

LESSON SKILL MATRIX

Skill	Exam Objective	Objective Number
Creating Forms	Create new forms.	4.1.1
	Save forms.	4.1.3
	Delete forms.	4.1.4
	Create databases using wizards.	1.1.4
	Apply themes.	4.3.4
Sorting and Filtering Data within a Form	Sort Records.	4.3.3

WILEY



KEY TERMS

- Blank Form tool
- common filters
- filter
- filter by form
- Form Design button
- Form tool
- Form Wizard
- Themes



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You are the owner of the Graphic Art Institute, a small fine-arts gallery dedicated to presenting challenging and contemporary visual arts and educational programs. The current exhibition is successfully underway; you are now calling for submissions for the next exhibition—a juried art show featuring photographic work from the local region. The competition is open to all regional artists who use photographic processes in their work. This particular event will be open to digital submissions. As each submission is received, you will enter the artist and image information into an Access database for easy retrieval. In this lesson, you learn how to create forms using a variety of methods; how to apply a Theme to a form; and how to sort and filter data within a form.

SOFTWARE ORIENTATION

Forms Group

The Forms group (see Figure 5-1) is located on the CREATE tab in the Ribbon and can be used to create a variety of forms.

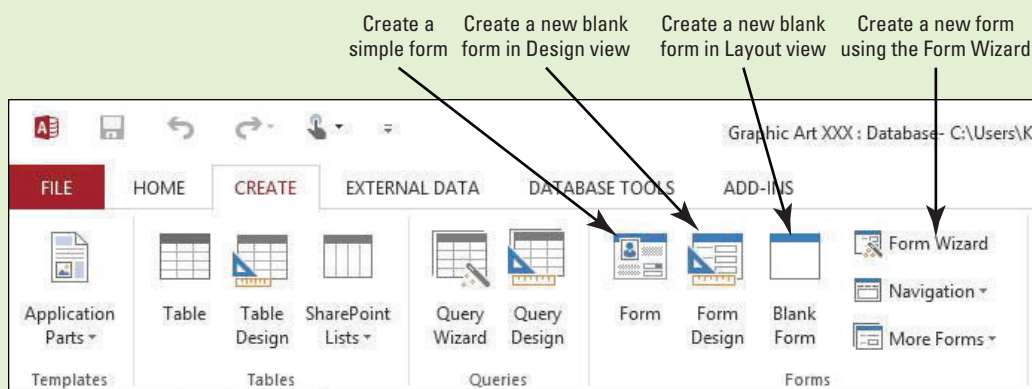


Figure 5-1

Forms group

Use this figure as a reference throughout this lesson as well as the rest of this book.

CREATING FORMS

The Bottom Line

A form is a database object that you can use to enter, edit, or display data from a table or query. Forms can be used to control access to data by limiting which fields or rows of data are displayed to users. For example, certain users might need to see only certain fields in a table. Providing those users with a form that contains just those fields makes it easier for them to use the database. Think of forms as windows through which people see and reach your database in a more visually attractive and efficient way.

You can create forms in several different ways, depending on how much control you want over the form's design. Forms that include all fields in a table can be quickly created through a single mouse-click by using the Form tool, or you can control the number of fields you'd like to include on the form as well as the layout of the form by using the Form Wizard. You have the most flexibility with the amount and placement of fields on the form by using Layout or Design view, with

Design view giving you the greatest control over field placement and properties. You can quickly apply a chosen theme to the form to modify its color and font scheme using the Themes command. Finally, you can delete any form by simply using the Delete command. In this section, you practice creating forms using a variety of these skills. You also delete a pre-existing form.

Creating a Simple Form and Deleting a Form

You can use the **Form tool** to create a form with a single mouse-click. When you use this tool, all the fields from the underlying data source are placed on the form. Access creates the form and displays it in Layout view. You can begin using the new form immediately, or you can modify it in Layout view or Design view to better suit your needs. You can also delete a form to remove it permanently from the database. In this exercise, you create a simple form by using the Form tool and delete a form by using the Delete command.

To use the Form tool to create a simple form, first click in the Navigation Pane on the table that contains the data you want to see on the form. On the CREATE tab, in the Forms group, click Form.

To save a form design, click the FILE tab and click Save. Key a name in the Form Name box and click OK. After you save your form design, you can run the form as often as you want. The design stays the same, but you see current data every time you view the form. If your needs change, you can modify the form design or create a new form that is based on the original. You can also permanently delete the form or any preexisting forms from the database by using the Delete command in the Records group of the HOME tab. You can delete a form if you erroneously created it or simply want to unclutter the database.

STEP BY STEP

Create a Simple Form and Delete a Form



GET READY. Before you begin these steps, be sure to **LAUNCH** Microsoft Access.

1. **OPEN** the **Graphic Art** database from the data files for this lesson.
2. **SAVE** the database as **Graphic ArtXXX** (where XXX is your initials).
3. In the Navigation Pane, click the **Photo Exhibit** table. This is the table for which you will create a form.
4. On the CREATE tab, in the Forms group, click the **Form** button. Access creates the form and displays it in Layout view (see Figure 5-2). Your form may be slightly different.

Figure 5-2

Simple form

Close 'Photo Exhibit' button

The screenshot shows the Microsoft Access application window with the 'Photo Exhibit' form open. The form is in Layout View and contains the following fields:

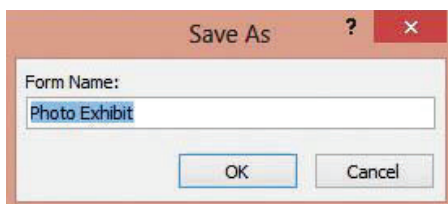
- ID: 1
- Artist: Greg Bolender
- Image Title: Spectral State
- Dimensions: 34 x 36
- Price: \$485.00
- Media: gallery wrapped canvas
- Entry fee paid: ☐
- Comments: send entry form
- Attachments:

The Navigation Pane on the left shows the 'Photo Exhibit' table selected. The top ribbon shows the 'CREATE' tab with the 'Form' button highlighted. A close button is visible in the top right corner of the form window.

- Click the **FILE** tab and click **Save**. The Save As dialog box appears (see Figure 5-3).

Figure 5-3

Save As dialog box

**Take Note**

You can use the record navigation buttons at the bottom of a form to navigate among the form's records, just as you used them to navigate among records in a table in Lesson 3.

**Another Way**

You can also delete a form or any other object by right-clicking it in the Navigation Pane and choosing Delete from the shortcut menu that appears.

- Click **OK** to accept the Photo Exhibit form name suggested by Access. The form name appears in the Navigation Pane.
- Click the **Close** button on Photo Exhibit to close the form.
- In the Navigation Pane, click the **Photo Info** form. This is a form that you no longer need.
- In the Records group, click the **Delete** button arrow and then click the **Delete** command on the menu that appears.
- Click **Yes** on the dialog box asking you if you want to permanently delete the Photo Info form. The form is now permanently deleted from the database.

CERTIFICATION READY? 4.1.1

How do you create new forms?

CERTIFICATION READY? 4.1.3

How do you save forms?

CERTIFICATION READY? 4.1.4

How do you delete forms?

PAUSE. LEAVE the database open to use in the next exercise.

Creating a Form in Design View

When you click the **Form Design button**, a new blank form is created in Design view. Design view gives you a more detailed view of the structure of your form than Layout view. The form is not actually running when it is shown in Design view, so you cannot see the underlying data while you are making design changes. In this exercise, you create a new blank form in Design view and manually add fields to it.

You can fine-tune your form's design by working in Design view. To switch to Design view, right-click the form name in the Navigation Pane and then click Design view. You can also use the View button on the HOME tab of the Ribbon. You can add new controls—used to enter, edit, and find information—and fields to the form by adding them to the design grid. Plus, the property sheet gives you access to a large number of properties that you can set to customize your form.

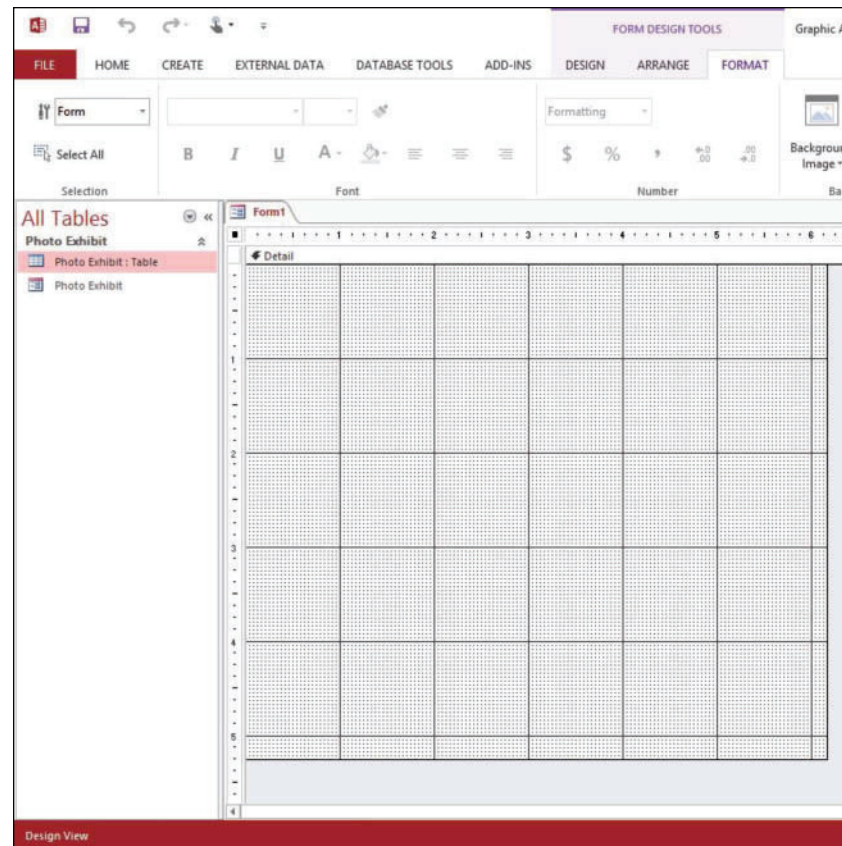
STEP BY STEP**Create a Form in Design View**

USE the database that is open from the previous exercise.

- On the **CREATE** tab, in the Forms group, click the **Form Design** button. A new blank form is created in Design view (see Figure 5-4).

