# Using Microsoft Access

# Forms & Reports

## 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 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.
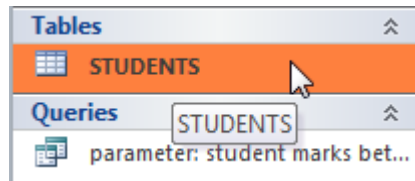- Create a form completely from scratch using the Design View tools.

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 used 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.
2.  Select your *STUDENTS* table in the **Navigation Pane** to the left of the window.



3.  Click the **Create** tab on the **Ribbon**.



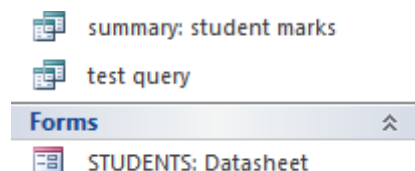4.  Click on ![More Forms] and then click ![Datasheet] .



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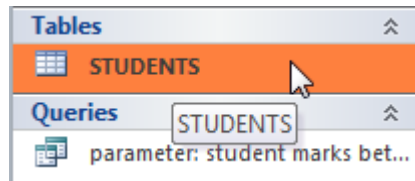6.  When you are prompted to save the form, click **Yes**.
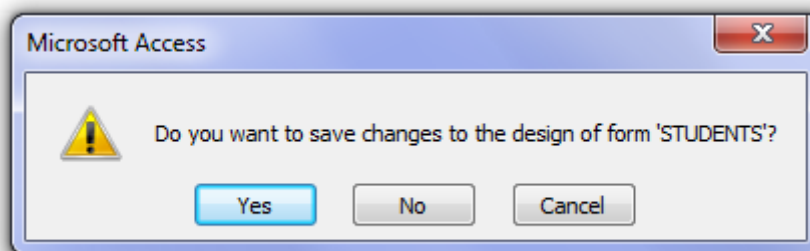


7.  Enter *STUDENTS: Datasheet* as the form name and click **OK**.

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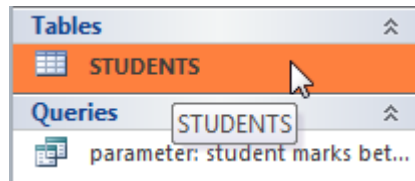
4. Click on **More Forms** and then click **Split Form**

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**.

## 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**.
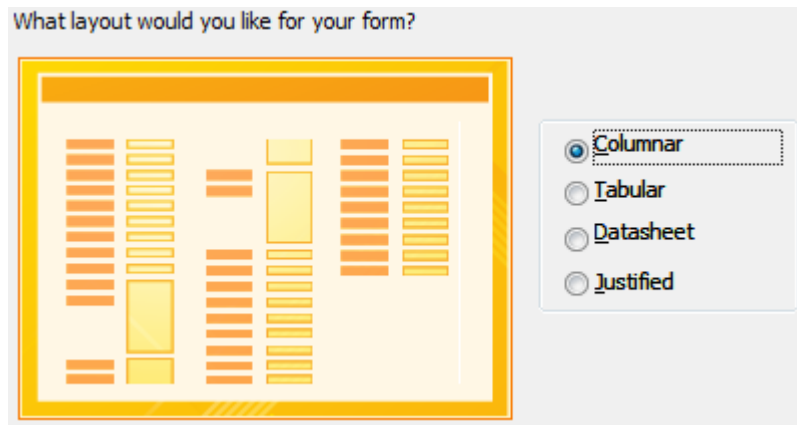2. Click 🔲 Form Wizard .
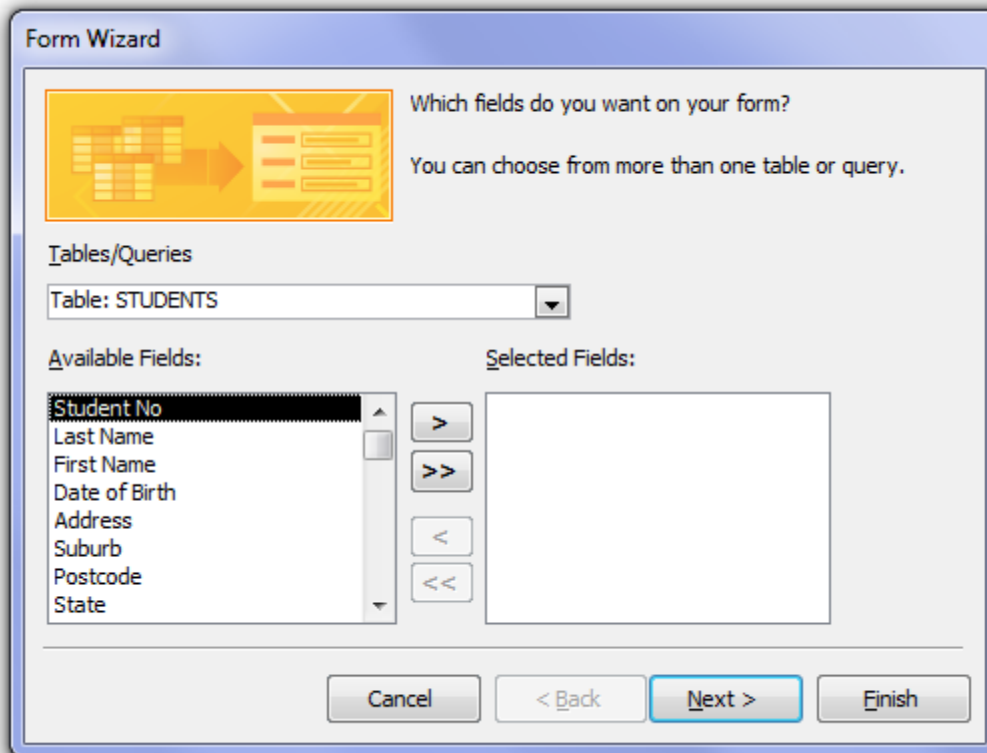


