Forms & Reports

Instructor: Aarthi Natarajan

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

Creating & Using Forms

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Robert Grauer, Keith Mast, Mary Anne Poatsy

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
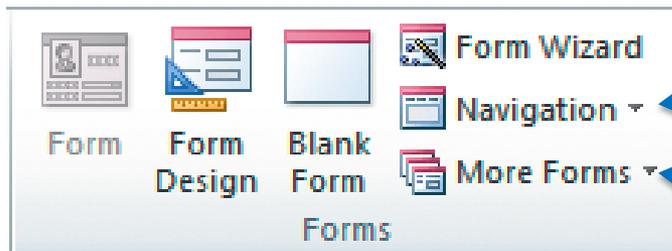
- 16 tools for creating forms

- Forms group

- Navigation forms (6)

- More Forms (6)

Identify a Record Source

- Record source — the <u>table</u> or <u>query</u> 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

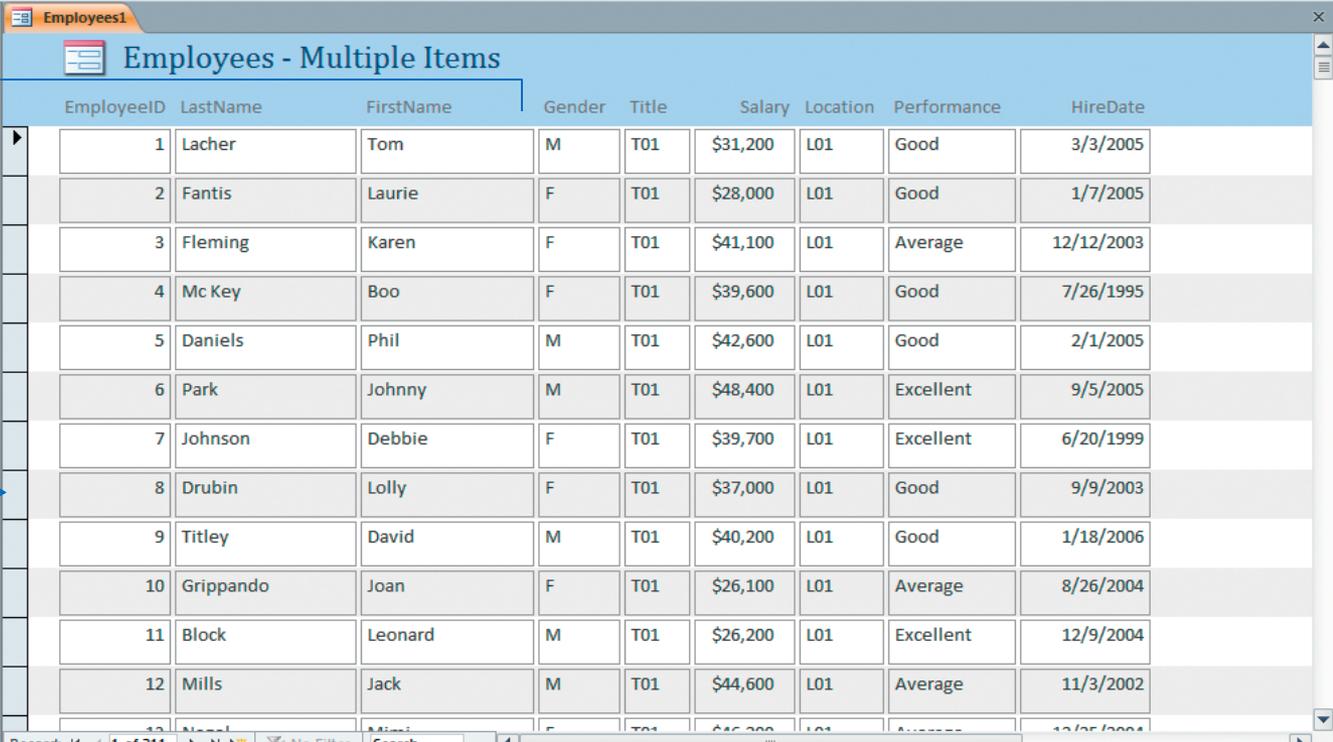Bottom section shows multiple employees in Datasheet view