Figure 5-4

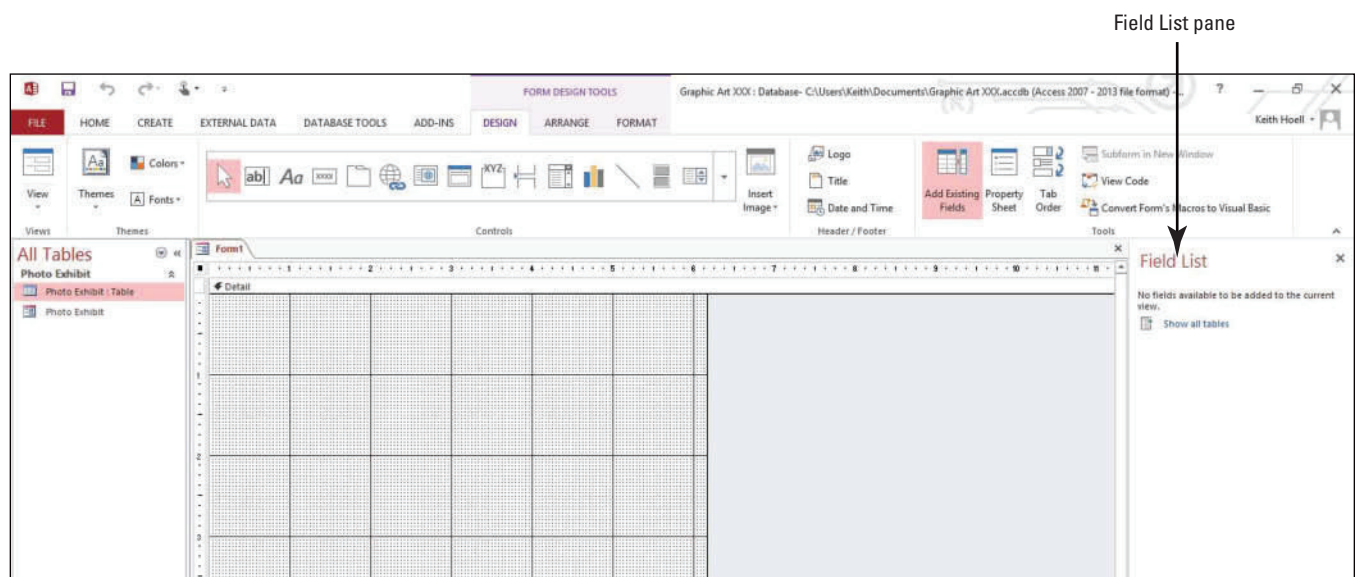
New blank form in
Design view



2. On the FORM DESIGN TOOLS Design contextual tab, in the Tools group, click the **Add Existing Fields** button. The Field List pane appears (see Figure 5-5).

Figure 5-5

Field List pane



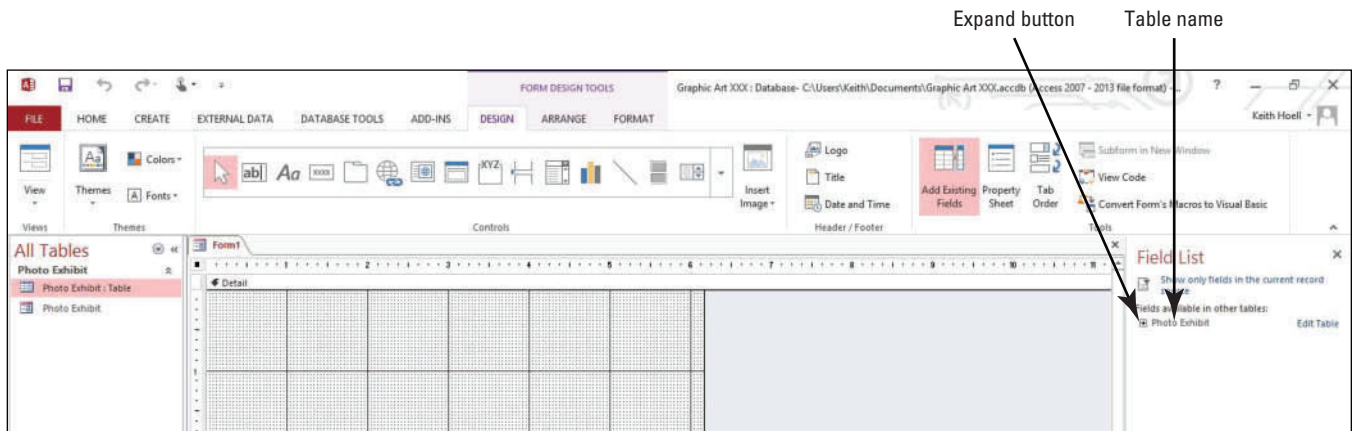
Another Way

You can also display the Field List pane by pressing Alt+F8.

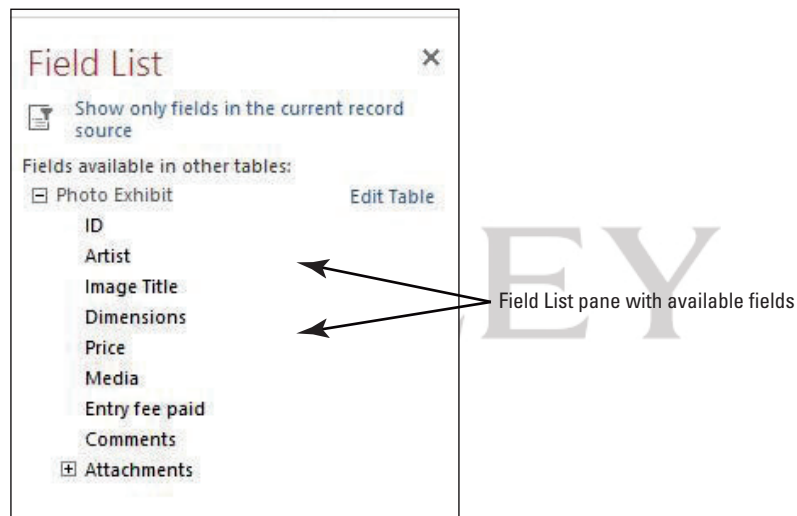
3. Click the **Show all tables** link, then the **expand button** to the left of the table name (see Figure 5-6). The available fields display from the Photo Exhibit table (see Figure 5-7).

Figure 5-6

Field List pane with
expand button

**Figure 5-7**

Field List pane with
available fields



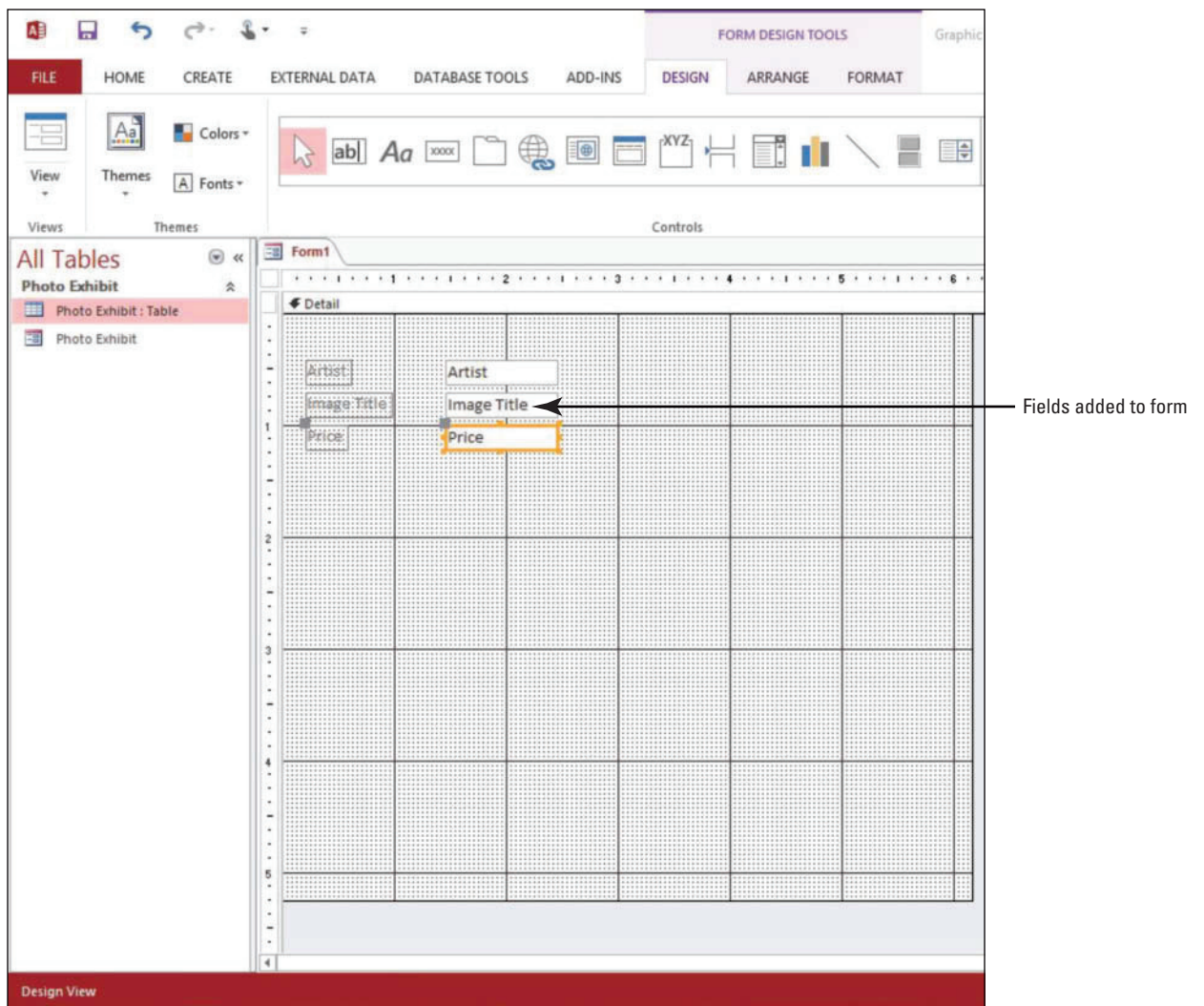
Another Way

You can also click the field name and drag it onto the form to add a field.

4. In the list of fields, double-click **Artist** to add it to the form.
5. Double-click **Image Title** to add it to the form.
6. Double-click **Price** to add it to the form. Your form should look similar to Figure 5-8.

Figure 5-8

Fields inserted in Design view



7. Click the **FILE** tab and click **Save**.
8. In the Save As dialog box, key **Photo Label**, and click **OK**.
9. On the Design menu, in the Views group, click the lower half of the **View** button and click **Form View** to display the form in Form view (see Figure 5-9).

Figure 5-9

Form view

10. Click the **Close** button on Photo Label to close the form.

PAUSE. LEAVE the database open to use in the next exercise.



**Cross
Ref**

You learn how to use the commands in the Controls group and a greater variety of form design tools in Lessons 8 and 10.

Creating a Form in Layout View

If other form-building tools do not fit your needs, you can use the Blank Form tool to create a form. The **Blank Form tool** creates a new form in Layout view. This can be a very quick way to build a form, especially if you plan to put only a few fields on your form. Click the Blank Form button to quickly create a new blank form in Layout view; you can make design changes to the form while viewing the underlying data. In this exercise, you use the Blank Form tool to create a form in Layout view.

On the **CREATE** tab, in the Forms group, click the Blank Form button. Access opens a blank form in Layout view and displays the Field List pane. To add a field to the form, double-click it or drag it onto the form. In Layout view, you can make design changes to the form while it is displaying data.

