MS Access Lab 4

Topic: Introduction to Forms and Reports

Summary

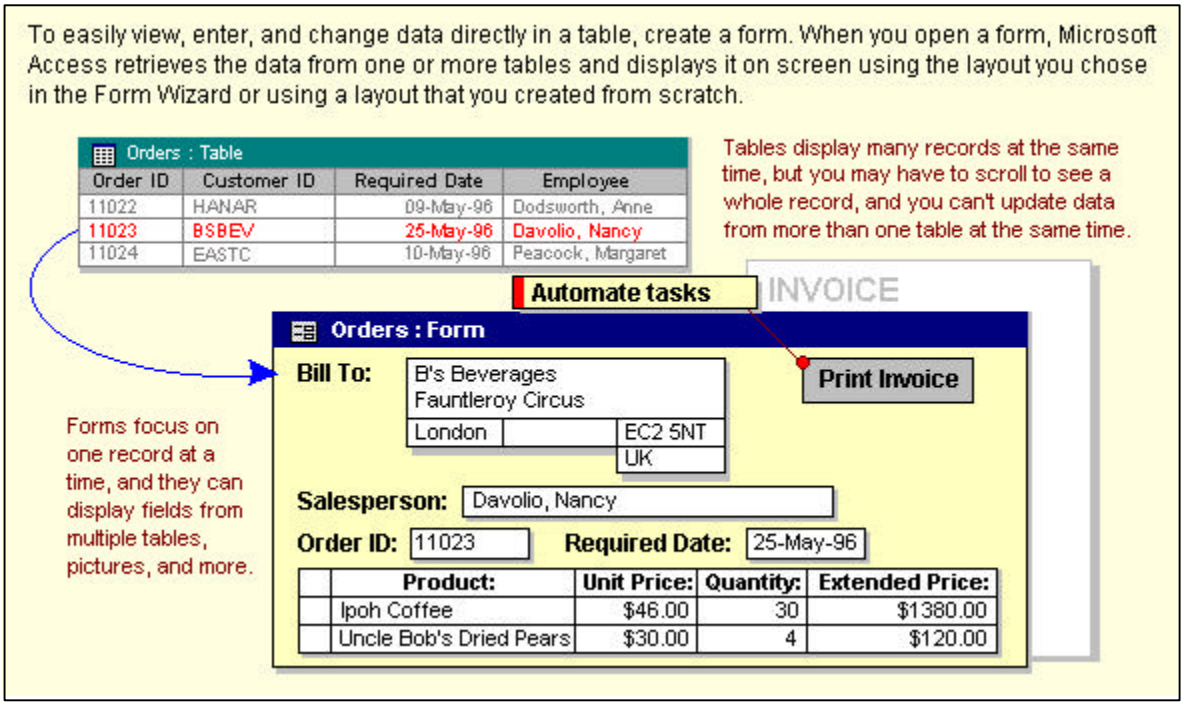
1. **Forms:**
   - Introduction
   - Kinds and Purposes
   - Information in a Form
   - Link between a form and its record
   - Creating a form
   - Example

2. **Reports:**
   - Introduction
   - Information in a report
   - Link between a report and its record
   - Creating a report
   - Example

Northwind.mdb

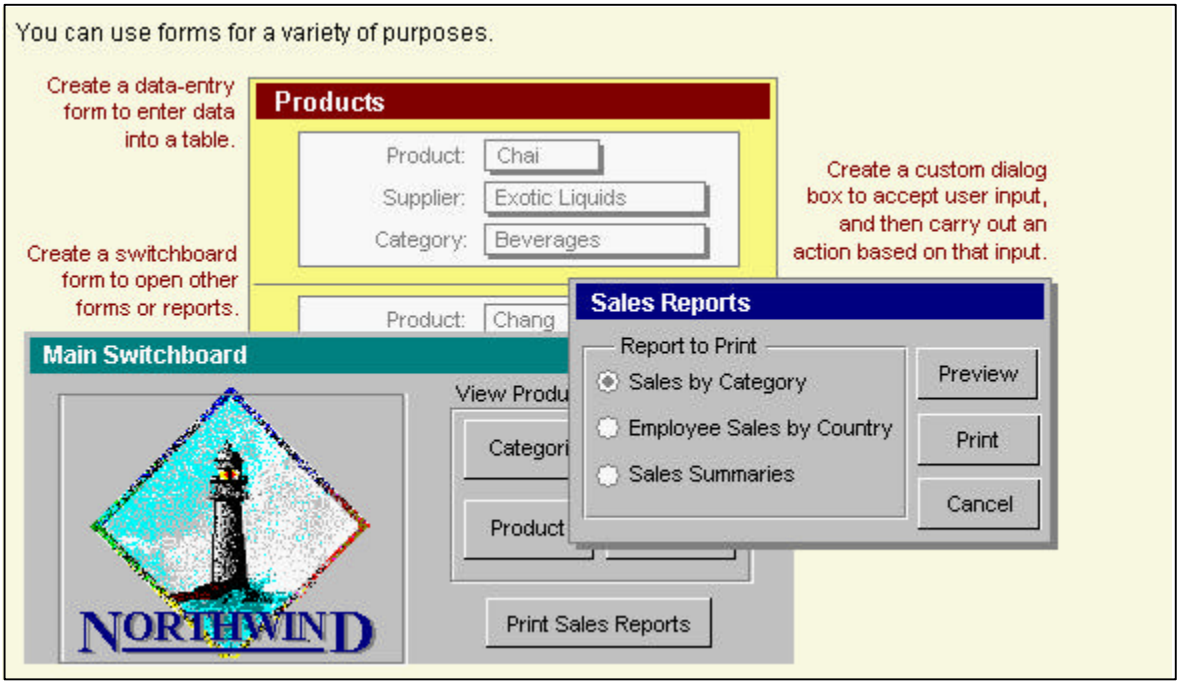
In this session we will again use northwind.mdb. Open Northwind.mdb file in "C:/Program Files/Microsoft Office/Office/Samples" folder

