

Proicere, Inc.

MS Access: Forms and Reports

Lesson Notes

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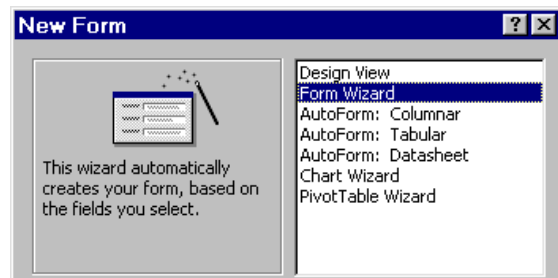
Forms

Forms allow a graphical interface for the user to enter and change data. A form can be attached to a table or a query. A form can be designed to automate some of the data entry and allow fields to be validated.

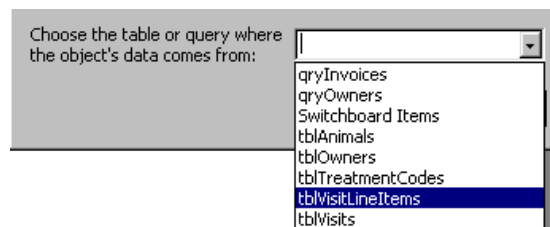


Creating a Form using the Wizard

On the Form tab click on the "New" button.

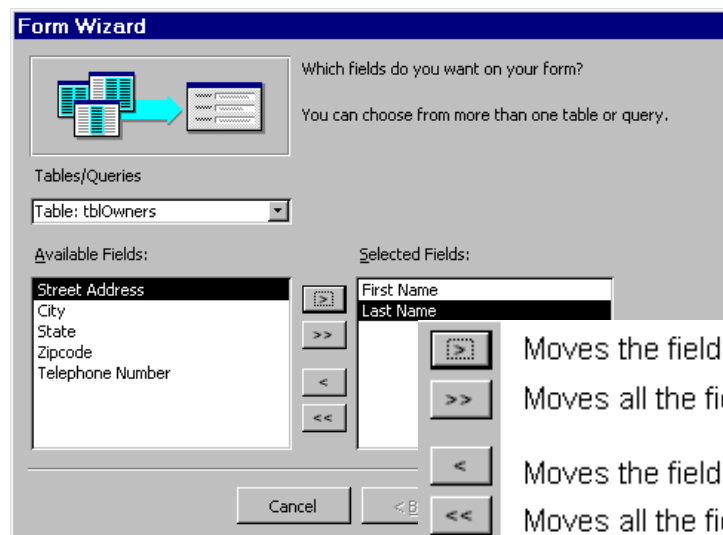


In the New Form dialog box, choose Form Wizard.



Choose the table or query to attach the form.

Choose the fields to be placed on the form. All fields do not need to be on each form.



Moves the field selected on the left to the list on the right.

Moves all the fields from the list on the left to the list on the right.

Moves the field selected on the right back to the list on the left.

Moves all the fields from the list on the right back to the list on the left.

After clicking the next button, a dialog box will display showing the choices of the initial layout of the form. Choose one that is closest to the desired look. The form can be changed in the design layout mode.

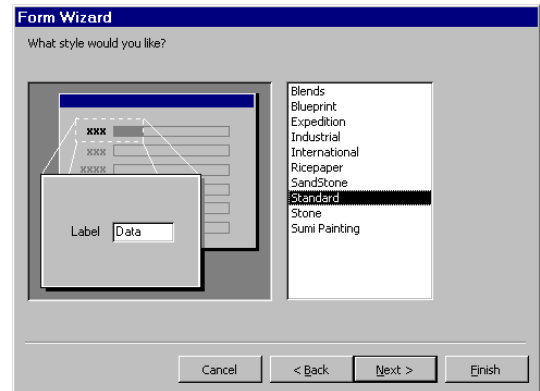
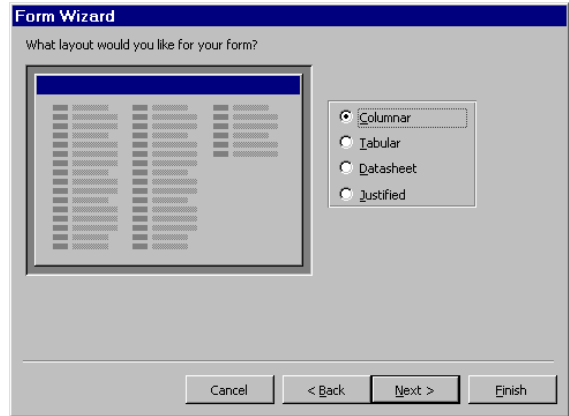
Columnar will show one record per screen.