STEP BY STEP**Create a Form in Layout View**

USE the database that is open from the previous exercise.


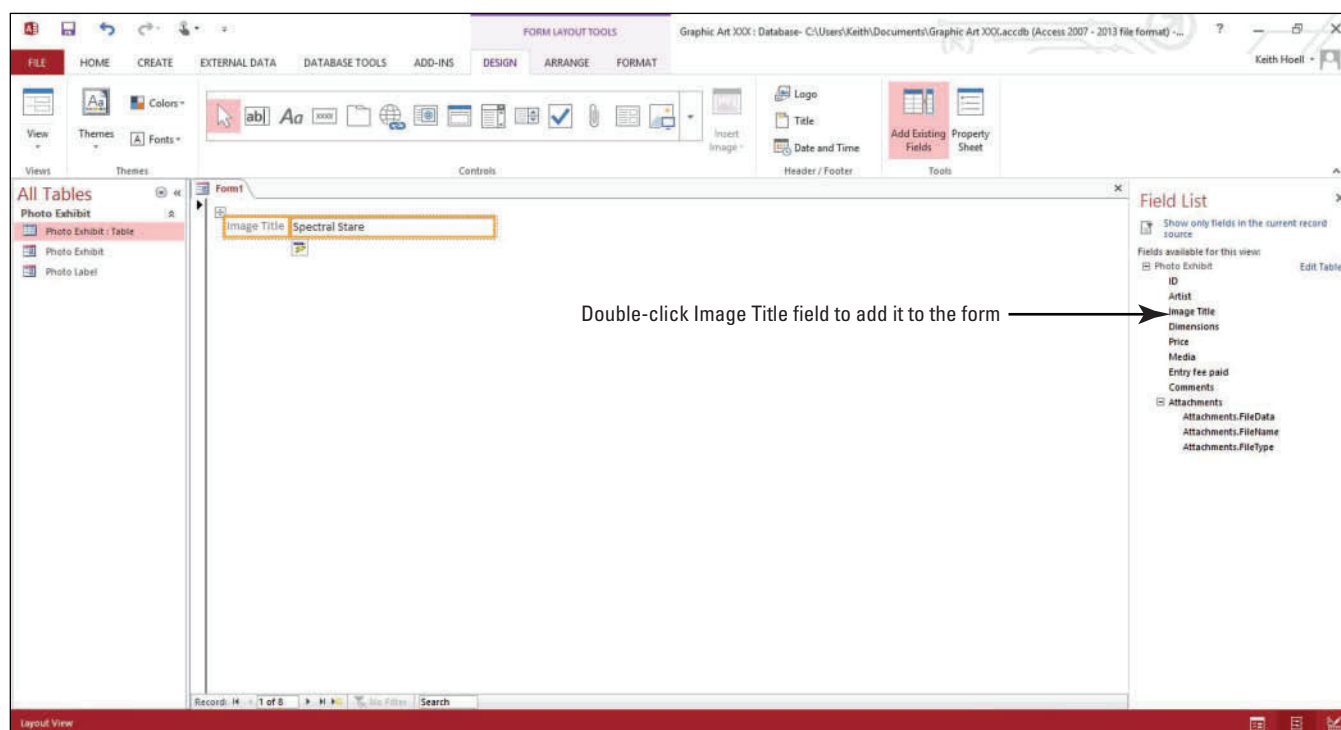
1. On the **CREATE** tab, in the **Forms** group, click the **Blank Form** button. A new blank form is created in **Layout** view.
2. Click the **Show all tables** link in the **Field List** pane to show the **Photo Exhibit** table name, if necessary.
3. If necessary, click the **expand button**  next to the **Photo Exhibit** table name to show a list of fields related to the table and double-click **Image Title** to add it to the form. Your screen should look like Figure 5-10.

Figure 5-10

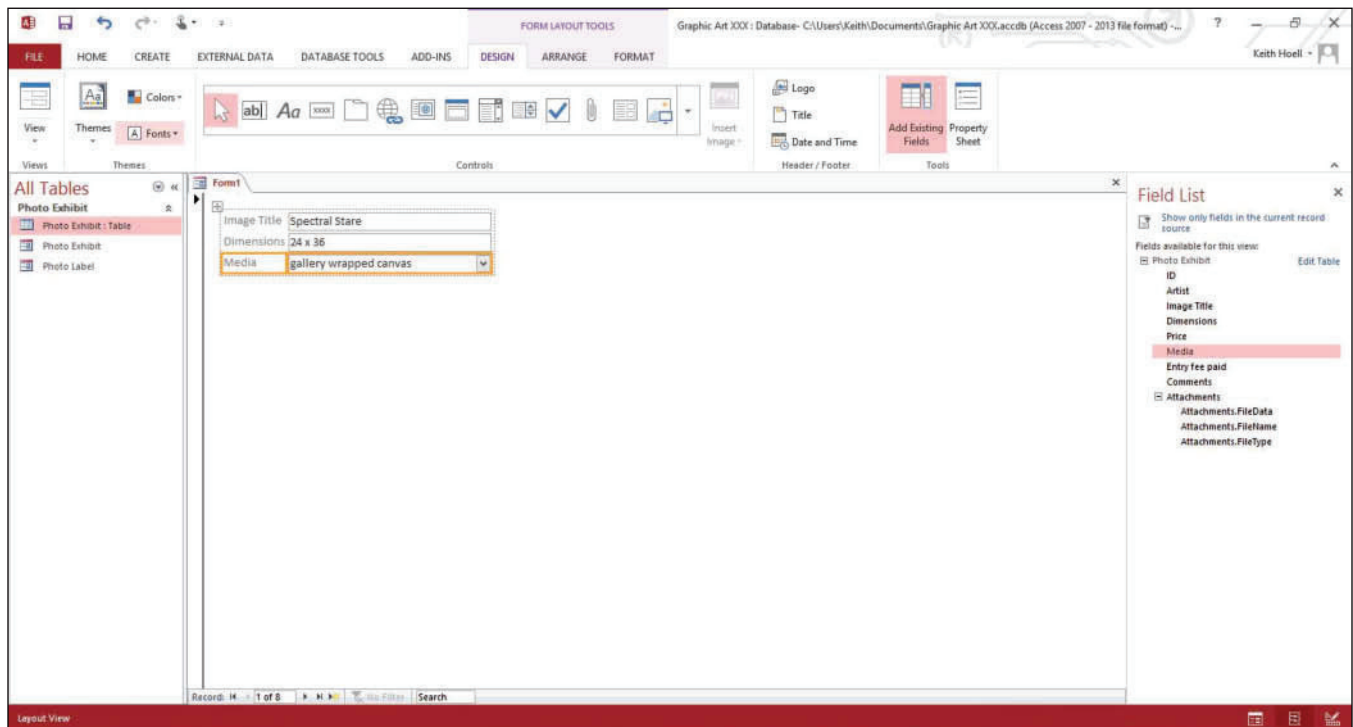
Image Title field added to new blank form



4. Double-click **Dimensions** to add it to the form.
5. Double-click **Media** to add it to the form. Your form should look similar to Figure 5-11.

Figure 5-11

Fields inserted in Layout view



6. Click the **FILE** tab and click **Save**.
7. In the Save As dialog box, key **Image Info**, and click **OK**.
8. Click the **Close** button to close the Field List.
9. Click the **Close** button on Image Info to close the form.

PAUSE. LEAVE the database open to use in the next exercise.

Take Note To add more than one field at a time after adding at least one other field, press **Ctrl** and click several fields; then, drag them all onto the form at once.

Using the Form Wizard

Another method of building a form is to use the **Form Wizard** tool. The Form Wizard allows you to select the fields that will appear on the form, choose the form layout (which determines the positioning of controls, objects, and data on a form), and also choose a predefined style, if desired. In this exercise, you use the Form Wizard to create a datasheet form. A datasheet form looks very similar to the table upon which it is based and provides a way to enter data using columns and rows.

STEP BY STEP

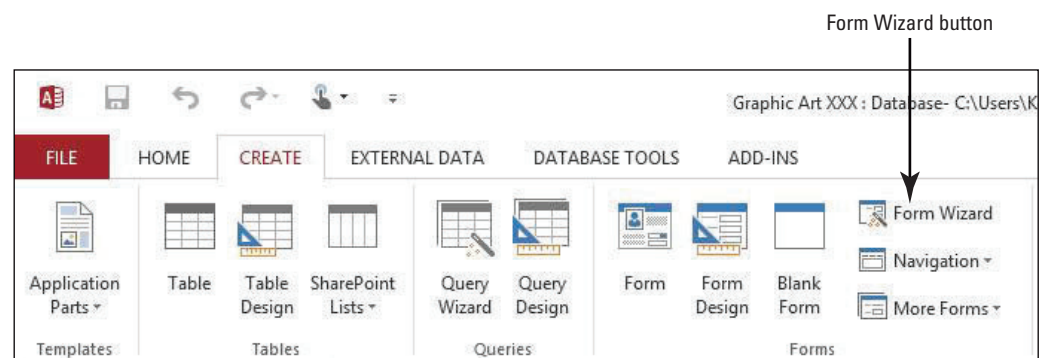
Use the Form Wizard

USE the database that is open from the previous exercise.

1. On the **CREATE** tab, in the Forms group, click the **Form Wizard** button (see Figure 5-12).

Figure 5-12

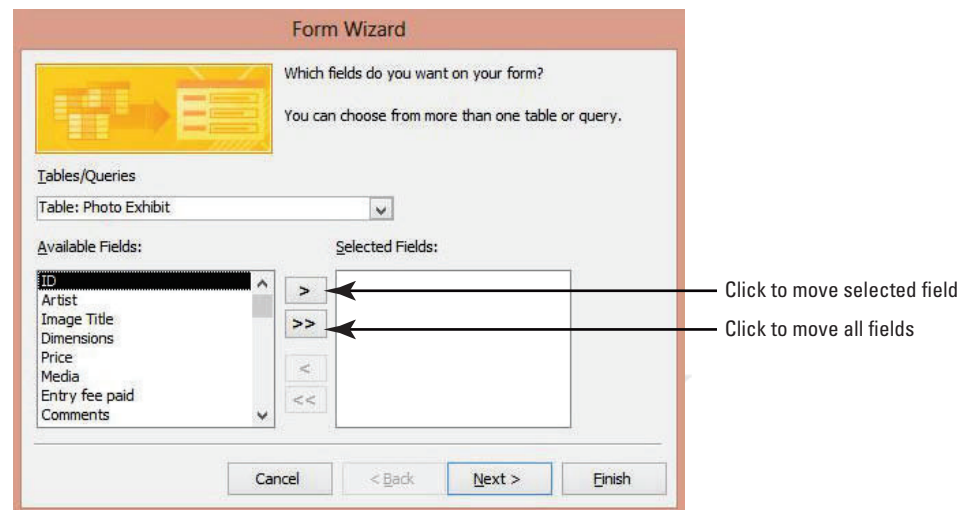
Form Wizard button in
Forms group



2. The Form Wizard appears (see Figure 5-13).

Figure 5-13

Form Wizard

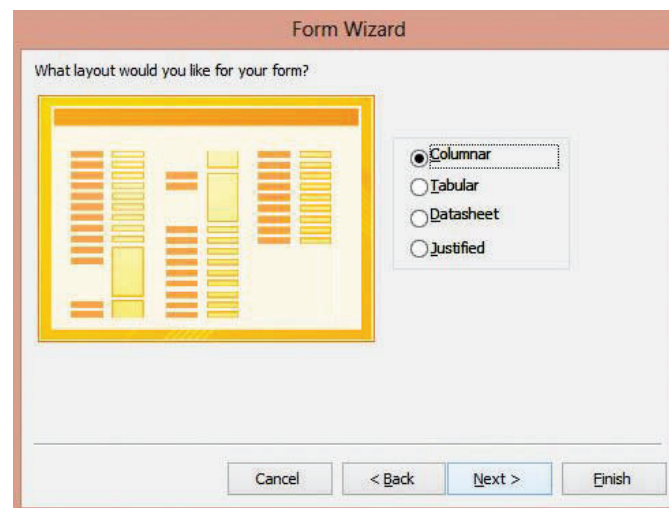


3. Click the >> button to move all the fields from the Available Fields box to the Selected Fields box.

4. Click the **Next >** button to move to the next page in the Form Wizard (see Figure 5-14).

Figure 5-14

Form Wizard, page 2



5. Click **Datasheet** as the layout for the form. Form layouts help determine the positioning of controls, objects, and data on a form.

