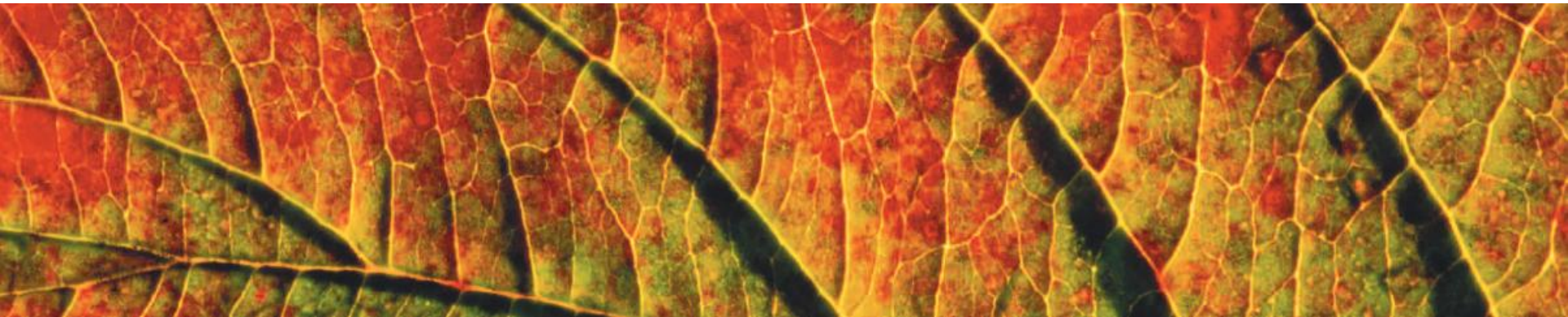


# **Access Tutorial 4**

## **Creating Forms and Reports**

Microsoft<sup>®</sup> Office 2010



# Objectives

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- Create a form using the Form Wizard
- Apply a theme to a form
- Add a picture to a form
- Change the color and line type of items on a form
- Find and maintain data using a form
- Preview and print selected form records

# Objectives

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- Create a form with a main form and a subform
- Create a report using the Report Wizard
- Apply a theme to a report
- Resize fields in a report
- Insert a picture in a report
- Use conditional formatting in a report
- Preview and print a report

# Form Displayed in Form View

The form object's name is displayed on the tab for the form.

The form title appears at the top of the form. By default, the form object name is used as the form title, but you can edit the title to display the text you want, as done here—a space was added between the two words for readability.

You can add graphic elements, such as a picture, to a form to improve its appearance or add visual appeal.

With this form layout, the Columnar layout, the field captions appear in a column on the left side of the form. If captions have not been specified for the fields, the field names would appear here instead.

The navigation buttons allow you to display the first, last, next, or previous record in the form; enter a specific record number and move to that record; and create a new record.

The Columnar form layout displays the corresponding field values in boxes to the right of the field captions (or field names).

The Customer Data form was created using the **Form Wizard**, which allows you to choose some or all of the fields in the table or query used as the basis for the form, choose fields from other tables and queries, and display the selected fields in any order on the form.

This selected button indicates the form is displayed in **Form view**. You use Form view to view, enter, and maintain data in the table on which the form is based.

You can click this button to display the form in **Layout view**, which allows you to modify many aspects of a form's layout and design.

You use the Find button to display the Find and Replace dialog box, which lets you search for specific data in the form.

You can apply a theme to a form, as done here with the Customer Data form. A theme is a predefined set of formats including colors, fonts, and other effects that enhance a form's appearance and usability.

# Creating a Form

## Using the Form Wizard

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- The **Form Wizard** allows you to choose some or all of the fields in the selected table or query, choose fields from other tables and queries, and display the selected fields in any order on the form
- Click the **Create** tab in the Ribbon
- In the Forms group, click the **Form Wizard** button