Tabular will show several records per screen.

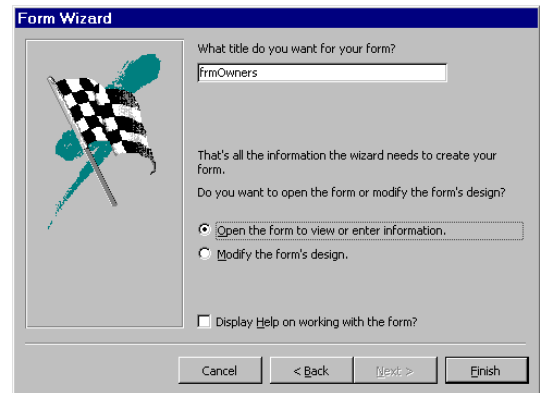
Datasheet looks like a table layout.

Justified looks similar to columnar, but the fields are fixed length. (this layout does not have as much flexibility as the others.)

The next dialog box displays the choice of formatting for the form.



In the next dialog box, choose a name for the form. The form name can be changed later if desired.



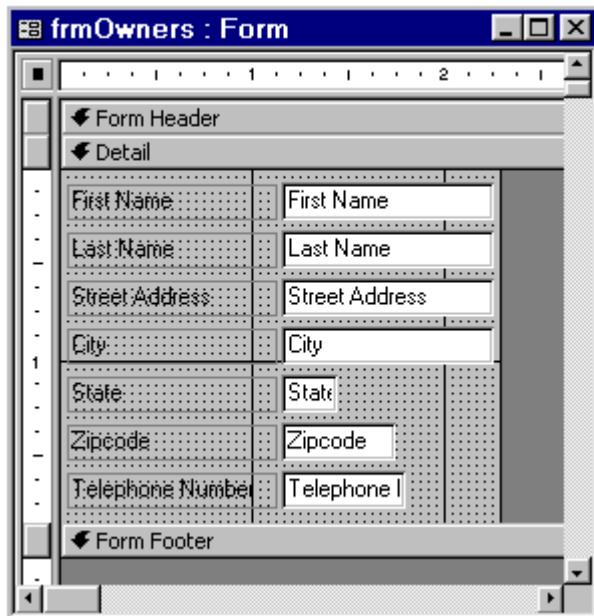
When the finish button is selected, the system will generate the form.

The form may be used as is, or modified.



Modify a Form

To modify the form, change to the design mode.



Controls

A form consists of controls. Anything that is placed on a form is a control.

Unbound Control

An unbound control is any static text (does not change) that is placed on a form. i.e. Labels, headings, etc.

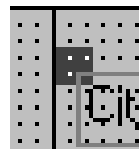
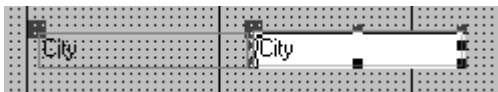
Bound Control

A control that pulls information from another source such as a field in a table or query.

Moving Controls

To move a control, click and drag the control. A hand will appear. If the hand shows five fingers, a bound control and its attached unbound control will move together.

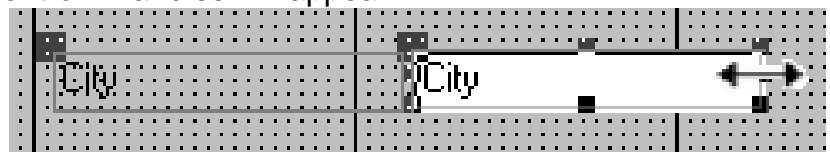
If the hand is pointing, it will only move the one control (either bound or unbound).



Resizing Controls

To resize the control, click on the control. Handles will appear.

