Microsoft Access 2010
Forms, SubForms, and Menus
Microsoft Access 2010: Forms, SubForms, and Menus

2.0 hours

Topics include building forms with the wizard and in design view; customizing tab orders; creating combo boxes to display data and to search through records; working with SubForms and Tab Controls; creating Navigation menus; and working with startup options. Completion of "Access: Basics" and "Intro to Forms and Reports" highly recommended.

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Form 1: Patients
Build Patient Form in Design View based on Patient Table.

1. From the Create tab click on Form Design

2. Open Property Sheet
   a. Double-click anywhere in the form
   b. Or – press F4
   c. Or – click on Property Sheet in the Design tab

3. Set Form Properties
   a. Record Source to Patients
   b. Allow Datasheet View to No
   c. Allow Pivot Table View to No
   d. Allow Pivot Chart View to No
   e. Allow Layout View to No

4. Resize grid to 5 inches wide by 2.5 inches tall
   a. Drag grid, or set Form Width and Detail Height

5. Open Field List
   a. Click on Add Existing Fields in the Design tab
   b. Add and arrange fields to create form shown below

6. Use your Sizing and Ordering tools on the Arrange tab to organize your fields.

7. Create Command Buttons by using the controls on the Design tab
   a. Be sure to give the buttons unique names

8. Save as "Patients"
**Customizing Tab Order**

1. Swap Pt Last Name field and Pt First Name field

2. Adjust Tab Order
   a. From Design Tab or right-click in the grid

3. Remove buttons from tab order
   a. Select buttons
   b. Open Properties
   c. Set Tab Stop property to No

**Form 2: Employees**

1. Select the Employee table in the Navigation pane

2. From the Create tab, click the Form button
   a. Access will place you in the Layout view

3. If necessary open the Property Sheet from the Design tab
   a. Turn to the Format Tab of the Property Sheet

4. Select the Picture
   a. Set Width property to 1.25”
      i. All the objects should shrink to this width
   b. Set Height property to 1.25”
      i. Only the picture will grow to this height

5. Select Emp First Name (Annie) and Emp Last Name (Appleton) text boxes (use Shift key)
   a. Do not select the labels
   b. Set Format property to > (all caps)

6. Select the Birthday
   a. Set Format property to \textit{mmmm} \textit{d}
7. Move to the **Design View**

8. Create a **Combo box** from the controls on the Design tab  
   a. Place it in an empty space of the grid

9. Follow steps on the next page to make a drop down list for the department names

10. Move combo box between Dept ID and Emp Picture

11. Right-click on grid and choose **Form Header/Footer**  
    a. Click **Yes** to confirm deletion.

12. Close and Save as "Employees"


**Combo box**

Create a lookup via a drop down menu. You can type in the text box or select an entry in the drop down to save a value to a bound field.

This is the most important step. You must store the value in the correct field. If you miss this step you will create an UNBOUND combo box.
**Form 3: Employee Tabs**

1. From the Create tab, click on Form Design

2. Open Property Sheet  
   a. Record Source to Employees

3. Open Field List  
   a. Add **Emp First Name** and **Emp Last Name**

4. Create a **Tab Control** from the controls on the Design tab

5. Rename tab From the Property Sheet  
   a. First Page (page 3)  
      i. **Name PagePers; Caption Personal Info**
   b. Second Page (page 4)  
      i. **Name PageDept; Caption Dept Info**

6. Add fields to pages  
   a. Drag Birthday and Celebrate to Personal Info  
   b. Drag Dept ID to Dept Info

7. Right-click on page name and change Page Order  
   a. Dept Info first

8. Right-click on page name and add Page  
   a. **Name PagePict; Caption Picture**  
   b. Drag in Picture field  
   c. Delete Picture Label

9. Move to Layout view

10. Change format properties (see pg. 2 for help)  
    a. First & Last: All Caps  
    b. Birthday: Full Month, Day  
    c. Picture: Height and Width 1.25"

11. Create Dept Name combo box (see pg. 4 for help)

12. Save Form as "Employee Tabs"

*Notes about Tab Controls*  
– Use Ctrl-Tab to switch between pages in the Form view  
– If you right-click on the tab control you will see options to add, delete and reorder the pages.  
– Each page in the tab control has its own tab order.  
– To select the tab control, click at the top of the control where the new pages would appear.
When you drag a field onto the page the page area will darken. Make sure the area is still dark when you drop your item to keep it in that page.

**Form 4: Departments**

1. Select the Department table in the Navigation pane
2. From the Create tab, click the Form button
3. Right-click on column names to hide fields
   a. Birthday, Celebrate, Picture
4. Close and save all
   a. Save form as “Departments”
5. Open Employee table
   a. Unhide fields
   b. Close and Save
6. Open Form
7. Adjust width of SubForm to 'hide' last three columns.

**Notes about Subdatasheets**

When you create a lookup value through the table or a set a relationship Access will attach a Subdatasheet to the table. You'll recognize it by the small column of expand and collapse buttons on the far left side of the table's datasheet view.

You can enter data into both tables from this view. Access will assign the subdatasheet the first time a relationship is created.