6. Click the **Next >** button to move to the final page in the Form Wizard (see Figure 5-15).

Figure 5-15

Form Wizard, final page

Form Wizard

What title do you want for your form?
Photo Exhibit1

That's all the information the wizard needs to create your form.

Do you want to open the form or modify the form's design?

☒ Open the form to view or enter information.
☐ Modify the form's design.

Cancel < Back Next > Finish

7. Key **Photo Details** as the title of the form.8. Click the **Finish** button. A datasheet form appears (see Figure 5-16).

Figure 5-16

Datasheet form

ID	Artist	Image Title	Dimensions	Price	Media	Entry fee paid	Comments
1	Greg Bolender	Spectral Stare	24 x 36	\$465.00	gallery wrapped canvas	<input type="checkbox"/>	send entry form
2	Marc J. Ingle	Out of Nowhere	11 x 14	\$225.00	inkjet print	<input checked="" type="checkbox"/>	
3	Karan Khanna	The Guardian	16 x 20	\$350.00	gelatin silver print	<input checked="" type="checkbox"/>	
4	Julie Taft-Rider	Once in a Lifetime	30 x 40	\$800.00	gelatin silver print	<input checked="" type="checkbox"/>	
5	Dragan Tomic	Saving Face	29 x 29	\$545.00	composite color photo	<input checked="" type="checkbox"/>	arrange for shipping
6	Pilar Ackerman	Twisting, Turning, Leaning, Burr	12 x 28	\$400.00	digital pigment print	<input checked="" type="checkbox"/>	
7	Douglas Hite	Untitled	28 x 33	\$750.00	gelatin silver print	<input checked="" type="checkbox"/>	
8	Zheng Mu	Illuminated	18 x 26	\$335.00	gallery wrapped canvas	<input checked="" type="checkbox"/>	insurance question
(New)				\$0.00		<input type="checkbox"/>	

9. Click the **Close** button on Photo Details to close the form.**PAUSE. LEAVE** the database open to use in the next exercise.**Take Note****CERTIFICATION
READY?****1.1.4**How do you create
databases using wizards?

To include fields from more than one table on your form, do not click Next or Finish after you select the fields from the first table on the first page of the Form Wizard. Instead, repeat the steps to select another table, and click any additional fields that you want to include on the form before continuing.

Applying a Theme

The **Themes** command applies a predefined color and font scheme to a form or report. A theme modifies a form by controlling the color and fonts of its text. In this exercise, you apply a Theme to a form.

Take Note

Access certification exam objective 1.1.4, "How do you create databases using wizards," is met by using any number of wizards used to create database objects including other wizards you'll learn about in later lessons.

To apply a theme, first switch to Layout view. On the FORM LAYOUT TOOLS Design contextual tab, in the Themes group, click the Themes button to view a gallery of theme styles from which to choose. You can point to each option to see the name of that format and a live preview before it is applied to the form.

STEP BY STEP

Apply a Theme

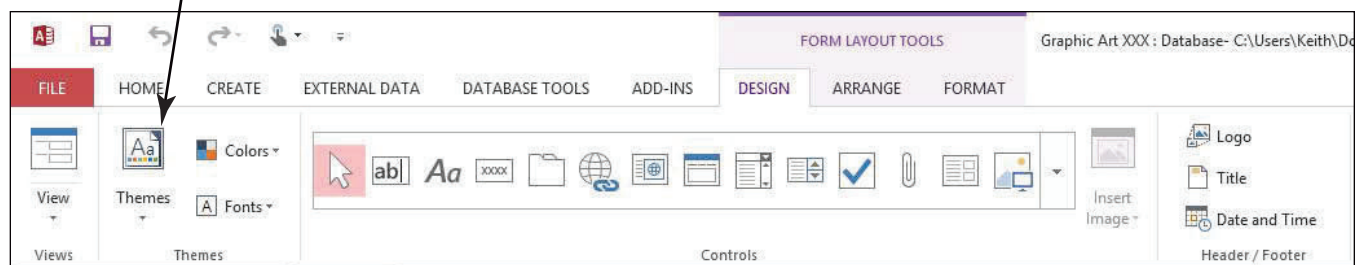
USE the database that is open from the previous exercise.

1. Double-click the **Image Info** form in the Navigation Pane to open it.
2. On the HOME tab, in the Views group, click the lower half of the **View** button, and click **Layout View** on the View menu.
3. On the FORM LAYOUT TOOLS Design contextual tab, in the Themes group, click the **Themes** button (see Figure 5-17).

Figure 5-17

Themes button

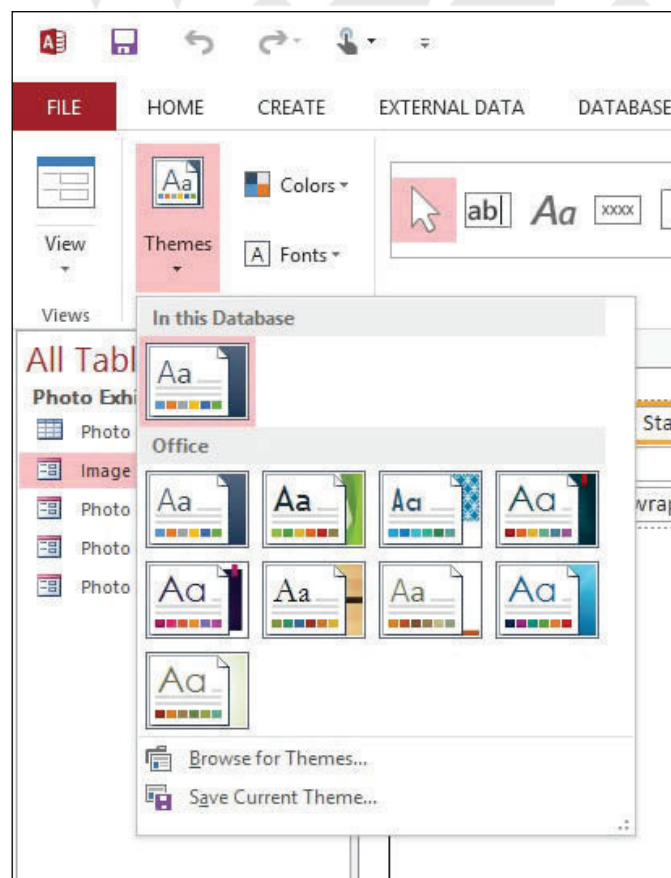
Themes button accesses Themes gallery



4. A gallery of themes appears (see Figure 5-18).

Figure 5-18

Themes gallery



5. Click the **Integral theme** (first row, third column) to apply it to the form. Notice how the form's text has changed (see Figure 5-19).

Figure 5-19

Form in Layout view with Integral theme applied

The screenshot shows the Microsoft Access interface with a form in Layout View. The ribbon at the top includes FILE, HOME, CREATE, EXTERNAL DATA, DATABASE TOOLS, ADD-INS, DESIGN, and ARRANGE. The left pane shows 'All Tables' with a list of tables: Photo Exhibit, Photo Exhibit : Table, Image Info, Photo Details, Photo Exhibit, and Photo Label. The 'Image Info' table is selected, and its form is displayed in the center. The form has a title bar 'Image Info' and three data entry fields: 'Image Title' with the value 'Spectral Stare', 'Dimensions' with the value '24 x 36', and 'Media' with a dropdown menu showing 'gallery wrapped canvas'. The text in the form is styled with the Integral theme. An arrow points to the text, with the caption 'Theme modified fonts for labels and record data text'.

**CERTIFICATION
READY?** 4.3.4

How do you apply themes?

6. Click the **Close** button on Image Info to close the form.

PAUSE. LEAVE the database open to use in the next exercise.

SORTING AND FILTERING DATA WITHIN A FORM

Sorting data in a form can help make it much more effective and easy to use. Sorting helps users review and locate the records they want without having to browse the data. To find one or more specific records in a form, you can use a filter. A **filter** limits a view of data to specific records without requiring you to alter the design of the form. You also can use a tool called filter by form to filter on several fields in a form or to find a specific record.

Sorting Data within a Form

Data can be sorted in the Form view of a form. The order that is chosen when a form is designed becomes that object's default sort order. But when viewing the form, users can sort the records in whatever way is most useful. You can sort the records in a form on one or more fields. In this exercise, you sort data in a form in ascending order.

The Bottom Line

STEP BY STEP**Sort Data within a Form**

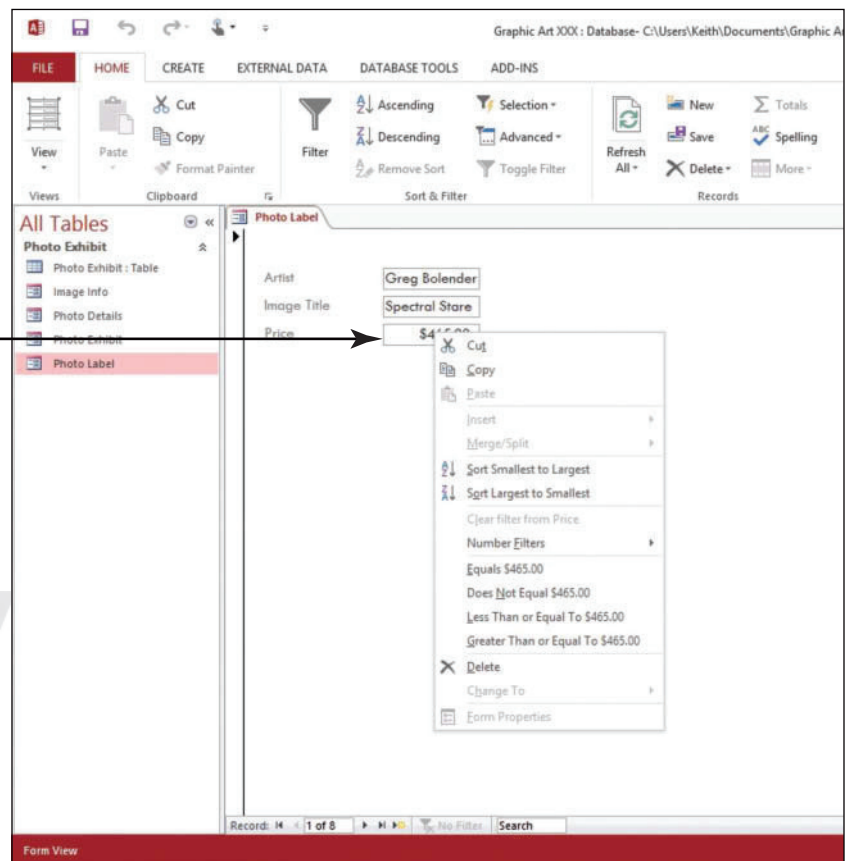
USE the database that is open from the previous exercise.

