Forms & Reports
Instructor: Aarthi Natarajan

Based on slides by
Robert Grauer, Keith Mast, Mary Anne Poatsy
Creating & Using Forms

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Objectives

Using the form tools:
• Creating and modifying a form
• Sorting records in a form
• Identifying form sections
• Revising forms using form views
• Identifying control types in forms
Form Basics

• Forms — database objects used to add data into a table

• Reasons to use forms rather than tables
  1. Less likely to edit the wrong record by mistake
  2. Can show data from more than one table simultaneously
  3. Can create Access forms to match paper forms
Creating Forms Using the Form Tools

• 16 tools for creating forms
• Forms group
• Navigation forms (6)
• More Forms (6)
Identify a Record Source

• Record source — the table or query that supplies the records for a form or report
  – A table gives all its fields; a query is more flexible
  – When a table or query is selected, the Form tool is no longer greyed out

• Sketch the form first
• Then use the Form Tool
The Form Tool

• This is a **Stacked** Form (aka Columnar)
• Use Layout view to modify design of form
Work with a Subform

• When using the Form tool to create a form:
  – Access analyzes the table relationships in the database, and may …
  – Automatically add a subform to your form.

• Subforms — display records with foreign key values that match the primary key value in the main form.
  – Subforms can be deleted.
Create a Split form

- Split forms — combine two views of the same record source
  - One section is displayed in a stacked layout
  - One section is displayed in a tabular layout
  - Use More Forms > Split Form

Top section shows one employee in Form view

Use the form splitter bar to resize each section

Bottom section shows multiple employees in Datasheet view
Create a Multiple Items Form

- Multiple items form — displays multiple records in a tabular layout similar to a table’s Datasheet view.

Use More Forms > Multiple Items

Layout resembles a table’s Datasheet view

Employee records are displayed in tabular format
Create a Datasheet Form

- **Datasheet form**
  looks like the datasheet view of the table
  use More Forms > Datasheet
- **Visual Basic for Applications (VBA)**
  can be used to enforce more complex data checking rules
Forms Demo 1

- Open **a04h1coffee**, save with another name

**Use the Form tool**

- Click **Customers** table, Create tab, Forms / Form
- Three new Form Design Tools tabs appear: Design, Arrange, & Format. Unlike other Microsoft applications, where text formatting lives in the Home tab, text formatting for forms is under this Format tab in Access.

- Click C0001 box. Resize to half current width. All text boxes resize.
- Click Arrange tab > Rows & Columns > Select Layout.
- Click Arrange tab > Position > Control Padding > Narrow
- Save: "Customer Information", OK.
- Home > Views > View (Form view). Advance to Lugo Computer…
- Double-click Customers table in Navigation pane. Check Lugo record
- Click Customer Information tab, change Derek to your name, advance to next record. Check Customer table record 6. Back to Customer Information, change back to Derek Anderson.
- Switch to Layout view, change title to Customer Information, Save.
Forms Demo 2

Make a Split Form

- Click **Customers** table, Create tab, More Forms > Split Form
- Switch to Form view, click Lugo Computer Sales in bottom half.
- Change email address to your name in upper part. Move on & back.
- Click anywhere in Coulter Office Supplies (bottom). Add "xyz" to Contact, email, and Address1 in top half. Click anywhere in bottom half to save changes. Remove xyzs.
- Switch to Layout view. Change title to Customers – Split View, Save form as Customers – Split View, OK.
- Adjust splitter bar.
- Close the form and save the changes.
Forms Demo 3

Make a Multiple Items Form
• Click Products table, then Create tab, More Forms / Multiple Items.
• Click cell with P0001. Reduce depth by about 50%. All rows changed.
• Change title to Products – Multiple Items.
• Click Themes > right-click Technic > Apply theme to this object only.
• Close and save form as Products – Multiple Items.

Make a Datasheet form, Delete fields from form
• Click Products table, then Create tab, More Forms / Datasheet.
• Click an empty area, click Cost box, Delete, click blank space, Delete.
• Repeat for MarkupPercent. Click Refrigeration Needed, change to Refrig?
• Double-click Products table, compare. Close table and form.
Forms Demo 4

Add a field to (a table and) a form

- Right-click Customers table, then click Design view.
- Click Address1 field, then click Tools group > Insert Rows
- Type Website into Field Name box, choose Hyperlink as Data Type.
- Close and Save. Right-click Customer Information form, Layout view.
- Click Add Existing Fields, drag Website field to form above Address1.
- Switch to Form view, tab to Website field, type URL, close and save.

