

# Access Tutorial 4

## Creating Forms and Reports



# Objectives

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- Create a form using the Form Wizard
- Modify a form's design in Layout view
- Change a form's AutoFormat
- Add a picture to a form
- Change the color, line type, and position of items on a form
- Navigate a form and find data using a form
- Maintain table 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
- Modify a report's design in Layout view
- Move and resize fields in a report
- Insert a picture in a report
- Change the font color of a report title
- Use conditional formatting in a report
- Preview and print a report



# Creating a Form

## Using the Form Wizard

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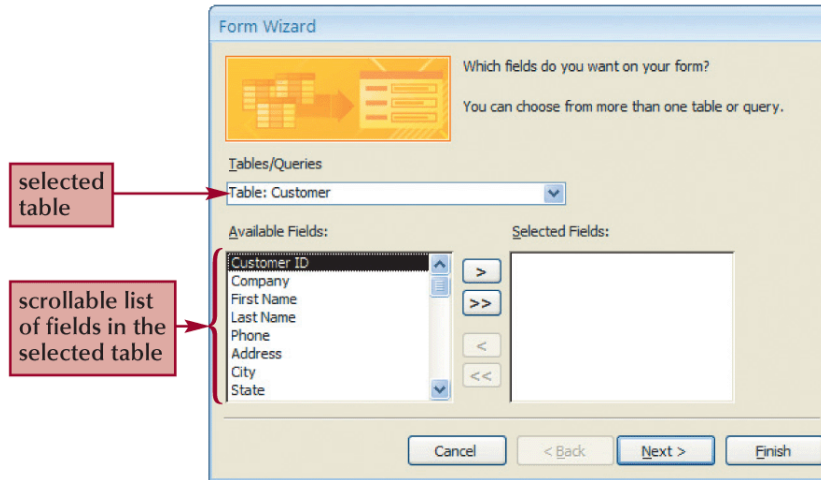
- The **Form Wizard** allows you to choose some or all of the fields in the selected table or query, choose fields from other tables and queries, and display the selected fields in any order on the form
- Click the **Create** tab in the Ribbon
- In the Forms group, click the **More Forms** button, and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



# Creating a Form

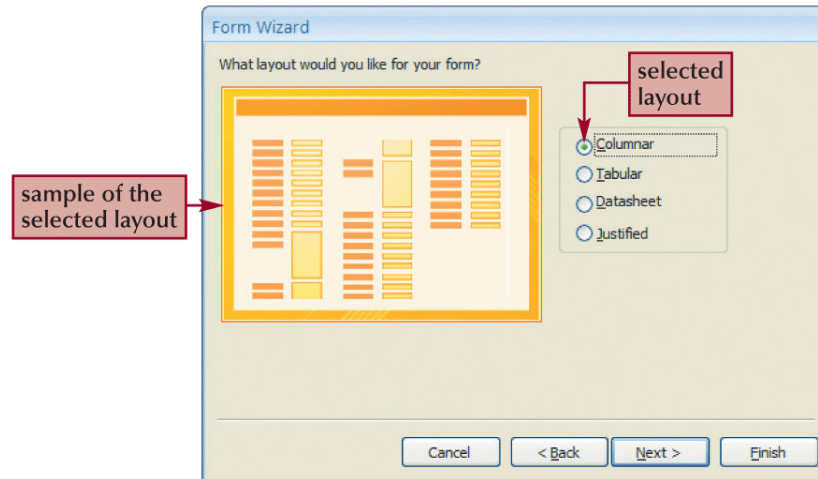
## Using the Form Wizard

Figure 4-1 First Form Wizard dialog box



Choosing a layout for the form

Figure 4-2



# Creating a Form

## Using the Form Wizard

Figure 4-3

Customer Data form in Form view

The screenshot shows a Microsoft Access form titled "Customer Data" in Form view. The form has a tab labeled "Customer Data" at the top. On the left is a "Navigation Pane" listing the fields: Customer ID, Company, First Name, Last Name, Address, City, State, Zip, E-mail Address, and Phone. The form body contains input fields for each of these fields. A red box at the top right points to the form title and tab, stating: "form title appears at the top of the form and on the tab for the form object". A red box on the right points to the input fields, stating: "field values for the first Customer table record appear in the form". A red box at the bottom left points to the field names in the Navigation Pane, stating: "names of the fields in the Customer table". At the bottom of the form, there is a status bar showing "Record: 1 of 40", "No Filter", and a "Search" button. The "Primary key" label is visible at the bottom left of the form body.

Field Name	Value
Customer ID	11001
Company	
First Name	Sharon
Last Name	Maloney
Address	49 Blackstone Dr
City	Rockford
State	MI
Zip	49341
E-mail Address	smaloney2@milocal123.com
Phone	616-866-3901

# Changing a Form's AutoFormat

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- Display the form in Layout view
- In the AutoFormat group on the Form Layout Tools Format tab, click the More button
- In the displayed gallery, click the AutoFormat you want to apply; or, click AutoFormat Wizard to open the AutoFormat dialog box, click the name of the AutoFormat you want to apply, and then click the OK button



# 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 Controls group on the Form Layout Tools Format 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 4-6