1. Double-click the **Photo Label** form in the Navigation Pane to open it in Form view.
2. Right-click the **Price** field to display the shortcut menu (see Figure 5-20).

Figure 5-20

Price field shortcut menu

Right-click to display
shortcut menu



3. Click **Sort Smallest to Largest**. The form is sorted by price from smallest to largest. The record with the smallest price is displayed first (see Figure 5-21).

Figure 5-21

Form sorted by price

**Another Way**

You can also sort on a field by selecting it and clicking the Ascending or Descending button on the HOME tab in the Sort & Filter group.

4. Click the **Next record** button on the record navigator at the bottom of the form. Continue clicking through all the records to see the records in order according to price.
5. On the HOME tab, in the Sort & Filter group, click the **Remove Sort** button. The records have resorted back to their original order.
6. Click the **Close** button on Photo Label to close the form.

PAUSE. LEAVE the database open to use in the next exercise.

Take Note

You cannot sort on a field that contains attachments. When sorting on a field with the Yes/No data type, a value of “Yes,” “True,” or “On” is considered “Selected,” and when sorted in ascending order will appear at the top of the list; a value of “No,” “False,” or “Off” is considered “Cleared,” and when sorted in ascending order will appear at the bottom of the list.

You must identify the fields on which you want to sort. To sort on two or more fields, identify the fields that will act as the innermost and outermost sort fields. Right-click anywhere in the column corresponding to the innermost field, and click one of the sort commands. The commands vary based on the type of data that is in the selected field. Repeat the process for each sort field, ending with the outermost sort field. The records are rearranged to match the sort order.

**Cross Ref**

You already learned how to sort data within a table in Lesson 3. Sorting in a form is very similar.

The last-applied sort order is automatically saved with the form. If you want it automatically applied the next time you open the form, make sure the Order By On Load property of the form is set to Yes. Remember that you cannot remove a sort order from just a single field. To remove sorting from all sort fields, on the HOME tab, in the Sort & Filter group, click Remove Sort.

Filtering Data within a Form

Common filters are built into every view that displays data. The filters available depend on the type and values of the field. When you apply the filter, only records that contain the values that you are interested in are included in the view. The rest are hidden until you remove the filter. In this exercise, you filter form data using common filters.

Filters are easy to apply and remove. Filter settings remain in effect until you close the form, even if you switch to another view. If you save the form while the filter is applied, it will be available the next time you open the form. To permanently remove a filter, on the HOME tab, in the Sort & Filter group, click the Advanced button and click Clear All Filters.

STEP BY STEP

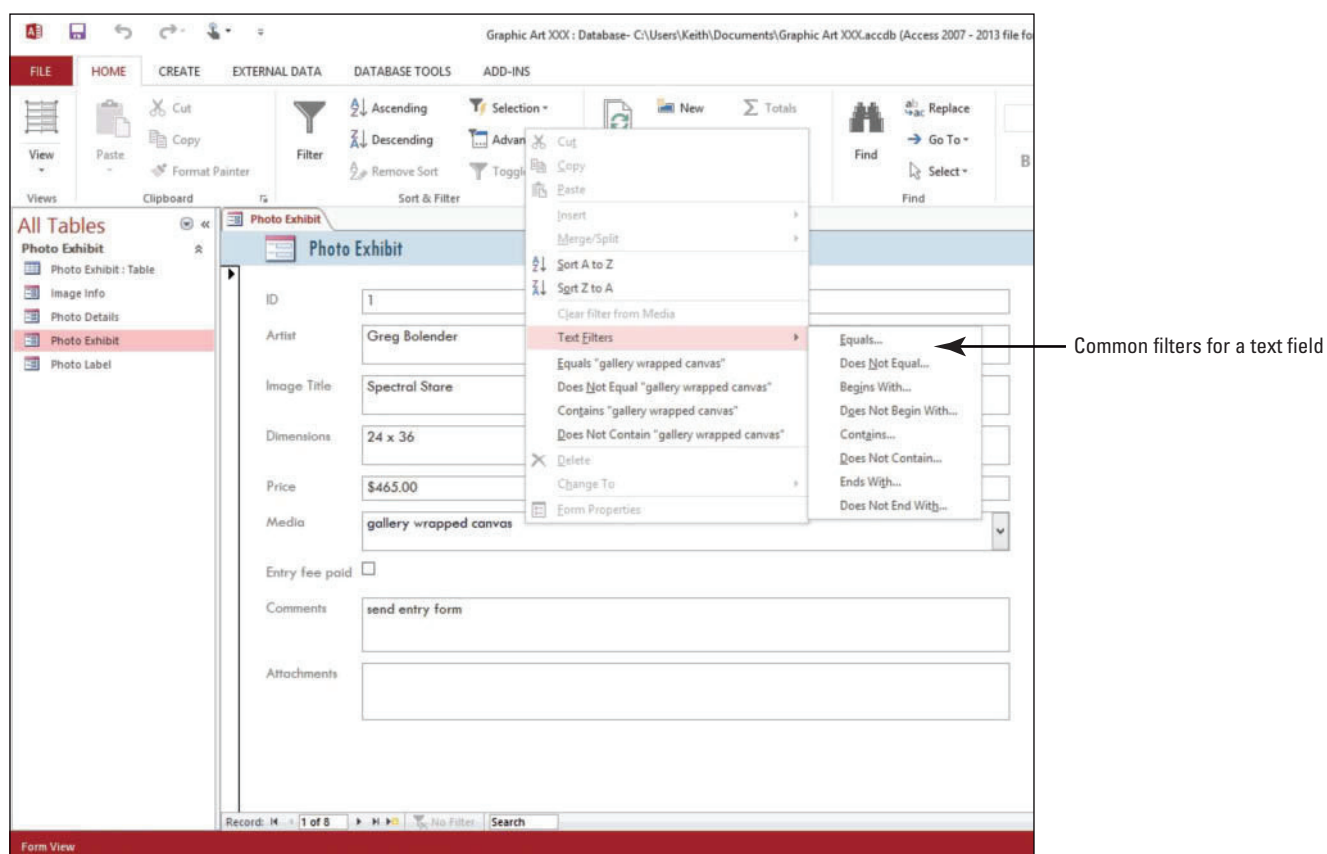
Filter Data with Common Filters

USE the database that is open from the previous exercise.

1. Double-click the **Photo Exhibit** form in the Navigation Pane to open it in Form view.
2. Right-click the **Media** field to display the shortcut menu and click **Text Filters** (see Figure 5-22).

Figure 5-22

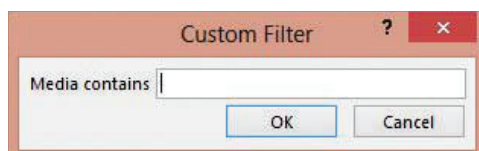
Media field text filters



3. Click **Contains...** to display the Custom Filter dialog box (see Figure 5-23).

Figure 5-23

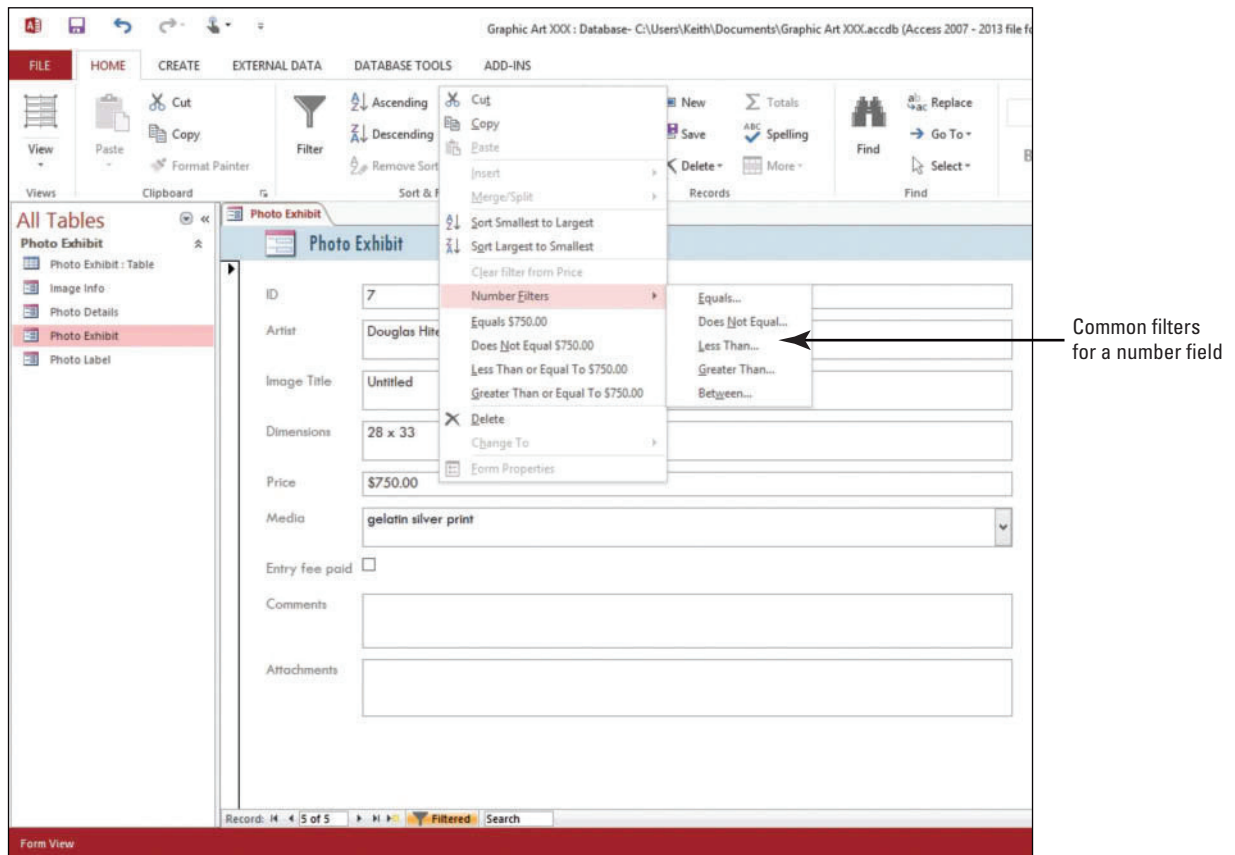
Custom Filter dialog box



4. In the *Media contains* box, key **print**, and click **OK**.
5. Click the **Next record** button on the record navigator at the bottom of the form. Continue clicking to see the five records that contain the word “print” in the Media field.
6. Right-click the **Price** field to display the shortcut menu and click **Number Filters** (see Figure 5-24).

