Access: Using Forms for Data Entry and Editing

Viewing and Entering Data with Forms
A form is the most convenient layout for entering, changing, and viewing records from a database table or query and are primarily designed for viewing/editing data on screen. You can use the Form Wizard to assist you in creating a form or you can use the Form button to build a simple form instantly. Once a form is built you can modify its design by going directly to the Form Design View.

Forms can provide a more efficient means for data entry through the use of drop-down lists (where users select the value they want), graphics, command buttons, etc. To see the many options available for form creation, go to Form Design View and view the Form tools. While using a wizard can greatly simplify the creation of a simple form, more advanced controls such as drop-down boxes, command buttons, graphics, etc. are only available for insertion through a Form’s Design View.

Creating Forms
There are three methods for creating forms:
1) Click the Form icon
2) Use the Form Wizard, located under the More Forms drop down
3) Create the form in Design View

Form
Form creates an “instant” form. The Form can be built by selecting the table or query to be displayed in the form and clicking on the Form button on the Create tab of the Ribbon. If you wish to make alterations to the form, you will need to open the form in Design View. Note: the Form will include all fields from your table or query. If you wish to select the fields yourself, use the Form Wizard.

Form Wizard
An easy way to get started with forms is to use a wizard. To create a form with the wizard, click on Form Wizard icon from the Create tab of the Ribbon.

1) Select the table or query to display in the form
2) Select the fields you wish to use in the form
3) If you wish to add fields from another table or query, select the 2nd table or query from the drop down list on this screen and add those fields before moving on to Next. Repeat the steps to select a table or query, and pick fields that you want to include in the form, until you have selected all the required fields.
4) Choose a Layout (e.g., Columnar or Tabular)
5) Choose a Style (background image) for the form.
6) Name the form and click Finish.
Form Views
There are 3 views of a form: Form View, Design View, and Datasheet View. Any customization of the form’s appearance or characteristics will have to be done through the Design View.

Controls
Every object on a form or report is a control and has its own set of properties (displayed in the Property list) that determine the characteristics of the data it contains. Some controls are linked to fields in the underlying table or query and some are merely text or graphical objects not related to any data source. Two of the most commonly used controls in a form or report are text boxes and labels.

1) Label: displays unchanging or informational text often times as headings or titles. Labels do not come from a source in the database such as a field or expression. This is called an unbound control because it is not bound to any data source.

2) Text Box: displays data as text and is a bound control. A bound control displays information that is stored in a field from the database. Text boxes are used to display, enter, and update values from fields in your database.

Form Sections
Forms consist of header, footer, and detail sections. In forms, there are two types of headers/footers. Form headers and footers are visible on every page of the form. Page headers/footers only appear on a printed copy of a form. There are never visible in Form View. Information about individual records appears in the detail sections.

Sizing Sections
Adjust the size of the area for any of the sections (headers, footers, detail), by dragging the horizontal border for that section with your mouse. To adjust line spacing in the detail section, drag the Detail border. There is no other line spacing control.

Selecting and Editing Controls
All actions you can perform on a control, including moving, sizing, changing properties, or deleting it, require that you select it first. Make sure the selection tool (arrow) is activated before clicking on a control.
Select one control – click once on it. Handles will be displayed around the object.
Select multiple controls – hold down the Shift key while you click each control.
Select a form or report – click the upper left corner of the form.
Select a section – click on the gray bar above the section to select it.
Select multiple controls – hold the left mouse button down and drag an outline around one or more controls or drag the mouse through the horizontal or vertical ruler bar.

**Sizing Controls**
To size a control, first select it by clicking on it. This adds sizing handles to the control. To size a box, drag any of the sizing handles located on the border around the control. To "size to fit" a control or label, double-click on any of its sizing handles.

**Moving Controls**
Move a control and its label at the same time by dragging them with the “full-hand” icon. To move them separately do so by dragging the upper left hand box only.

**Deleting Controls**
To delete a control, click on it once to select it then press the DEL key on the keyboard.

**Cut/Copy/Paste**
To cut or copy a control, select the control and choose either Cut or Copy. To paste the control at the top of a different section, click on that Section’s header bar and choose Paste. To paste the control directly underneath another, select the control under which you wish to paste and choose Paste.