It is possible however for one table to be involved in multiple relationships. For example, one patient could have many appointments, many doctors, and many medications.

You can change the Subdatasheet
• Home tab
• Record group
• More menu
• Subdatasheet

Form 5/Form 6: Patient Visits / Patient Visits SubForm
Instead of building forms with embedded tables, it's much better to embed another Form. If your relationships have been properly created you should be able to do this fairly painlessly with the Form wizard. This form will be created using both the Patient and the Visit Info tables.

1. From the Create tab, click the **Form Wizard** button

2. Choose Table **Patients** from the drop down menu
   a. Use >> button to Select all the fields from Patients

3. Choose Table **Visit Info** from the drop down menu
   a. Bring over everything except the VisitID and Pt Med Rec fields

4. **Next** Step, view form options
   a. By Patients – Form with Subform(s)
      i. Creates two forms: a main Patient Form with an embedded Visit Info form that will display multiple visits for that one patient
   b. By Patients – Linked Forms
      i. Creates two forms: a Patient Form and a separate Visit Info Form. The Patient Form will have a button that will open the Visit Info form that will only display the visits for the current Patient
   c. By Visit Info
      i. Creates one form – All Patient data and that one Visit data displayed on the same screen, i.e. a billing screen at the end of an appointment
5. Choose by Patients -- Form with SubForm

6. Next Choose Datasheet layout for the SubForm

7. Next Title forms
   a. Patient Visits
   b. Patient Visits SubForm

Reformat Form w/SubForm
1. Open Design View
2. Move Zip under State
   a. Make it wider if necessary
3. Select all Pt fields,
   a. Size to Shortest
   b. Align to Top
4. Delete Patient Visits Label
5. Move SubForm under addresses
6. Adjust column widths in SubForm
7. Remove Header/Footer
**Form 7: Main Menu**

Now that we have multiple forms and some that we may not want everyone to open, we can create a navigation menu. We will not use this form to modify our data, so there will be no record source.

1. From the Create tab, click on the **Form Design** button

2. Create **Command Buttons** by using the controls on the Design tab
   a. Be sure to give the buttons unique names
   ![Image of unique name buttons]
   b. Each Open Form button should return ALL the records
   i. Form category -> Open Form -> Patients
   ii. Form category -> Open Form -> Patient Visits
   iii. Form category -> Open Form -> Departments
   iv. Form category -> Open Form -> Employees
   c. **Application category** -> **Quit Application**

3. Save Form as "Main Menu"

4. Test each of the buttons to make sure they are opening the forms you wanted

5. Format as you'd like. Some suggestions:
   a. Use a Label control to create the title
   b. Use a Line and/or Rectangle controls
   c. Use **Format tab Quick Stlyes** and **Change Shape**

![Image of form design interface]

**Patient and Employee Database**

- Patients
- Departments
- Patient Visits
- Employees
- Exit Database
**Start Up Options**
When we first start this database, it would be helpful if the Main Menu form opened automatically.

1. Open the File menu

2. Choose Options near the bottom of the menu

3. Choose Current Database from the pane on the left

4. In the Application Options –
   a. Change the Application Title to be *Patient and Employee Database*
   b. Change the Display Form to *Main Menu*

5. In the Navigation –
   a. Uncheck the Display Navigation Pane
      i. Remember F11 will always make the pane reappear
**Linked Forms**

On the Main Menu form we created buttons that open forms and display all the records. One of the Form Wizard options was creating a Linked Form (Page 7). Basically we have two independent forms, where the first form has a button that opens only specified data on the second form.

1. Open the **Employee Tabs** form

2. Create a button on the Department Info Tab
   a. Form Operation -> Open Form -> Departments
   b. "Open the form and find specific data to display"

   ![Command Button Wizard](image)

   c. Choose Dept ID from each side to help Access see the link between the two forms

   ![Command Button Wizard](image)

   d. Set the button to show a picture and give it a meaningful name

3. Test the button
   a. Access opens the Departments form, showing only the department of the current employee
   b. The data is actually being **Filtered**
      i. To see all Departments click "filtered" to toggle it off
      ii. See the Queries handout for more about Filters

   ![Departments](image)
Search Box
You can click inside a field and use the find button or Ctrl-F to open the Find dialog box to search for a particular record; but spelling counts. Sometimes it’s nice to have a menu to select our search criteria.

1. Open the Patients form
2. Go to the Design View
3. Create a Combo box
   a. Choose *Find a Record on my form based on the value I selected in my combo box.*
   b. Use the Pt Last Name field, hiding the key, labeling it "Search for Patients"
4. Test the look up
   a. Notice it’s not in alphabetical order
5. Go to the Design View, open properties for combo box
6. Click in the Row Source property, and click on the build button (…) at the end of the line
7. In the Query Builder, set the sort order of Pt Last Name to Ascending
8. Close and Save Query Builder
9. Test search box
10. Go back to the Query builder for the Search Patients Combo box
11. Delete the First Name field and change Last Name to be -- Pt Name: [Pt Last Name]&", "&[Pt First Name]
12. Close and Save Query Builder
13. In the Format section of the properties, set the Column Count to 2, Column Widths to 0"; 2"
14. Test search box again