing Controls

One reason for selecting controls is to resize them. The square black handles around the outer edge of the control will allow you to resize the control (make it larger or smaller). Once the control is selected, you can place your mouse pointer on one of these handles. The pointer will change into a double-headed black arrow that will allow you to click and drag to resize the field.

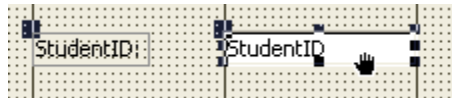


Moving Controls

Another reason for selecting controls is to move them. You can move



- A single control along with its label.
- A single control without its label.
- Multiple controls with their labels

To move a single control along with its label or multiple controls with their labels, you must use the **open hand**. When you select the control(s) that you want, along with the handles a rectangle box will appear around the control. When your mouse pointer is on one of the lines of the box, the pointer appearance will change to an open hand. When you see the open hand, you can click and drag and move the control(s) where you want them to be.



To move a control without its label (or vice versa), when you click on the field to select it, you will see a large black box (also known as a **move handle**) appear in the upper left corner of the field. When you place your mouse pointer over the **move handle**, the pointer will change to an **upward-pointing hand**. You can then drag the control or label to move it.



Note: If you want to move a control or label to a different section, you will have to select the control or label you want to move, click on the **cut**  button, click anywhere in the background of the section you want to place the field in, and click on the **paste**  button. The pasted field will always appear in the upper left corner of the section and already be selected for you to reposition the field.



Button	Function
Option group	A frame with a set of options and labels in which the user can only choose one option. An option group can be bound to a single field in a table or query. The data type of the field must be number , and when the option is chosen, Access will store a number in the underlying table or query that corresponds to the choice made. Check boxes, toggle buttons, and option buttons can be used in an option group.
Toggle button	A toggle button can be used to indicate an “On/Off”, “Yes/No”, or “True False” condition. They can be used within option groups or as a stand-alone control and be bound to a Yes/No datatype field in a table or query. When the button is pressed in, it indicates a Yes, On, or True. When the button isn’t pressed in, it indicates a No, Off, or False. Whichever option is displayed in the table or query is determined by the field’s format property.
Option button	An option button can be used to indicate an “On/Off”, “Yes/No”, or “True False” condition. They can be used within option groups or as a stand-alone control and be bound to a Yes/No datatype field in a table or query. When the option button is selected, it indicates a Yes, On, or True. When the button isn’t selected, it indicates a No, Off, or False. Whichever option is displayed in the table or query is determined by the field’s format property.
Check box	A check box can be used to indicate an “On/Off”, “Yes/No”, or “True False” condition. They can be used within option groups or as a stand-alone control and be bound to a Yes/No datatype field in a table or query. When the box is checked, it indicates a Yes, On, or True. When the box isn’t checked, it indicates a No, Off, or False. Whichever option is displayed in the table or query is determined by the field’s format property.
Combo box	A Combo box is like a text box and a list box combined. You can usually either choose an option from the drop-down list in the box, or you can type in your own, dependent upon the Limit to List property. Combo boxes can have multiple columns in which one of the columns is bound to fields in tables or queries, but can also be bound to SQL statements. You can use unbound combo boxes to find a record based on the value you select.
List box	A List box can contain multiple columns and is good for short lists of information. The user can scroll through the list box or choose one item from a list box. A user cannot type in a list box or choose an option that’s not there.


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Button	Function
Command button	Command buttons are useful when you want a user to be able to click, double click, or use the mouse in some other way to make something happen, such as print a form or look for information inside of a form. You can use the Control Wizard to take you through a wizard and help you create a command button or you can create one on your own using VBA (Visual Basic for Applications). Access will create an Event Procedure whether you utilize the wizard or do it manually, and you can always modify the procedure in the VBA editor as needed.
Image	Used to add pictures to forms and reports. Good for logos and other types of graphics.
Unbound object frame	Use this tool when you need to add an object to a form or report and you want to be able to edit the object inside of the form or report. The information or value from this type of object is not stored in a table.
Bound object frame	Use this control to display and edit OLE (Object Linking and Embedding) objects stored in tables.
Page break	When used in forms with Form View , this tool will mark to where the form scrolls when you use the Page Up and Page Down keys. Use it to begin a new page on a printed form or report.
Tab control	This tool allows you to insert tabbed pages into your form to create pages that you can use to help break up your controls. This is useful when you have a lot of controls to work with that can be separated into different categories.
Subform/Subreport	Utilize this tool when you want to nest a related form or report inside of a main form or report. These are helpful when you want to show data from tables or queries that have a one-to-many relationship.
Line	Use this tool to draw lines in forms and reports to separate sections or call attention to certain areas. Use the Shift key to help keep lines straight when drawing them in.
Rectangle	This tool is for drawing rectangles around a group of controls, such as when you want to keep them together or group them as one object. It's also good to use when you want to emphasize important information in a control.
More controls	This button will take you to more controls that you can use.