# Creating a Form

## Using the Form Wizard

Figure 4-1 First Form Wizard dialog box

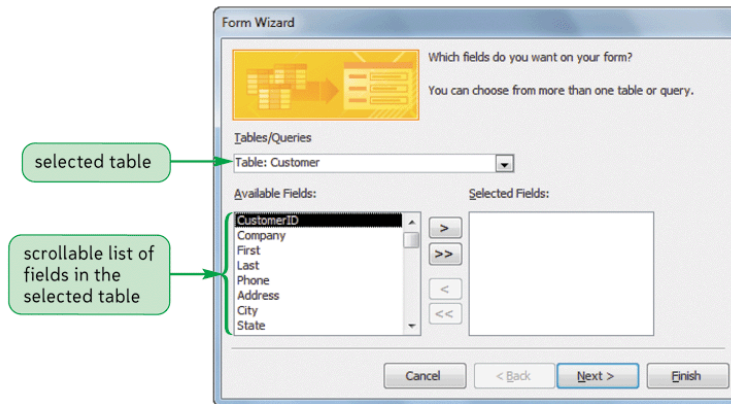
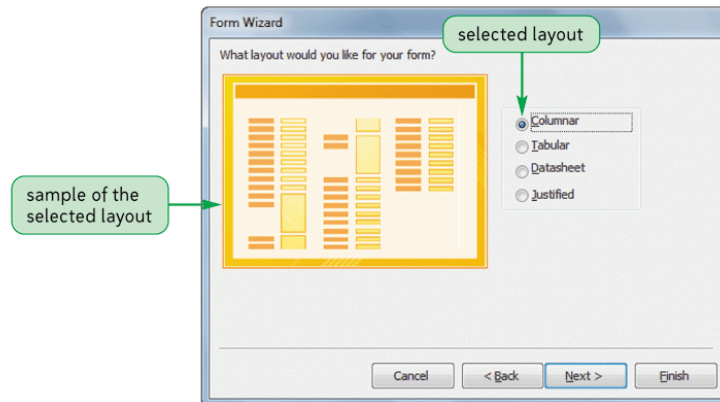


Figure 4-2 Choosing a layout for the form





# Creating a Form

## Using the Form Wizard

**Figure 4-3** CustomerData form in Form view

The screenshot shows the CustomerData form in Form view. The form has a title bar labeled 'CustomerData'. On the left is a Navigation Pane with a list of fields: Customer ID, Company, First Name, Last Name, Address, City, State, Zip, Email, and Phone. The form fields are populated with data from the first record of the Customer table. Annotations with green boxes and arrows point to various parts of the form:

- field's value appears in the field value box (points to the Customer ID field containing 11001)
- field's Caption property value appears in a label (points to the label 'Customer ID' in the Navigation Pane)
- captions of the fields in the Customer table (points to the list of field captions in the Navigation Pane)
- form title appears on the object tab for the form and at the top of the form (points to the 'CustomerData' title in the title bar and the 'CustomerData' label in the top header)
- field values for the first Customer table record appear in the form (points to the entire set of form fields)

At the bottom of the form, the status bar shows 'Record: 1 of 40' and 'Primary key'.

Field Caption	Field Value
Customer ID	11001
Company	
First Name	Student First
Last Name	Student Last
Address	49 Blackstone Dr
City	Rockford
State	MI
Zip	49341
Email	student2@milocal123.com
Phone	616-866-3901

# Applying a Theme to a Form

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- Display the form in Layout view
- In the Themes group on the Design tab, click the Themes button
- In the displayed gallery, click the theme you want to apply to all objects; or, right-click the theme to display the shortcut menu, and then choose to apply the theme to the current object only or to all matching objects



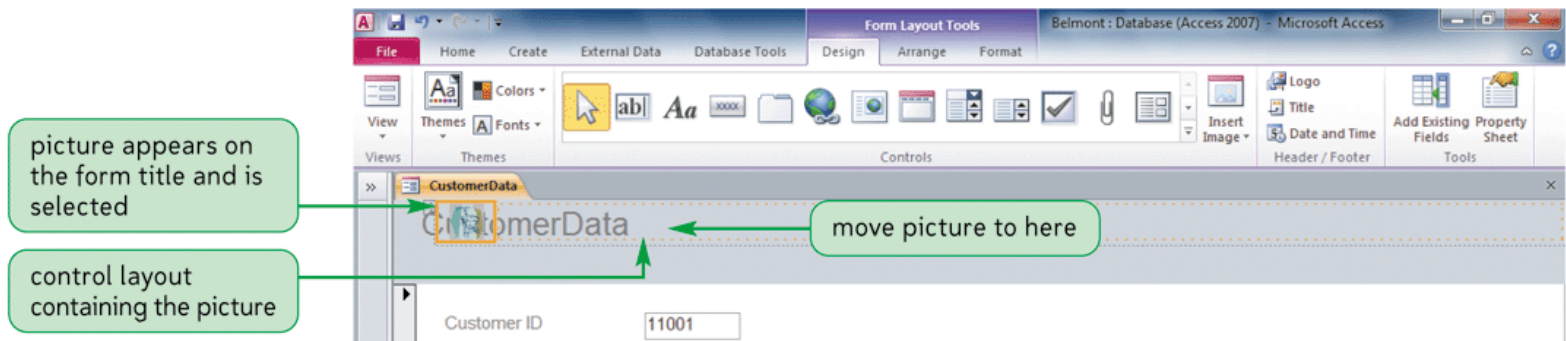
# Adding a Picture to a Form

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- A picture is one of many controls you can add and modify on a form
- A **control** is an item on a form, report, or other database object that you can manipulate to modify the object's appearance
- In the Header/Footer group on the Design tab, click the **Logo** button
- Navigate to the picture you want to insert and then click the OK button