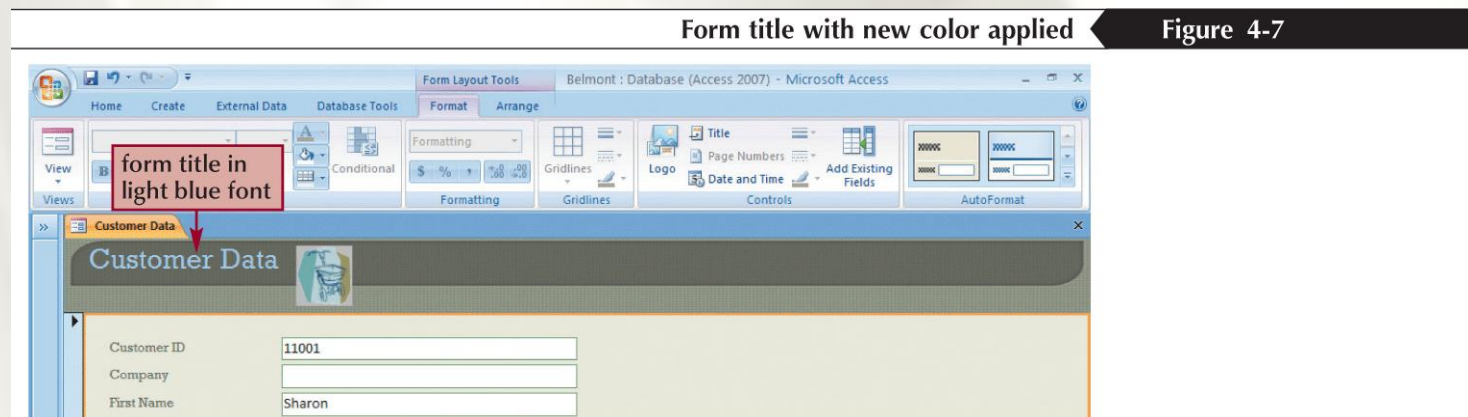
Form with new AutoFormat applied and picture added

The screenshot shows a Microsoft Access form titled 'Customer Data'. The form has a title bar with a close button. The form's title 'Customer Data' is displayed in a large font. To the right of the title, a small picture of a person's head has been added and repositioned. The form contains several text boxes for data entry, each with a label to its left. The labels and their corresponding values are: Customer ID (11001), Company (empty), First Name (Sharon), Last Name (Maloney), Address (49 Blackstone Dr), City (Rockford), State (MI), Zip (49341), E-mail Address (smaloney2@milocal123.com), and Phone (616-866-3901). The form is surrounded by an orange outline, indicating it is selected. A red box with an arrow points to the 'Foundry AutoFormat applied to form' label. Another red box with an arrow points to the picture, stating 'picture added and repositioned to the right of the form title'. A third red box with an arrow points to the orange outline, stating 'orange outline around main form area indicates the form is selected'. The form is displayed in 'Layout View' at the bottom.

Customer ID	11001
Company	
First Name	Sharon
Last Name	Maloney
Address	49 Blackstone Dr
City	Rockford
State	MI
Zip	49341
E-mail Address	smaloney2@milocal123.com
Phone	616-866-3901

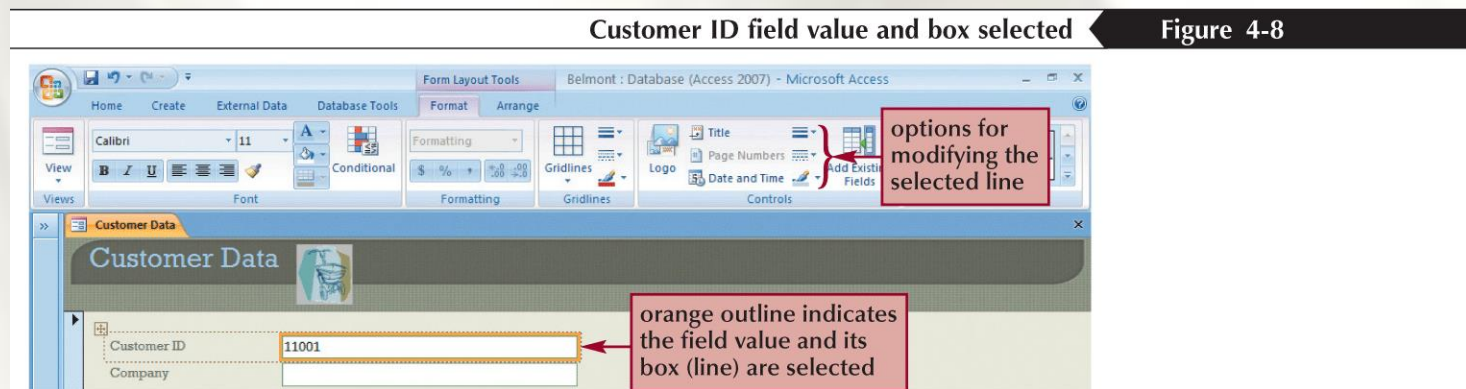
# Changing the Color of the Form Title

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



# Changing the Type of Line on a Form

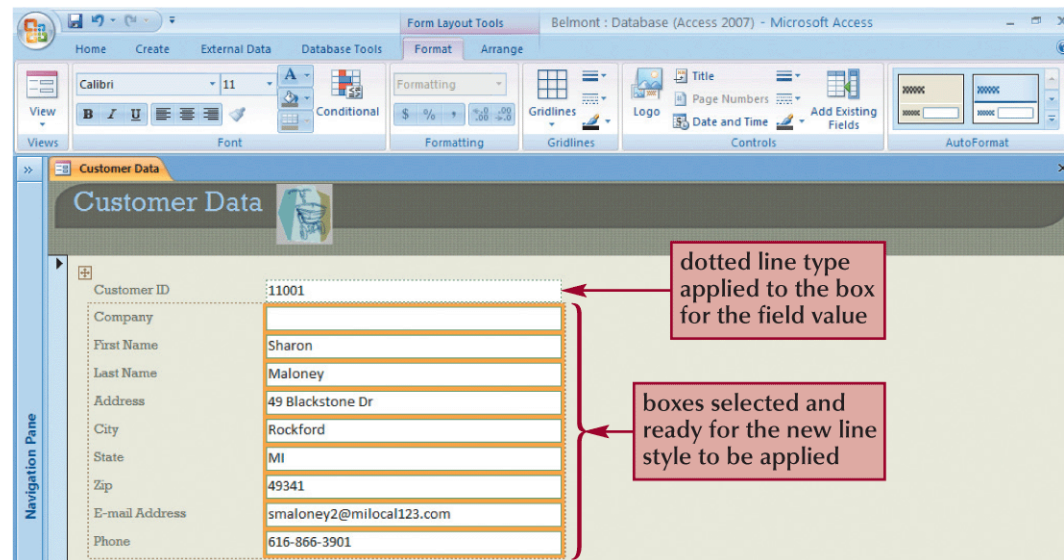
- A line on a form, such as the box around each field value, is another type of control that you can modify in Layout view



