

Forms

Although information in a database can be entered and edited directly in a table, most people 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 to use. 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 used an auto form when you used a form for data entry. 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.
- 2) Select the Forms section from the **Database Window**.
- 3) Click the **New** button with the top of the Database Window.
- 4) When the **New Form** dialog appears, click on the list at the bottom as shown below. A list of all your tables and queries appears since forms can be based on either.
- 5) Select your *STUDENTS* table from the list (it's easy to tell which one's a table because we named tables in uppercase and queries in lowercase).

New Form	? ×
This wizard automatically creates a datasheet form.	Design View Form Wizard AutoForm: Columnar AutoForm: Tabular AutoForm: Datasheet AutoForm: PivotTable AutoForm: PivotChart Chart Wizard PivotTable Wizard
Choose the table or query where	I •
	parameter: students by last name parameter: students by suburb parameter: students marks betwe student listing with age student marks STUDENTS

- 6) From the list of options at the top of the dialog, select **AutoForm: Datasheet**.
- 7) Click **OK** to create the form.

Н	STUDENTS					- 0
_	Student Number	Last Name	First Name	Date of Birth	Address	Suburb
>		Robbins	Mark	17-06-89	4 Kensington Ave	Dianella
	2	Stevens	Sarah	10-04-89	24 Browne Ave	Yokine
		Andrews	Claire	01-11-89	322 Walter Rd	Morley
	4	McKay	Tim	02-08-89	54 Coode St	Dianella
		Deterson	Dobort	28 03 80	230 Elindore St	Vakino

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.

- 8) Close the form.
- 9) When you are prompted to save the form, click **Yes**.

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e

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

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📑 Querie	es
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Exercise 2. Creating a Tabular Auto form

1) Click the **New** button **w** at the top of the Database Window.

Des For Aut	ign View m Wizard
This wizard automatically creates a tabular form. Aut Char Pive	oForm: Columnar oForm: Tabular oForm: Datasheet oForm: PivotTable oForm: PivotChart rt Wizard tTable Wizard
Choose the table or query where the object's data comes from:	DENTS

- 2) When the **New Form** dialog appears, select the options shown above (*STUDENTS* as the table and *AutoForm: Tabular* as the type of form).
- 3) Click OK to create the form.

umbe	r Last Nai First Na	r of Birth	Address	Suburb	Pc SI	Phone	Gender	Mark	Comment
1	Robbins Mark	·06-89	4 Kensir	Dianella	60 ₩	(08) 937	Male	78	2
2	Stevens Sarah	1-04-89	24 Brow	Yokine	60 😽	(08) 924	Female	62	New student

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

A tabular form can be used in the same was as a table, but it can be formatted and customised a lot more than a table. This form could be neatened up in Design View as you will see later.

Exercise 3. Creating a Columnar Auto Form

This is the type of form that was created in the first section when you used a form for data entry. 1) Click the **New** button when the top of the Database Window.

New Form	? X
This wizard automatically creates a columnar form.	Design View Form Wizard AutoForm: Columnar AutoForm: Tabular AutoForm: Datasheet AutoForm: PivotTable AutoForm: PivotChart Chart Wizard PivotTable Wizard
Choose the table or query where the object's data comes from:	STUDENTS
	OK Cancel

- 2) When the **New Form** dialog appears, select the options shown above (*STUDENTS* as the table and *AutoForm: Tabular* as the type of form).
- 3) Click OK to create the form.

Unlike the other two forms, this one only shows one record at a time. Most people find this makes it easier to work with records.

Student Number		Comment	
.ast Name	Robbins		
First Name	Mark		
Date of Birth	17-06-89		
Address	4 Kensington Ave		
Suburb	Dianella		
Postcode	6059		
itate	WA		
hone	(08) 9375 1234		
iender	Male		
1ark	78		

- 4) Close the form.
- 5) When you are prompted to save the form, click **Yes**.
- 6) Enter *STUDENTS: Columnar* as the form name and click **OK**.

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 **New** button the top of the **Database Window**.
- 2) Choose Form Wizard from the list of options. Choose *STUDENTS* for the table.

New Form	? ×
Create a new form without using a wizard.	Design View Form Wizard AutoForm: Columnar AutoForm: Tabular AutoForm: Datasheet AutoForm: PivotTable AutoForm: PivotTable AutoForm: PivotChart Chart Wizard PivotTable Wizard
Choose the table or query where the object's data comes from:	STUDENTS 主
	Cancel

3) Click **OK** to begin the wizard.