# Adding a Picture to a Form

**Figure 4-7** Form with picture added

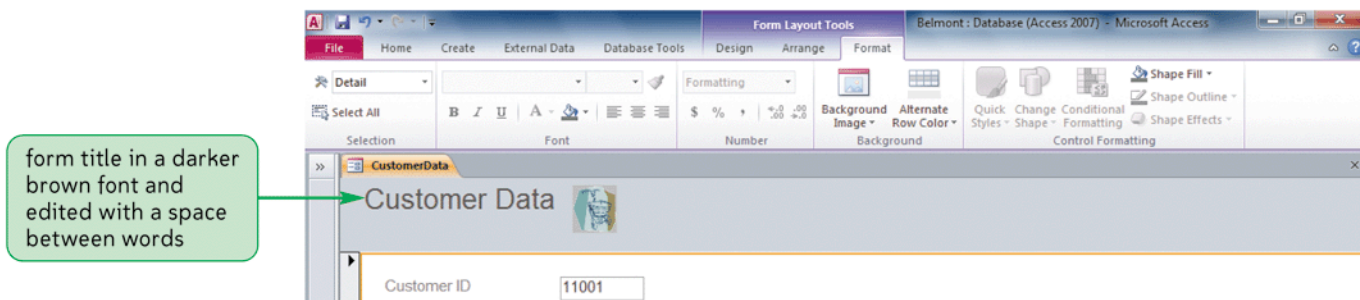


# Changing the Color of the Form Title

- The Font group on the Format tab provides many options you can use to change the appearance of text on a form

Figure 4-9

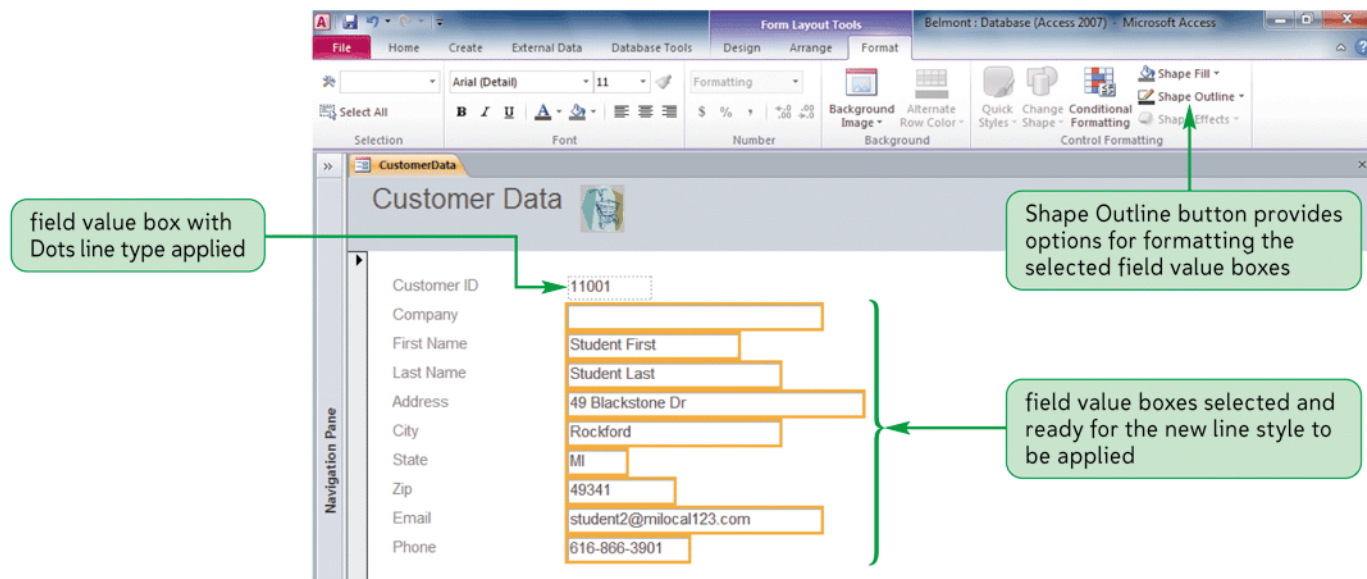
Form title with new color applied



# Changing the Type of Line on a Form

- A line on a form, such as the box around each field value, is another type of control that you can modify in Layout view