Adding Controls from the Toolbox

Dependent upon which type of control you add from the **Toolbox** toolbar, depends on whether or not you'll go through a **Wizard**. A wizard is a step-by-step process that prompts you for the information you'll need to make the control work. For example, say you want to add a group of options to your form so that a user can only choose from one option in the group. You can use the **Option group**  button in conjunction with the **Control wizard**  button to build that type of control.

Maybe you would like to place a subform based from another form or table in the main form you've already created. You can use the **Subform/Subreport**  button along with the Control Wizards button to aid you in doing this. Having a subform in a main form is useful because it allows you to enter data into two or more tables from the same location.

There might be times where you need a title in the form header. Having a title in a form or report lets others know what the form or report is being used for. Using the **Label**  button is how you can make titles or labels for other objects.

There is also a **Text Box**  button. This button allows you to make controls such as calculated controls. These can be very useful, especially when you need to add controls together and have a value returned, but don't want the value stored in the underlying table or query.

These are just a few things that the Toolbox can do for you. To use one of these or other options from the Toolbox, you can do the following:

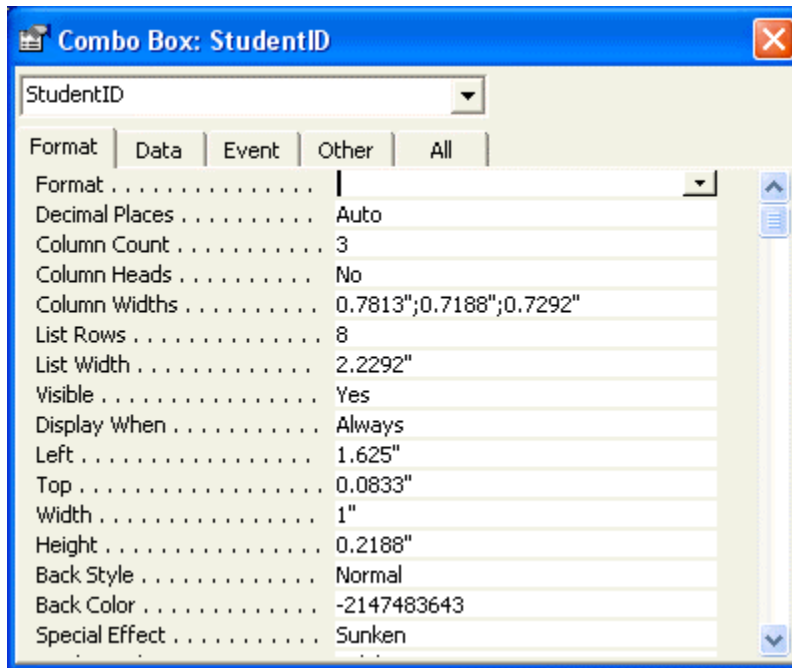
1. Make sure the **Control Wizards** button is on or off, as needed.
2. Click on the button that you want to use.
3. Click in the section of the form where you want to place the button.
4. If a wizard appears, follow the prompts of the wizard.

Modifying Properties

Whenever you add controls to a form, you might find you'll need to change some of the properties of the controls or the form itself to make it easier to read and use. For example, you might need to reset the way a user tabs from field to field. In the tab order box, it can be difficult to decipher which field you want to move if one field says *Combo 12* while another field says *Combo 15*. Changing the **Name** property in the **Property** box for each of the controls can aid in distinguishing between different controls.

To open the property dialog box for a control, simple double click on the control when in Design or Datasheet View.

Every object in a form will contain properties; therefore, the property box will always contain the following tabs: **Format, Data, Event, Other, and All**. However, not all controls will have the same properties and some of the tabs might not have any properties, dependent upon which object's properties you're trying to see.



