HANDS-ON EXERCISES

1 Form Basics

It is your first day on the job at Santiago Coffee Shop. After talking with Alex about his data entry needs, you decide to create several sample forms with different formats. You will show each form to Alex to get his feedback and see if he has a preference. Remember to select the correct record source prior to creating each new form.

Skills covered: Use the Form Tool and Adjust Column Widths in a Form • Create a Split Form • Create a Multiple Items Form • Create a Datasheet Form and Delete a Field from a Form • Add a Field to a Form • Change the Sorting in a Form and Remove Sorting in a Form

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STEP 1 ▶ USE THE FORM TOOL AND ADJUST COLUMN WIDTHS IN A FORM

Use the Form tool to create an Access form to help Alex manage his customers. This form will enable Tonya to add, edit, and delete records more efficiently than working with tables. Refer to Figure 4.7 as you complete Step 1.
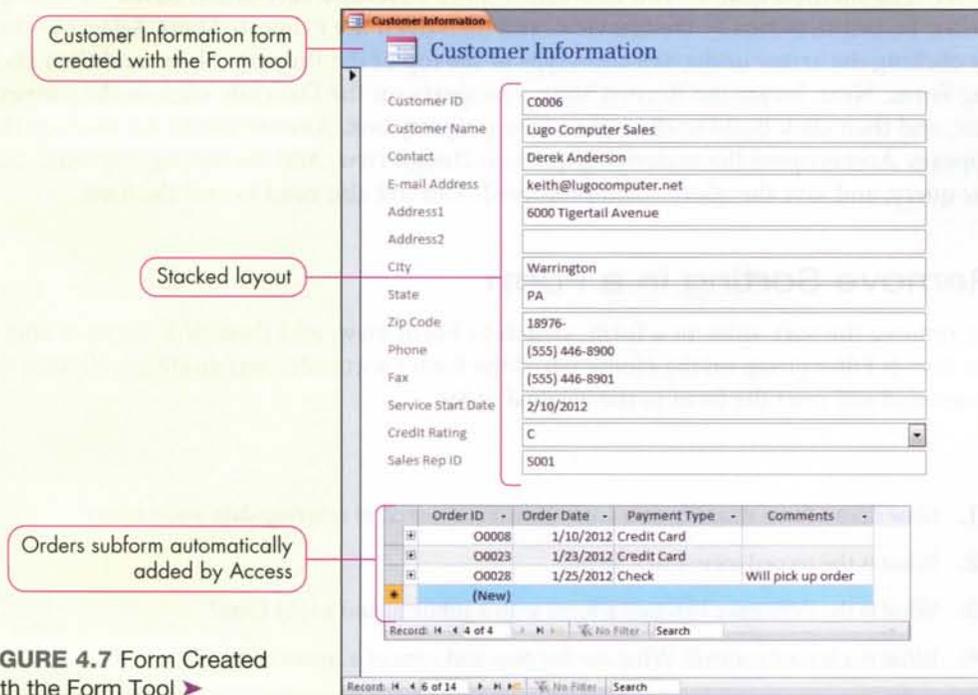
Customer Information form created with the Form tool

Stacked layout

Orders subform automatically added by Access

FIGURE 4.7 Form Created with the Form Tool ▶

a. Open *a04h1coffee*. Click the **File tab**, click **Save Database As**, and then type **a04h1coffee_ LastnameFirstname**. Click Save.

> **TROUBLESHOOTING:** Throughout the remainder of this chapter and textbook, click Enable Content whenever you are working with student files.

> **TROUBLESHOOTING:** If you make any major mistakes in this exercise, you can close the file, repeat step a above, and then start over.

b. Click the **Customers table** in the Navigation Pane. Click the **Create tab**, and then click **Form** in the Forms group.

Access creates a new form with two record sources—Customers (with stacked layout, on top) and Orders (with tabular layout, below). Access found a one-to-many relationship between the Customers and Orders tables. The form opens in Layout view.

c. Click the top text box containing *C0001*. The text box is outlined with an orange border. Move the mouse to the right edge of the orange border until the mouse pointer changes to a double-headed arrow. Drag the right edge to the left until the text box is approximately 50% of its original size.