Form: Introduction

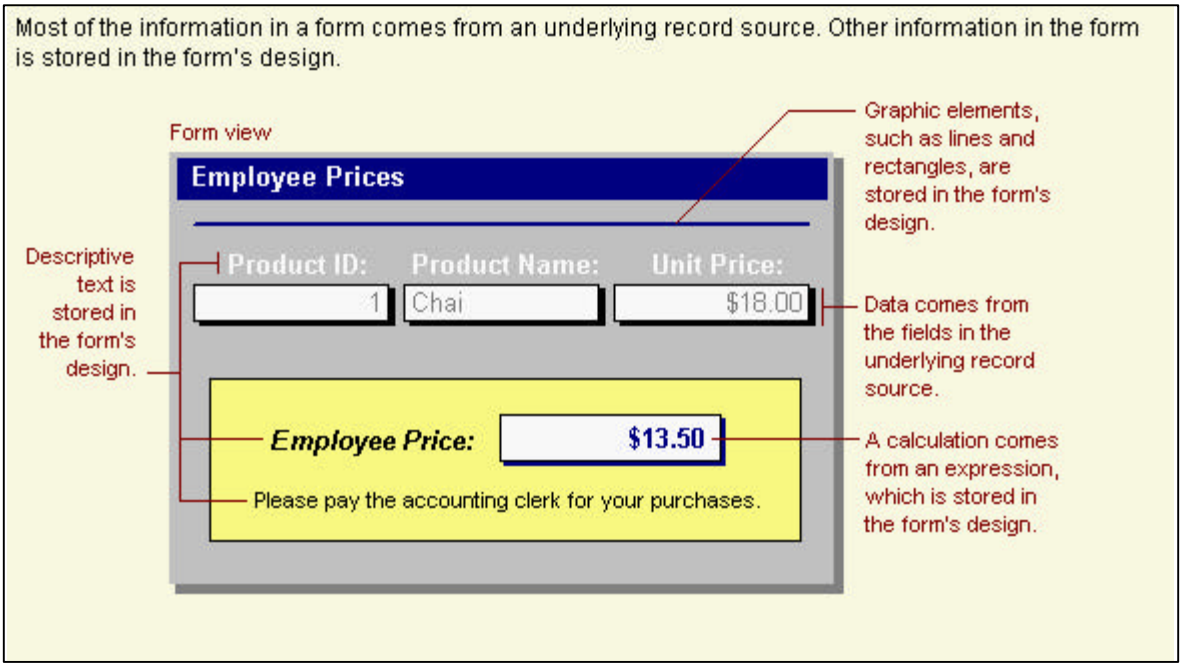


Form: Kinds and Purposes

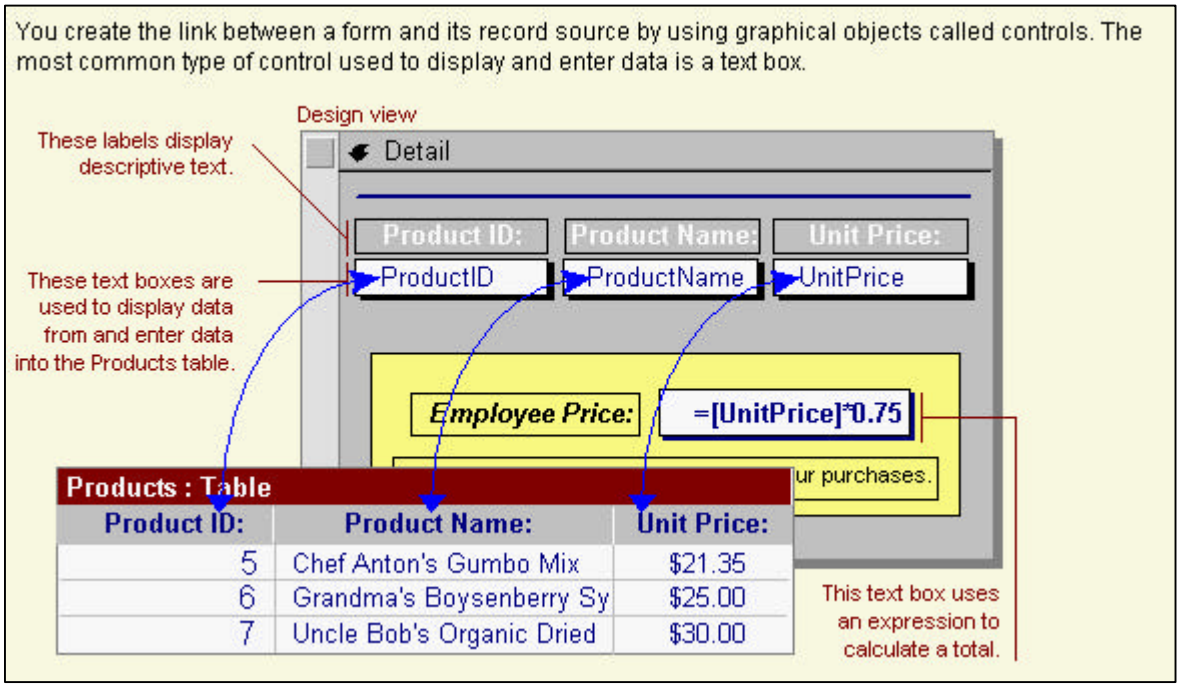
1. **Data entry form**: To enter data into a table
2. **Custom dialog box**: To accept user input and then carry out an action based on that input
3. **Switchboard**: To open other forms or reports



Form: Information in a Form



Form: Link between a form and its record



Creating a form

You can create a form on your own or you can have Microsoft Access create your form for you using a Form Wizard. A Form Wizard speeds up the process of creating a form because it does all the basic work for you. When you use a Form Wizard, Microsoft Access prompts you for information and creates a form based on your answers. Even if you've created many forms, you may want to use a Form Wizard to quickly lay out all the controls on your form. Then you can switch to Design view to customize your form.

Creating a form with a wizard

Option 1:

1. Choose **Objects → Forms → Create form by using wizard** (Fig. 1)