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

EmployeeID	LastName	FirstName	Gender	Title	Salary	Location	Performance	HireDate
1	Lacher	Tom	M	T01	$31,200	L01	Good	3/3/2005
2	Fantis	Laurie	F	T01	$28,000	L01	Good	1/7/2005
3	Fleming	Karen	F	T01	$41,100	L01	Average	12/12/2003
4	Mc Key	Boo	F	T01	$39,600	L01	Good	7/26/1995
5	Daniels	Phil	M	T01	$42,600	L01	Good	2/1/2005
6	Park	Johnny	M	T01	$48,400	L01	Excellent	9/5/2005
7	Johnson	Debbie	F	T01	$39,700	L01	Excellent	6/20/1999
8	Drubin	Lolly	F	T01	$37,000	L01	Good	9/9/2003
9	Titley	David	M	T01	$40,200	L01	Good	1/18/2006
10	Grippando	Joan	F	T01	$26,100	L01	Average	8/26/2004
11	Block	Leonard	M	T01	$26,200	L01	Excellent	12/9/2004
12	Mills	Jack	M	T01	$44,600	L01	Average	11/3/2002

Employees - Multiple Items

Record: ◄ 1 of 311 ► ►► No Filter Search

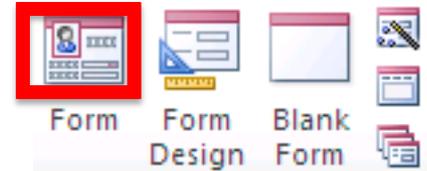# Create a Datasheet Form

- 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
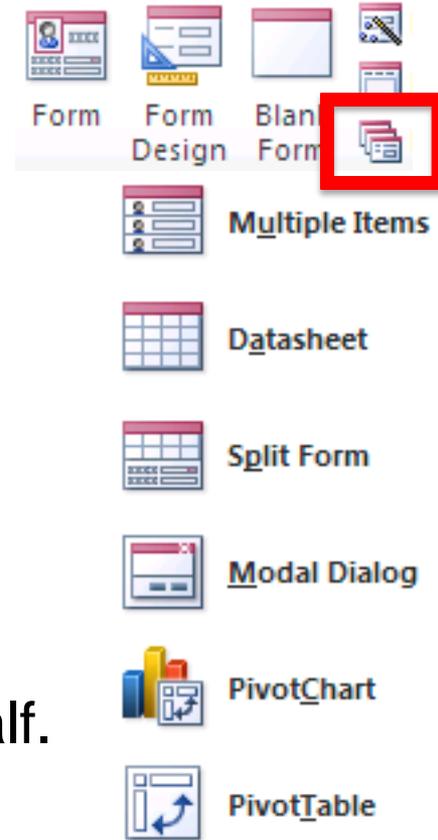
Use the Form tool

- 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.
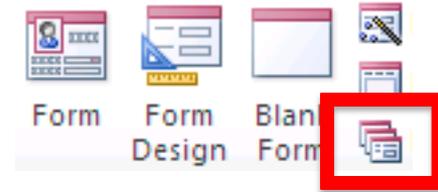- Switch to Layout view, change title to Customer Information, Save.

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.

Form   Form Design   Blank Form

Multiple Items

Datasheet

Split Form

Modal Dialog

PivotChart

PivotTable

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
- Save as Products – Datasheet. Right-click Products – Datasheet in Navigation pane, choose Layout view.
- 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

Select | Label | Tab | Web browser | Option group | Combo box | Line | List box | Check box | Attachment

Text box | Button | Hyperlink | Navigation | Page Break | Chart | Toggle | Rectangle | Unbound object frame

