Forms & Reports

Forms

Although information in a database can be entered and edited directly in a table, people often find it simpler to use a form. We use forms all the time in everyday life as a way of recording information so forms are familiar to us. The Form design tools in Access are very flexible and allow you to customise a form with many features to make it easy for the user to enter/edit data. Forms can be created in a few different ways:

- Use an Auto form to create a form based on a standard layout.
- Use the Form Wizard.
- Use one of the above methods and then modify the form in Design View.
- Create a form completely from scratch using the Design View tools.

As you become more and more familiar with working with Forms in Access you may find yourself using the latter methods more and more. To begin with though, it is best to use the Auto forms and Form Wizards until you are more comfortable with designing forms.

Using Auto Forms

Auto forms allow you to create a form quickly based on a standard layout. In the first exercises, you actually created an auto form when you used a form for data entry. A form was immediately created based on a table. In addition to the standard layout you have already seen, there are several auto form layouts to choose from and we will try out three of them in the following exercises.
Exercise 1. Creating a Datasheet Auto Form

1. Make sure your Student List database is open (close any queries that are still open).
2. Select your STUDENTS table in the Navigation Pane to the left of the window.

3. Click the Create tab on the Ribbon.

4. Click on More Forms and then click Datasheet.

The end result is a form that looks and acts the same as a table. It may not seem very useful to have a form that’s the same as a table but it can be very useful for subforms as you will see later on. Sometimes it is handy to have a list inside a form. Since a table can’t be placed inside a form, another form that looks like a table can be used instead.

5. Close the form.
6. When you are prompted to save the form, click Yes.

7. Enter STUDENTS: Datasheet as the form name and click OK.

The form will be added to the bottom of the Navigation Pane.
Exercise 2. Creating a Tabular Auto Form

1. Make sure your Student List database is open.
2. Select your STUDENTS table in the Navigation Pane to the left of the window.

3. Click the Create tab on the Ribbon.

4. Click on More Forms and then click Multiple Items.

5. Close the form.
6. When you are prompted to save the form, click Yes.
7. Enter STUDENTS: Tabular as the form name and click OK.

A tabular form can be used in the same way as a table, but it can be formatted and customised a lot more than a table. This form could be neated up in Design View as you will see later.
Exercise 3. Creating a Split Form

1. Make sure your Student List database is open.
2. Select your STUDENTS table in the Navigation Pane to the left of the window.

3. Click the Create tab on the Ribbon.

4. Click on More Forms and then click Split Form.

Here was have a form which combines 2 different layouts. The top half shows one record at a time like a regular (columnar) form layout. The bottom half shows a list of records in a Datasheet layout. You can use either one to edit records. Any records you select in the bottom section will display in the top section.

5. Close the form.
6. When you are prompted to save the form, click Yes.
7. Enter STUDENTS: Split View as the form name and click OK.
Using Microsoft Access

Custom Forms

Using the Form Wizard and form Design View allow you to have a lot more control over how your form looks and functions. These methods allow you to select fields from more than one table/query as well as giving you a lot of choice about how the form will appear.

Exercise 4. Using a Form Wizard

1. Click the Create tab on the Ribbon.
2. Click Form Wizard

In the first step of the wizard, you are asked to specify which fields will be used in the form.

Note: You can select fields from more than one table. You can even select fields from Queries (including calculated fields). In later exercises we will use this wizard to create more complex forms which include fields from more than one table.

3. Click the >> button to select all of the fields for use in the form. All of the fields will now be listed on the right side.
4. Double-click on Student Number to move it back over to the left, since we won’t need to have that displayed in our form.
5. Click **Next** to move to the next step of the wizard.

6. Leave **Columnar** selected for the **Form Layout** and click **Next**.

   The last step in the wizard asks you to specify a name for the form. When you click Finish, the form is automatically saved with that name.

7. Type **Student Entry Form** for the form title and click **Finish**.

8. Close the Form. There is no need to save it since it was already saved at the end of the wizard.
Reports

Reports are used in a database to present information in a neat and organised format that is ready for printing. When a report is opened in Access, it is opened in Print preview for this reason. Creating a report is very similar to creating a form and like a form, can be done using any of the following methods:

- Use an Auto report to create a form based on a standard layout.
- Use the Report Wizard.
- Use one of the above methods and then modify the report in Design View.
- Create a report completely from scratch using the Design View tools.