Figure 5-24

Price field number filters



7. Click **Less Than...** to display the Custom Filter dialog box shown in Figure 5-25.

Figure 5-25

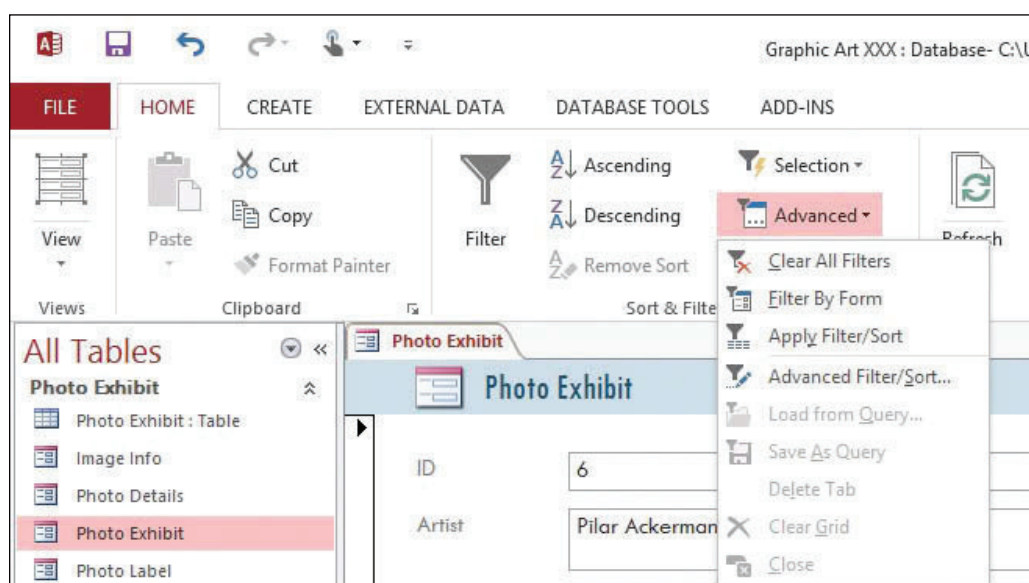
Custom Filter dialog box



8. In the *Price is less than or equal to* box, key **500**, and click **OK**.
9. Click the **Next record** button on the record navigator at the bottom of the form. Continue clicking to see the three photos that use print media and are less than \$500.
10. On the HOME tab, in the Sort & Filter group, click the **Advanced Filter Options** button to display the menu shown in Figure 5-26.

Figure 5-26

Advanced Filter Options
button menu



11. Click **Clear All Filters**.

PAUSE. LEAVE the database open to use in the next exercise.





**Cross
Ref**

You already learned how to filter data within a table in Lesson 3. Filtering in a form using common filters is very similar.

Using Filter by Form

Although only a single filter can be in effect for any one field at any one time, you can specify a different filter for each field that is present in the view. In addition to the ready-to-use filters for each data type, you can also filter a form by completing an action called filter by form. **Filter by form** is useful when you want to filter several fields in a form or if you are trying to find a specific record. Access creates a blank form that is similar to the original form; you then complete as many of the fields as you want. When you are finished, Access finds the records that contain the specified values. In this exercise, you filter by form.

To use filter by form, open the form in Form view and make sure the view is not already filtered by verifying that either the Unfiltered icon  or the dimmed No Filter icon  is present on the record selector bar. On the HOME tab, in the Sort & Filter group, click Advanced, and then click Filter By Form. Click the down arrow in a field to display the available values.

Enter the first set of values on the Look for tab, and then click the Or tab and enter the next set of values. Each time you click the Or tab, Access creates another Or tab; so you can continue to add additional filter values. Click the Toggle Filter button to apply the filter. The filter returns any record that contains all of the values specified on the Look for tab, or all of the values specified on the first Or tab, or all of the values specified on the second Or tab, and so on.

STEP BY STEP Use Filter by Form

USE the database that is open from the previous exercise.

1. On the HOME tab, in the Sort & Filter group, click the **Advanced Filter Options** button and click **Filter By Form**. A form filter appears (see Figure 5-27).

Figure 5-27

Form filter

Graphic Art XXX : Database- C:\Users\Keith\Documents\Graphic Art XXX\accdb (Access 2007 - 2013 file f

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS ADD-INS

View Paste Copy Format Painter Filter Ascending Descending Remove Sort Advanced Toggle Filter Refresh All Save Delete More Find Go To Select

Views Clipboard Sort & Filter Records Find

All Tables Photo Exhibit: Filter by Form

Photo Exhibit

Photo Exhibit: Table
Image Info
Photo Details
Photo Exhibit
Photo Label

ID
Artist
Image Title
Dimensions
Price
Media
Entry fee paid ☐
Comments
Attachments

Look for Or

Form View

Click Or tab to add additional filter values

2. Place the insertion point in the Dimensions box, and click the **down arrow** on the right to display the list of options shown in Figure 5-28.

Figure 5-28

Form filter field options

The screenshot shows the Microsoft Access interface with the 'Photo Exhibit' form open. The ribbon at the top includes FILE, HOME, CREATE, EXTERNAL DATA, DATABASE TOOLS, and ADD-INS. The 'Photo Exhibit' table is selected in the 'All Tables' pane on the left. The form fields are as follows:

Field Name	Current Value / Options
ID	[Empty text box]
Artist	[Empty text box]
Image Title	[Empty text box]
Dimensions	11 x 14 (dropdown menu)
Price	12 x 28
Media	16 x 20
Entry fee paid	18 x 26
Comments	24 x 36
Attachments	28 x 33

An arrow points to the dropdown arrow on the 'Dimensions' field with the text: 'Click to see available field values'.

3. Click **30 X 40**.
4. Click the **Or** tab at the bottom of the form.
5. Place the insertion point in the Dimensions box, click the **down arrow**, and then click **12 X 28**.
6. On the HOME tab, in the Sort & Filter group, click the **Toggle Filter** button to apply the filter. The records containing either the dimensions **30 X 40** or **12 X 28** are displayed (see Figure 5-29).

Figure 5-29

Form filter results

Indicates the form is filtered

The screenshot shows the Microsoft Access interface with the 'Photo Exhibit' form open. The ribbon is set to the 'HOME' tab, and the 'Filter' button is highlighted in the 'Sort & Filter' group. The form displays a single record for Julie Taft-Rider. The status bar at the bottom indicates 'Record: 1 of 2' and 'Filtered'.

7. Click the **Next record** button on the record navigator at the bottom of the form to see the second record in the form filter results.
8. On the HOME tab, in the Sort & Filter group, click the **Toggle Filter** button again to remove the filter.
9. On the HOME tab, in the Sort & Filter group, click the **Advanced** button and click **Clear All Filters**.
10. Click the **FILE** tab and click **Close**.

STOP. LEAVE Access open for use in the projects.

Take Note

If you want a field value to operate as a filter that is independent of other field values, you must enter that value on the Look for tab and each Or tab. In other words, the Look for tab and each Or tab represents an alternate set of filter values.

**CERTIFICATION
READY?** **4.3.3**

How do you sort records
within a form?

SKILL SUMMARY

In This Lesson You Learned How To:	Exam Objective	Objective Number
Create Forms	Create new forms. Save forms. Delete forms. Create databases using wizards. Apply themes.	4.1.1 4.1.3 4.1.4 1.1.4 4.3.4
Sort and Filter Data within a Form	Sort Records.	4.3.3

Knowledge Assessment

Matching

Match the term in Column 1 to its description in Column 2.

Column 1

1. Form Wizard
2. Form Design button
3. Theme command
4. Blank Form button
5. form
6. filter by form
7. sorting
8. Form tool
9. common filters
10. filter

Column 2

- a. useful when you want to filter on several fields in a form or if you are trying to find a specific record
- b. creates a simple form with a single mouse-click
- c. applies a predefined combination of colors and fonts that you select for a form or report
- d. quickly creates a new blank form in Design view
- e. allows you to select fields for the form, choose the form layout, and also choose a predefined style
- f. limits a view of data to specific records without requiring you to alter the design of the form
- g. built into every view that displays data
- h. database object that you can use to enter, edit, or display data from a table or a query
- i. helps users review and locate records without having to browse the data
- j. quickly creates a new blank form in Layout view

True/False

Circle T if the statement is true or F if the statement is false.

- T F 1. The Forms group is located on the HOME tab of the Ribbon.
- T F 2. Forms can be used to control access to data, such as which fields or rows of data are displayed.
- T F 3. After you save your form design, you can run the form as often as you want.
- T F 4. Layout view gives you a more detailed view of the structure of your form than Design view.
- T F 5. Using the Blank Form tool is a very quick way to build a form, especially if you plan to put only a few fields on your form.
- T F 6. To access the Theme options, first switch to Form view.
- T F 7. You cannot remove a sort order from just a single field.
- T F 8. The filters available depend on the field's data type and values.
- T F 9. To delete a form click on the Remove button in the Forms group.
- T F 10. When using the Form Wizard, you can only include fields from one table.

Competency Assessment

Project 5-1: Form Wizard

As a travel agent at Erin's Travel, you need an easy way to input data about events into the database. You decide to use the Form Wizard to create a datasheet form that has a preformatted style.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** *Travel Events* from the data files for this lesson.
2. **SAVE** the database as *Travel Events XXX* (where XXX is your initials).
3. On the CREATE tab, in the Forms group, click the **Form Wizard** button.
4. Click the **>>** button to move all the fields from the Available Fields box to the Selected Fields box.
5. Click the **Next >** button to move to the next page in the Form Wizard.
6. Click **Datasheet** as the layout for the form.
7. Click the **Next >** button to move to the final page in the Form Wizard.
8. Key **Event Details** as the title of the form.
9. Click the **Finish** button to create a datasheet form.
10. On the HOME tab, in the Views group, click the lower half of the **View button**, and click **Form View**.
11. Click the **Close** button on Event Details to close the form.
12. **CLOSE** the database.

LEAVE Access open for the next project.