2. Click on the name of the **Table** or **Query** that includes the data you want to base your form on (in the left column)
3. Then choose the Layout that you want your Forms to follow (experiment with **Columnar**, **Tabular, Datasheet** and **Justified** to find the layout that you like best)
4. Next, choose the Style that you would like for your Form.
5. Give a Title to your Form. You can now either go and open your form or either modify the design in **Design view**.
6. Click on **Finish.**

Option 2:

1. Choose **Insert → Form**
2. A **New Form** dialog box will pop up(Fig 2.) and then choose **Form Wizard**
3. Click on the name of the **Table** or **Query** that includes the data you want to base your form on (click on the list at the bottom of the dialog box)
4. Follow steps 4-6 in Option 1

Note: 1. If you clicked AutoForm: Columnar, AutoForm: Tabular, or AutoForm: Datasheet, Microsoft Access automatically creates your form.
2. If the resulting form doesn't look the way you want, you can ALWAYS change it in **Design view**

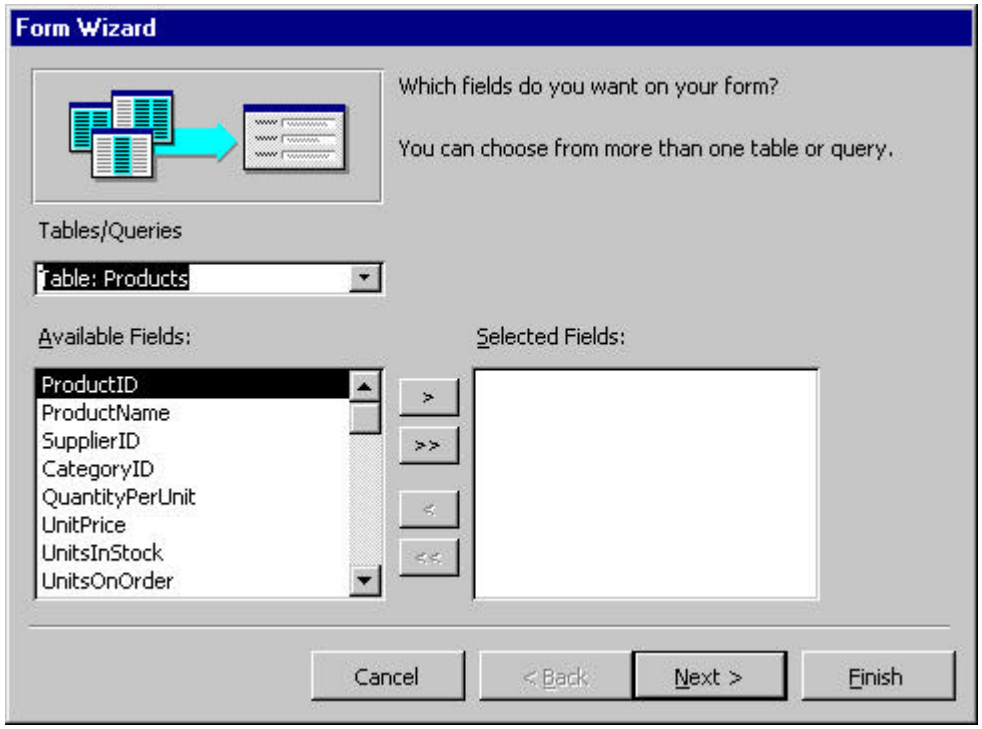


Fig. 1: Window in Form Wizard (Option 1)