Figure 4-10 Form with multiple field value boxes selected



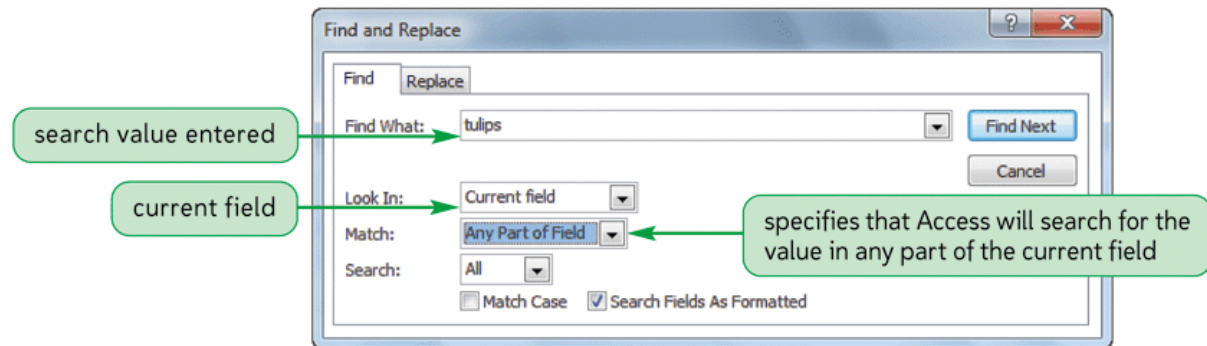
# Finding Data in a Form or Datasheet

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- Open the form or datasheet, and then select the field you want to search
- In the Find group on the Home tab, click the Find button to open the Find and Replace dialog box
- In the Find What box, type the field value you want to find
- Complete the remaining options, as necessary, to specify the type of search to conduct
- Click the Find Next button to begin the search
- Click the Find Next button to continue searching for the next match
- Click the Cancel button to stop the search operation

# Finding Data in a Form or Datasheet

**Figure 4-11** Completed Find and Replace dialog box



# Finding Data in a Form or Datasheet

**Figure 4-12** Wildcard characters

Wildcard Character	Purpose	Example
*	Match any number of characters. It can be used as the first and/or last character in the character string.	th* finds the, that, this, therefore, and so on
?	Match any single alphabetic character.	a?t finds act, aft, ant, apt, and art
[]	Match any single character within the brackets.	a[fr]t finds aft and art but not act, ant, and apt
!	Match any character not within brackets.	a[!fr]t finds act, ant, and apt but not aft and art
-	Match any one of a range of characters. The range must be in ascending order (a to z, not z to a).	a[d-p]t finds aft, ant, and apt but not act and art
#	Match any single numeric character.	#72 finds 072, 172, 272, 372, and so on



# Maintaining Table Data Using a Form

- Maintaining data using a form is often easier than using a datasheet, because you can concentrate on all the changes required to a single record at one time

Figure 4-13 Customer record after changing field values

pencil symbol indicates editing mode

record 22 is the current record

field values changed

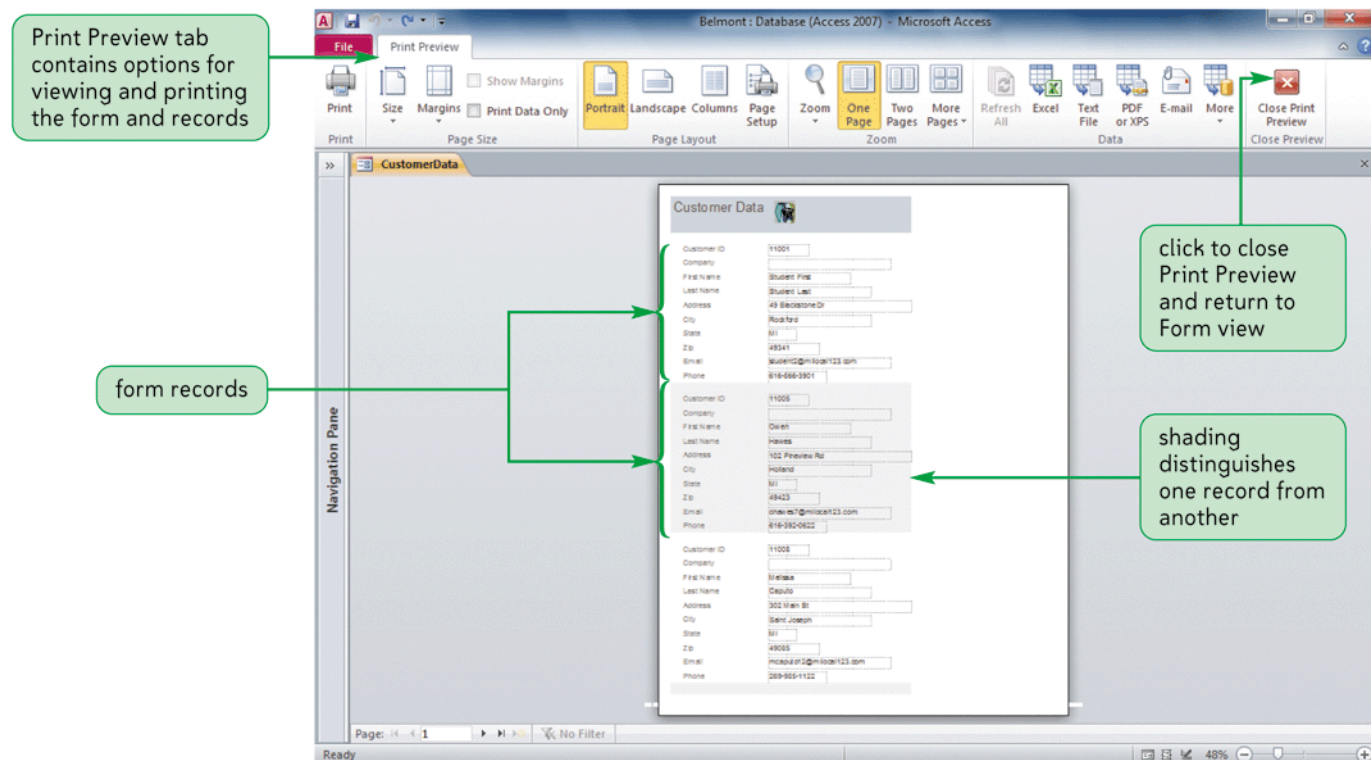
Field	Value
Customer ID	11058
Company	Cherrywood Senior Center
First Name	Dan
Last Name	Lewis
Address	77 Forest Hill Rd
City	Saugatuck
State	MI
Zip	49453
Email	dlewis4@csc77.com
Phone	269-857-1890