Click on one of the handles and drag.



Formatting a Control

The text in labels can be changed. Do not change the name of fields in bound controls.

Any control can be formatted to change the font, order, and background of a control.

The formatting toolbar can be used to change the formatting of a control.



Note: The format of a control can not be changed unless the whole control is selected. The handles will display when the control is selected.



Format Painter

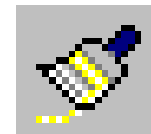
Use the Format Painter tool to copy the formatting of one control to another control.

Format Painter tool on the toolbar (looks like a paintbrush)

Click on desired control

Click on the Format Painter tool

Go to the destination control and click



Hint: double clicking on the Format Painter tool will allow the formatting to be copied to several controls.

Changing Tab Order

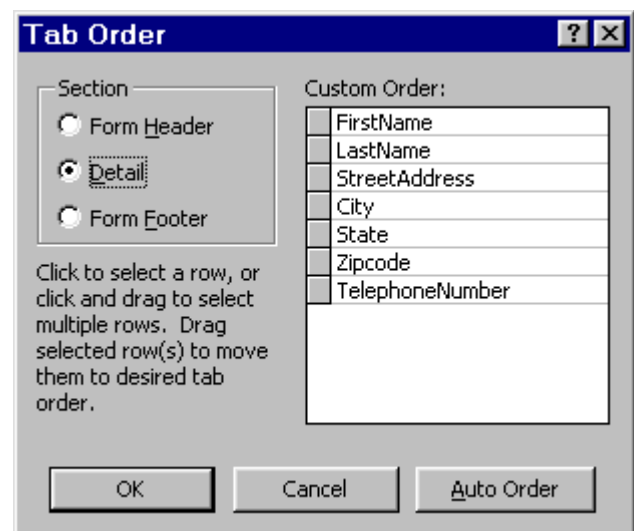
Moving controls does not change the tab order. To change the tab order, right click on the ruler. From the menu that appears, choose "tab order".

The dialog box that appears will allow the tab order of the controls to be re-ordered.

The "auto order" button will reorder the tabs for each control from left to right.

The tab order for each control can be moved individually.

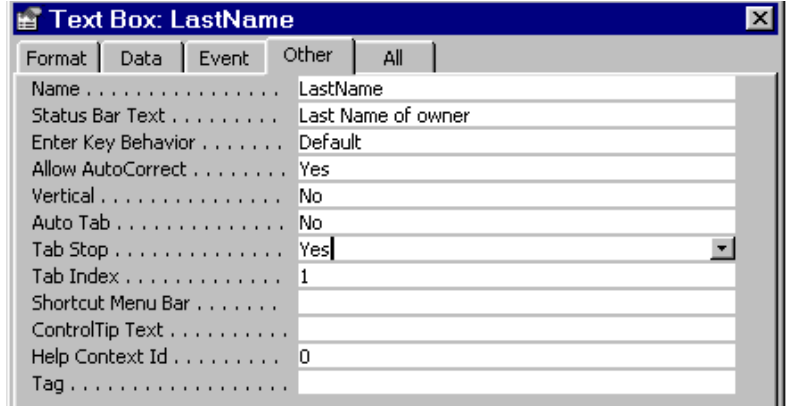
To change the tab order of a control, click on the gray square to the left of the control name.



Grab the dark gray square that appears and drag to desired position.

Remove from Tab Order

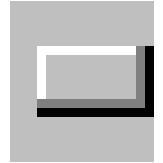
To remove a control from the tab order, in the design mode of the form, click on the control with the right mouse button. Select properties. On the “Other” tab, change the “Tab Stop” to “NO”.



Command Buttons

Command buttons can be added to forms to do commands such as “close a form”, “find a record”, “add a record”, etc.