# Changing the Type of Line on a Form

Figure 4-9

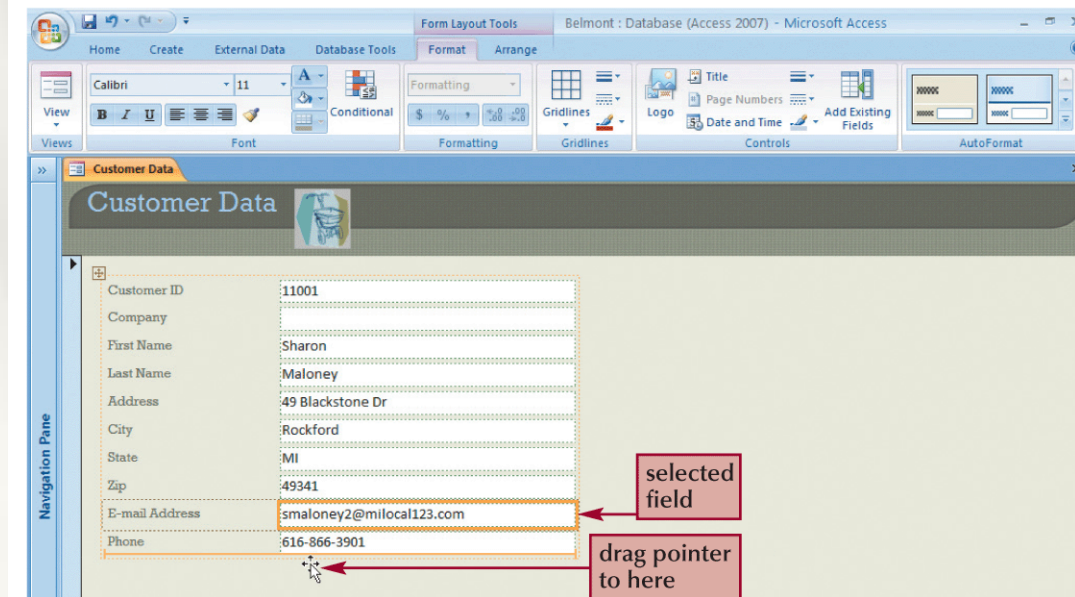
Form with multiple field value boxes selected



# Moving a Field in Layout View

Moving the E-mail Address field

Figure 4-10



# Finding Data in a Form or Datasheet

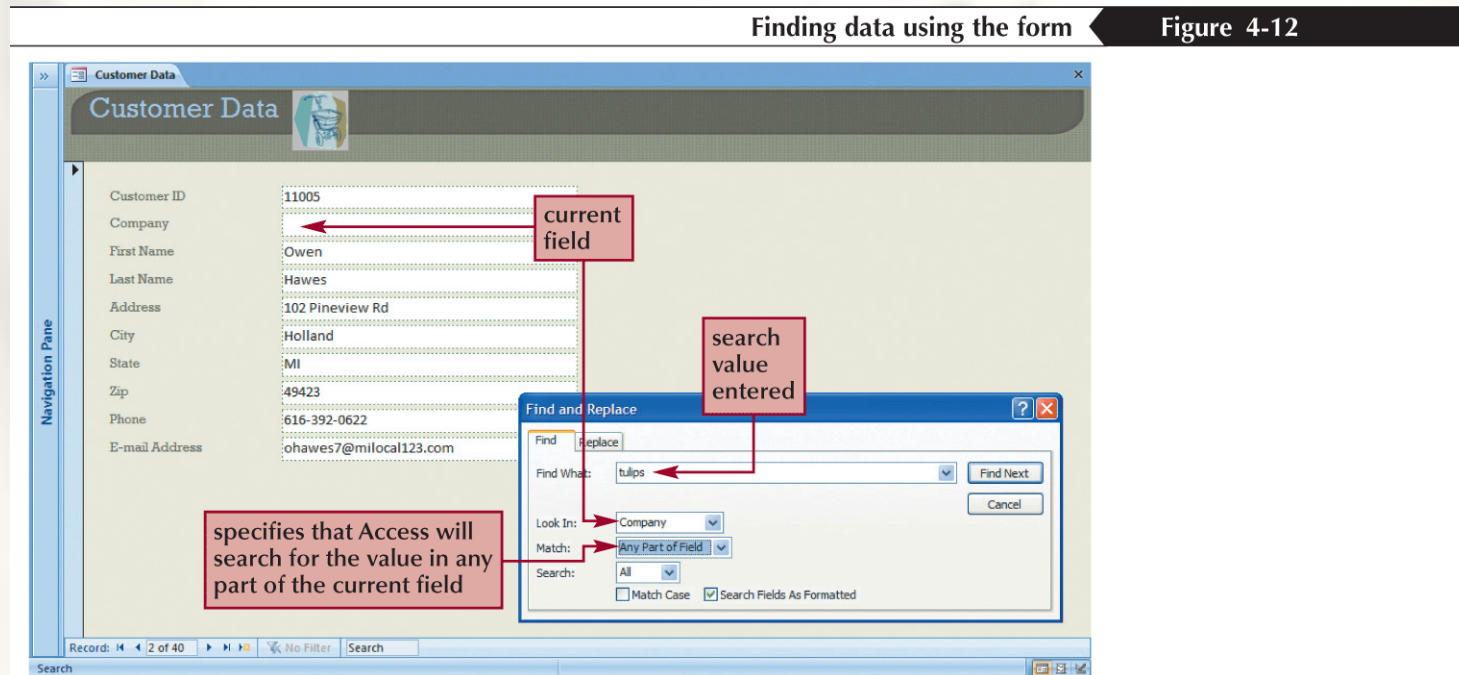
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- Open the form or datasheet, and then make the field you want to search the current field
- In the Find group on the Home tab, click the Find button to open the Find and Replace dialog box
- In the Find What text box, type the field value you want 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