Record: 22 of 40

# Previewing and Printing Selected Form Records

- Access prints as many form records as can fit on a printed page

Figure 4-15 Form records displayed in Print Preview



# Report in Print Preview

The report title appears at the top of the report. By default, the report object name is used as the report title, but you can edit the title to display the text you want, as done here, with spaces added between words for readability.

The report object's name is displayed on the tab for the report.

Fields from the primary Customer table appear first in the report.

Fields from the related Contract table appear below the fields from the primary table.

For a **grouped report**, the data from a record in the primary table (the Customer table in this report) appears as a group, followed on subsequent lines of the report by the joined records from the related table (the Contract table in this report).

By default, the Report Wizard includes the current date at the bottom of each page in the report.

The Navigation buttons allow you to display the first, last, next, or previous page in the report, or to enter a specific page number and move to that page.

The CustomersAndContracts report was created using the **Report Wizard**, which asks you a series of questions and then creates a report based on your answers. This report is based on data in both the Customer and Contract tables, which are joined in a one-to-many relationship through the common CustomerID field.

This report uses landscape orientation, where the page is wider than it is tall; this orientation allows more content to fit across the width of the page.

Shading is used to distinguish one Customer record from another, and one Contract record from another.

The set of field values for each record in the related table is called a **detail record**. These three detail records are the Contract table records related to the Customer table record for Owen Hawes.

By default, the Report Wizard includes the page number and total number of pages at the bottom of each page in the report.

Customer ID	Company	First Name	Last Name	City	Phone
11001		Student	First	Rockford	616-888-3901
			Last Name		
11005		Owen	Hawes	Holland	616-392-0622
11008		Melissa	Caputo	Saint Joseph	289-985-1122

Signing Date	Contract Num	Contract Amt	Contract Type
2/9/2013	3011	4,000	Residential landscape plan
3/1/2013	3015	1,500	Schematic plan for backyard, residential
7/8/2013	3033	2,250	Residential landscape plan for front yard
11/30/2013	3090	4,000	Front walk and drive design, residential
4/7/2013	3027	1,250	Schematic plan for back yard, residential

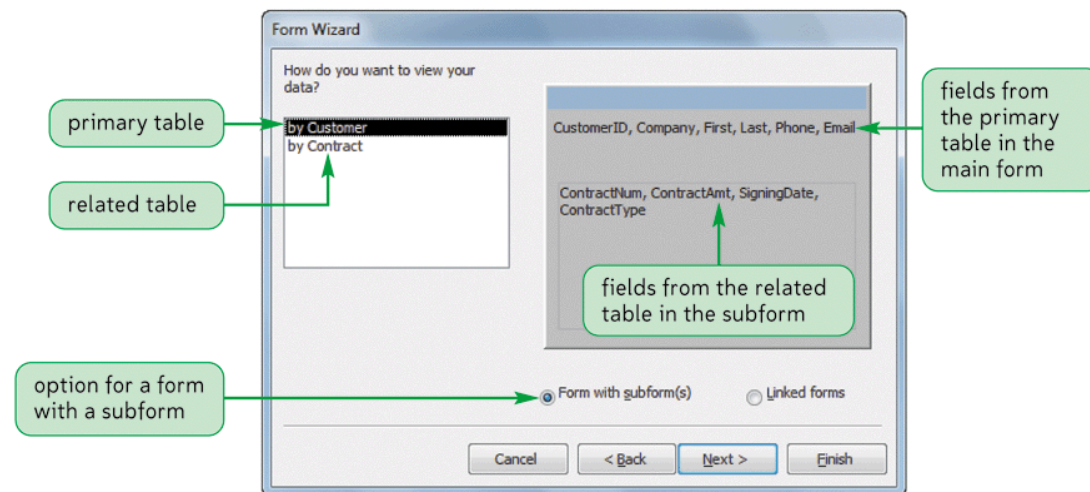
Tuesday, September 10, 2013

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# Creating a Form with a Main Form and a Subform