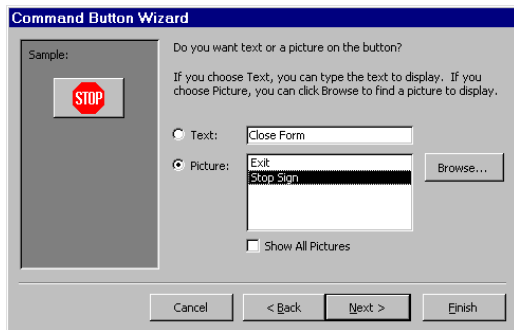
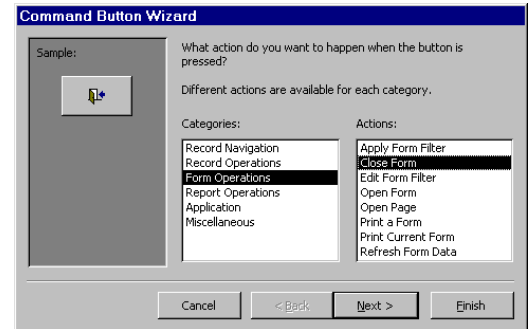
To add a button using the wizard, click on the “command button” tool on the toolbar.



Choose the location on the form to place the command button, and click the mouse.

A dialog box will appear.

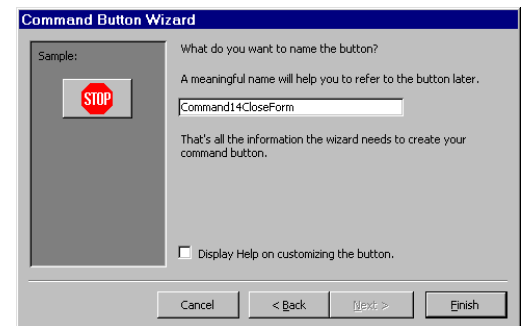
Select the category and the action for the command button, then select the “next” button.



In the dialog box that appears, choose a picture, or type in text for the button, then select the “next” button.

In the dialog box that appears, enter a name for the button.

Note: if the wizard does not start, be sure the wizard button is depressed, then start the procedure over.



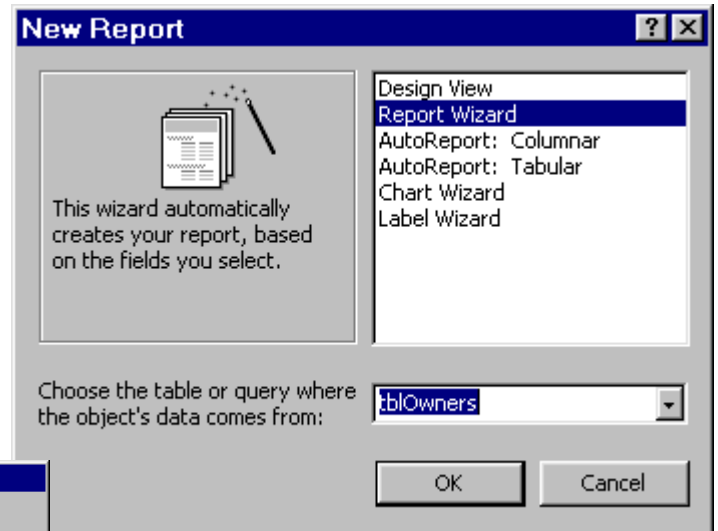
Reports

Reports allow the information to be displayed or printed in an organized manner.

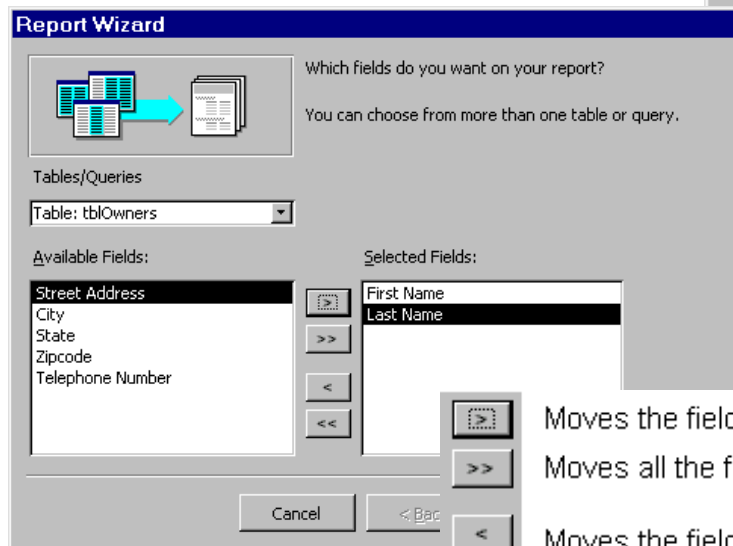
Creating a Report using the Wizard

On the Report tab, click on the “New” button.