**Adding Fields**
To display the field list, open the form in Design view. From the Design tab of the Ribbon, choose Add Existing Fields. You can add one or more fields at a time. To add one field, drag the field name to the design grid. To add all fields, double click on the field list title bar and drag all fields as a group. To add multiple fields, CTRL-click on the fields you wish to add to select them, and then drag as a group to the grid. When you choose a field from the field list, Access also creates a label from the field name.

**Tab Order**
After adding fields to your form, you will want to open your form and press the tab key to see the order in which the cursor will advance from field to field. To change the tab sequence, make sure you are in Design View, go to the Form Design Tools, Design tab, and select Tab Order.
Format Tools
Use the formatting tools on the Design tab to format/change the Detail section of the form. Formatting tools include fonts, colors, alignment, appearance, etc. of any single control or group of controls. Select the control(s) or section bar of the area to format, and choose the appropriate button from the Ribbon.

Format Painter
Once you have formatted a control, you can "paint" this format to other controls using the Format Painter. Select the control that is already formatted and click on the Format Painter button. Then simply paint the new format on other controls by clicking on them. Note: to “paint” the format of more than one object, double-click on the format painter button. This will allow you to transfer this format to other objects, until you click on the button once more to turn it off.

AutoFormat
To apply one of the styles available through the Wizard, choose Format, AutoFormat.

Controls
The Controls Group should display by default when in the Design View, Design tab, when an item is selected. This Design tab displays most of the controls or objects you can add to a Form/Report. For more information about a control, click on the button and press F1. To create one of the controls from the Design tab, click the button to select the tool and use your mouse to drag and draw the control in the Design grid.

Note: because reports present data in a printed format (or print preview), not all controls will function in a report. For example, a combo box is a form control and while you can add one to a report, it will not display any data. Similarly, placing a command button on a report will not work because a report is either sent to the printer or displayed in Print Preview mode. There is no direct interaction with a report.

Properties
Each form, report, section, and control has property settings that you can change to alter the look or behavior of that particular item. Use the properties sheet to view and change properties.

To set properties:
1) In Design View, select the control, section, form, or report for which you want to set the property.
2) Display the property sheet by right-clicking the object or section and then clicking Properties on the menu, or by clicking the Properties button on the Ribbon.
Examples of Property Settings

Record source: Choose this property to change the record source of your form or report. You can choose to enter a table or query name.

Data Entry: Change this property if you want to set the form for data entry only. Setting the property to yes means the form will always display as a blank data entry form.

Picture: This property will place a picture in the background of the form. Type the location and name of the file on this line.

Control Source: This property is the name of the field or an expression that populates a text box control.

Default Value: This property is the same as a table's property. Enter a code, e.g., Date() or text as the default value of a control.

Allow Edits: If this property is set to No, it means that existing data cannot be modified. This property has no impact on new records.

Allow Deletions: If you want to make sure that users can't remove a record from the table, set this property to No.

Allow Additions: If you want to use a form for only editing or deleting data, then set this property to No.

Creating Controls with the Toolbox

Select Tool  This button should always be depressed unless you wish to create one of the other controls listed below.

Control Wizard Button  When this button is pressed, a Control Wizard will help you create a new option group, combo box, list box, or command button. To use the Wizard, depress the Wizard button, then click the button to create the desired control. The appropriate Wizard will appear to step you through the process.

Calculated control
A calculated control displays a value derived from an expression. This is a control whose source of data is an expression rather than a field. Create a calculated control by typing the expression in a text box. An example of a calculated control to concatenate first and last names would be:

= [FirstName]&" ":[LastName] where FirstName and LastName are fields in a table.

To insert the date, add a Text Box, then enter the expression =DATE(). Look in Access Help for more Expressions.

Drop Down Boxes  There are two kinds of drop down boxes: list box and combo box. These boxes present drop down lists containing values from an existing table or query or from a list you specify. If you want Access to select the closest matching entry when you type a few leading characters in a combo box, set the Auto Expand property to Yes.
Subforms  You can create a form within a form (based on different tables). This arrangement is particularly useful if the tables involved have a one-to-many relationship. The main form and subform are linked so that the subform displays only records related to the current record in the main form. For example, when the main form displays the Beverages category, the subform displays only the products in the Beverages category. You can also use the Report Wizard to create a report/subreport.

Command Button  Use a command button to create a button that when clicked will activate a macro or Visual Basic for Applications procedure.