Change sorting in a form

- Open Customer Information form, click Next record arrow a few times. Customers are in Customer ID order.
- Click First record arrow. Click Customer Name field, then Ascending in Home> Sort & Filter group. Check order using Next record. Close.
- File > Compact & Repair Database.
Create Forms Using the Other Form Tools

- Form Design tool
- Blank Form tool
- Navigation option
- PivotTables and PivotCharts converted to Forms
- Modal Dialog Form tool
Modifying a Form

We'll see how to…

• Add a field
• Remove a field
• Change the order of fields
• Change the width of a field
• Modify label text
• Changing color themes or style
Add a Field to a Form

• Stacked layout
  – Switch to Layout view
  – Click Design>Tools>Add Existing Fields
  – Drag new field to desired place, using orange line guide.

• Tabular layout
  – As above, but orange line will be vertical, not horizontal
Work with a Form Layout Control

This is a Customer information form created with the Form tool.

It produces a Stacked layout.

This Orders subform is automatically added by Access.
Working with Fields on a Form

• To delete a field from a form
  – Go to Layout view. Click text box control of field. Click Delete. Click empty space left behind. Click Delete.

• To adjust column widths in a form
  – Go to Layout view. Select a box. Grab right edge and drag.
Sorting Records in a Form

• To change the sorting in a form
  Open in Form view. Select desired field. Click A-Z (Ascending) in Home>Sort&Filter

• Remove sorting in a form
  Open in Form view. Click Remove Sort icon in Home>Sort&Filter
Form Sections, Views and Controls

• Form Sections

• Views
  – Layout view
  – Form view
  – Design view

• Controls

• Bound control:
  text box connected to a field in a table or query

• Unbound control:
  label or decorative design element

• Calculated control
Identify Default Form Sections

• Form header section
e.g. form title
• Detail section
fields, field labels, etc.
• Form footer section
often used for totals of field values, e.g. in an invoice
• Modifying the Default Form Sections

Easiest to identify in Design view
Revising Forms Using Form Views

• Switch between form views by e.g. right-click form tab
• *Enter or edit data* in Form view
• *Alter a form* in Layout View
• Design view provides the most *options for modifying the form*
Forms Demo 5

• Open `a04h1coffee_demo`, save as `a04h2coffee_demo`

Form sections; Alter a form in Design view

• Select Revenue query, click Create > Form. Grab right edge of LastName textbox, reduce field width by ~50%, switch to Design view
• Drag bottom margin of Form Footer bar down until size is 1" (2.5cm), switch to Form view, inspect, can't see white-on-white change.
• Back to Design View. Click Form Footer bar. Click Tools/Property Sheet, click Format tab, then Back Color arrow (not … button), pick Background light header. Switch to Layout view. Footer is visible.
• Back to Design view. Drag bottom margin of Form Header to ¾"
• Save (as Revenue) and Close form.
Forms Demo 6

**Edit data in Form view**

- Select Products table, click Create tab, click Form.
- Click anywhere in subform, select Layout view, delete subform.
- Select Form View. Click Next Record twice in Nav bar … record 3.
- Change *Coffee – Mild Blend* to *Coffee – Light*.
- Click Last Record, then Previous Record twice, change, *Styrofoam Cups – 12 ounce* to *Heavy Paper Cups – 12 ounce*.
- Click in Current Record box in Nav bar, type 12, press Enter.
- Change *Sugar Substitute* to *Splenda*.
- Click in Search box in Nav bar, type pop, press Enter.
- Change *Popcorn – Plain* to *Popcorn – Low Calorie*.
- Save as Products, Close.
Forms Demo 7

Work with Controls

- Right-click Revenue form, click Design view.
- Click Revenue label in form header, twice, change to *Revenue Form*.
- Click Form logo to left of "Revenue Form", press Delete key.
- Click Controls > Label, click in Form Footer at say (1cm, 1cm) and type "This form was created by Donald Duck".
- Click the Revenue Form label in the form header, then click Home > Clipboard > Format brush. Click new label in form footer. Resize box.
- Click Label, add 2nd label under 1st one. Type *Last Revision 7/5/2013*.
- Click form header bar, open Property Sheet. Change Height to 1.5cm.
- Click Revenue Form label, change Height to 1.2cm, Width to 12cm, close Property Sheet.
- Put mouse on rhs of design grid and drag to make form width 13.3cm.
- Switch to Form view, check a few records, click Save.
Forms Demo 8