In the New Report dialog box, choose Report Wizard.

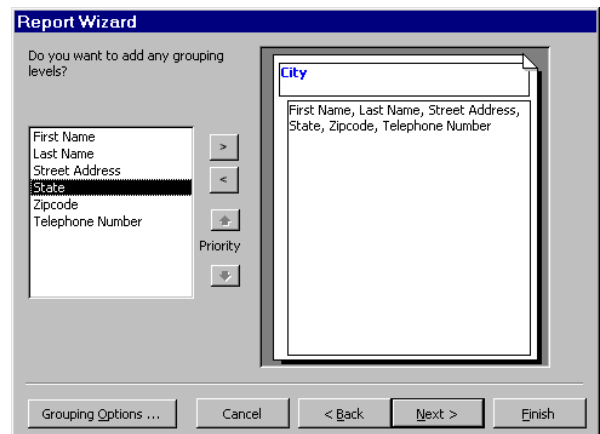


In the next dialog box, choose the fields to be placed on the report.

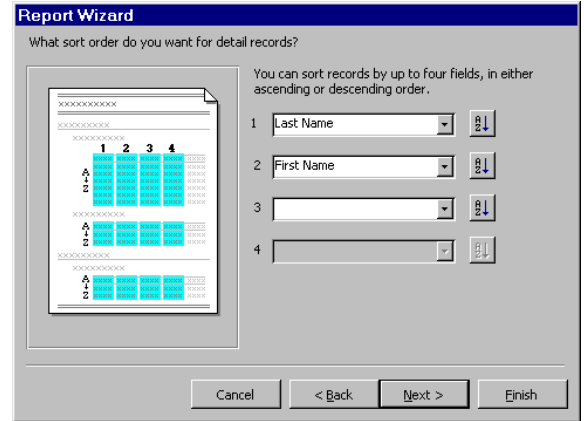


- Moves the field selected on the left to the list on the right.
- Moves all the fields from the list on the left to the list on the right.
- Moves the field selected on the right back to the list on the left.
- Moves all the fields from the list on the right back to the list on the left.

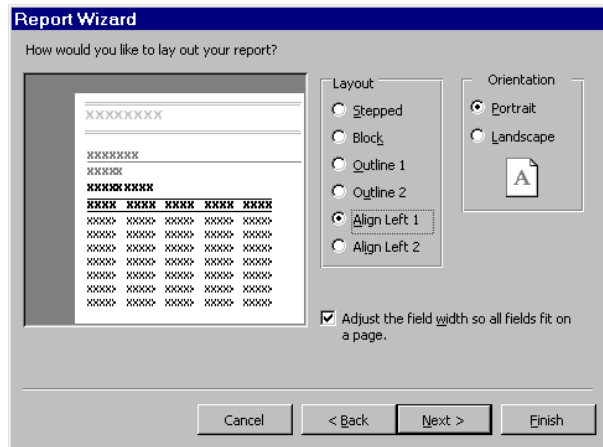
In the next dialog box, choose a grouping level if desired.



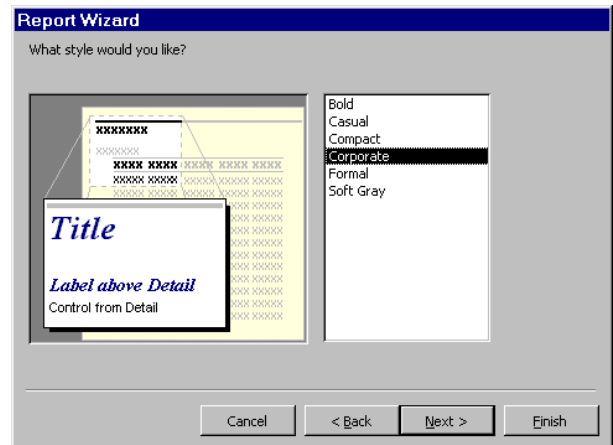
In the next dialog box, choose any sorting for this report.