Controls
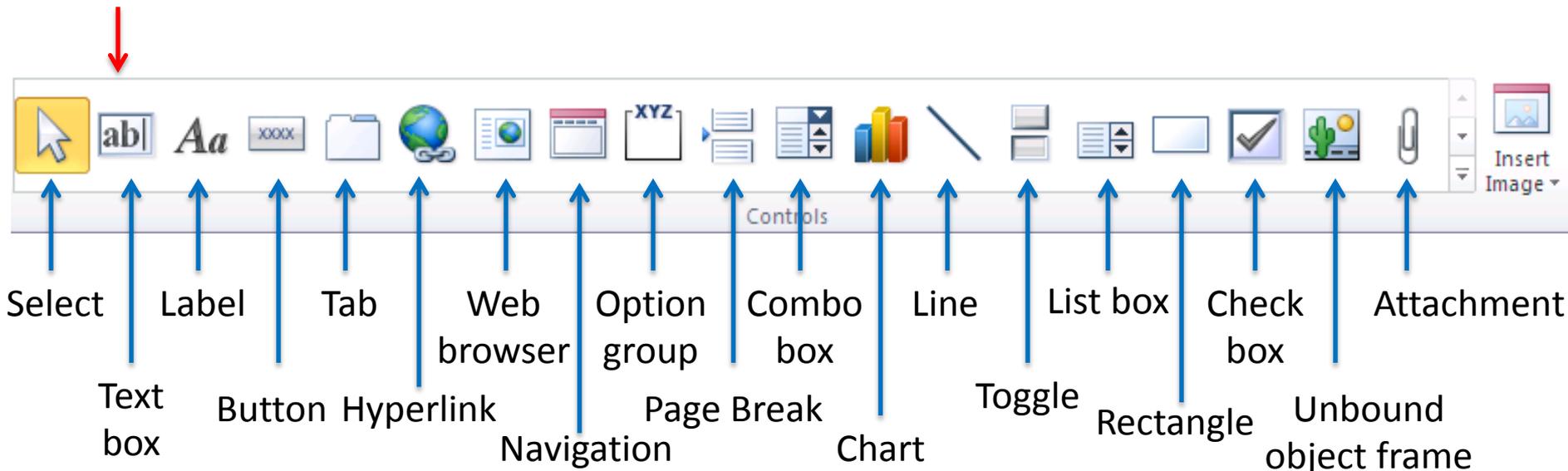
Identify Default Form Sections

- Form header section

  e.g. form title

- Detail section

  fields, field labels, etc.

- Form footer section

Easiest to identify in Design view

  often used for totals of field values, e.g. in an invoice

- Modifying the Default Form Sections

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$_{3,1}$). Click Cost of Order label, Font Color arrow=Light Gray 4 (Standard colors$_{5,1}$).

- 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
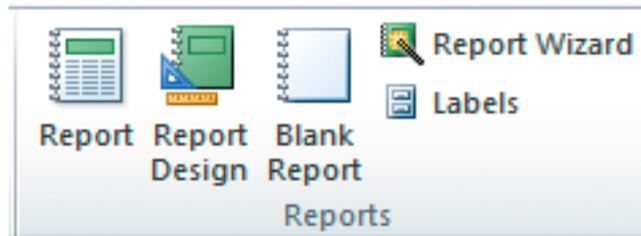
Identify the Record Source