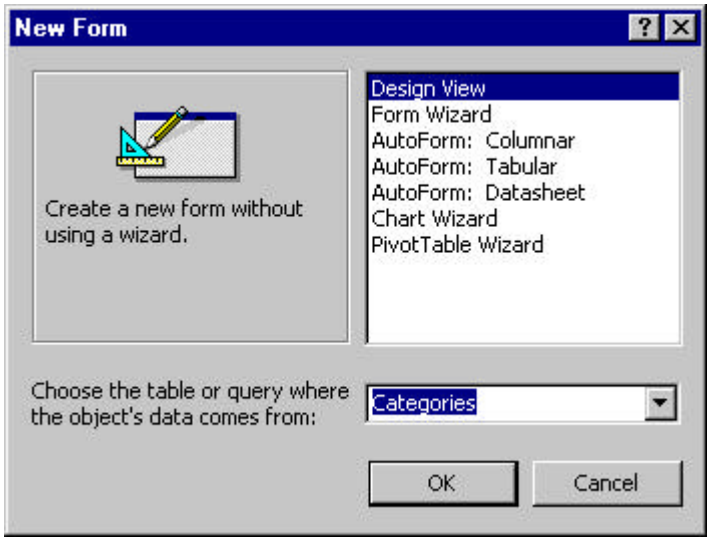
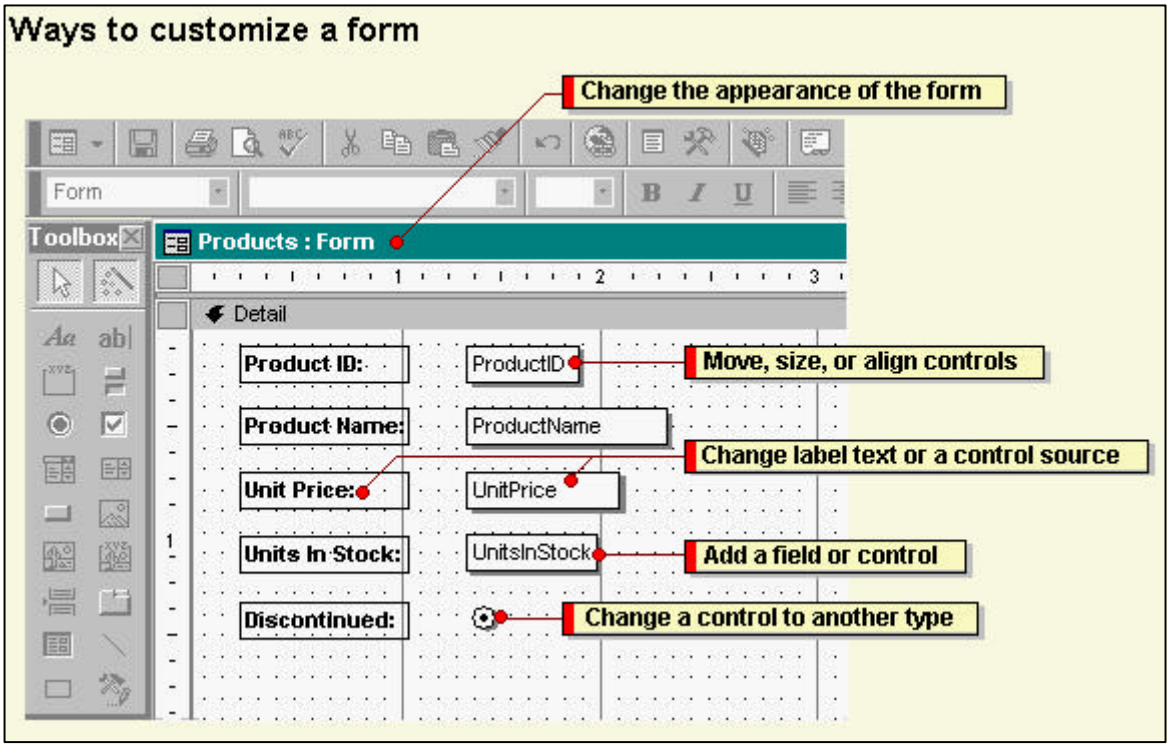


Fig. 2: New Form Dialog Box (Option 2)



Note If you click one of the AutoForm options, Microsoft Access uses the autoformat you last specified, either in the Form Wizard or using the AutoFormat command on the Format menu in Design view.