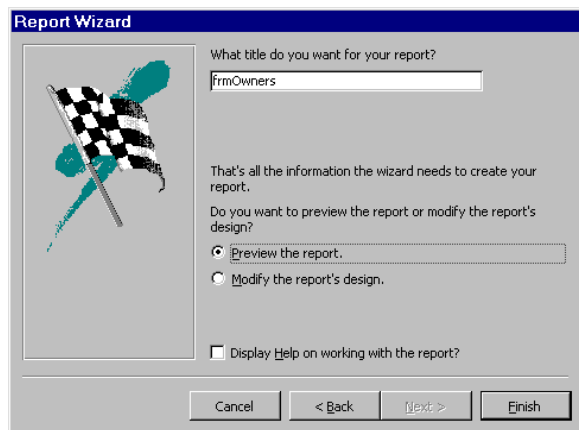
Choose the summary options button to have the report do basic calculations. (Note: this field only shows if there is a field on which a calculation can be done.)



In the next dialog box, choose the layout for this report.



Choose a style in the next dialog box.



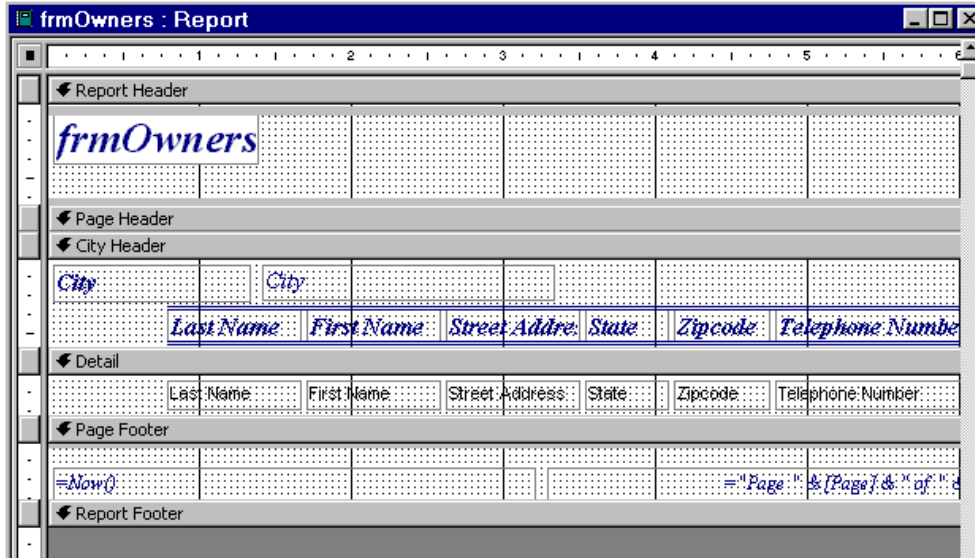
In the following dialog box key in the name of the report. This may be changed at a later date.



When the finished button is selected, the system will generate the report.

Modify a Report

The report may be modified in the design mode. The manipulation of controls in the report is the same as that of the forms.



Areas of a Report

Report Header – shows only on first page of report

Page Header – shows at the top of every page

Group Header – shows at the top of each new grouping

Group Footer – shows at the bottom of each group

Page Footer – shows at the bottom of every page

Report Footer – show only on the last page of report

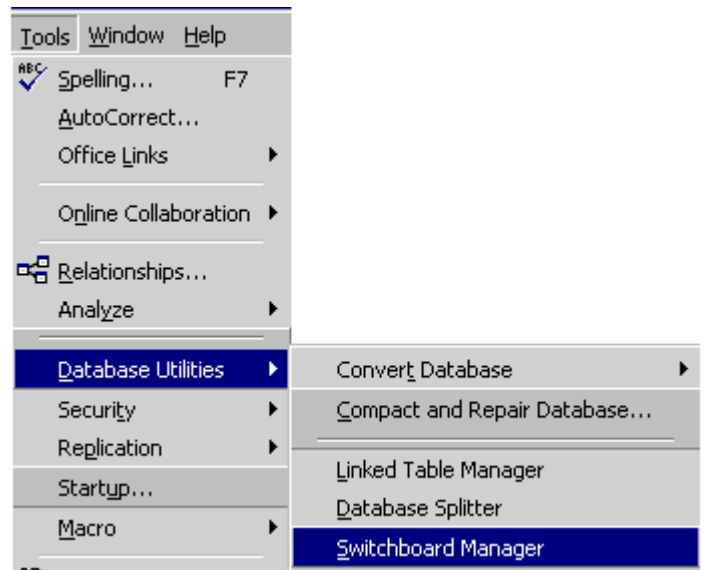
Menu (Switchboard)