- When you create a form containing data from two tables that have a one-to-many relationship, you actually create a **main form** for data from the primary table and a **subform** for data from the related table

Figure 4-16 Choosing a format for the main form and subform





# Creating a Form with a Main Form and a Subform

Figure 4-17 Main form with subform in Form view

The screenshot displays the Microsoft Access interface in Form view. The main form, titled 'CustomerContracts', is shown with a light blue header. Below the header, there are text boxes for 'Customer ID' (containing '11001'), 'Company', 'First Name' (containing 'Student First'), 'Last Name' (containing 'Student Last'), 'Phone' (containing '616-866-3901'), and 'Email' (containing 'student2@milocal123.com'). A vertical 'Navigation Pane' is visible on the left side. Below the main form fields, there is a subform titled 'Contract'. The subform displays a table with the following columns: 'Contract', 'Contract Amt', 'Signing Date', and 'Contract Type'. The first row of the table contains the values '3011', '4,000', '2/9/2013', and 'Residential landscape plan'. The subform is currently narrow, and a green callout box points to it with the text 'subform needs to be widened so columns can be resized'. Other green callout boxes point to the main form title 'CustomerContracts' (labeled 'name and title of main form'), the subform title 'Contract' (labeled 'name of subform'), and the subform itself (labeled 'subform'). The status bar at the bottom indicates 'Record: 1 of 41' and 'No Filter'.

Contract	Contract Amt	Signing Date	Contract Type
3011	4,000	2/9/2013	Residential landscape plan

# Creating a Report

## Using the Report Wizard

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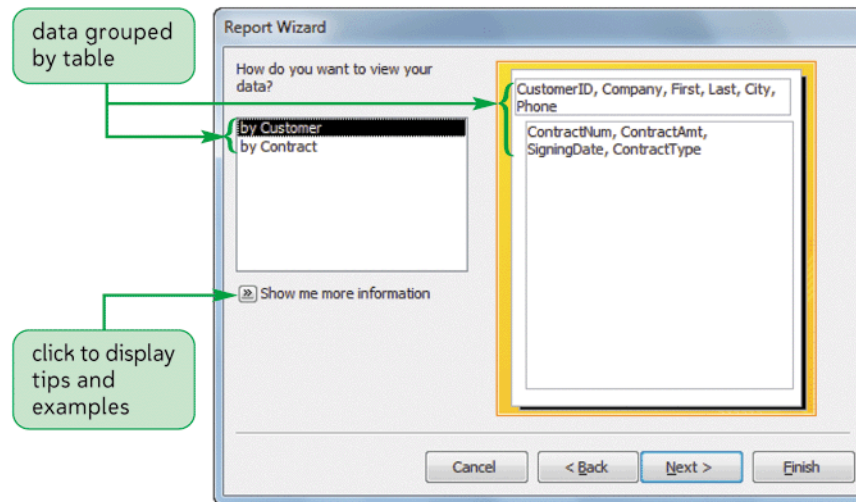
- The **Report Wizard** asks you a series of questions and then creates a report based on your answers
- A report is a formatted printout of the contents of one or more tables or queries in a database
- You can change the report's design after you create it

# Creating a Report

## Using the Report Wizard

- Click the **Create** tab on the Ribbon
- In the Reports group on the Create tab, click the **Report Wizard** button