All the text boxes and the subform at the bottom adjust in size when you adjust the top text box. This is a characteristic of Layout view—enabling you to easily modify all controls at once.

TROUBLESHOOTING: You may need to maximize the Access window, or close the Navigation Pane, if the right edge of the text box is not visible.

d. Click the Arrange tab, and then click **Select Layout** in the Rows & Columns group.

All the controls are now selected.

TROUBLESHOOTING: Click any control in the top part of the form before you click Select layout.

e. On the Arrange tab, click **Control Padding** in the Position group. Select **Narrow** from the list of choices.

The space between the controls is reduced.

f. Click **Save** in the Quick Access Toolbar, and then type **Customer Information** as the form name in the **Save As dialog box**. Click **OK**.

g. Click the **Home tab**, and then click **View** in the Views group to switch to Form view, the view that most users will see. Advance to the sixth customer, *Lugo Computer Sales*, using the **Navigation bar** at the bottom of the form.

TROUBLESHOOTING: Two Navigation bars exist, one for the main form and one for the subform. Make sure you use the bottom one that shows 14 records.

h. Double-click the **Customers table** in the Navigation Pane.

Two tabs now appear in the main window. You will compare the table data and the form data while you make changes to both.

i. Verify the sixth record of the Customers table is *Lugo Computer Sales*, which corresponds to the sixth record in the Customer Information form. Click the tabs to switch between the table and the form.

j. Click the **Customer Information tab**, and then replace *Derek Anderson*, the contact for Lugo Computer Sales, with your name. Advance to the next record to save the changes. Click the **Customers tab** to see that the contact name changed in the table as well.

The contact field and the other fields on the Customer Information form are bound controls. Changing the data in the form automatically changes the data in the underlying table.

TROUBLESHOOTING: If the change to Derek Anderson does not appear in the Customers table, check the Customer Information form to see if the pencil appears in the left margin. If it does, save the record by advancing to the next customer, and then recheck to see if the name has changed.

k. Replace your name with **Derek Anderson**. Save the record by clicking on the record below *Lugo Computer Sales*. Click the **Customer Information tab**, and then find the sixth record. You should see the change you just made—Derek is back!

l. Switch to Layout view. Click the **Customers title** at the top of the form to select it, and then click again and change the title to **Customer Information**.

The Customer Information title, a label control, is an example of an unbound control; an unbound control does not have a connection to an underlying table.

m. Click **Save** in the Quick Access Toolbar to save the changes to the form's title. Close the form and the table.

> **TROUBLESHOOTING:** If you make a mistake that you cannot easily recover from, consider deleting the form and starting over. The Form tool makes it easy to start over again.