Project 5-2: Used Games Forms

You are the manager at Southridge Video. To expand the store, you have recently started taking used games in trade. You store information about each title in an Access database. You decide to create some forms to help you use the database more efficiently.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** *Games inventory* from the data files for this lesson.
2. **SAVE** the database as *Games inventory XXX* (where XXX is your initials).
3. In the Navigation Pane, double-click **Games: Table** to open the table.
4. On the CREATE tab, in the Forms group, click the **Form** button to create a simple form and display it in Layout view.
5. Click the **FILE** tab and click **Save**.
6. In the Save As dialog box, click **OK** to accept the Games form name suggested by Access.
7. Click the **Close** button for Games to close the form.
8. On the CREATE tab, in the Forms group, click the **Form Design** button to create a new blank form in Design view.
9. On the FORM DESIGN TOOLS Design contextual tab, in the Tools group, click the **Add Existing Fields** button to display the Field List pane.
10. Click the **Show all tables link** in the Field List pane, if necessary.
11. Click the **expand button** next to Games to list the available fields, if necessary.
12. Double-click **Title** to add it to the form.
13. Double-click **Rating** to add it to the form.
14. Double-click **Platform** to add it to the form.
15. Click the **FILE** tab and click **Save**.
16. In the Save As dialog box, key **Game Rating**, and click **OK**.
17. Click the **Close** button to close the Field List.
18. On the DESIGN contextual tab, in the Views group, click the lower half of the **View** button and click **Form View** to display the form in Form view.
19. Click the **Close** button for Game Rating to close the form.

LEAVE the database open for the next project.

Proficiency Assessment

Project 5-3: Sort and Filter Games

A customer comes into Southridge Video and asks about game publishers and the availability of a particular game. Sort and filter data in the forms you created to get the information that you need.

USE the database that is open from the previous project.

1. In the Navigation Pane, double-click the **Games** form to open it.
2. Right-click the **Publisher** field to display the shortcut menu.
3. Click **Sort A to Z** to sort the form by publisher name in alphabetic order.
4. Navigate to record 3, titled **Marvel: Ultimate Alliance**.
5. Right-click the **Title** field and click **Contains "Marvel: Ultimate Alliance."**
6. Click the **Next record** button on the record navigator at the bottom of the form to see all the versions of the game with that name.
7. On the HOME tab, in the Sort & Filter group, click the **Remove Sort** button.
8. **CLOSE** the database.

LEAVE Access open for the next project.

Project 5-4: Toy Inventory

Your brother owns Wingtip Toys and recently started keeping a list of the store inventory in an Access database. He wants to add a form to the database and asks for your help. Add a simple form, and then show him how to sort and apply filters.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** **Toy inventory** from the data files for this lesson.
2. **SAVE** the database as **Toy inventory XXX** (where XXX is your initials).
3. **OPEN** **Inventory: Table**.
4. Use the Form tool to create a simple form.
5. Format the form using the **Organic** theme option (last row, first column).
6. Save the form as **Inventory**.
7. Sort the form's In Stock field from **Largest to Smallest**.
8. Sort the Description field from **A to Z**.
9. Run a filter that finds all the records where the Price field is **between \$50 and \$100**.
10. Clear all sorts and filters.
11. Create a **filter by form** to find all the records that have two items in stock.
12. **CLOSE** the form and close the database.

LEAVE Access open for the next project.

Mastery Assessment

Project 5-5: Coffee of the Month

Fourth Coffee has started a “Coffee of the Month” club. Each month features a new coffee type chosen for its unique blend. Information about the monthly club selections is stored in an Access database; you will create forms so that you can retrieve the data in a useful way.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** the *Coffee Selections* database from the data files for this lesson.
2. **SAVE** the database as *Coffee Selections XXX* (where XXX is your initials).
3. Create a simple form that contains all the fields in the Coffee Inventory table and save it with the default name of *Coffee Inventory*.
4. Use the Form Design button to create a form named *Coffee of the Month* that uses the Organic theme and looks like the one shown in Figure 5-30 when displayed in Form view.

Figure 5-30

Coffee of the Month form

The screenshot displays the Microsoft Access application window for the 'Coffee Selections XXX' database. The 'Coffee of the Month' form is open in Form View, featuring the 'Organic' theme. The form contains three text boxes: 'Club Month' (containing 'May'), 'Product Name' (containing 'Breakfast Blend'), and 'Blend' (containing 'Mild'). The ribbon at the top includes 'FILE', 'HOME', 'CREATE', 'EXTERNAL DATA', 'DATABASE TOOLS', and 'ADD-INS'. The 'All Tables' task pane on the left shows a list of tables: 'Coffee Inventory', 'Coffee Inventory: Table', 'Coffee Inventory', and 'Coffee of the Month'. The status bar at the bottom indicates 'Record: 5 of 12' and 'No Filter'.

5. **CLOSE** the database.

LEAVE Access open for the next project.

Project 5-6: Personal Contacts

Your address book is becoming outdated, and you decide to transfer all the current information about friends and family to an Access database. Input the data and then create forms to manage it efficiently.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** *Personal Contacts* from the data files for this lesson.
2. **SAVE** the database as *Personal Contacts XXX* (where XXX is your initials).
3. Input as much contact information as you have about at least five friends or family members.
4. Create at least two forms that help you input, sort, or filter the data in a useful way. Use Themes to improve the look of the forms.
5. **CLOSE** the database.

STOP. CLOSE Access.

WILEY

Circling Back

You are a real estate agent and have recently opened your own office—Woodgrove Real Estate—with several other licensed agents. Because you are the one who is most knowledgeable about computers, you will be responsible for keeping track of the listings and other relevant information. You will use Access to begin developing the database that will be used by everyone in the office.

Project 1: Create a Database and Tables

After sketching out a plan on paper, you are ready to begin creating the database and tables.

GET READY. Launch Access if it is not already running.

1. Near the center of the screen, click the **Blank desktop database icon**.
2. In the File Name box, key **WoodgroveXXX** (where XXX is your initials).
3. Click the **folder icon** and browse to the location where you want to store the file.
4. Click the **Create** button to create a new blank database.
5. Click **Click to Add** and click **Short Text** on the shortcut menu.
6. Key **Address** as the column name and press **Enter**.
7. Add new **Short Text** columns named **Bedrooms**, **Bathrooms**, **Square Feet**, and **Price**.
8. Click the **FILE** tab and click **Save**.
9. In the Save As dialog box, key **Listings** as the table name and click **OK**.
10. On the CREATE tab, in the Templates group, click the **Application Parts** button, and click **Contacts** to create a new table. Click **Yes**, if necessary, to close and save the Listings table, then click **Cancel** in the Create Relationship dialog box that appears.
11. Open the **Contacts** table.
12. Right-click the **Company** field header and click **Delete Field** on the shortcut menu. Click **Yes** if you receive a dialog box warning you about the deletion.
13. Delete the Job Title, Business Phone, Fax Number, Address, City, State/Province, ZIP/Postal Code, Country/Region, Web Page, Notes, and Attachments columns. (If you get a message asking if you want to delete all indexes for the ZIP/Postal Code column, click **Yes**.)
14. **SAVE** the table as **Agents**.
15. Delete all the objects in your database except the Agents and Listings tables.

PAUSE. LEAVE the database open to use in the next project.

Project 2: Modify Tables and Fields

Now that you have created the tables for your database, you need to modify them to suit your needs.

USE the database that is open from the previous project. The Agents table should be displayed.

1. On the HOME tab, in the Views group, click the bottom portion of the View button and then click **Design View**.
2. On the TABLE TOOLS DESIGN contextual tab, in the Show/Hide group, click **Property Sheet**.
3. In the Property Sheet's Description property box, key **Agent contact information**.
4. Click **Close** to **CLOSE** the property sheet.
5. In the upper portion of the table design grid, click the **EmailAddress field**. In the field properties on the bottom, click in the Required property box and set it to **Yes**. In the field properties, click in the Default Value property box and key **@woodgroverealestate.com**.
6. **SAVE** the table and switch back to **Datasheet View**.

7. **OPEN** the **Listings** table. Place the insertion point in the **Price** column.
8. On the TABLE TOOLS FIELDS contextual tab, in the Formatting group, click the **down arrow** in the Data Type box and click **Number**.
9. In the Format box, click the **down arrow** and choose **Currency**.
10. Change the data type/format on the Bedrooms, Bathrooms, and Square Feet fields to **Number/General Number**.
11. Click the **Click to Add** column. Choose **Attachment** as the data type to create an attachment column.
12. **SAVE** the table.

PAUSE. LEAVE the database open for the next project.

Project 3: Create Forms and Enter Data

Now it is time to enter data into your database. First you create a form to make this task easier.

USE the database that is open from the previous project. The Listings table should be displayed.

1. On the CREATE tab, in the Forms group, click the **More Forms** button.
2. Click **Datasheet** to create a datasheet form.
3. Click the **FILE** tab and click **Save**.
4. In the Save As dialog box, key **Listings** as the form name and click **OK**.
5. Use the form to enter data into the Listings table, as shown in Figure 1.

Figure 1

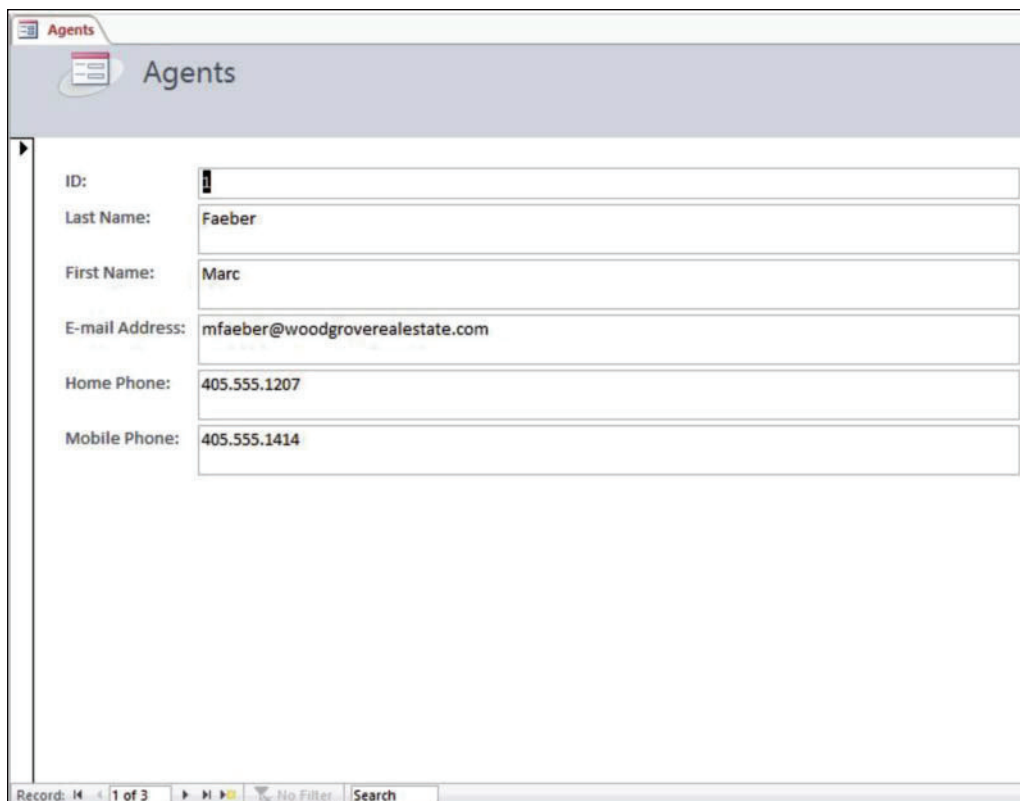
Listings data

ID	Address	Bedrooms	Bathrooms	Square Feet	Price	
1	214 Main Street	4	2	3150	\$352,800.00	📎(0)
2	3328 Broadway	3	2	2125	\$265,625.00	📎(0)
3	89 Ridge Road	3	1	1550	\$201,500.00	📎(0)
4	677 West Avenue	3	3	2892	\$303,660.00	📎(0)
5	40 Upper Grant	5	3	4984	\$697,760.00	📎(0)
6	2002 Sundown Lane	2	2	1880	\$253,800.00	📎(0)
7	2828 Green Briar	2	1	1060	\$185,500.00	📎(0)
8	685 South Grand	4	3	3535	\$530,250.00	📎(0)
9	13811 Crown Bluff	3	2	2248	\$319,216.00	📎(0)
10	1505 Pinehurst	4	3	2670	\$435,210.00	📎(0)
*(New)						📎(0)

6. Display the **Agents** table.
7. On the CREATE tab, in the Forms group, click the **Form** button.
8. **SAVE** the form as **Agents**.
9. Switch to Form View and use the form to enter the data shown in Figure 2.