Add Calculated Control to Form

• Switch to Design view. Place mouse on top edge of Form Footer bar, drag down until Detail section is 10cm. Click Controls > Text Box, then click just below the NetRevenue text box at bottom of Detail.
• Click in the text box, type = [Quantity]*[Cost]. Press Enter.
• Open Property Sheet, click All, click in Name box, type CostOfOrder. Format=Currency, Text Align=Left. Switch to Form, inspect.
• Switch to Design view, click Label control for CostOfOrder, set Caption to Cost of Order. Resize if necessary.
• Click calculated control, click Other tab on Prop Sheet, Tab Stop=No
• Switch to Form view. Tab through a record or two to see how tabbing doesn't stop at the calculated control value.
• Save the form.
Forms Demo 9

Add Styling to Form

• Switch to Design view.
• Open Property Sheet if necessary, then click the Revenue Form label. Click the Back Color arrow on the Property Sheet Format tab, and choose Access Theme 2. Then set Special Effect to Raised.
• Click Center in the Text Formatting group on the Ribbon.
• Click just above the Quantity bound control box on the grid, drag through all but Cost of Order, set Special Effect to Sunken.
• Click Cost of Order, Border Width=2pt. Close Property Sheet.
• Click Format > Font > Background Color (bucket) arrow, select Light Gray 2 (Standard colors\textsubscript{3,1}). Click Cost of Order label, Font Color arrow=Light Gray 4 (Standard colors\textsubscript{5,1}).
• Switch to Form view, check it out, File > Compact & Repair Database
Creating & Using Reports

Based on slides by
Robert Grauer, Keith Mast, Mary Anne Poatsy
Objectives

Learn how to…

• Create reports using report tools
• Modify a report
• Sort records in a report
• Identify report sections
• Revise reports using report views
• Identify control types in reports
Report Basics

• Report — a printed document that displays information from a database in a format that provides meaningful information to its readers

Steps:
• Identifying a record source
• Choosing a Report tool
• Modifying a report
Questions before Creating a Report

- What is the purpose of the report?
- Who will use the report?
- Which tables are needed for the report?
- What fields, labels, and calculations are needed?
- How will the report be distributed?
- Will the results be converted to Word, Excel, HTML, or another format?
Creating Reports using Report Tools

- Access Report Tools to create reports
  - Report Tool
  - Report Design
  - Blank Report
  - Report Wizard
  - Labels Tool

- Modify existing report by using:
  - Layout View, or
  - Design View
Identify the Record Source

Can be...

- One or more tables
- Queries
- Combinations of tables and queries
- Can also contain graphics including
  - Company Logos
  - Watermarks
### Sketch the Report

**Physicians Report - Draft**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Phone Number</th>
<th>Specialization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonnie</td>
<td>Clinton</td>
<td>10000 SW 59 Court</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33071</td>
<td>(954) 777-8889</td>
<td>Obstetrics</td>
</tr>
<tr>
<td>Warren</td>
<td>Brasington</td>
<td>9470 SW 25 Street</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33071</td>
<td>(954) 888-7654</td>
<td>Hematology</td>
</tr>
<tr>
<td>James</td>
<td>Shindell</td>
<td>Avenue</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33070</td>
<td>(954) 773-4343</td>
<td>General Medicine</td>
</tr>
<tr>
<td>Edward</td>
<td>Wood</td>
<td>Avenue</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33072</td>
<td>(954) 555-5555</td>
<td>Cardiology</td>
</tr>
<tr>
<td>Michelle</td>
<td>Quintana</td>
<td>3990 NW 3 Street</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33071</td>
<td>(954) 888-1221</td>
<td>Internal Medicine</td>
</tr>
<tr>
<td>Kristine</td>
<td>Park</td>
<td>9240 NW 59 Street</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33072</td>
<td>(954) 777-1111</td>
<td>Exercise Physiology</td>
</tr>
<tr>
<td>William</td>
<td>Williamson</td>
<td>108 Los Pinos Place</td>
<td>Coral Springs</td>
<td>FL</td>
<td>33071</td>
<td>(954) 888-4554</td>
<td>General Medicine</td>
</tr>
<tr>
<td>Holly</td>
<td>Davis</td>
<td>8009 Riviera Drive</td>
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</tr>
<tr>
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<tr>
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<td>102 SCC</td>
<td>E. Norridon</td>
<td>PA</td>
<td>19401</td>
<td>(610) 555-1212</td>
<td>General Medicine</td>
</tr>
</tbody>
</table>
Use the Report Tool

Report is constructed with the Report tool.