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

- 4) 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.
- 5) 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.

	Which fields do you want on your form? You can choose from more than one table or query.
<u>T</u> ables/Queries	
Table: STUDENTS	÷
Available Fields:	Selected Fields:
Student Number	

6) Click <u>Next</u> to move to the next step of the wizard.

Forms & Reports

Using Microsoft Access

	O Datasheet
	O Justified
	O PivotTable
	⊖ Pi <u>v</u> otChart

7) Leave <u>Columnar</u> selected for the Form Layout and click <u>Next</u>.

Form Wizerd What style would you like?	
XXX XXXX XXXXX Label Data	Blends Blueprint Expedition Industrial International Ricepaper SandStone Standard Stone Stone
Cancel	< Back Next > Einish

- 8) Click on each of the different form styles to see the preview for each one.
- 9) Select a style you like and click <u>Next</u>.

Using Microsoft Access	Forms & Reports
Form Witerrd	
What	at title do you want for your form?
St.	dent Entry Form
Tha form Do to	t's all the information the wizard needs to create your 1. you want to open the form or modify the form's design?
	Open the form to view or enter information.
0	
	Display Help on working with the form?
Ca	ncel <back next=""> Einish</back>

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.

10) Type *Student Entry Form* for the form title and click <u>Finish</u>.

Last Name	Robbins	Comment	
First Name	Mark		
Date of Birth	17-06-89		
Address	4 Kensington Ave		
Suburb	Dianella		
Postcode	6059		
State	WA		
Phone	(08) 9375 1234		
Gender	Male		
Mark	78		

11) Close the Form. There is no need to save it since it was 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 a Tabular Auto Report

- 1) Make sure you are in the forms section of the Database Window.
- 2) Click the <u>New Wew</u> button at the top of the Database Window.



- 3) Select AutoReport: Tabular and make sure the *STUDENTS* table is selected as the source.
- 4) Click **OK** to create the report. The report will appear in **Print Preview** ready for printing.

STUDENTS

t Number Last Name	First Name	e of Birth	Address	Suburb	Postc	State	Phone	Gender
1 Robbins	Mark	17-06-89	4 Kensington A	Dianella	6059	WA	(08) 9375 1234	Male
2 Stevens	Sarah	10-04-89	24 Browne Ave	Yokine	6060	WA	(08) 9249 8127	Female
3 Andrews	Claire	01-11-89	322 Walter Rd	Morley	6059	WA	(08) 9275 1937	Female
4 McKay	Tim	02-08-89	54 Coode St	Dianella	6059	WA	(08) 9375 5610	Male

5) Close the report. When prompted, save the report as *Student Report: Tabular*.

Exercise 6. Creating a Columnar Auto Report

1) Click the <u>New Wew</u> button at the top of the Database Window.

New Report	? X
This wizard automatically creates a columnar report.	Design View Report Wizard AutoReport: Columnar AutoReport: Tabular Chart Wizard Label Wizard
Choose the table or query where the object's data comes from:	STUDENTS
	Cancel

- 2) Select AutoReport: Tabular and make sure the *STUDENTS* table is selected as the source.
- 3) Click **OK** to create the report. The report will appear in **Print Preview** ready for printing.

Student Number	1
Last Name	Robbins
First Name	Mark
Date of Birth	17-06-89
Address	4 Kensington Ave
Suburb	Dianella
Postcode	6059
State	WA
Phone	(08) 9375 1234
Gender	Male
Mark	78
Comment	
Student Number	2
Last Name	Stevens

4) Close the report. When prompted, save the report as *Student Report: Columnar*.

Exercise 7. Using a Report Wizard

1) From the Database Window, click the option that says Create report by using wizard.

Report Wizard	Which fields do you want on your report? You can choose from more than one table or query.
Tables/Queries	
Available Fields:	Selected Fields:
Student Number Comment	Date of Birth Address Suburb Postcode State Phone
	Cancel

- 2) In the <u>Tables/Queries</u> list, make sure that *table: STUDENTS* is selected.
- 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* and *Comment* to move them back over to the left as shown above.
- 5) Click <u>Next</u> when ready.

Do you want to add an evels? Last Name First Name Date of Birth Address Suburb Postcode State Phone Mark	y grouping	Gender Last Name, First Name, Date of Birth, Address, Suburb, Postcode, State, Phone, Mark
Grouping Options	Cancel	Einish

- 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 <u>N</u>ext to continue.