STEP 2 ▶ CREATE A SPLIT FORM

Use the Split Form tool to create a different form to show to Tonya. She may prefer to use a split form to add, edit, and delete records rather than the Customer Information form that you created in the previous step. Refer to Figure 4.8 as you complete Step 2.
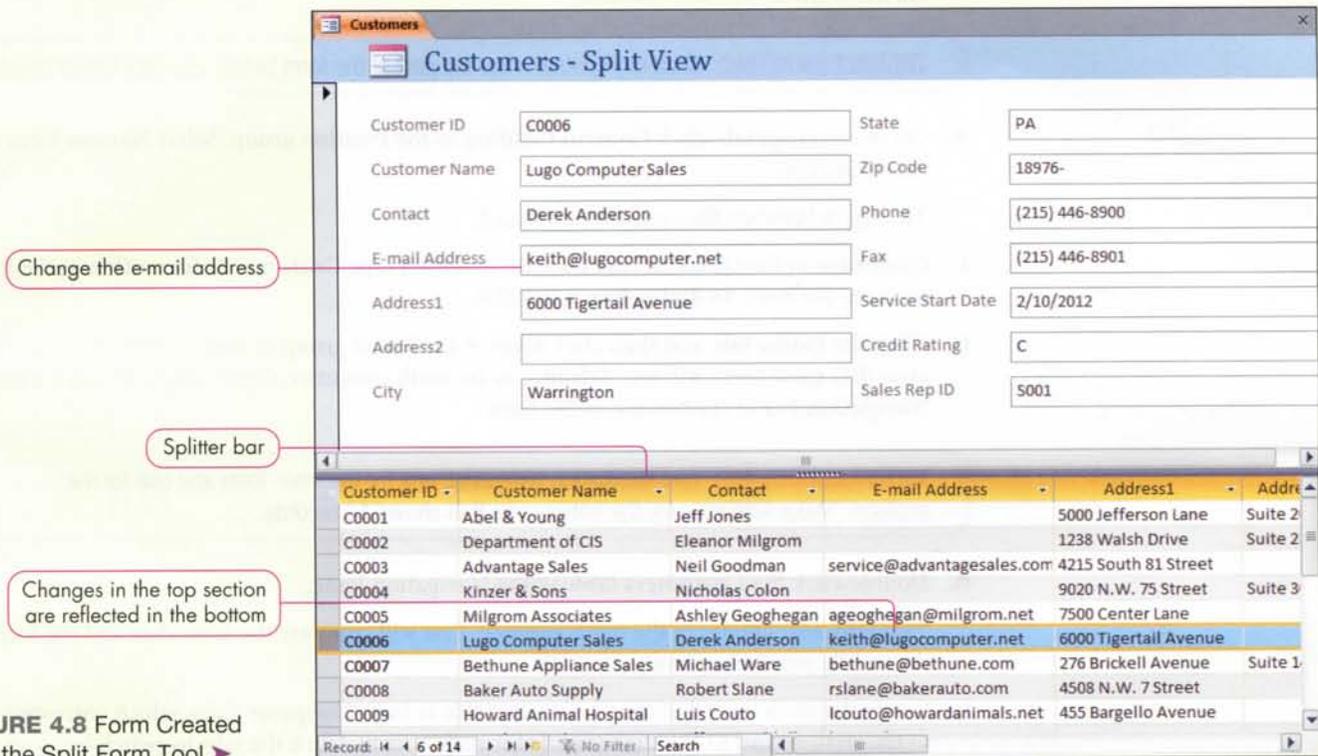

FIGURE 4.8 Form Created with the Split Form Tool ▶

a. Verify the Customers table is selected in the Navigation Pane. Click the **Create tab**, click **More Forms** in the Forms group, and then select **Split Form** from the list.

Access creates a new form with a split view, one view in stacked layout and one view in tabular layout.

b. Switch to Form view. In the bottom portion of the split form, click **Lugo Computer Sales**, the sixth record. Notice the top portion now displays the information for Lugo Computer Sales.

c. Change *service@lugocomputer.net* to **yourname@lugocomputer.net** in the top portion of the form.

The bottom portion reflects your change when you move to another field or advance to another record.

d. Click another record, and then click back on **Lugo Computer Sales**.

The pencil disappears from the record selector box and the changes are saved to the table.

e. Click anywhere on the Coulter Office Supplies customer in the bottom portion of the form (record 14).

The top portion shows all the information for this customer.

f. Modify the Contact, E-mail Address, and Address1 information in the top portion of the form, by typing **xyz** at the end of each cell. Save your changes by clicking anywhere in the bottom portion of the window.

Notice the xyz characters appear in the bottom portion of the form.

g. Remove the xyz's from the Coulter Office Supplies record in the top section.

h. Switch to Layout view. Click the **Customers title** at the top of the form to select it, and then click **Customers** again and change the title to **Customers - Split View**.

i. Click **Save** on the Quick Access Toolbar, and then type **Customers - Split View** in the **Form Name box**. Click **OK**.

j. Move your mouse over the splitter bar, the border between the top and bottom portions of the window. When the pointer shape changes to a double-headed arrow, drag the splitter bar up until it almost touches the Sales Rep ID field.

k. Close the form and save the changes when prompted.