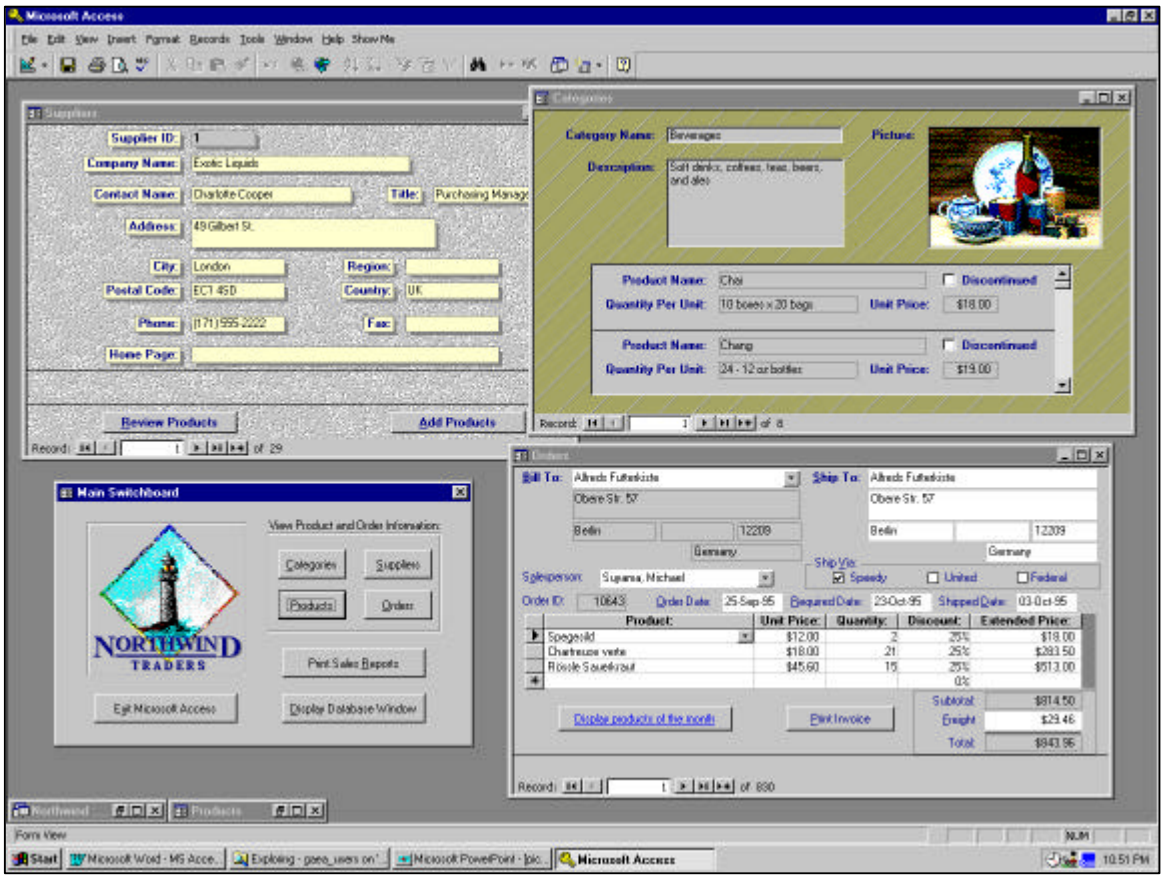
Creating a form without a wizard

1. Go to **Insert → Form → Design View** (Fig.2)
2. Click the name of the table or query that includes the data you want to base your form on. If the form won't contain data (for example, if you want to create a form to use as a switchboard to open other forms or reports, or if you want to create a custom dialog box), don't select anything from this list.

   Note If you want to create a form that uses data from more than one table, base your form on a query that includes the tables you want to include.