In the first step of the wizard, you are asked to specify which fields will be used in the form.

| 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.
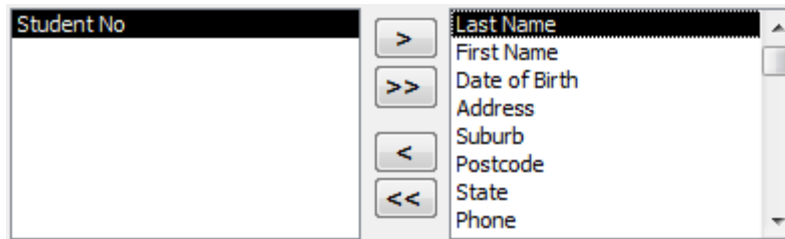
5. Click **Next** to move to the next step of the wizard.



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.
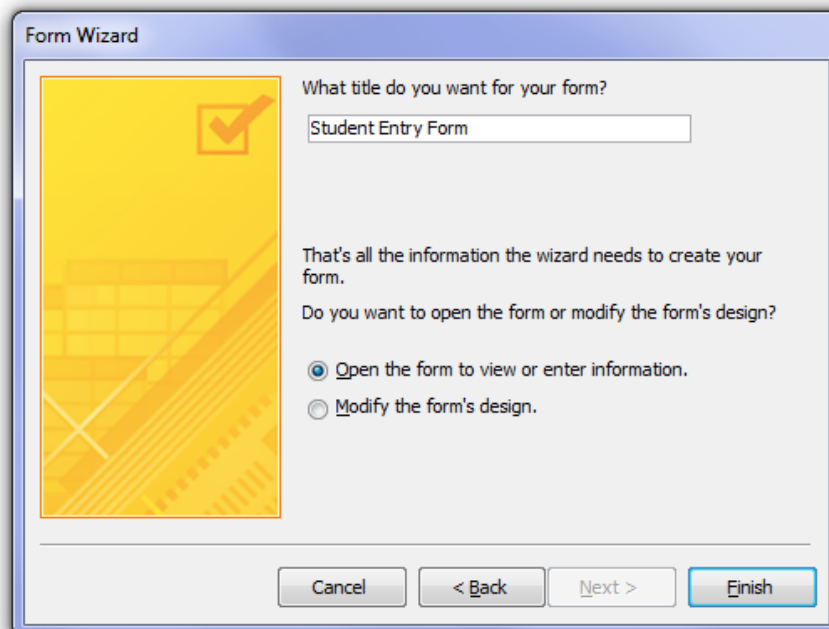


7. Type *Student Entry Form* for the form title and click **Finish**.
8. Close the Form. There is no need to save it since it was already saved at the end of the wizard.