Information is presented in tabular format.

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</tr>
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Use the Report Wizard

• The Report Wizard asks questions
  – Uses 6 dialog boxes to collect information
• Then it generates the report based on answers
• The report design can later be modified
Starting the Report Wizard

Select a table or query

Select fields
Add Grouping to the Report Wizard

Access adds StudyID automatically

Add a group

Select a field to group by

Remove a group
Add Sorting and Summary Options

Choose the sort fields

Choose Ascending or Descending order

Click Summary Options to add aggregate functions
Choose the Layout of the Report

Choose the Orientation

Choose the Layout

Adjust field widths so fields fit on one page wide.
Save and Name the Report

Type a report name

Click "Preview the report" to see what it will look like

Click Finish and you'll also see the report in preview
### Previewing the Report

**Volunteers Grouped by Study**

<table>
<thead>
<tr>
<th>StudyID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Weight</th>
<th>VolunteerID</th>
<th>Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>S01</td>
<td>Cooper</td>
<td>Deborah</td>
<td>150</td>
<td>V002</td>
<td>4000 SW 14 Stre</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
<tr>
<td></td>
<td>Mullins</td>
<td>Bernard</td>
<td>175</td>
<td>V010</td>
<td>387 Hardie Road</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
<tr>
<td></td>
<td>Newcomb</td>
<td>Jeff</td>
<td>210</td>
<td>V003</td>
<td>1900 Bird Road</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
<tr>
<td></td>
<td>Roberts</td>
<td>Kevin</td>
<td>178</td>
<td>V014</td>
<td>7899 SW 56 Ave</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
</tbody>
</table>

**Summary for 'StudyID' = 1 (4 detail records)**

| Avg | 178.25 |

<table>
<thead>
<tr>
<th>StudyID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Weight</th>
<th>VolunteerID</th>
<th>Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>S02</td>
<td>Campbell</td>
<td>Patsy</td>
<td>125</td>
<td>V001</td>
<td>900 Sunset Drive</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
<tr>
<td></td>
<td>Miller</td>
<td>Joe</td>
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<td>V007</td>
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<td>FL</td>
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<tr>
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<td>Roberts</td>
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<td>400 Granada Bv</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
</tbody>
</table>

**Summary for 'StudyID' = 2 (3 detail records)**

| Avg | 160    |

<table>
<thead>
<tr>
<th>StudyID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Weight</th>
<th>VolunteerID</th>
<th>Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>S03</td>
<td>Glatstein</td>
<td>Victor</td>
<td>188</td>
<td>V017</td>
<td>2998 Leafy Way</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
<tr>
<td></td>
<td>Mayhew</td>
<td>Mary</td>
<td>165</td>
<td>V018</td>
<td>200 SW 20 Stree</td>
<td>Coral Springs</td>
<td>FL</td>
</tr>
</tbody>
</table>

**Summary for 'StudyID' = 3 (2 detail records)**

| Avg | 176.5  |

<table>
<thead>
<tr>
<th>StudyID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Weight</th>
<th>VolunteerID</th>
<th>Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Label Wizard

- Click a Table or Query, then click Reports > Labels

- Wizard guides you through choice of label, font, fields to print, & how to sort the data.
Modifying a Report

• Add a Field to a Report
  – Tabular layout
  – Stacked layout

• Delete a Field from a Report
  – Tabular layout
  – Stacked layout
Modifying a Report (continued)

• Adjust Column Widths in a report
  Layout or Design view. Click on text box, grab orange border and drag.

• Add a Theme to a report
  Layout view. Click Design > Themes > Theme, choose a theme, click it.
Sorting Records in a Report

Report comes sorted, usually on primary key. This can be over-ridden in the report.

Select FirstName for the second sort

LastName is the first sort
Report Demo 1

• Open a04h2coffee_demo and rename as a04h3coffee_demo

Using the Report Tool
• Select the Products table. Click Create > Reports > Report
• Close and Save report as Products.