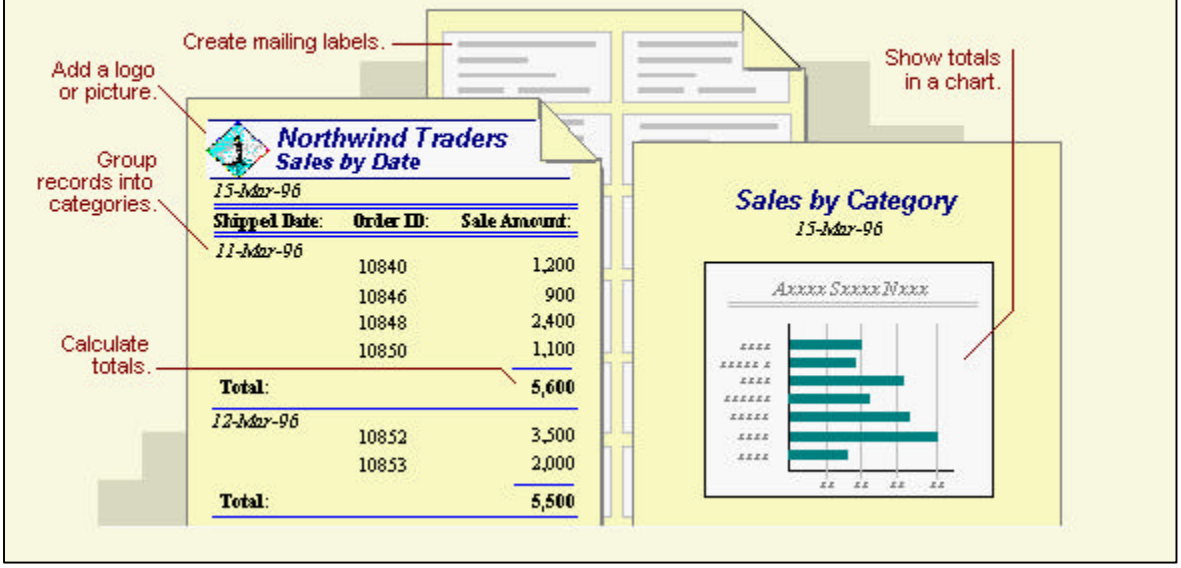
3. Click OK.
4. With this option you can TOTALLY customize and control everything you would like to have and see in your forms.

Examples: Various kinds of Forms in Northwind.mdb



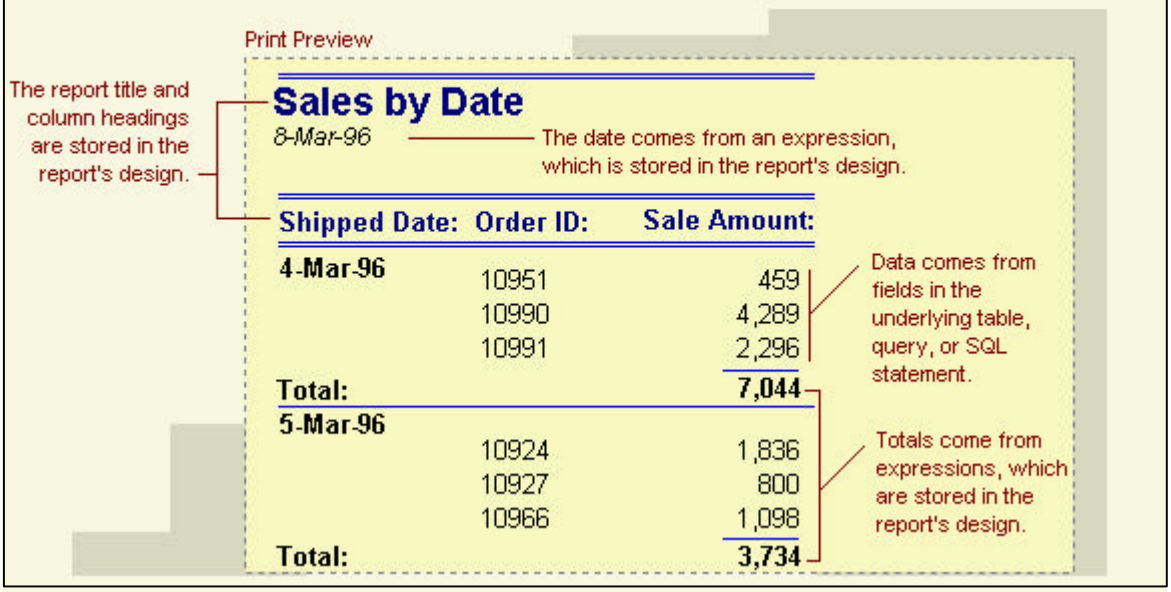
Report:Introduction

A report is an effective way to present your data in a printed format. Because you have control over the size and appearance of everything on a report, you can display the information the way you want to see it.

