

# ACCESS <<<<<<<

By Patricia Cox

## The Master Budget Project: Creating the Navigation Structure

In the last two columns, we created a query to select the data needed for the Materials List Report and then created the report. We also previously created three forms for data input. This month we will begin to create a navigation structure that will allow you to connect all of your work in an easily accessible system. This will include three forms that will act as menus to help users navigate the database. Figure 1 shows how the three forms we are creating will work together.

### Create the Forms

When creating navigation forms, start with a blank form so you can place instructions, headers, and command buttons wherever you want them. Go to the Create tab and click Blank Form. This opens the new form. After closing the Field List window that appears, right-click the Form1 tab and save the form. For the first form, use the name “Main Menu.” Now switch to Design View. On the Design tab, click on the Label tool and create a heading label for the menu’s name, e.g., Main Menu. As you can see in Figure 1, the Main Menu form connects to two other forms. This

requires command buttons to open the other forms. Before we can add these buttons, however, we need to create the Report Menu and Data Entry Menu forms. Follow the same process we just used to create the Main Menu.

### Add Buttons

After creating the three forms, return to the Main Menu form. Make sure you are in Design view. From the Design tab, click the Button form control and click on the form where you want to place the button. The Command Button Wizard will present you with lists of categories and actions. These are what allow you to create all the buttons needed to automate the forms. Under Category, choose Form Operations. Then choose the Open Form action. Click next and select the Data Entry Menu. In the next step, click the text radio button and enter “Data Entry” to create a label for your button. Then click Finish. The “Data Entry” button will appear on your Main Menu form. Repeat this process for the Reports Menu button. Resize and format the buttons to your taste using the Font group tools.

There are a number of other buttons

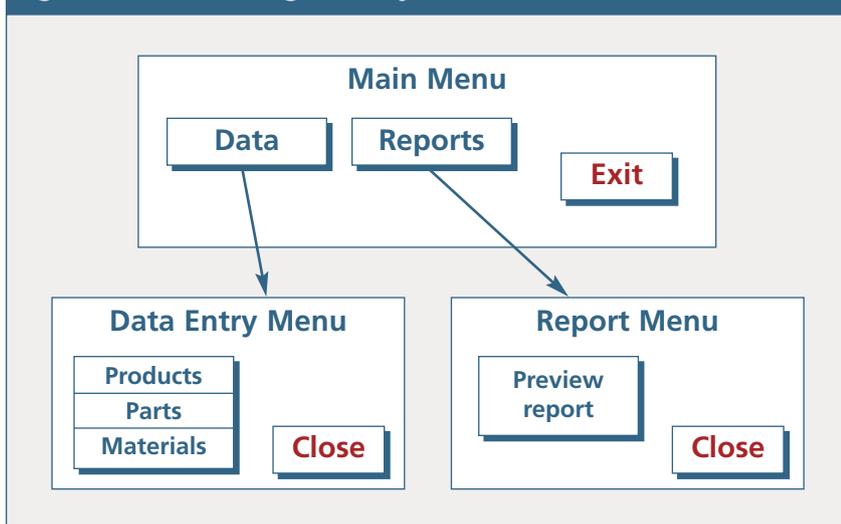
that will be helpful to add to your menus. The process is the same as what we just went through—the only difference is the selection you make for the Category and Action.

On the Main Menu, I like to include a button that will close Access. For that button, choose the Application category and Quit Application action. Similar to that, you’ll want to add buttons to the Report and Data Entry menus that will close them. The category for those is Form Operation, and the action is Close Form. On the Report Menu, it will also be helpful to create a button that will preview the Materials List Report. Use the Report Operations category and Preview a Report action.

On the Data Entry menu, you can also add buttons that open the various data entry forms we created previously. Add a button for each of the forms you want to be able to open easily, and skip the ones you don’t think you will use.

Now you have created a basic navigation system that will allow you to move easily within your Access database as you do the work for your budget. Use the Arrange tab to align and size the

**Figure 1. Basic Navigation System**



controls to your taste. The database will look more professional if you keep your buttons and forms consistent in appearance.

## Modify Forms

This navigation system can be expanded as you develop your database functionality. As we continue to work on new reports, you can add a preview button to the Reports Menu. It's always a good idea to preview reports first. You can simply print them, but previewing allows you to confirm that it's the correct

report you want to print.

## Test Your Buttons

Once you've added all the buttons and are satisfied with how the menus look, change the view of each form to Form View to test your buttons. Use the Main Menu form to open each of the other menus. Use the close buttons to close each of them. If you are following along with the database file uploaded to *LinkUp IMA*, you'll find that some of the close buttons don't work. That's because we are saving the file with an .MDB

extension, which allows more readers to use it. This is one of the challenges you might encounter as you work in Access, and we'll discuss the strategies to handle it next month. Until then, you can close the form by right-clicking its tab and selecting "Close" or by clicking on the X located to the far-right of the window.

We'll also take a look at other challenges next month, such as what to do if you name a query or table incorrectly and need to correct it. Changing the name of an item can sometimes be a challenge because everything in Access is connected, but there are ways. We will also add a macro that opens the main menu automatically when you open the database file. **SF**

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