# Finding Data in a Form or Datasheet

Wildcard characters

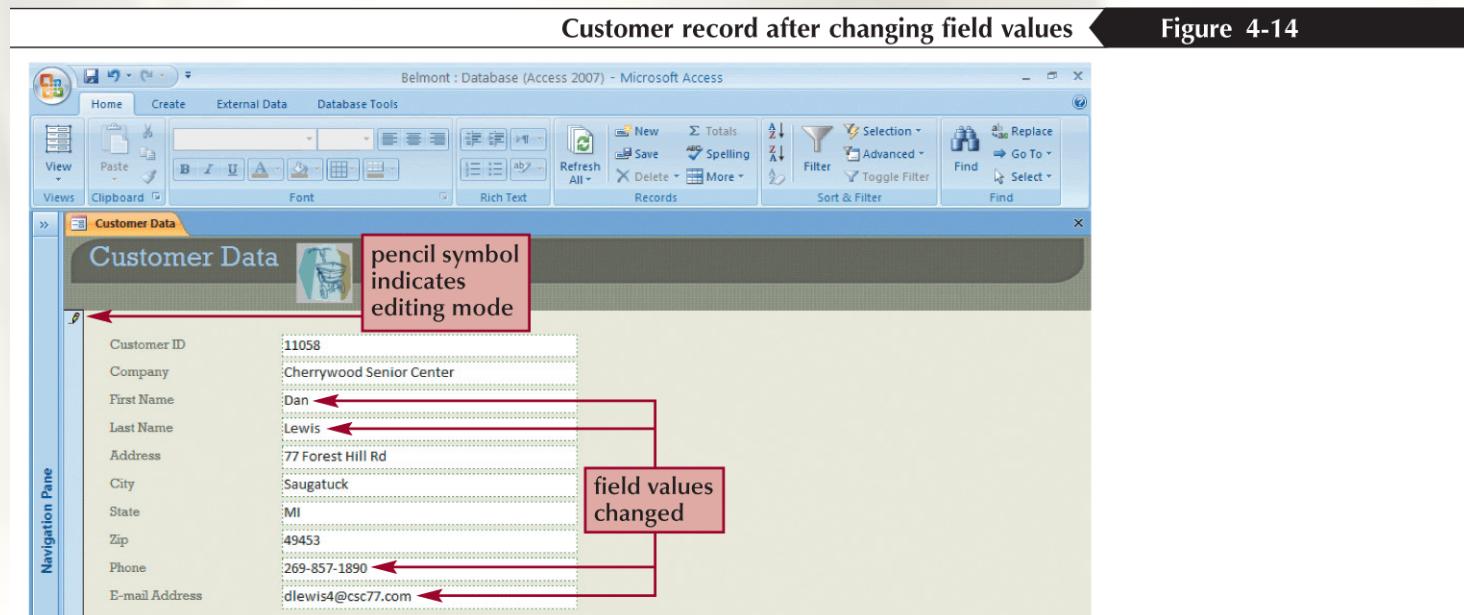
Figure 4-13

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



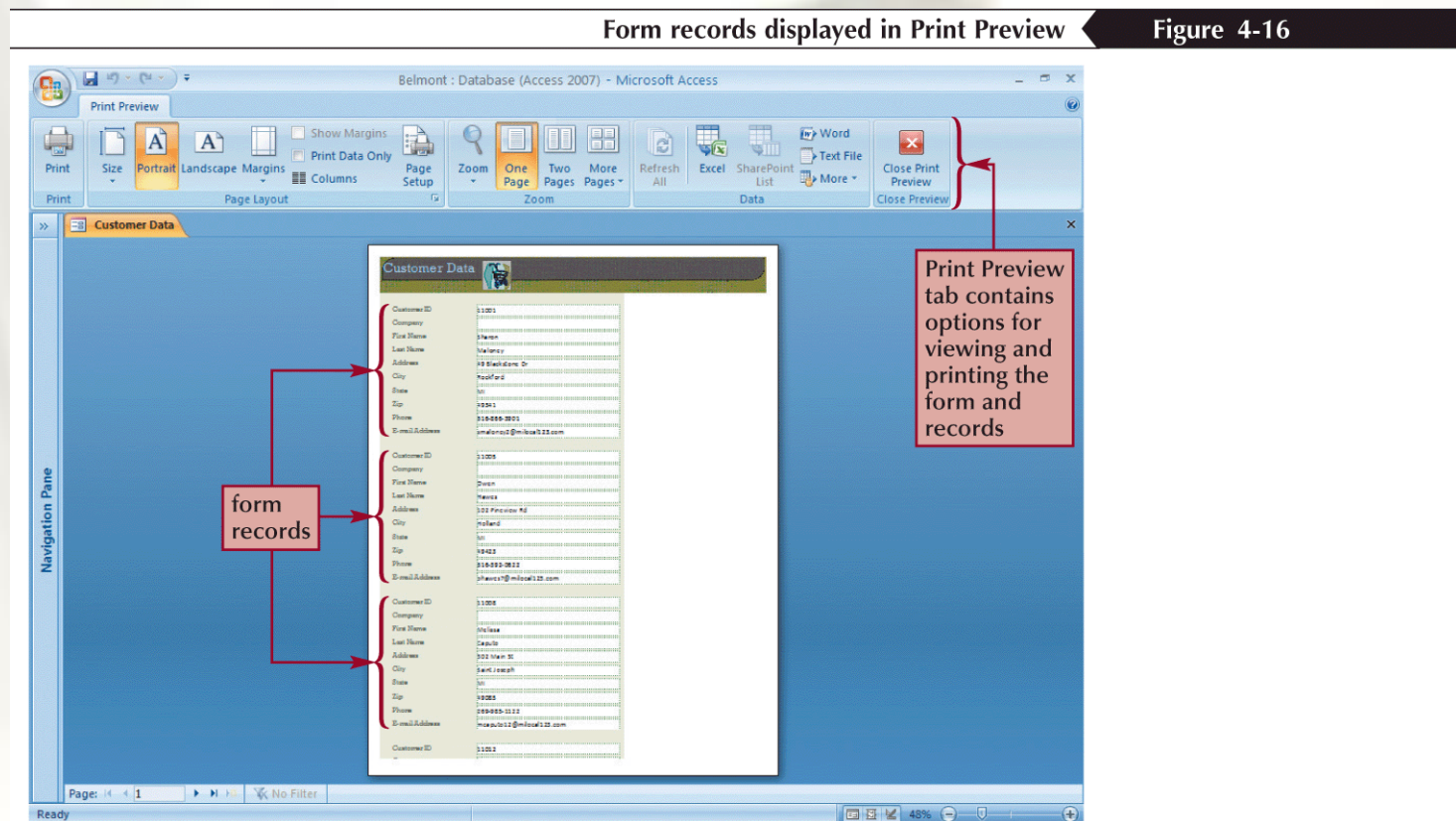
# Maintaining Table Data Using a Form

- 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



# Previewing and Printing Selected Form Records

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

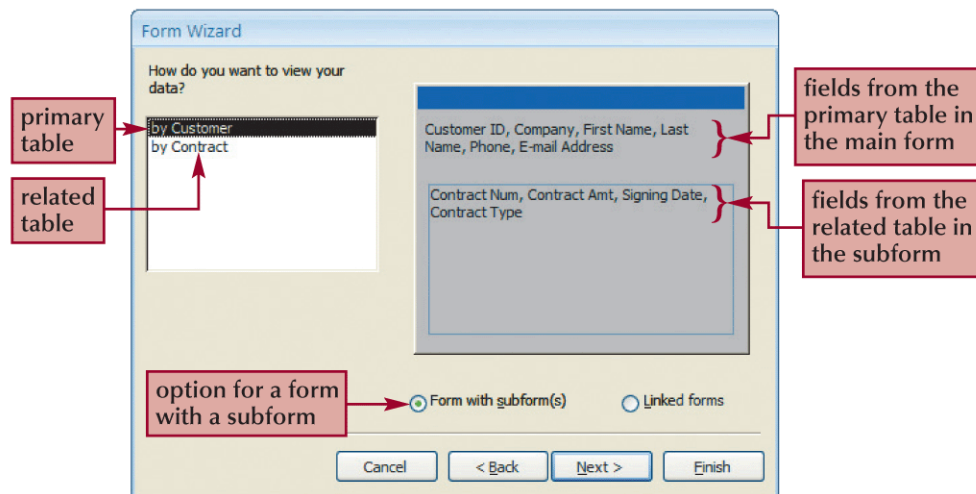


# Creating a Form with a Main Form and a Subform

- 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

Choosing a format for the main form and subform

Figure 4-17



# Creating a Form with a Main Form and a Subform

Figure 4-18

Main form with subform in Form view

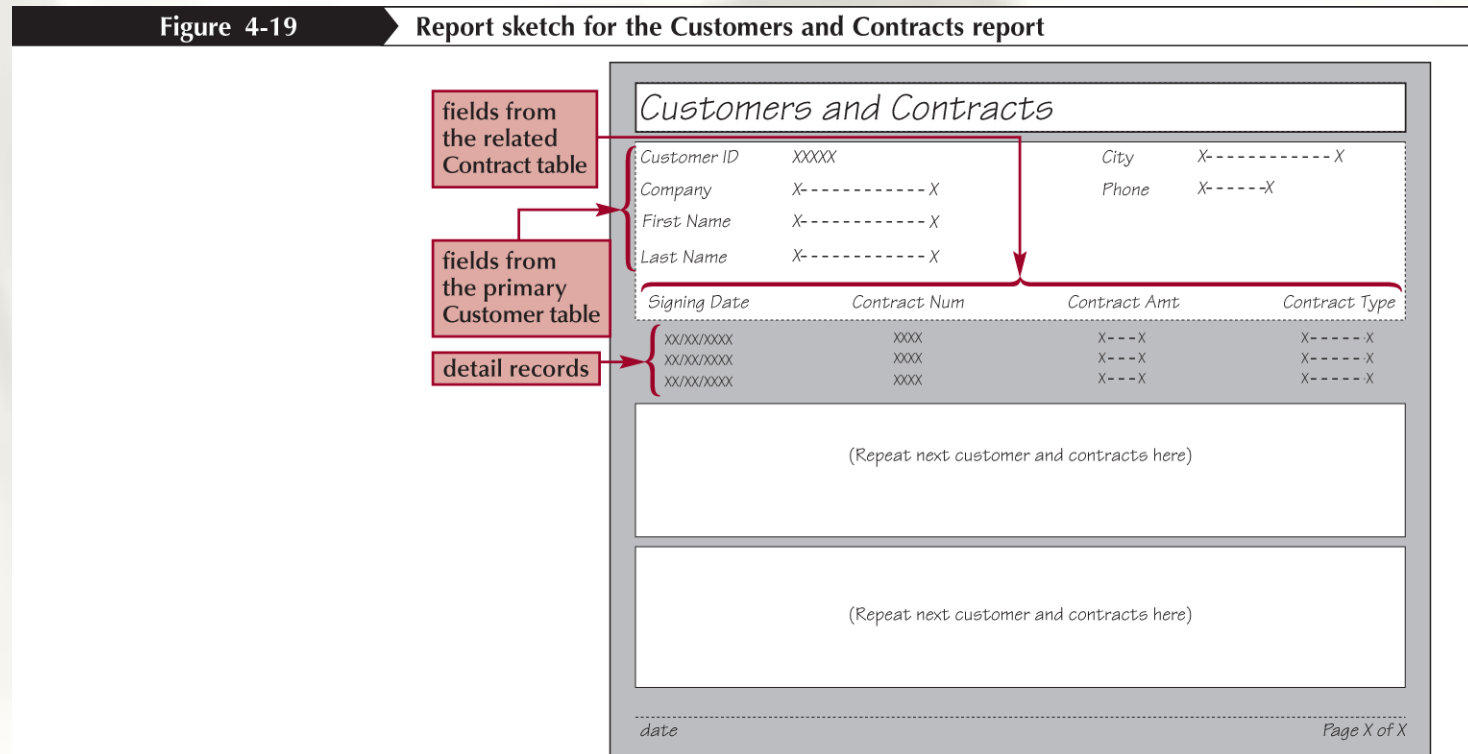
The screenshot displays a Microsoft Access form titled "Customer Contracts". The form is divided into two main sections: a main form and a subform. The main form contains several text boxes for data entry: Customer ID (11001), Company, First Name (Sharon), Last Name (Maloney), Phone (616-866-3901), and E-mail Address (smaloney2@mllocal123.com). Below these fields is a subform titled "Contract". The subform is a table with the following columns: Contract Num, Contract Amt, Signing Date, and Contract Type. The first row of the subform contains the values: 3011, 4,000, 2/9/2010, and Residential landscape plan. The subform has a record bar at the bottom showing "Record: 1 of 1". The main form has a record bar at the bottom showing "Record: 1 of 41". Red callout boxes with arrows point to various parts of the form: "name of main form" points to the title bar, "name of subform" points to the subform title, "main form" points to the main form title, "subform" points to the subform table, "main form navigation buttons" points to the record bar of the main form, and "subform navigation buttons" points to the record bar of the subform.