Add a Field to a Report
• Open Products table, change to Design view.
• Click MarkupPercent field, then click Tools > Insert Rows.
• Type OnHand in Field Name box, Number as Data Type. In Field Properties at bottom, change Field Size to Integer. Add sample data: 10#6, 25#2, 55, 40, 55, 125, 75, 200#3, 75#2, 42#2, 175#2, 22, 37.
• Close table, open Products report in Layout view. Collapse Nav pane.
• Click Design > Tools > Add Existing Fields. Drag Onhand to Products report after Cost. Close Field List pane.
• Insert a space in the OnHand label control in the Report Header.
• Display the report in Print Preview. Still too wide. 😞. Save report.
Report Demo 2

Delete a Field from a Report; Adjust Column Widths

- Close Print Preview.
- Scroll right. Right-click in Year Introduced column (only works in Layout & Design view), press Delete.
- Click ProductID heading, drag right border to remove waste space.
- Click Refrigeration Needed heading, change to Refrig?, drag border.
- Reduce widths of other fields until it fits on one page.
- Check Print Preview, close, save the report.

Apply a Theme to the Report

- Click Themes > right-click Solstice (2–, 2), Apply Theme to This Object Only. Preview/close. File>Save Object As>Products Solstice, OK, click File tab.
- Repeat with Module theme (7,1), Preview/close, Save Object As Products Module, OK. Click File tab.
Report Demo 3

Change Sorting in a Report
- Click Grouping & Totals > Group & Sort, click Add a sort button, select ProductName from the list. Preview/close. Save & close report.

Use the Report Wizard
- Open Nav pane if necessary, select Revenue query, Create/Report Wizard.
- Click >> to add all to Selected Fields. Click Cost, then < to remove Cost field. Also remove MarkupPercent, LastName, and ProductName fields. Click Next.
- Select City, click >, click Next.
- Select OrderDate. Click Summary Options. Click Sum for the Revenue field. Click Calculate percent …, click OK. Click Next, twice.
- Type Sales by City as the title, click Finish. Inspect, close Print Preview.
- In Layout view, adjust controls so all field values are visible. Click Revenue total field, open Property Sheet, select Currency format.
- Preview/close. Close and save report. Compact & Repair Database.
Identifying Report Sections

- Report header
- Page header
- Detail
- Page footer
- Report footer
Adding a Group Header/Footer

Click Group & Sort to add grouping

Specialization group header section

Specialization group footer section

Modify the grouping & sorting
Add Totals to a Group Footer/Report Footer

<table>
<thead>
<tr>
<th>Rep</th>
<th>Total Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buckingham</td>
<td>$508.39</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$36.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$32.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$40.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$60.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$30.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$30.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$17.50</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$3.63</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$24.00</td>
</tr>
<tr>
<td>New Britain</td>
<td>$92.00</td>
</tr>
<tr>
<td>Doylestown</td>
<td>$48.00</td>
</tr>
</tbody>
</table>

Total revenue is shown at the bottom of each sales rep.

Count is shown at the bottom of each sales rep.
# Report Sections

<table>
<thead>
<tr>
<th>Section</th>
<th>Location</th>
<th>Frequency</th>
<th>Typical Use</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Header</td>
<td>Top of report</td>
<td>Once</td>
<td>Report title, organization or author name, logo, run date and time</td>
<td>On</td>
</tr>
<tr>
<td>Page Header</td>
<td>Top of each page</td>
<td>Once per page</td>
<td>Column headings</td>
<td>On</td>
</tr>
<tr>
<td>Group Header</td>
<td>Top of each group</td>
<td>Once per group</td>
<td>Identifying information for group: e.g. state name, course name, or type of employee</td>
<td>Off</td>
</tr>
<tr>
<td>Detail</td>
<td>Middle</td>
<td>Once per record</td>
<td>Field values for each record in the source table or query.</td>
<td>On</td>
</tr>
<tr>
<td>Group Footer</td>
<td>End of each group</td>
<td>Once per group</td>
<td>Summary info for group, e.g. state total, number of students or employees</td>
<td>Off</td>
</tr>
<tr>
<td>Page Footer</td>
<td>End of each page</td>
<td>Once per page</td>
<td>Page numbers</td>
<td>On</td>
</tr>
<tr>
<td>Report Footer</td>
<td>End of report</td>
<td>Once</td>
<td>Grand totals and other aggregate information</td>
<td>On</td>
</tr>
</tbody>
</table>
Revising Reports Using Report Views