STEP 3 ▶ CREATE A MULTIPLE ITEMS FORM

You decide to use the Multiple Items tool to create a form for Alex to manage his products. Because of its tabular format, it will enable Alex and Tonya to view multiple records at one time. Refer to Figure 4.9 as you complete Step 3.
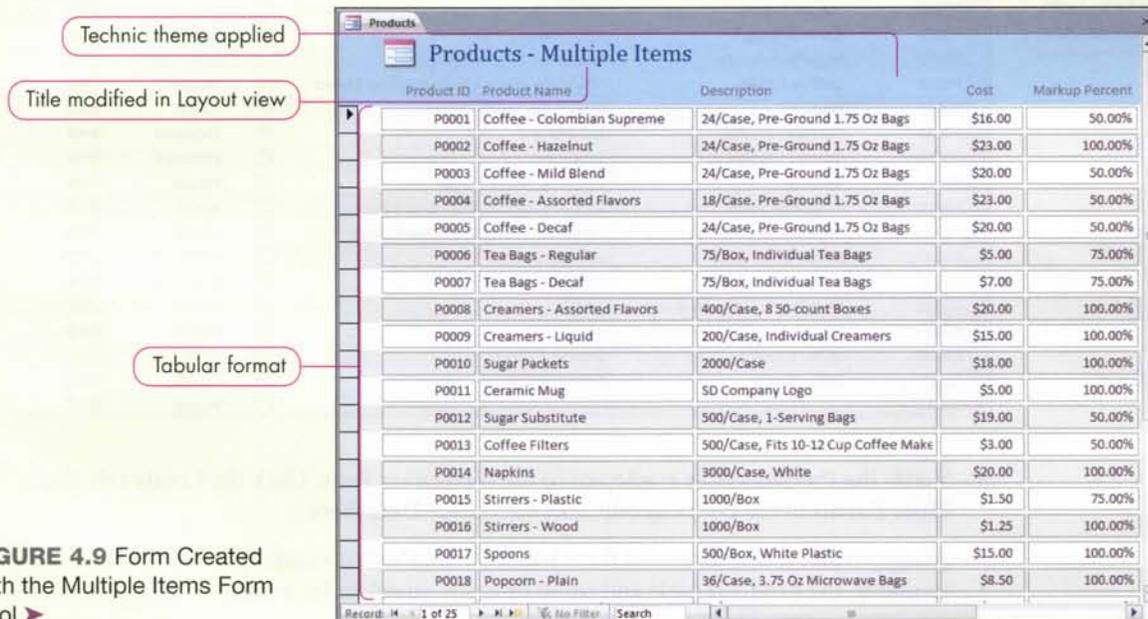

FIGURE 4.9 Form Created with the Multiple Items Form Tool ▶

Technic theme applied

Title modified in Layout view

Tabular format

a. Click the **Products table** in the Navigation Pane. Click the **Create tab**, click **More Forms** in the Forms group, and then select **Multiple Items** from the list.

Access creates a new multiple items form based on the Products table. The form resembles the datasheet of a table—both have a tabular layout.

b. Click **cell P0001**. Move the mouse over the bottom edge of cell P0001 until the pointer shape changes to a two-headed arrow. Drag the bottom edge up to reduce the height of the rows by 50%.

Changing the height of one row affects the height of all the rows.

c. Click the **Products title** at the top of the form to select it, and then click again on **Products** and change the title to **Products - Multiple Items**.

d. Click the **Themes arrow** in the Themes group on the Design tab. Right-click the **Technic Theme** (near the bottom of the gallery), and then choose **Apply Theme to This Object Only**.

Hover over a theme and its name will display as a ScreenTip. The Technic theme is applied to the Products - Multiple Items form.

e. Close and save the form as **Products - Multiple Items**.

STEP 4 ▶ **CREATE A DATASHEET FORM AND DELETE A FIELD FROM A FORM**

You decide to use the Datasheet tool to create another form for Alex to manage his products. The Datasheet form is in tabular format and is similar to the Multiple Items form, but requires little or no maintenance, which Alex may like. Refer to Figure 4.10 as you complete Step 4.