Contract Num	Contract Amt	Signing Date	Contract Type
3011	4,000	2/9/2010	Residential landscape plan
*			

# Creating a Report

## Using the Report Wizard

- The **Report Wizard** asks you a series of questions and then creates a report based on your answers

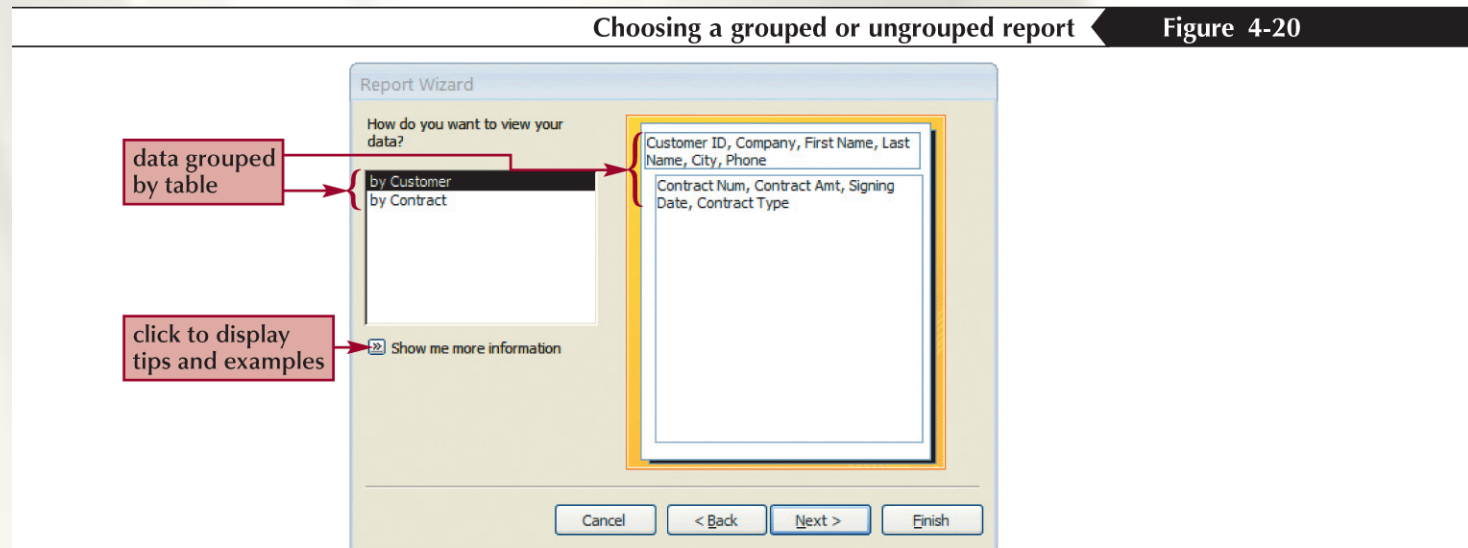




# Creating a Report

## Using the Report Wizard

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

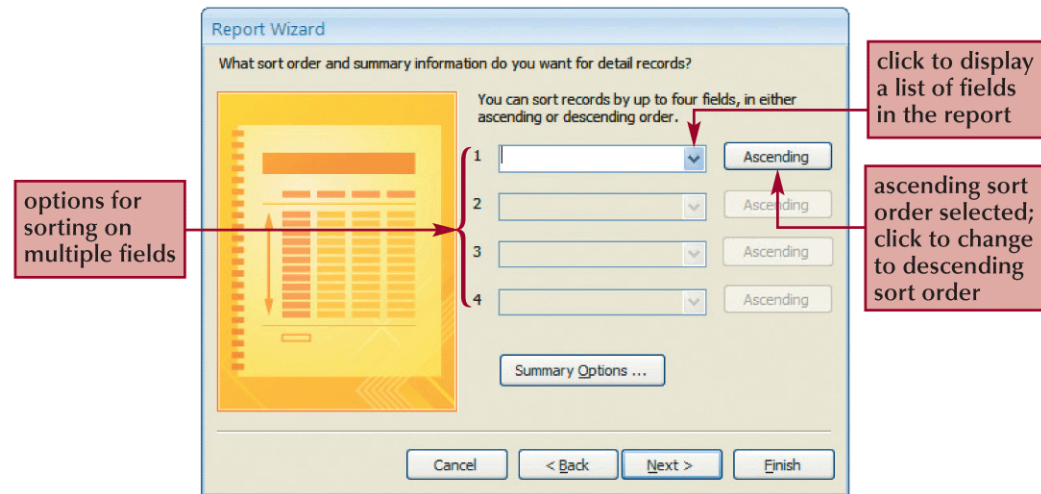


# Creating a Report

## Using the Report Wizard

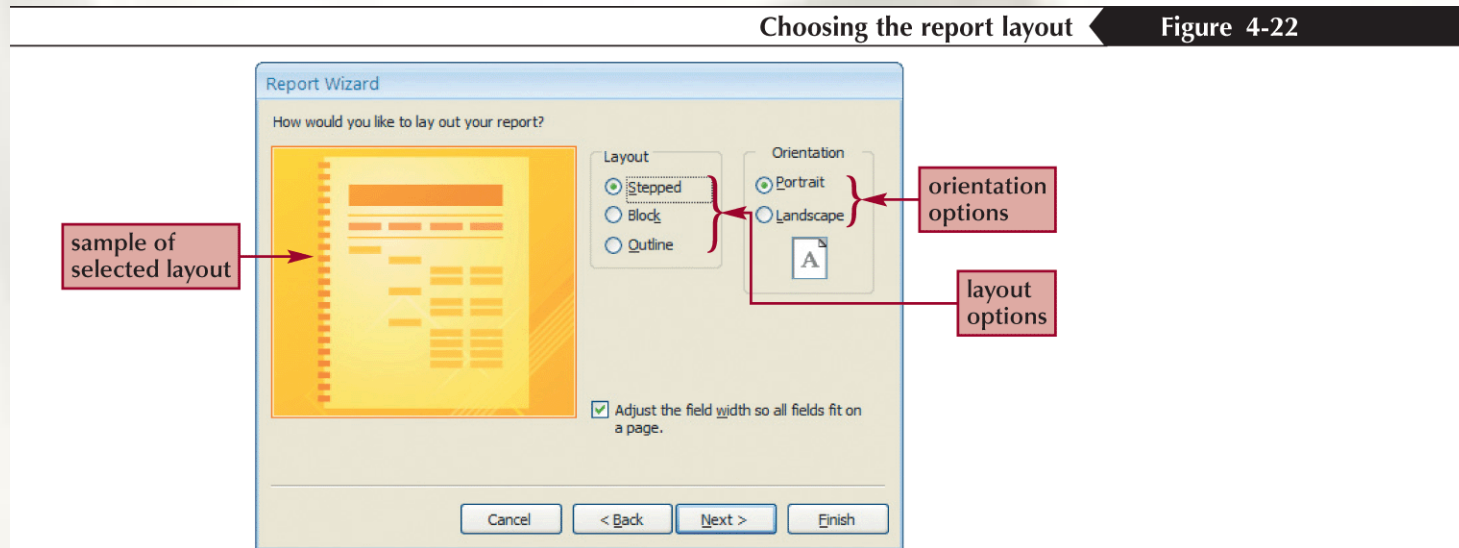
Figure 4-21

Choosing the sort order for detail records



# Creating a Report

## Using the Report Wizard





# Creating a Report Using the Report Wizard

Figure 4-23

Close-up view of the report

The screenshot shows a report window titled "Customers And Contracts". It contains three main sections for different customers. The first section is for Customer ID 11001, Sharon Maloney, with a contract of 4,000 for a residential landscape plan signed on 2/9/2010. The second section is for Customer ID 11005, Owen Hawes, with three contracts signed on 3/1/2010, 7/8/2010, and 11/30/2010. The third section is for Customer ID 11008, Saint Joseph, with a contract signed on 11/30/2010. A red box on the left side of the report, labeled "Contract records listed in ascending order by Signing Date", points to the contract records for Customer ID 11005, which are sorted by their signing dates.

