Database Applications – Microsoft Access

Lesson 3
Creating and Modifying Forms and Reports

Updated 09/13 35 slides in presentation

Lesson 3 – Tutorial 4

For Lesson 3, you will work through Tutorial 4 in your textbook.

The tutorial may expose you to more information than is identified in the course competencies.

This presentation focuses on the skills necessary to achieve the course competencies as outlined in your syllabus.

Foundation

In previous lessons you have created tables and entered records into a table. While tables are the foundation of the database, it is often easier to enter data in forms. Data can be viewed in tables, but reports provide more attractive output options. In this lesson, you will learn

- How to create a form with the Form Wizard
- How to modify forms for a more efficient layout of data
- How to navigate forms and find data in forms
- How to print selected form records
- How to create a report with the Report Wizard
- How to modify reports
- How to preview and print reports

Forms

Forms are used to view and manage data in a user-friendly layout.

User Interface

When properly designed, forms provide an attractive, easy-to-use interface for users to enter data. Properly designed forms include effective layouts (often matching paper forms), descriptive labels, and even instructions for entering data.

Creating Forms

Forms can be created several ways:

- Using the AutoForm (the quickest way)
- Using the Form Wizard
- In Design View
Form Wizard

The **Form Wizard** is a quick and easy way to design a form. The Form Wizard takes you through several steps that allow you to select the fields to be included in the form and select the layout of fields on the form. The Form Wizard gives the designer a bit more control over form design than the AutoForm.

To create a form using the Form Wizard:
- Select the table on which to base the form from the Objects Pane.
- Click the Create tab.
- In the Forms Group, click the Form Wizard button.
- Add the desired fields and answer the prompts that follow.

Forms with Subforms

When you create forms based on two tables, you create a **main form** and **subform**. Forms with subforms must be based on tables that are related through a common field.

Forms with subforms are often based on tables with a one-to-many relationship where the main form is the primary or “one” table and the subform is the related or “many” table.

Use the Form Wizard to create a form with a subform. Select the fields from the primary table first, then identify the fields from the related table.

Modifying Forms

Once a form has been created with the Form Wizard, the design of the form can be modified in either Design View or Layout View. In this lesson, forms will be modified in Layout View. **Layout View** allows the designer to make certain design changes to the form while viewing the form with data as it will look to the user.

Using the Form Wizard

From the Form Wizard, click the arrow buttons to add or remove fields from your form. The order in which you select fields is the order in which they will display in the completed form.

Modifying Forms

**Control**—any item on a form (or report)

In layout view, form controls can be moved, sized, deleted, and formatted with various attributes such as font size, style, and color. Controls such as pictures and lines that can enhance a form can also be added in Layout view.
Modifying Forms-Themes
An easy way to format your form with colors, fonts, and other attributes is to apply a Theme to the Form. Applying the same theme to all objects in a database is an easy and effective way to create uniformity of design in the database.

- To apply a theme to a form, open the form and select Layout View.
- Click the Themes button from the Design tab to display the Themes gallery.
- As you mouse over each theme, the form will display as it would look if you selected that theme.

Modifying Forms-Formatting
In Layout View, use the tools on the Format tab to apply custom design changes to a form.

Formatting includes:
- Bold
- Italics
- Underline
- Alignment (left, center, right)
- Font style and size
- Font Color

Modifying Forms-Sizing Fields
Fields can be moved and sized in Layout View.

- Click a field to select it, then drag the field to the desired location.
- To size a field, click the field and drag the border to adjust the size.

Modifying Forms-Changing Labels
Labels can be changed in Layout View.

Assume you want to change the label below to read: Company Name.

- Click inside the label box and place your cursor after the “o”.
- Type your changes and press Enter.

Modifying Forms-Adjusting Labels
Assume now that you want this label to take up less horizontal space. You can accomplish this by placing Company on one line and Name below it.

- Click inside the label box and place your cursor after ‘Company’.
- Press Shift+Enter.
- Reduce the size of the label.

NOTE: This information is not covered in Tutorial 4.

Take a Break
If you need to take a break, this is a good breaking point. When you return, start with slide #18.
Maintaining Data

Maintaining data refers to:
- Adding records
- Deleting records
- Updating records

While records can be maintained in tables, forms are often used to work more easily with selected records.

The form must be in Form View in order to maintain the data. Use the Views button to toggle between Form View and Layout View.

Deleting Records - Warning

Once a record is deleted, it cannot be restored with the Undo button.

Navigating in a Form - Commonly Used Keyboard Keys

- Use the up and down arrows to move back a field (up) or forward a field (down).
- Use the left and right arrows to move back a field (left) or forward a field (right).
- Use Ctrl + Home to move to the first form record.
- Use Ctrl + End to move to the last form record.

Navigation

In order to maintain your database, you must be able to locate records. You can do this by using the navigation keys until you see the record you're looking for or by using the Find function.

- Navigation refers to methods of moving around in an object.
- Several different methods for navigating Access objects are available.

Form Navigation Buttons

- Go to First Record
- Go to Previous Record
- Go to Next Record
- Go to Last Record
- New Record

Forms with Subforms

Forms with subforms will have two sets of navigation buttons:
- One set of navigation buttons for the main form
- One set of navigation buttons for the subform
Finding Data in Forms

Use the **Find** tool on the Home tab to locate data in forms. Data searches can be performed on the entire database or on a single field. If you know the field where the data you want is stored, you should limit your search to that field to reduce the time necessary for the search.

Finding Data in Forms - Example

In the Contract form, you want to locate Customer 12005. By placing your cursor in the Customer ID field, Access will automatically limit your search to this field only.

Execute the search by clicking the Find button on the Home tab and entering the desired data in the Find What text box.

Wildcards

If you don’t know the exact item you are searching for, you can use a wildcard in the Find What text box. **Wildcards** are characters used to substitute for characters within criteria.

- * (asterisk) - used to substitute for any number of characters
- # (pound sign) - used to substitute for one numerical character
- ? (question mark) - used to substitute for one alphabetic character

Take a Break

If you need to take a break, this is a good breaking point. When you return, start with slide #28.

Reports

**Reports** are used to display and print specified data in a formal, user-defined layout. Just like forms, reports can be created several ways:

- Using the AutoReport (the quickest way)
- Using the Report Wizard
- In Design View

In this lesson, you will create reports with the Report Wizard and modify the reports in Layout View using the same skills you used to create and modify forms.

Formatting Reports

- Reports are formatted using the same techniques as forms.
- Keep design consistency in your database by applying the same theme to all Access objects. Recall that themes are applied under the **Design** tab.
- Apply attributes such as bold, italics, underline, alignment, font style and size, and font color from the **Format** tab.
- Use Layout View to make design modifications while viewing the report as it will appear to the user.
Conditional Formatting

Conditional Formatting – special formatting applied to fields that meet specified criteria.
To apply conditional formatting:
- Change to Layout View
- Select the field to which the formatting is to be applied by clicking the field
- Click the Conditional Formatting button in the Font group on the Format tab.

Printing

You can create hard copies of data in forms or reports by printing the object.
Forms
When printing a form, you can choose to print all records, the selected record (the currently displayed record), or several specified records.
Reports
When printing a report, you can choose to print the entire report or a specified range of pages.

Printing

To print only one record from a form, follow these steps:
- Display the record you wish to print
- Go to Backstage View and click the Print tab
- Click the Print icon
- On the Print dialog box, choose the option button for Selected Record(s).

End of Lesson

- Work through Tutorial 4 on pages AC179 – AC 221 in your Access textbook.
- Complete the assigned exercises and submit through NS Online.