Using Microsoft Access	Forms & Reports
Report Wizard What sort order and summary information do you want for detail records? Image: Cancel	

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 the <u>Summary Options button</u>.

ield	Sum Avg Min Max	Cancel
Mark		Show

You can use these options to add totals for any number fields. The only field available here is Mark.

- 10) Click the box to put a tick under the **Avg** option as shown above. This will add an average mark figure to the report.
- 11) Click **OK** to return to the wizard.
- 12) Click $\underline{N}ext$ to move to the next step.

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Layout ○ Stepped ○ Block ○ Qutine 1 ○ Outine 2 ○ Adjust the field width so all fields fit a page.	on
	Layout Orientation Stepped Portrait Blods Image: Constraint of the state of the s

13) Click Align Left 2 for the report layout with <u>L</u>andscape selected as the orientation and click <u>Next</u>.

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	A NAME AND	Casual Compact Corporate Formal Soft Gray	
Title	XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX		
Label above Detail	XXX XXXXX XXX XXXXX XXX XXXXX		
ontrol from Detail	XXX XXXXX XXX XXXXX XXX XXXXX		

14) Select a report style and click \underline{Next} .

15) Enter *Students by Gender* for the report name and click <u>Finish</u>.

Students by Gender

	-					
FirstName	Date of Birth Address	Suburb	Postcod	State	Phone	Mark
Claire	01-11-89 322 Walter Rd	Morley	6059	WA	(08) 9275 1937	58
Laura	09-07-88 14 Halvorsen Rd	Morley	6062	WA	(08) 9276 8291	48
Jemma	30-05-89 183 Grand Prom.	Bedford	60.62	WA	(08) 9273 9182	91
Larissa	12-08-89 14 Chelsea Crt	Dianella	60.59	WA	(08) 9375 8127	8
Louise	18-10-89 56 Surry St	Dianella	60.59	WA	(08) 9375 9182	73
Sarah	10-04-89 24 Browne Ave	Yokine	60.60	WA	(08) 9249 8127	62
nale (6 detail records)						65
ale						
FirstName	Date of Birth Address	Suburb	Postcod	State	Phone	Mark
	FirstName	First Name Date of Birth Address	First Name Date of Birth Address Suburb	First Name Date of Birth Address Suburb Postcod	First Name Date of Birth Address Suburb Postcod State	First Name Date of Birth Address Suburb Postcod State Phone

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Report Design

Several things may appear in the Report Design window. Some may appear to begin with and others may need to be turned on before they will appear.

Student Numb	Field List Turn on or off with the icon or with the Field <u>L</u> ist option in the <u>V</u> iew menu	Shows the fields in the table/query the report is linked to. This can be used to add more fields to the report if needed.
Aa ab	Toolbox Turn on or off with the icon or with the Toolbox option in the View menu	This toolbar has icons for the common Report Design tools. It usually sits towards the side of the screen and can be attached to the side of the screen so it's not in the way.
Report X Report Image: Constraint of the state of t	Properties Window Turn on or off with the fraction or with the Properties option in the View menu	This shows properties that can be modified for the report or for whichever part of the form is currently selected.

The design window itself has several sections as shown below.

1111	2.123	2 * 1 * 3	3 • 1 • •	4 + 1 +	5	6 - 1 -	7 - 1 -	8 . 1 .	9 • 1 • 1	10 • • • 1	1 + 1 + 1	2 • 1 • 1	3 • 1 • 1	4 1 1 1	15 • • •	16 · · · 1	7 • 1 • 1	8 • • •	19 י י
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Stu	Ide	nts	by	Ge	nde	r													
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Gende	r		Ge	nder															
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	-	Last Na	me		First Na	me		ate of I	irth	Address	5		Suburb			Postcode	State	F	hon
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	ort Foot	ter																	

Rulers	Placed along the top and side of the form to help you position and select objects on
	the report.
Report Header	The contents of this section will be displayed at the beginning of the report.
Page Header	This section is displayed at the top of each page in the report.
Gender Header	When you have used a field to group the results, this area includes everything that
	will appear before each group.
Detail	This is the section of the report that is repeated for each record.
Gender Footer	Summary information for each grouped field. In this case, the average for each
	gender will be displayed here.
Page Footer	Repeated at the bottom of each page. In this case, the current date and page number
	are displayed.
Report Footer	Displayed at the end of the report and usually contains totals for the report.