• Layout View
  Sort of WYSIWYG
• Print Preview
• Design View
  Useful for long reports
• Report View
  Un-paginated
Identifying Control Types in Reports

• Types of control:
  – Bound controls (connected to a table or query field)
  – Unbound controls (e.g. text labels)
  – Calculated Controls

• To add a Calculated control to a report
  – Use Design view
  – Add a text box at the desired location.
  – Enter expression to do the calculation: =…
  – Format as needed
Report Demo 4

- Open `a04h3coffee_demo` and save with `h3 → h4`

**Identify default report sections and add a group header**
- Open Sales Rep table. Add your name to sales rep S0002, close table.
- Open Customers table. Change SalesRepID for Buckingham to 003.
- Close. Select Revenue query, click Create > Report Wizard.
- Add LastName, City, Revenue, OrderDate, & ProductName fields. Click Next 4 times. Type *Monthly Revenue by Salesperson* as report title, click Finish, inspect preview, close preview.
- Click Group & Sort, click Add a group, select LastName. Close G&S.
- Bold all column headings (Format > Font > Bold). Select Last Name column heading, type Sales Rep.
- Modify column positions so columns are equally spaced.
- Preview, close, save report.
Report Demo 5

Add totals to a group footer/report footer in Layout view

- Click Revenue field, click Grouping & Sorting > Totals, select Sum.
- Print Preview, check a couple of pages, close.
- Click City field, click Grouping & Totals > Totals, select Count Records. Scroll down until first totals is visible, adjust field width for City count if necessary, click Revenue total, open Property sheet, click Format arrow, select Currency. Ditto grand total at foot of report.
- Print preview, check whole report, close.
- Switch to Design view, check out all 7 report regions.
- Save the report.
Report Demo 6

Work with controls in Design view

• Click the Monthly Revenue by Salesperson label in the Report Header. Press ↓ enough times to make room for another label.
• Click Design > Controls > Label, click just above the M of Monthly…, type Santiago Coffee Shop, press Enter.
• Click the Format tab, do Font Size 14, Style Italic, Font Color Dark Blue, Text 2, Darker 25%, (5,4)-position, then resize the box so all is visible.
• Click LastName text box in LastName Header, Font Size 12, Font Color Dark Blue, Text 2 (1,4)-position, Bold, Center, background color Yellow.
• Resize if necessary. Click Count control in Report Footer, shift-click Sum control, Bold, Background Color Blue, Accent 1, Lighter 80%, (2,5)-position in Theme Colors.
• Print Preview, review all, close.
• Save report.
Add a calculated control to a report in Design view

- In Design view, click OrderDate box, press Delete, then delete OrderDate label. Drag ProductName box and label to 11.4cm mark.
- Click Design > Controls > Text Box. Click in Detail section to right of ProductName. You get a label for free – select and delete it.
- Click Tools > Property Sheet. Click in the new box. Click the All tab in the Property Sheet, type MinimumOrder in the Name property box and ="minimum" in the Control Source property box. Change the Border Style to Transparent.
- Check Print Preview, everything shows "minimum". Close preview.
- Click the Control Source, press Shift-F2, change the expression to =Iif(Revenue<10, "minimum", ""), click OK.
- Click the MinimumOrder control, Bold, Font Color=Red.
- Print Preview, check all, close preview, close and save report.
- File > Compact & Repair Database.
Aligning Objects

• An issue in designing a form or report is getting the boxes aligned, so the form or report looks neat.

• To align two (or more) objects in Design view:
  – click the first object, then shift-click the other(s)
  – click the Arrange tab, find the Sizing & Ordering group, click Align, then select the kind of alignment you want (Left, Right, Top, or Bottom)
  – if you click one or more objects, you also have the option of aligning it to the grid.

• To get boxes A & B to be the same height or width – look up this info in box A's Property Sheet, and copy to box B's Property Sheet.
Summary

• In this section, you learned how to create forms using form tools, modify a form, sort records in a form, identify form sections, revise forms using form views, and identify control types in forms.

• You also learned how to create reports using report tools, modify reports, sort records in a report, identify report sections, revise reports using report view, and identify control types in reports.