A menu can be created using the switchboard.

From the Tools menu choose,

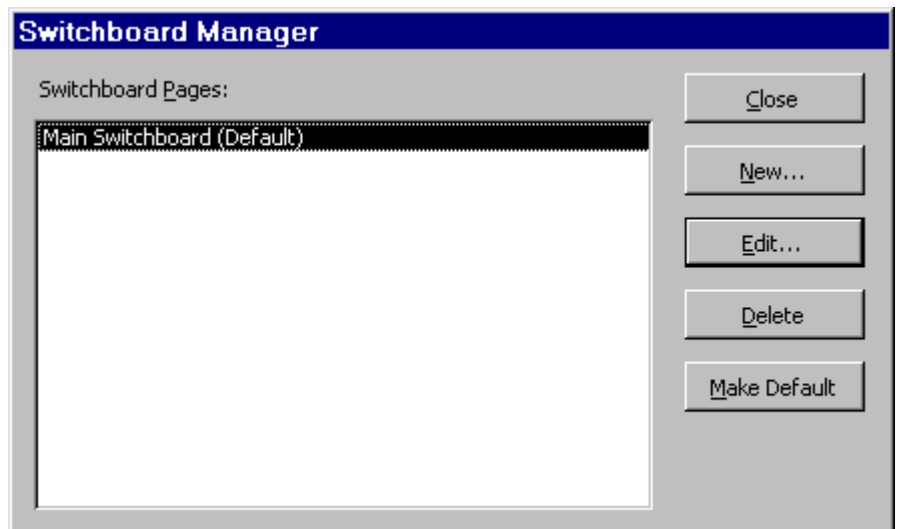
(MS Access 97) Add-ins, Switchboard Manager

(MS Access 2000) Database Utilities, Switchboard Manager



If this is the first switchboard for the database, a message will appear asking if one should be created.

The dialog box for the switchboard manager will appear.

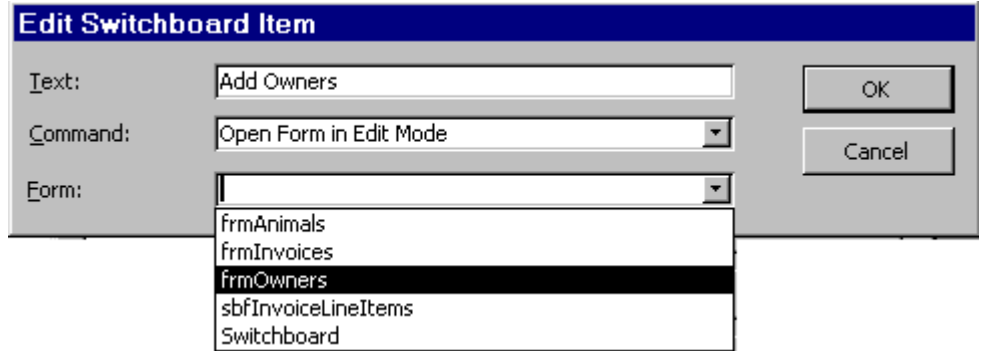


Choose edit to add items to the switchboard, then choose “new” to add the actual item to this list.

In the text box, enter the text to be displayed on the menu.

In the Command box, choose the appropriate action from the drop down menu.

Choose the form, report, switchboard, etc. to run.



Repeat the steps to add additional items to the menu.

When all items have been added to the list, choose the close button to close the edit screen. Then close the switchboard manager.

On the forms tab, open the switchboard to see the menu.