Exercise 8. Customising a Report in Report Design

- 1) With the *Students by Gender* report still open, click the View icon \leq to go to Design View.
- 2) Click on the **Text Box** icon **ab** in the **toolbox** to the left of the screen.
- 3) Click in the Report Footer area to place the textbox as shown. A textbox will usually have a label next to it so make sure you don't click too close to the left.



4) When you click, a textbox and a label will be created.



5) Click in the label (the one that says *Text33:*). Edit the label so that it says *Total Students*.

6) Edit the textbox (the one that says *unbound*) and change it so it says =*count*([*Mark*]).

This is a function that will count all of the records using the *Mark* field. The square brackets are used because they are necessary for any formula that refers to a field name.

7) If you are still editing the textbox, press [Enter] to exit edit mode. The whole box should be selected. Move your mouse over the top-left corner of the box. Your mouse pointer will change to a hand shape as shown.

8) Use this corner to drag the textbox towards the right edge of the report.

Normally dragging a textbox will move it's related label as well. Using this corner will move only the textbox.

- **Note** When moving and resizing in a report, be careful not to go too close to the edge of the report. The wizard will make the report just the right width to fit on a page. If you move things beyond the edge, even by a small amount, your report will become bigger and won't fit on a page. The result is that when the report is printed is that you may get what appears like blank pages between every page in the report as the small overflow gets printed.
- 9) Click the view icon \square to preview the changes to the report and see your new total.

10) Close the report and save any changes.

Exercise 9. Creating a Report from a Query

1) From the Database Window, click the option that says Create report by using wizard.

Report Wizard	Which fields do you want on your report? You can choose from more than one table or query.
Tables/Queries Query: parameter: students by las Table: STUDENTS Query: parameter: students by las Query: parameter: students by las Query: parameter: students by las Query: student isting with age Query: student listing with age Query: student marks Query: est query There	t name it name burb s between the amo
	ancel

- 2) From the Tables/Queries list, select Query: parameter: students by suburb as shown.
- 3) Click the \geq icon to select all of the fields in the query and then click <u>Next</u>.
- 4) Click <u>Next</u> again to skip the grouping options.

*****	a:	Last Name	ig order.	Ascending
1 2 3 4				
	2	First Name	÷	Ascending
SCHOOL SCHOOL SCHOOL SCHOOL SCHOOL	3		\$	Ascending
A NAME NAME NAME NAME NAME ANAME NAME NAME NAME NAME A NAME NAME NAME NAME NAME	4		-	Ascending
200000000 200000000	Ľ.		<u> </u>	

- 5) Choose to sort by *Last name* and *First name* as shown and click <u>Next</u>.
- 6) Leave the report layout as <u>Tabular</u> and click <u>Next</u>.
- 7) Select a report style and click <u>Next</u>.
- 8) For the name of the report, enter *Students by Suburb* and click <u>Finish</u>.

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

Enter Parameter Value	? X
Enter a suburb	
Ca	ncel

9) Enter Morley as the suburb and click **OK** to see the report. 10) Click the **View** icon \leq to enter 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) From the Format menu choose Change To and then Text Box as shown to the right. 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 textbox to make it wider.
- 15) Click the **view** icon \square to preview the report.
- 16) Enter Morley for the suburb again. The modified report header should now include the suburb as shown below.

Student Listing for Morley

Last Name	First Name	Address	Suburb	Postcode	State
Andrews	Claire	322 Walter Rd	Morley	6059	WA
Chang	Paul	89 Wellington Rd	Morley	6062	WA
Davies	Laura	14 Halvorsen Rd	Morley	6062	WA

17) Close the report and save the changes.

18) Double-click the report to test it again with a different suburb (such as Yokine or Bedford).

19) Close the report again when you are done.

F <u>o</u> rn	nat <u>T</u> ools <u>W</u> indow <u>H</u> elp						
¢	Auto <u>F</u> ormat	u 🗉 🗏 🗏 🔬 • 🛓					
	Con <u>d</u> itional Formatting	1 📯 (E 1 💜 🦮 🔗					
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~	S <u>n</u> ap to Grid	Aa	La <u>b</u> el				
	<u>A</u> lign		List Box				
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	Vertical Spacing	₩.	Toggle Button				
Ð	Group	\odot	Option Button				
÷.	Ungroup	~	Im <u>ag</u> e				
	Bring to Fron <u>t</u>	-	Command <u>B</u> utton				
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-			I I I - I ugo				