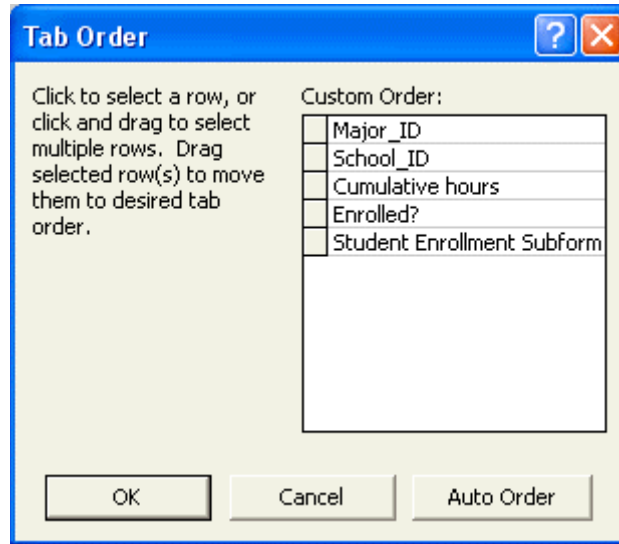
Once you're finished modifying the properties of a control, you can click on the **x** in the corner to close the box. If you simply want to see properties for a different control, you can locate the control and click on it without having to close the box. The property box will change to the selected object's properties automatically.

Note: Not all properties can be modified in Form View. You might have to switch to Design View instead. You do not have to close the properties box when switching between views. If you leave it open in one view, it will remain open when you switch to the other view.

Setting Tab Control

Once you've modified the properties for your controls, you can set the **Tab Order** for the form. The tab control is the order in which a user will tab through the form. Here's how you can set it.

1. Click on the **View** menu and choose **Tab Order**.



2. To rearrange the tab order, choose the section that you want to see the controls in.
3. Click on the gray square to the left of the control you want to move.
4. When you click on the gray square again, hold the click down while dragging it to the location you want it to be.
5. Once you let go of the click, the control will be moved to the new location. Do this for each control you need to move.
6. When you're finished changing the tab order, click **OK**. Change to Form View and test the tab order by tabbing or entering through a record in your form.


Sorting and Filtering in Forms

Sorting Information

Whether you're in a table or form, there are going to be times where you'd like to look at your data in alphabetical order by a field other than the primary key field. That's why *Access* allows you to use sorting features no matter what object you're using. Here's a quick way to sort in an *Access* form.

Sorting by One Field (Quick Sort)

To sort by one field in a form, do the following:

1. Place your cursor anywhere in the control on which you want the sort performed.
2. Select **Records** → **Sort**, and then choose **Sort Ascending** or **Sort Descending**. You can also click the Quick Sort  buttons on the database toolbar. Access sorts the form based upon the data in the selected column.
3. To undo a Quick Sort, select **Records** → **Remove Filter/Sort**.

Note: When you close a form, sorted records return to their previous order unless you save the layout changes.

Filtering Records

One of the basic features of any database is that it should allow you to look at a subset of your data, based upon some criteria. For example, in an address list, you might want to only look at address from a particular city or state.


One of the ways of doing this in *Access* is with filters. When you filter a form in the Form or Datasheet View, you hide all records that don't conform to your set of criteria. To "unhide" the hidden records, you remove the filter.

There are two basic types of filters: the Filter by Selection and the Filter by Form. They differ in the way you run the filter and the complexity of the filter you can create.

Filter By Selection

This type of filter is the easiest to perform. It allows you to view all the records in the form that have the same value in a particular field.

To do a Filter by Selection:

1. Find the value in the control that you want to filter by (e.g., find “Lawrence” in the City field).
2. Click in once that cell.
3. Choose **Records** → **Filter** → **Filter by Selection**. You can also choose the **Filter by Selection** button  from the database toolbar.

Filter By Form

Filter by Form gives you the flexibility to find records based on the values in multiple fields using the **And** operator or **Or** operator, or to use selection criteria to find ranges of values. Selection criteria are operators and values you enter into the Filter by Form.




Examples of several selection criteria operators include:

- > Greater than
- >= Greater than or equal to
- < Less than
- <= Less than or equal to
- <> Not equal to

This is an example of selection criteria:

<>66044 This criteria would find all values **not** equal to 66044.