Datasheet form based on the Products table

Field name modified

Datasheet form looks similar to Datasheet view

Product ID ▾	Product Name ▾	Description ▾	Refrig? ▾	Brand ▾	Year Introduce
P0001	Coffee - Colombian Supreme	24/Case, Pre-Ground 1.75 Oz Bags	☐	Discount	2008
P0002	Coffee - Hazelnut	24/Case, Pre-Ground 1.75 Oz Bags	☐	Premium	2008
P0003	Coffee - Mild Blend	24/Case, Pre-Ground 1.75 Oz Bags	☐	House	2008
P0004	Coffee - Assorted Flavors	18/Case, Pre-Ground 1.75 Oz Bags	☐	House	2008
P0005	Coffee - Decaf	24/Case, Pre-Ground 1.75 Oz Bags	☐	Discount	2008
P0006	Tea Bags - Regular	75/Box, Individual Tea Bags	☐	House	2008
P0007	Tea Bags - Decaf	75/Box, Individual Tea Bags	☐	House	2008
P0008	Creamers - Assorted Flavors	400/Case, 8 50-count Boxes	☐	Discount	2008
P0009	Creamers - Liquid	200/Case, Individual Creamers	☑	Premium	2008
P0010	Sugar Packets	2000/Case	☐	House	2008
P0011	Ceramic Mug	SD Company Logo	☐	House	2008
P0012	Sugar Substitute	500/Case, 1-Serving Bags	☐	Discount	2008
P0013	Coffee Filters	500/Case, Fits 10-12 Cup Coffee Maker	☐	House	2008
P0014	Napkins	3000/Case, White	☐	House	2008
P0015	Stirrers - Plastic	1000/Box	☐	Discount	2008
P0016	Stirrers - Wood	1000/Box	☐	Discount	2008
P0017	Spoons	500/Box, White Plastic	☐	House	2008
P0018	Popcorn - Plain	36/Case, 3.75 Oz Microwave Bags	☐	House	2008
P0019	Popcorn - Buttered	36/Case, 3.75 Oz Microwave Bags	☐	House	2008
P0020	Soup - Chicken	50 Envelopes	☐	Premium	2008
P0021	Soup - Variety Pak	50 Envelopes	☐	Premium	2008
P0022	Styrofoam Cups - 10 ounce	1000/Case	☐	House	2008
P0023	Styrofoam Cups - 12 ounce	1000/Case	☐	House	2008
P0024	Milk - 1 quart	Delivered Daily	☑	House	2008
P0025	Milk - 1 pint	Delivered Daily	☑	House	2008
* (New)			☐	House	2010

FIGURE 4.10 Datasheet Form ▶

a. Verify the Products table is selected in the Navigation Pane. Click the **Create tab**, click **More Forms** in the Forms group, and then select **Datasheet**.

Access creates a new datasheet form based on the Products table. The Tabular form looks similar to the Products table and could be easily mistaken for a table.

b. Click **Save** in the Quick Access Toolbar, and then type **Products - Datasheet** in the **Form Name box**. Click **OK**.

c. Widen the Navigation Pane so all object names are visible. Right-click the **Products - Datasheet form** in the Navigation Pane, and then choose **Layout View** from the list of options.

> **TROUBLESHOOTING:** The View arrow does not contain the Layout view options.

d. Click anywhere in an empty area to deselect the controls.

e. Click the **Cost box**, the control on the right, to select it (you will see the orange border), and then press **Delete**. Click the blank space, and then press **Delete** to remove the blank space. Repeat the process to delete *MarkupPercent*.

You removed fields from the Products form and the other fields adjust to maintain an even distribution (after you remove the blank space).

f. Click the **Refrigeration Needed label** to select it. Change the label to the abbreviation **Refrig?**. Save the form, and then switch to Datasheet view.

g. Double-click the **Products table** in the Navigation Pane to open it.

The Products - Datasheet form and the Products table now appear different because the Cost and MarkupPercent fields were deleted from the form.

h. Close the Products Datasheet form and the Products table.