Exercise 5. Creating an Auto Report

1. Click the Create tab on the Ribbon.
2. Click the Report icon.

The buttons in the bottom right of the Window provide access to the different report views (you can also use the view button at the start of the ribbon to see the same choices).


Note Reports are for displaying data. You cannot modify table data from a report.
Exercise 6. Using a Report Wizard

1. Click the Create tab on the Ribbon.
2. Click Report Wizard.
3. In the Tables/Queries list, make sure that table: STUDENTS is selected.
4. Select the fields shown below.

5. Click Next when ready.

6. The next step allows you to choose grouping levels for your report. Double click on Gender to select that as the grouping field. This means that all of the female students will be grouped together in the report and all the male students will be grouped together.

7. Click Next to continue.
This step in the wizard allows you to choose how the records in the report will be sorted. There are also options for adding totals and subtotals to your report.

8. In the first sort box, select *Last Name* as shown above. You can also select additional fields for sorting in case there are any records with the same last name.

9. Click **Next** to move to the next step.

10. Select **Block** for the report layout and click **Next**
11. Enter *Students by Gender* for the report name and click **Finish**. The report name is also used for the main heading in the report.

12. Change to **Layout View** by clicking the icon in the bottom right corner. A **Report Layout Tools** group of tabs will be added to the **Ribbon**, with the **Design** tab selected.

13. Click one of the birth dates in the *Date of Birth* field. All the dates of birth will be selected.

14. Hold down the **[Shift]** key and click the Date of Birth heading so that will be selected also.

15. Drag the Dates of Birth to the left slightly so that the fields are more evenly spaced.

16. Change to **Design View**.

We will use the Design View to add an average for the Marks field.

17. Move your mouse to the bottom edge of **Report Footer**.
18. Drag downward until you have an area large enough to add a text box.

19. Find the Controls group in the Ribbon (in the Design Tab).

20. Click the Text Box icon.

21. Click in the Report Footer to place a Textbox. Leave some room to the left of where you click.

A label will be placed to the left of the textbox.

A Label will only display static text on a form or a report. A Text Box will display dynamic text based on field data or calculations. All of the field data in the report Detail section are displayed using Text boxes, while the headings are displayed using labels.

22. Edit the Label and Textbox in the Report Footer and move/resize them to the right side so that they appear as follows.

The formula in the text box is much like a formula in Excel. It will average whatever is referred to inside the brackets. Since we are referring to a Field, it must be surrounded by square brackets. Using both types of brackets may be a little confusing but it is necessary.

Note: You will noticed that if you move the textbox, the label will move with it as they are linked to each other. When they are selected, a large dot will appear in the top left corner of each one. You can drag this dot to move one of them individually.

23. Switch back to Print Preview to view the average.

24. Close and save changes to the report.
Exercise 7. Creating a Report from a Query

1. Click the Create tab on the Ribbon.
2. Click Report Wizard.
3. From the Tables/Queries list, select Query: parameter: students by suburb.

![Query dialog box]

4. Click the >> button to select all of the fields and click Next.
5. Click Next again to skip the grouping options.

![Sort order dialog box]

6. Choose to sort by Last name and First name as shown and click Next.
7. Leave the report layout as Tabular and click Next.
8. For the name of the report, enter Students by Suburb and click Finish.

Because the report is based on a parameter query, the parameter criteria prompt will appear.

![Parameter value dialog box]

9. Enter Morley as the suburb and click OK to see the report.
10. Switch to **Design View**.

The **Report Header** section contains a label with the text *Students by Suburb*. We will change this in to a textbox that shows the name of the suburb being displayed in the report results.

11. Click the *Students by Suburb* label to select it.

12. **Right click** the Label. Select **Change To** and then select **Text Box**.

When the label changes to a textbox, its contents will change to *Unbound*, which just means that we haven’t specified what will appear in the textbox yet.

13. In the textbox enter the following:

   ```
   ="Student Listing for " & [Suburb]
   ```

   This is a formula that will take the text inside the quotation marks (including the space after the word for) and then the & character will join it to the contents of the Suburb Field (since we are using the query to only show the results for one suburb).

14. **Re-size the text box to make it wide enough to fit the title** (this may be easier in layout view where you can see how big it needs to be).

15. Change to one of the other views and you will be prompted again for a suburb.

16. Enter Morley for the suburb again.

17. The modified report header should now include the suburb as shown below.

18. In Layout View change any other parts of the Report that need re-sizing (such as Post Code).

19. Save and close the Report. Re-open the report and test it with a different suburb (such as Dianella or Yokine)