**Figure 4-19** Choosing a grouped or ungrouped report

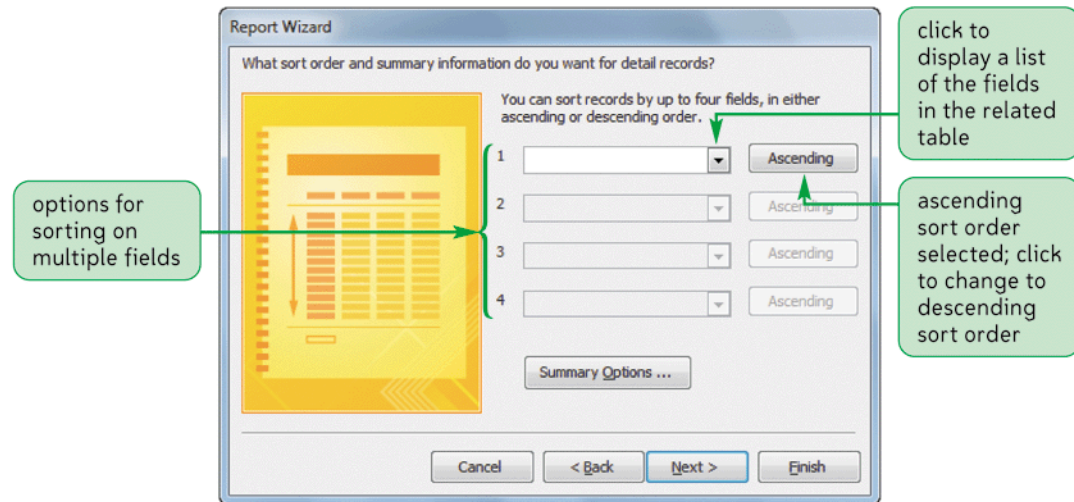




# Creating a Report

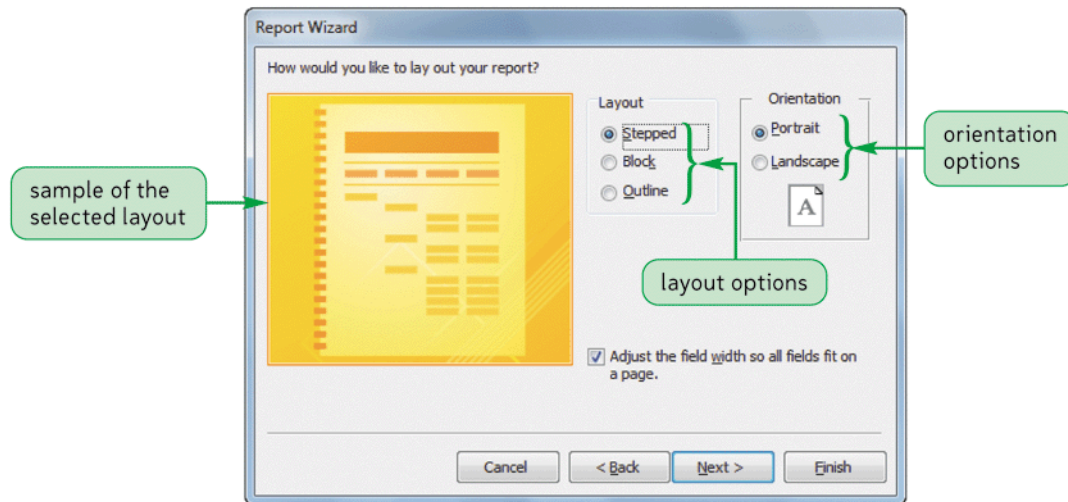
## Using the Report Wizard

**Figure 4-20** Choosing the sort order for detail records



# Creating a Report Using the Report Wizard

**Figure 4-21** Choosing the report layout



# Creating a Report

## Using the Report Wizard

Figure 4-22 Close-up view of the report

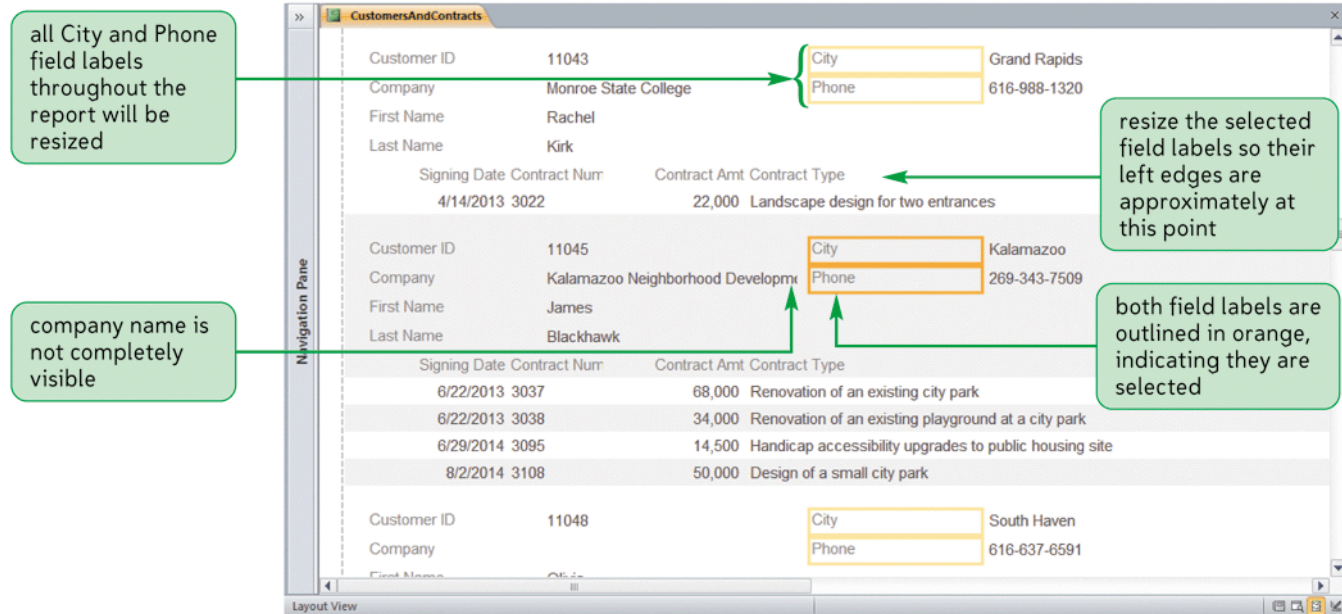
The screenshot shows a report window titled 'CustomersAndContracts'. It contains three main sections, each representing a different customer. The first section is for Customer ID 11001 (Student), the second for Customer ID 11005 (Owen Hawes), and the third for Customer ID 11008 (Melissa). Each customer section lists their contracts with columns for Signing Date, Contract Num, Contract Amt, and Contract Type. The contracts are sorted by Signing Date in ascending order. Shading is used to distinguish between different customer records and between different contract records.