## 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.
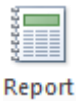
The buttons in the bottom right of the Window provide access to the different report views.

- The first button selects the standard **Report View**.
- The second button shows how the report will look when printed in **Print Preview**.
- The last two options are both for modifying the report. The first of these, **Layout View**, allows you to modify the report while the report data is displayed. This provides an easy way to make adjustments to the report layout while having a good idea of how the changes will affect the report.
- The last view is **Design View**. In design view you can't see the report's data as you make changes but it is necessary for some design changes that aren't possible with the Layout view.

3. Close the report. When prompted, save the report as *Student Report: Auto Report*.

**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 icon] Report Wizard .
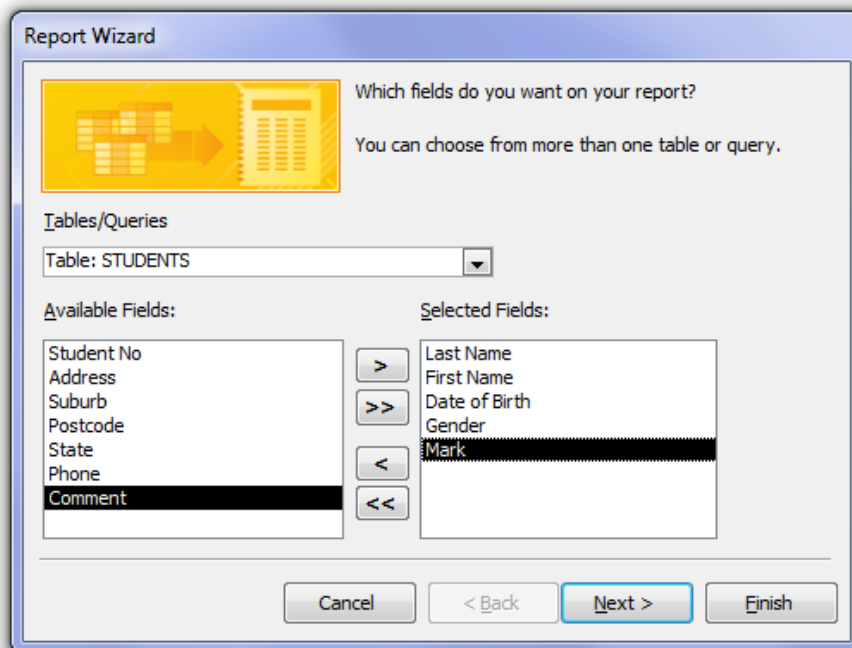


3. In the **Tables/Queries** list, make sure that *table: STUDENTS* is selected.
4. Select the fields shown above.
5. **Double-click** on *Student Number* and *Comment* to move them back over to the left as shown above.
6. Click **Next** when ready.
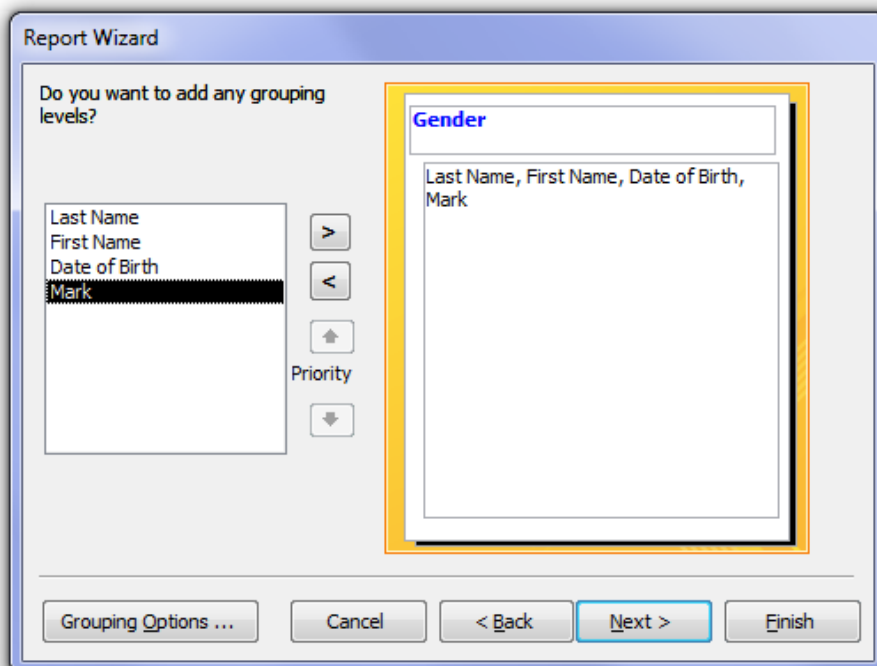
7. The next step allows you to choose grouping levels for your report. **Double click** on *Gender* to select that as the grouping field. This means that all of the female students will be grouped together in the report and all the male students will be grouped together.