Customer ID	Company	First Name	Last Name	Signing Date	Contract Num	Contract Amt	Contract Type
11001		Sharon	Maloney	2/9/2010	3011	4,000	Residential landscape plan
11005		Owen	Hawes	3/1/2010	3015	1,500	Schematic plan for backyard, residential
11005		Owen	Hawes	7/8/2010	3033	2,250	Residential landscape plan for front yard
11005		Owen	Hawes	11/30/2010	3060	4,000	Front walk and drive design, residential
11008			Saint Joseph	11/30/2010			

# Modifying a Report's Design in Layout View

- Click the **Layout View** button

Figure 4-24

Fields selected and ready to be moved

Customers And Contracts

Customer ID	11043	City	Grand Rapids
Company	Monroe State College	Phone	616-988-1320
First Name	Rachel		
Last Name	Kirk		

Signing Date	Contract Num	Contract Amt	Contract Type
4/14/2010	3022	22,000	Landscape design for two entrances

Customer ID	11045	City	Kalamazoo
Company	Kalamazoo Neighborhood Devel	Phone	269-343-7809
First Name	James		
Last Name	Blackhawk		

Signing Date	Contract Num	Contract Amt	Contract Type
6/22/2010	3037	68,000	Renovation of an existing city park
6/22/2010	3038	34,000	Renovation of an existing playground at a city park
6/29/2011	3095	14,500	Handicap accessibility upgrades to public housing site
8/2/2011	3108	50,000	Design of a small city park

Customer ID	11048	City	South Haven
Company		Phone	616-637-6591
First Name	Olivia		
Last Name	Pappas		

Signing Date	Contract Num	Contract Amt	Contract Type
9/2/2010	3046	300	Consultation for back yard, residential