Customer ID	City	Contract Num	Contract Amt	Contract Type
11001	Rockford	3011	4,000	Residential landscape plan
11005	Holland	3015	1,500	Schematic plan for backyard, residential
11005	Holland	3033	2,250	Residential landscape plan for front yard
11005	Holland	3060	4,000	Front walk and drive design, residential
11008	Saint Joseph			

# Modifying a Report's Design in Layout View

- Click the **Layout View** button on the status bar

**Figure 4-23** Field labels selected and ready to be resized



# Modifying a Report's Design in Layout View

Figure 4-24

Report after resizing field labels and field value boxes

all City and Phone field labels resized and closer to their field values

Company field value is now fully displayed

Contract Num field label is now fully displayed

Customer ID	Company	First Name	Last Name	Signing Date	Contract Num	Contract Amt	Contract Type
11043	Monroe State College	Rachel	Kirk	4/14/2013	3022	22,000	Landscape design for two entrances
11045	Kalamazoo Neighborhood Development	James	Blackhawk	6/22/2013	3037	68,000	Renovation of an existing city park
				6/22/2013	3038	34,000	Renovation of an existing playground at a city park
				6/29/2014	3095	14,500	Handicap accessibility upgrades to public housing site
				8/2/2014	3108	50,000	Design of a small city park
11048							

Navigation Pane

Layout View

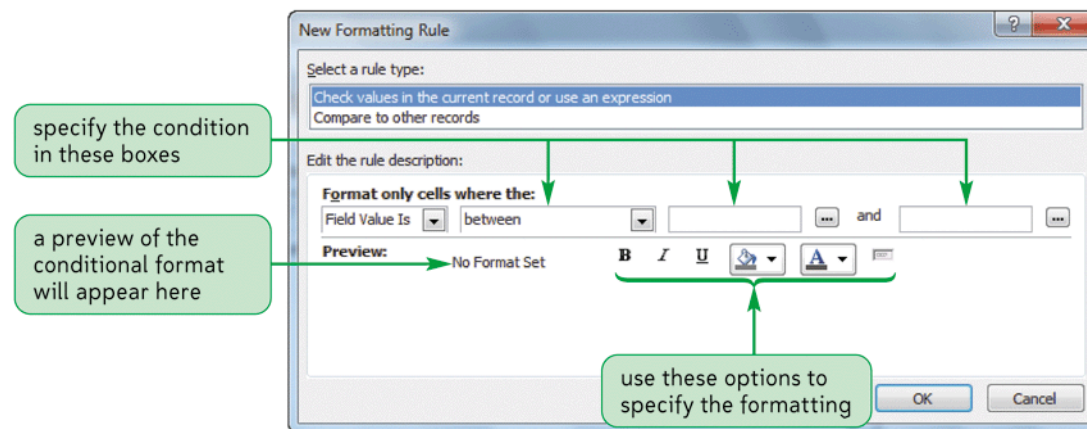
# Using Conditional Formatting in a Report

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- **Conditional formatting** in a report (or form) is special formatting applied to certain field values depending on one or more conditions
- Click the appropriate field value
- In the Control Formatting group on the Format tab, click the **Conditional Formatting** button
- Click the **New Rule** button

# Using Conditional Formatting in a Report

Figure 4-26 New Formatting Rule dialog box





# Using Conditional Formatting in a Report

Figure 4-28

Viewing the finished report in Print Preview

conditional formatting not applied to ContractAmt field values less than 25,000

conditional formatting applied to ContractAmt field values greater than 25,000

Navigation Pane

Customer ID	Company	City	First Name	Last Name	Signing Date	Contract Num	Contract Amt	Contract Type
11067	Blossom Day Care Center	Saint Joseph	Christina	Garrett	4/6/2014	3075	16,500	Design of a playground for a daycare center
					7/25/2014	3099	6,500	Schematic landscape design for daycare center
11068	Grand Rapids Housing Authority	Grand Rapids	Jessica	Ropiak	7/27/2013	3040	38,500	Renovation of open space around public housing site
					6/23/2014	3085	52,500	Open space & playground design for public housing site
11070	Legacy Companies, LTD.	Grand Rapids	Michael	Faraci	3/22/2013	3023	39,000	Renovation of large multi-family housing open space
					6/3/2013	3031	48,500	Landscape design for multi-family housing
					12/29/2013	3061	30,800	Landscape design for multi-family housing development

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No Filter

Ready

62%