8. Click **Next** to continue
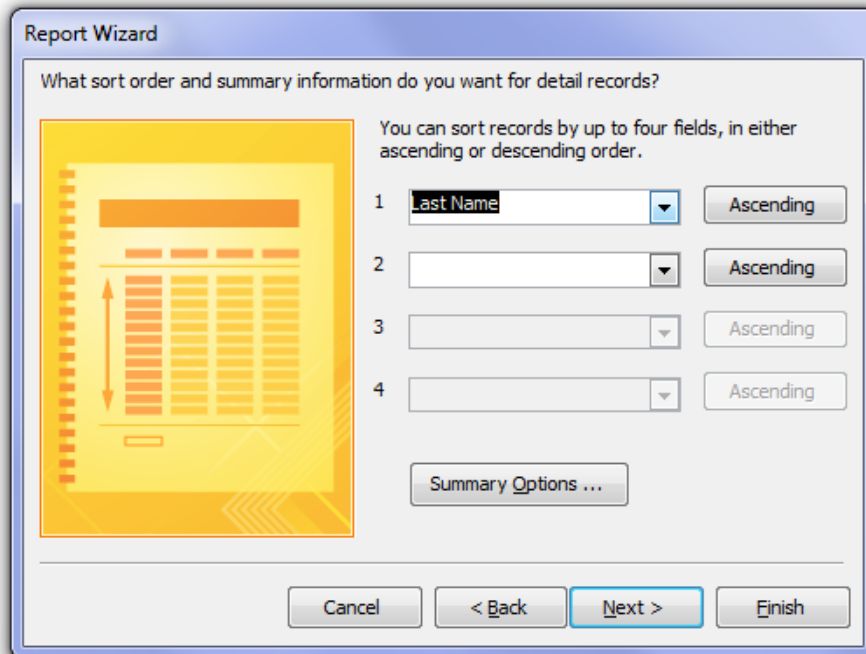


This step in the wizard allows you to choose how the records in the report will be sorted. There are also options for adding totals and subtotals to your report.

9. 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.

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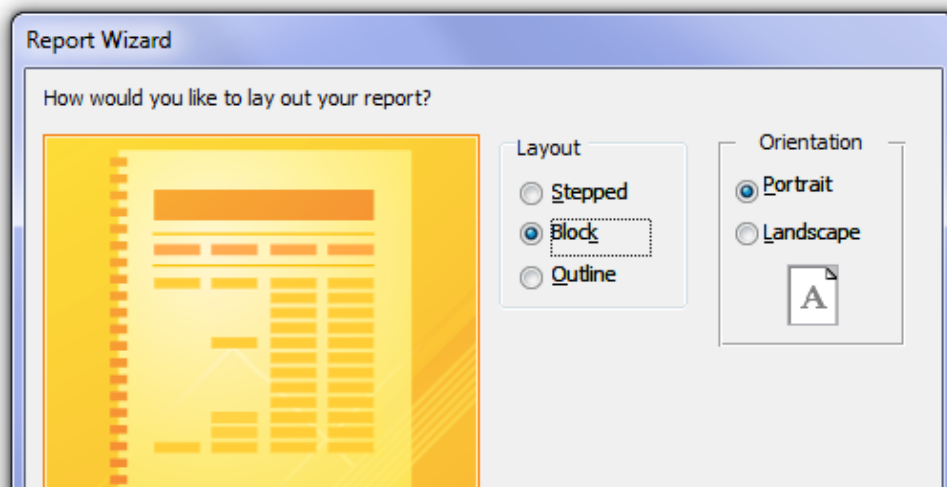