Figure 2

Agents data, record 1



The screenshot shows a web application titled "Agents" with a form for entering agent data. The form fields are as follows:

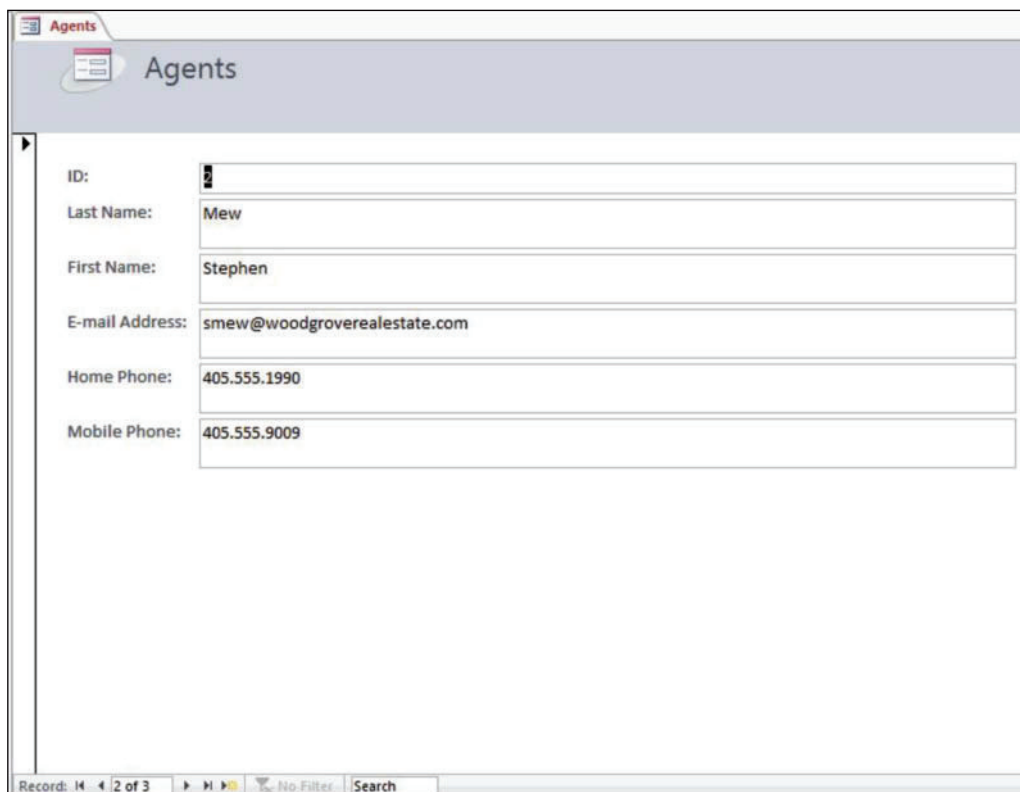
ID:	1
Last Name:	Faeber
First Name:	Marc
E-mail Address:	mfaeber@woodgroverealestate.com
Home Phone:	405.555.1207
Mobile Phone:	405.555.1414

At the bottom of the form, there is a record navigator showing "Record: 1 of 3" and a "Search" button.

10. Click the **Next record** button on the record navigator.
11. Enter the data shown in Figure 3 as the second record.

Figure 3

Agents data, record 2



The screenshot shows the same "Agents" web application, but now displaying the second record. The form fields are as follows:

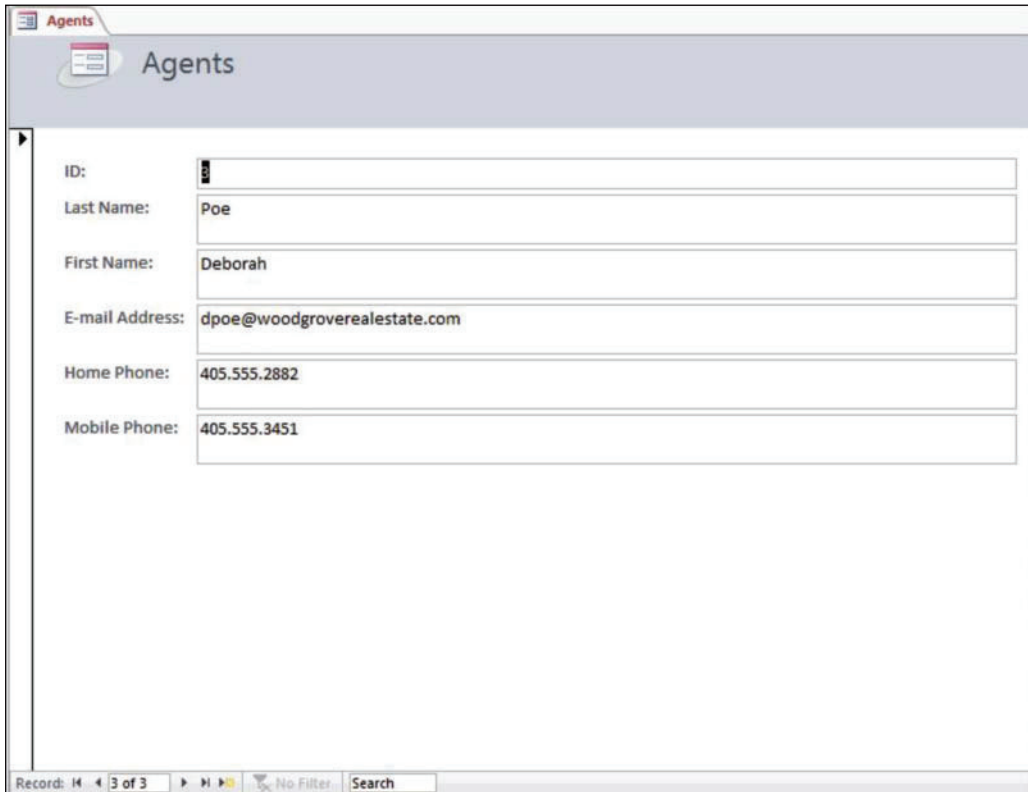
ID:	2
Last Name:	Mew
First Name:	Stephen
E-mail Address:	smew@woodgroverealestate.com
Home Phone:	405.555.1990
Mobile Phone:	405.555.9009

The record navigator at the bottom now shows "Record: 2 of 3" and the "Search" button.

12. Enter the data shown in Figure 4 as the third record.

Figure 4

Agents data, record 3



The screenshot shows a web form titled "Agents" with a tab icon. The form contains the following fields and values:

ID:	
Last Name:	Poe
First Name:	Deborah
E-mail Address:	dpoe@woodgroverealestate.com
Home Phone:	405.555.2882
Mobile Phone:	405.555.3451

At the bottom of the form, there is a status bar that reads: "Record: 14 3 of 3" with navigation arrows, a "No Filter" button, and a "Search" button.

13. **CLOSE** the Agents form and the Listings form.

PAUSE. LEAVE the database open for the next project.

Project 4: Add Attachments and Create a Lookup Field

You have begun to use the database and realize it would be helpful for the Listings table to include the listing agent. Create a lookup field with this information and attach photos for some of the houses.

USE the database that is open from the previous project.



1. In the Listings table, double-click the **Attachment** field for the fourth record (677 West Avenue).
2. In the Attachments dialog box, click **Add**.
3. Navigate to the data files for this lesson, select **677_West_Avenue**, and click **Open**.
4. In the Attachments dialog box, click **OK**.
5. Attach the photo named **2002_Sundown_Lane** to the sixth record.
6. In the Listings table, place the insertion point in the cell under the Click to Add column.
7. On the TABLE TOOLS FIELDS contextual tab in the Add & Delete group, click the **More Fields** button. Click the **Lookup & Relationship** command.
8. Click **Next>** twice.
9. Click **LastName** and then click the **>** button to move it to the Selected Fields box.
10. Click **Next>** three times.
11. Key **Listing Agent** as the title for your lookup column.

12. Click **Finish**.
13. **SAVE** the Listings table.

PAUSE. LEAVE the database open for the next project.

Project 5: Modify a Form

Now that you have a lookup field, you want to add it to your form and use it to enter additional information.

USE the database that is open from the previous project.

1. Display the Listings form and switch to Design View.
2. Click the **Field1** field on the design grid and press **Delete**.
3. On the FORM DESIGN TOOLS Design contextual tab, in the Tools group, click **Add Existing Fields**.
4. In the Field List pane, under Fields available for this view, click **Listing Agent** and drag it to the form below the Price field.
5. **CLOSE** the Field List pane and switch to Datasheet View.
6. In the Listing Agent column click the **down arrow** and select the last name for each record, as shown in Figure 5.

Figure 5
Listing agents

ID	Address	Bedrooms	Bathrooms	Square Feet	Price	Listing Agent
1	214 Main Street	4	2	3150	\$352,800.00	Faeber
2	3328 Broadway	3	2	2125	\$265,625.00	Faeber
3	89 Ridge Road	3	1	1550	\$201,500.00	Poe
4	677 West Avenue	3	3	2892	\$303,660.00	Mew
5	40 Upper Grant	5	3	4984	\$697,760.00	Faeber
6	2002 Sundown Lane	2	2	1880	\$253,800.00	Poe
7	2828 Green Briar	2	1	1060	\$185,500.00	Poe
8	685 South Grand	4	3	3535	\$530,250.00	Faeber
9	13811 Crown Bluff	3	2	2248	\$319,216.00	Mew
10	1505 Pinehurst	4	3	2670	\$435,210.00	Faeber
* (New)						

7. **CLOSE** the form.

STOP. CLOSE the database.