To use Filter by Form:

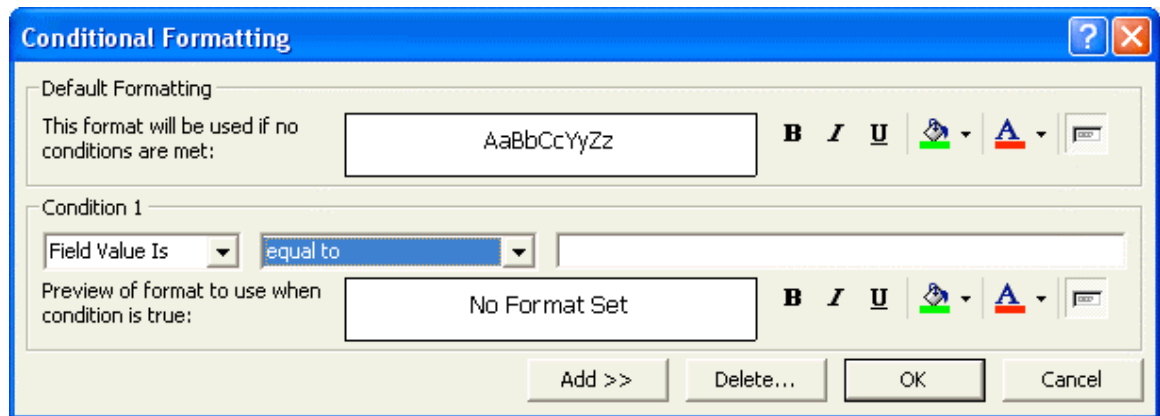
1. Click **Records** → **Filter** → **Filter by Form**. You can also select the **Filter by Form** button  on the database toolbar.
2. In the Filter by Form mode, you can select unique values from the pull-down menus for each field, or you can enter custom selection criteria.
3. If you are looking for more than one value in a field, click the **Or** tab at the bottom of the Form.
4. If a record must meet multiple values from different fields, do not click on the **Or** tab but instead continue to select or type in the appropriate value for each field. This uses the implied **And** operator.
5. Click on **Filter** → **Apply Filter/Sort** or click the **Apply Filter** button  on the toolbar.
6. When finished, click the **Records** menu again and choose **Remove Filter** or click on the **Remove Filter** button .

Conditional Formatting

Conditional formatting is very useful when you need data that meets certain criteria to stand out. For example, if you have a document that you only mail to out of state students, it can be easy to miss some students when there isn't anything that flags you to let you know that the student's record you're looking at is out of state. It looks the same as everyone else's. However, if you were scrolling through student records in your form and every time you were on an out of state record, the data in the state control was bold with red lettering and a yellow background, it would be much easier to see. Here's how to set up conditional formatting on a field.

Adding a Conditional Format

1. In either Design or Datasheet View, click in the control in which you want to set up the conditional format.
2. Click on the **Format** menu and choose **Conditional Formatting...**

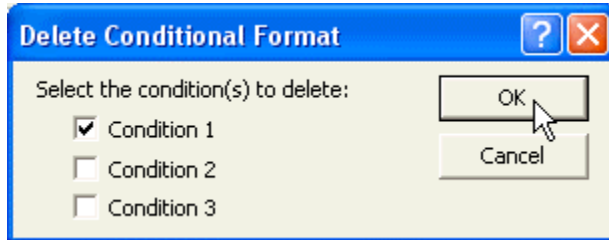


3. In the first field, select **Field Value Is**.
 - a) The other two available options are:
 - i. **Expression Is:**
 - ii. **Field Has Focus:**
4. In the second box, choose the operator you want to use.
5. In the criteria field(s), type in the criteria that the field must meet or not meet for the format to appear.
6. Set the format you want to see using any or all of the formatting options.
7. If you want to add another criteria, click on the **Add>>** button. You can set up to **three conditions**.
8. Click **OK**.

As you scroll through the records, look for records that meet the criteria you want. When you see a record that meets your conditional formatting criteria, the data in the control should have the format you specified.

Deleting a Conditional Format

If you find you need to delete a conditional format, you can go back into the **Conditional Formatting** dialog box, just as you did when you added them. Once inside, clicking on the **Delete...** button will open the **Delete Conditional Format** dialog box. When you check the box beside whichever condition you want to delete, click **OK**, and then click **OK** again, the format will be deleted.



Getting Additional Help

The Help Desk provides consulting and Q&A help in a variety of ways:

785/864-0200

question@ku.edu

www.ku.edu/~helpdesk

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