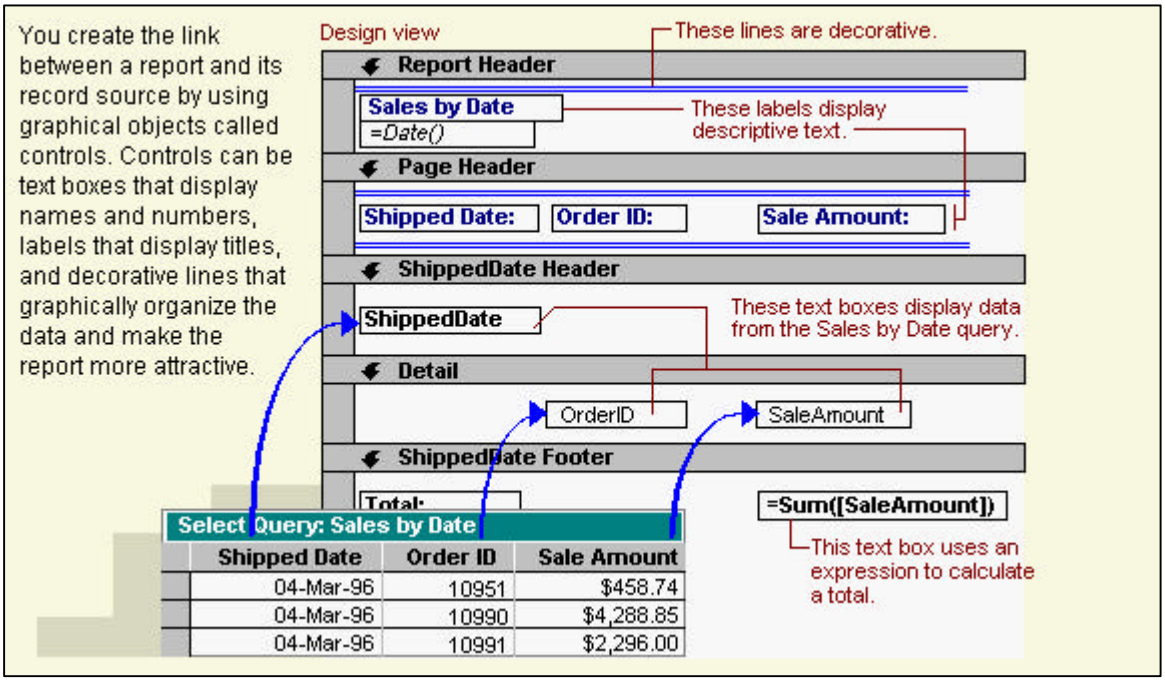


Report: Information in a report

Most of the information in a report comes from an underlying table, query, or SQL statement, which is the source of the report's data. Other information in the report is stored in the report's design.



Report: Link between a report and its record source



Creating a report

You can create a report on your own or you can have Microsoft Access create a report for you using a Report Wizard. A Report Wizard speeds up the process of creating a report because it does all the basic work for you. When you use a Report Wizard, it prompts you for information and creates a report based on your answers. Even if you've created many reports, you may want to use a Report Wizard to quickly lay out your report. Then you can switch to Design view to customize it.

Creating a report using AutoReport

AutoReport creates a report that displays **ALL** fields and records in the underlying table or query.

1. Go to **Insert → Report → AutoReport** (you can choose columnar or tabular) (Fig. 3)
   - AutoReport: Columnar. Each field appears on a separate line with a label to its left.
   - AutoReport: Tabular. The fields in each record appear on one line, and the labels print once at the top of each page.
2. Click the **Table** or **Query** that contains the data you want to base your report on.
3. Click OK.

Note: Microsoft Access applies the last autoformat you used to the report. If you haven't created a report with a wizard before or haven't used the AutoFormat command on the Format menu, it uses the Standard autoformat.

Create a report with a wizard

1. Go to **Insert → Report → Report Wizard** (or just click on **Objects → Form → Create Report by Using Wizard**)

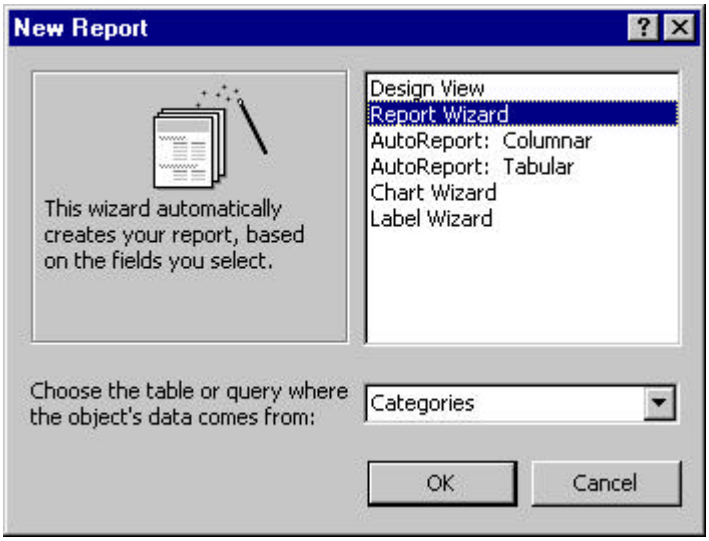
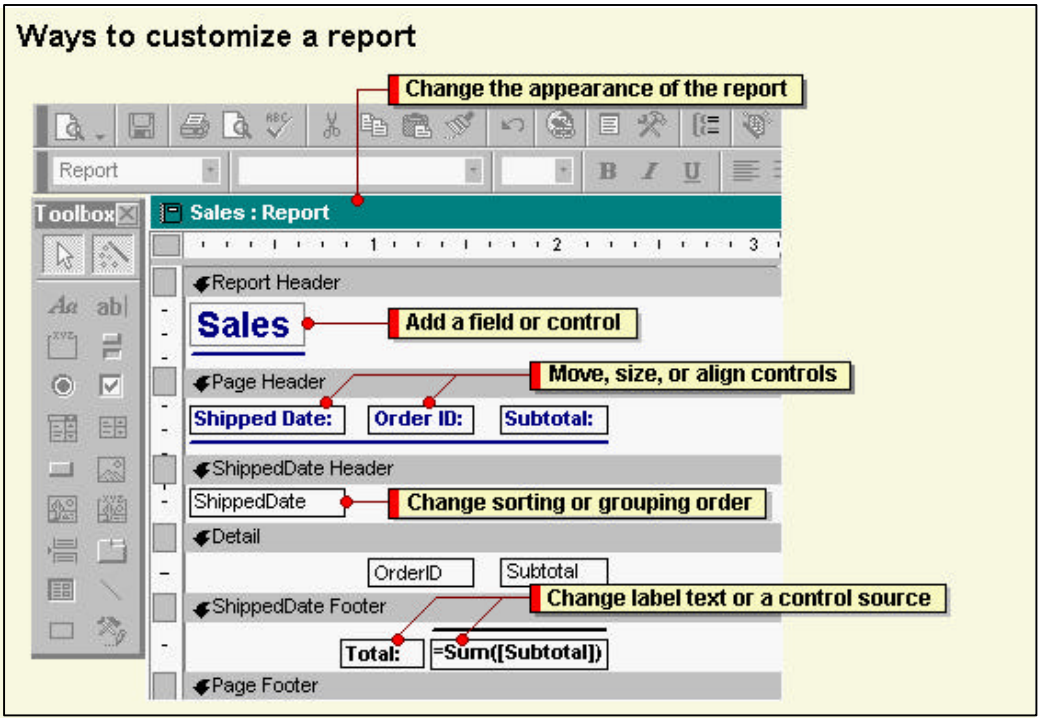