11. Select **Block** for the report layout and click **Next**
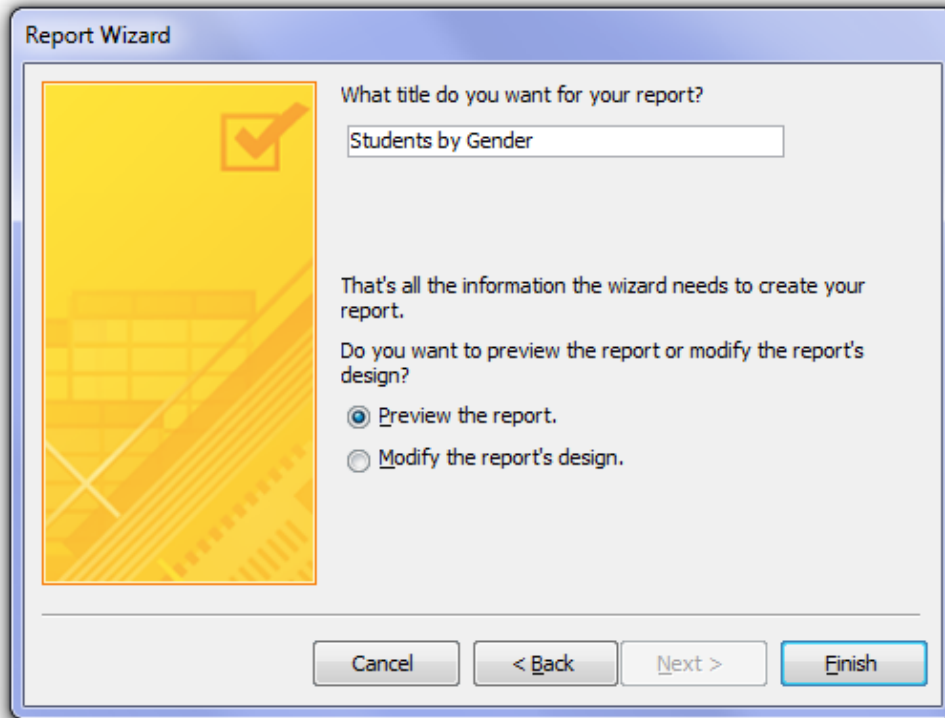
12. Enter *Students by Gender* for the report name and click **Finish**. The report name is also used for the main heading in the report.



13. Change to **Layout View**.

A **Report Layout Tools** group of tabs will be added to the **Ribbon**, with the **Design** tab selected.



14. Click one of the birth dates in the *Date of Birth* field. All the dates of birth will be selected.
15. Hold down the **[Shift]** key and click the Date of Birth heading so that will be selected also.
16. Drag the Dates of Birth to the left slightly so that the fields are more evenly spaced.

| First Name | Date of Birth | Mark |
|------------|---------------|------|
| Claire     | 01-11-95      | 58   |
| Laura      | 09-07-94      | 48   |
| Jemma      | 30-05-95      | 91   |
| Larissa    | 12-08-95      | 83   |
| Louise     | 18-10-95      | 72   |



17. Change to **Design View**

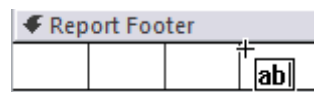We will use the Design View to add an average for the Marks field.

18. Move your mouse to the bottom edge of **Report Footer**.

19. Drag downward until you have an area large enough to add a text box.
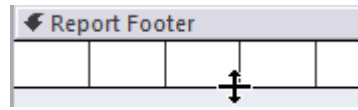
20. Find the **Controls** group in the **Ribbon** (in the **Design** Tab).

21. Click the **Text Box** icon.

22. Click in the **Report Footer** to place a **Textbox**.

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.

23. Edit the Label and Textbox in the Report Footer and move/resize them to the right side so that they appear as follows.
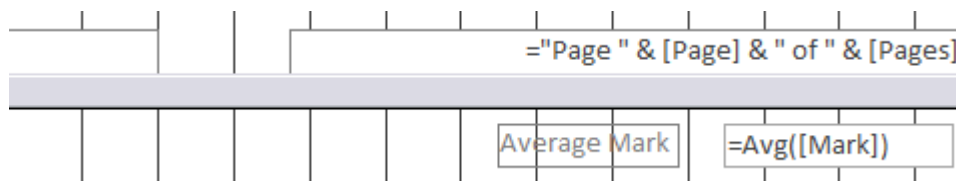
The formula in the text box is much like a formula in Excel. It will average whatever is referred to inside the brackets. Since we are referring to a Field, it must be surrounded by square brackets. Using both types of brackets may be a little confusing but it is necessary.