The form tools made it easy to create forms for Alex's company. But Alex decided he needs a Website field, so you need to modify the form. Refer to Figure 4.11 as you complete Step 5.
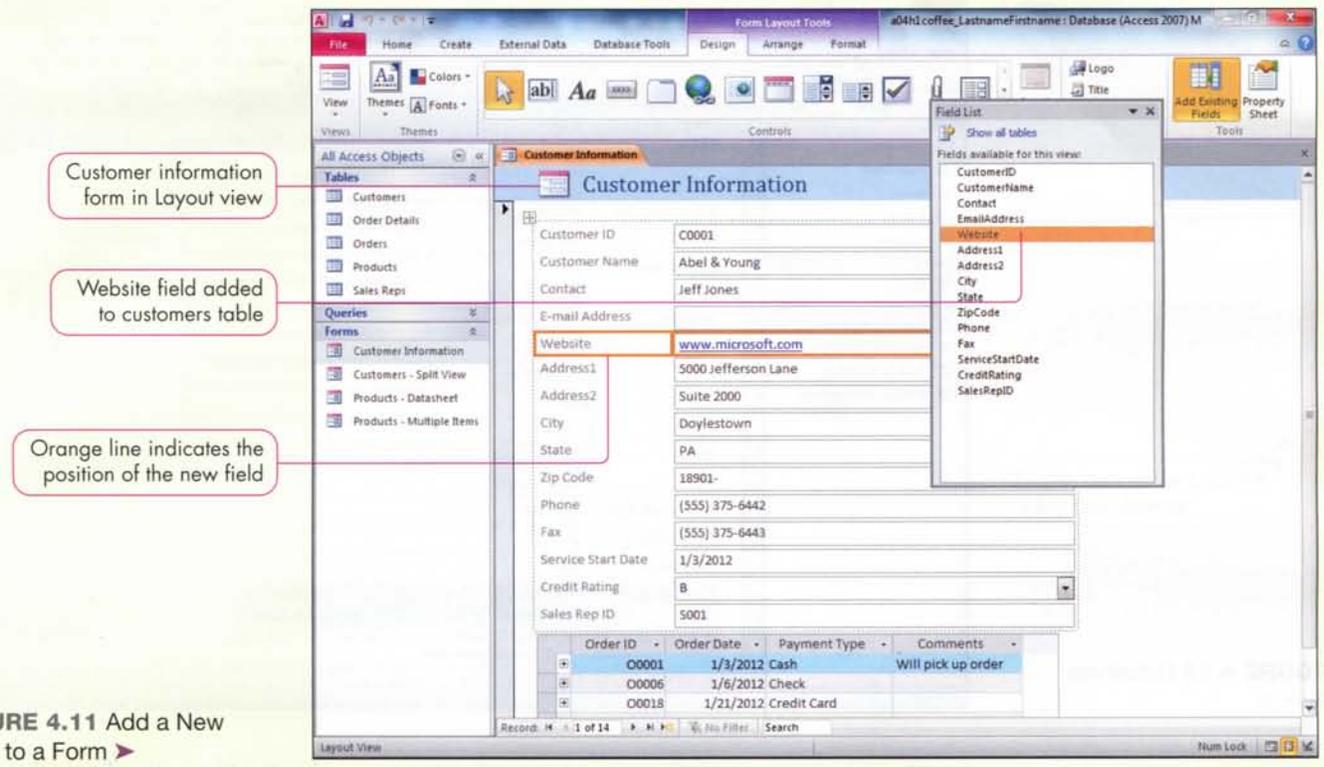

FIGURE 4.11 Add a New Field to a Form ▶

a. Right-click the **Customers table** in the Navigation Pane, and then click **Design View**.

You will add the Website field to the Customers table.

b. Click the **Address1 field**, and then click **Insert Rows** in the Tools group.

A new row is inserted above the Address1 field.

c. Type **Website** in the blank **Field Name box**, and then choose **Hyperlink** as the Data Type.

d. Close and save the Customers table.

e. Right-click the **Customer Information form** in the Navigation Pane, and then click **Layout View**.

You will add the Website field to the Customer Information form.

f. Click **Add Existing Fields** in the Tools group to display the Field List pane (if necessary).

g. Drag the **Website field** from the Field List pane to the form, below the E-mail Address field, until an orange line displays between E-mail Address and Address1 and release the mouse.

Access shows an orange line to help you place the field in the correct location.

h. Switch to Form view. Press **Tab** until you reach the **Website field**, and then type www.microsoft.com into the field.

i. Press **Tab** until the focus reaches the Orders subform to verify the tab order is correct.

j. Close and save the Customer Information form.