Fig. 3: New Report Dialog Box

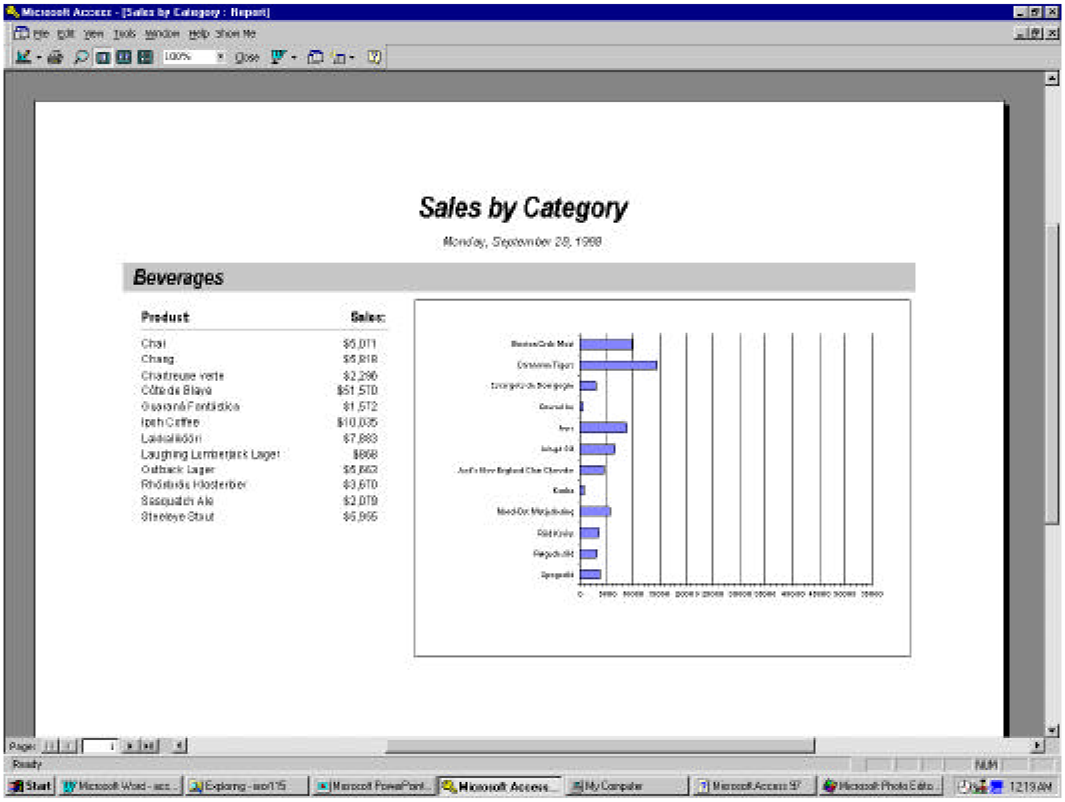
2. Click the table or query that contains the data you want to base your report on.

   Note Microsoft Access uses this table or query as the default record source for the report. However, you can change the record source in the wizard and select fields from other tables and queries.
3. Click OK.
4. Follow the instructions on the screen to format and output the report the way you want it

   Note: If the resulting report doesn't look the way you want, you can change it in **Design view**.



Example: Sales by Category Report in Northwind.mdb



You have just created your first form and report. Play around with the layout and design option until you find one that you like. Use your creativity !!

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