**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.
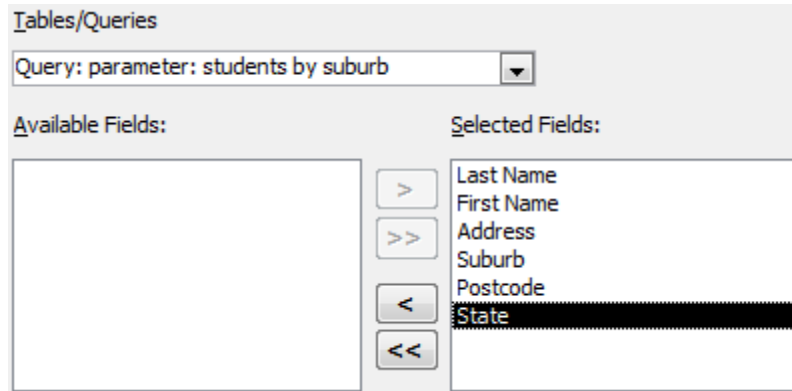
24. Switch back to **Print Preview** to view the average.

25. Close and save the report.

## Exercise 7.          Creating a Report from a Query

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



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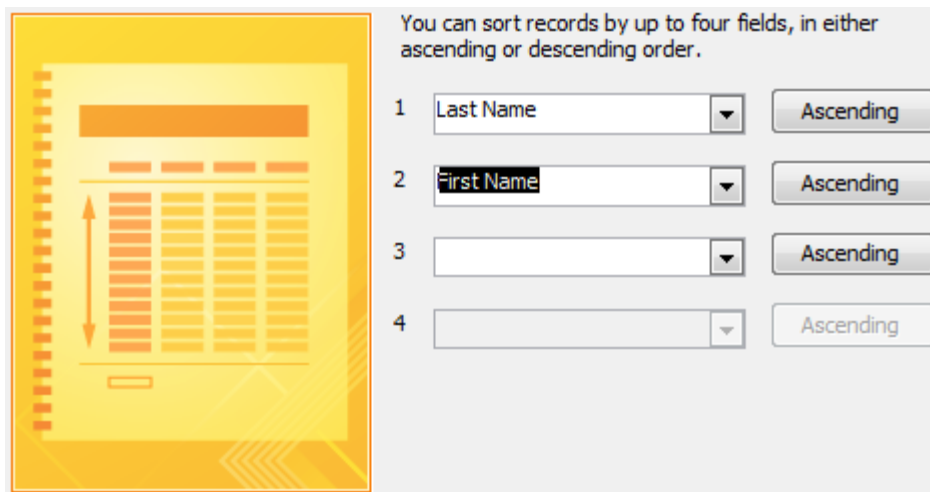


6. Choose to sort by *Last name* and *First name* as shown and click **Next**.
7. Leave the report layout as **Tabular** and click **Next**.
8. For the name of the report, enter *Students by Suburb* and click **Finish**.

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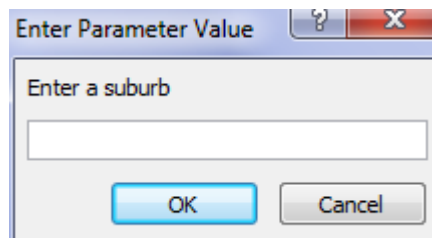


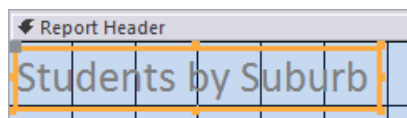9. Enter *Morley* as the suburb and click **OK** to see the report.

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**.
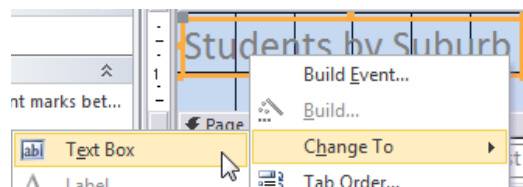


When the label changes to a textbox, its contents will change to *Unbound*, which just means that we haven't specified what will appear in the textbox yet.

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)