STEP 6 ▶ CHANGE THE SORTING IN A FORM AND REMOVE SORTING IN A FORM

Alex tested the Customer Information form and likes the way it is working. He asks you to change the sorting to make it easier to find customers with a similar Customer Name. Refer to Figure 4.12 as you complete Step 6.
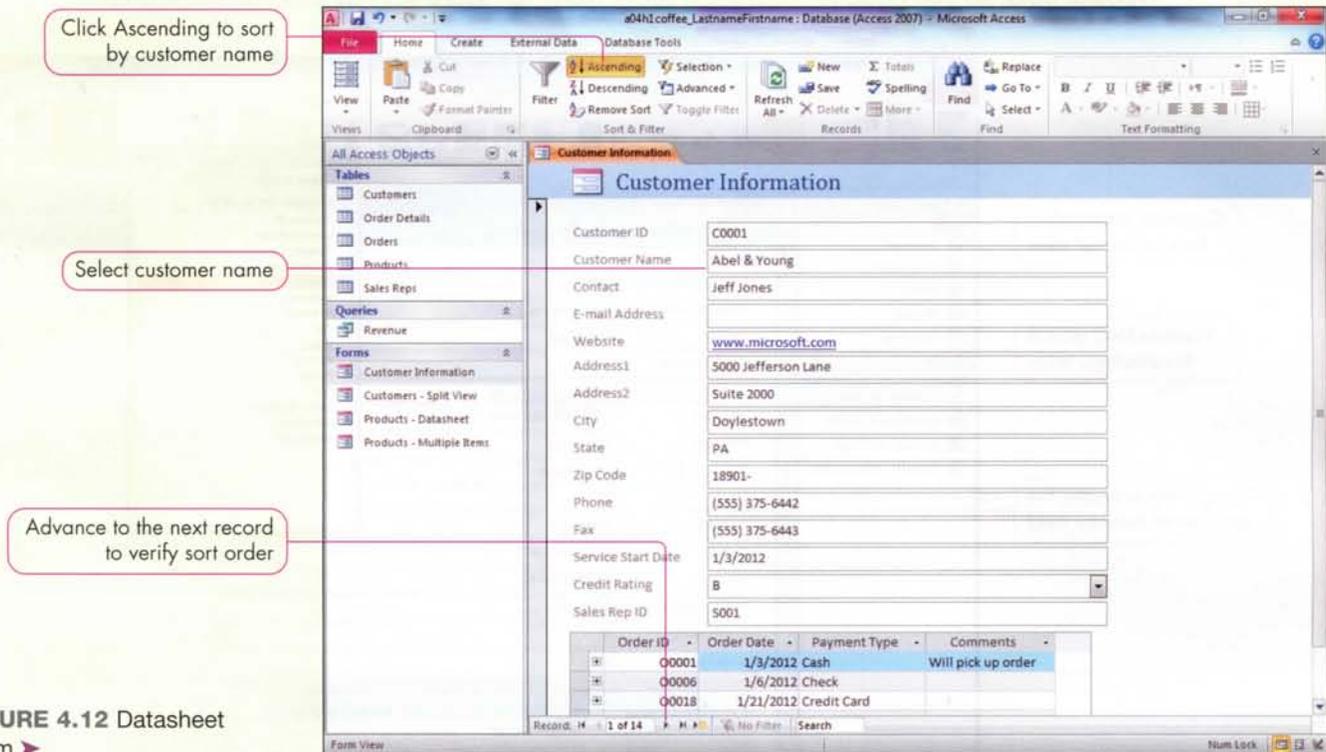

FIGURE 4.12 Datasheet Form ▶

a. Open the Customer Information form. Click **Next record** in the Navigation bar at the bottom several times to advance through the records.

Take note that the customers are in Customer ID order.

b. Click **First record** in the Navigation bar to return to customer Abel & Young.

c. Click the **Customer Name field**, and then click **Ascending** in the Sort & Filter group.

d. Click **Next record** in the Navigation bar at the bottom to advance through the records.

The records are now in Customer Name order.

e. Close the Customer Information form.

f. Click the **File tab**, and then click **Compact & Repair Database**.

g. Keep the database onscreen if you plan to continue with Hands-On Exercise 2. If not, close the database and exit Access.