Layout View

Navigation Pane

move handle

move the fields this far to the right

both fields are outlined in orange, indicating they are selected

# Modifying a Report's Design in Layout View

Figure 4-26

Report after resizing fields

**Customers And Contracts**

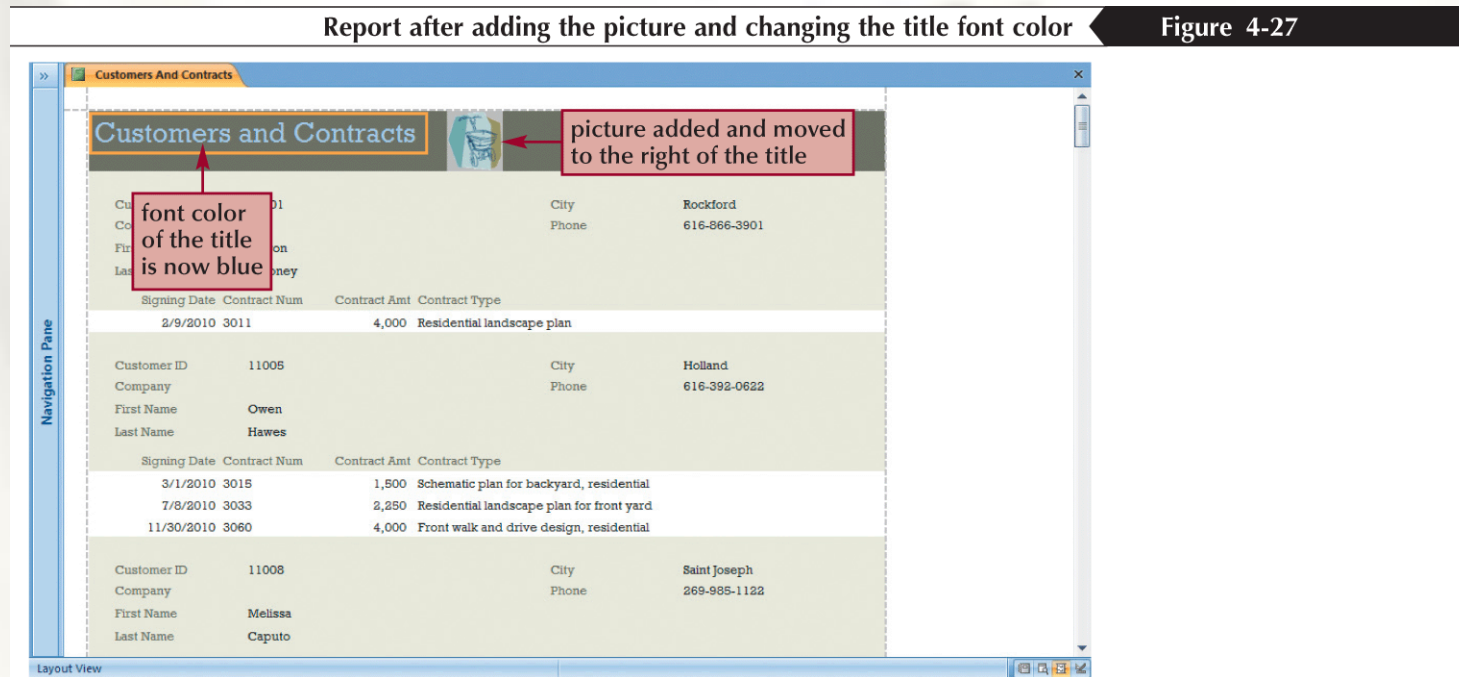
Signing Date	Contract Num	Contract Amt	Contract Type
6/11/2010	3030	5,250	Landscape plan for residential site
<b>Customer Details</b>			
Customer ID	11043	City	Grand Rapids
Company	Monroe State College	Phone	616-988-1320
First Name	Rachel		
Last Name	Kirk		
Signing Date	Contract Num	Contract Amt	Contract Type
4/14/2010	3022	22,000	Landscape design for two entrances
<b>Customer Details</b>			
Customer ID	11045	City	Kalamazoo
Company	Kalamazoo Neighborhood Development	Phone	269-343-7509
First Name	James		
Last Name	Blackhawk		
Signing Date	Contract Num	Contract Amt	Contract Type
2/2010	3037	68,000	Renovation of an existing city park
2/2010	3038	34,000	Renovation of an existing playground at a city park
9/2011	3095	14,500	Handicap accessibility upgrades to public housing site
2/2011	3108	50,000	Design of a small city park
<b>Customer Details</b>			
Customer ID	11048	City	South Haven
Company		Phone	616-637-6591
First Name	Olivia		
Last Name	Pappas		
Signing Date	Contract Num	Contract Amt	Contract Type

Layout View

all field values resized in this section

Company field value is now fully displayed

# Modifying a Report's Design in Layout View

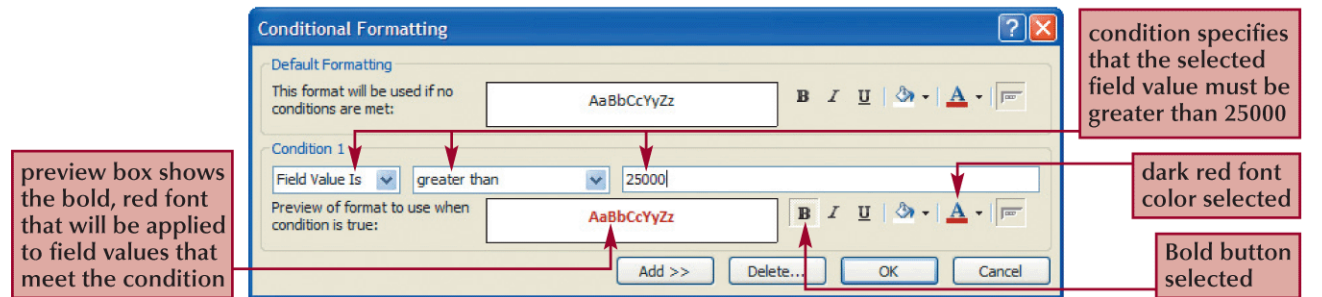


# Using Conditional Formatting in a Report

- **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 Font group on the Report Layout Tools Format tab, click the **Conditional** button

Figure 4-29

Conditional formatting set for the Contract Amt field



# Using Conditional Formatting in a Report