Can be…

- One or more tables

- Queries

- Combinations of tables and queries

- Can also contain graphics including
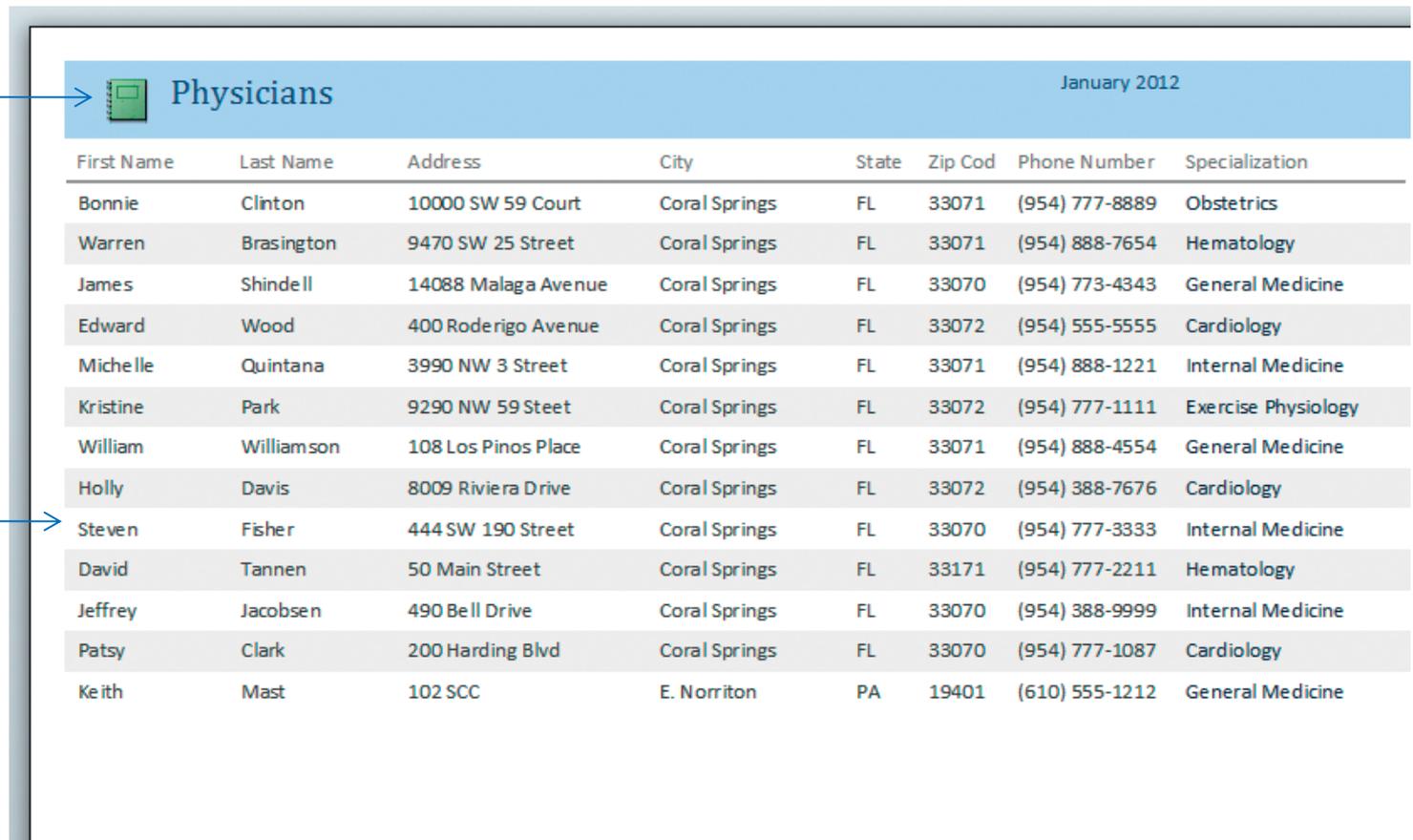 - Company Logos
  - Watermarks

Sketch the Report

Physicians Report - Draft

First Name	Last Name	Address	City	State	Zip Code	Phone Number	Specialization
Bonnie	Clinton	10000 SW 59 Court	Coral Springs	FL	33071	(954) 777-8889	Obstetrics
Warren	Brasington	9470 SW 25 Street	Coral Springs	FL	33071	(954) 888-7654	Hematology
James	Shindell	Avenue	Coral Springs	FL	33070	(954) 773-4343	General Medicine
Edward	Wood	Avenue	Coral Springs	FL	33072	(954) 555-5555	Cardiology
Michelle	Quintana	3990 NW 3 Street	Coral Springs	FL	33071	(954) 888-1221	Internal Medicine
Kristine	Park	9290 NW 59 Steet	Coral Springs	FL	33072	(954) 777-1111	Exercise Physiology
William	Williamson	108 Los Pinos Place	Coral Springs	FL	33071	(954) 888-4554	General Medicine
Holly	Davis	8009 Riviera Drive	Coral Springs	FL	33072	(954) 388-7676	Cardiology
Steven	Fisher	444 SW 190 Street	Coral Springs	FL	33070	(954) 777-3333	Internal Medicine
David	Tannen	50 Main Street	Coral Springs	FL	33171	(954) 777-2211	Hematology
Jeffrey	Jacobsen	490 Bell Drive	Coral Springs	FL	33070	(954) 388-9999	Internal Medicine
Patsy	Clark	200 Harding Blvd	Coral Springs	FL	33070	(954) 777-1087	Cardiology
Keith	Mast	102 SCC	E. Norriton	PA	19401	(610) 555-1212	General Medicine

Use the Report Tool

Report is constructed with the Report tool →

Information is presented in tabular format →

	January 2012

Physicians

First Name	Last Name	Address	City	State	Zip Cod	Phone Number	Specialization
Bonnie	Clinton	10000 SW 59 Court	Coral Springs	FL	33071	(954) 777-8889	Obstetrics
Warren	Brasington	9470 SW 25 Street	Coral Springs	FL	33071	(954) 888-7654	Hematology
James	Shindell	14088 Malaga Avenue	Coral Springs	FL	33070	(954) 773-4343	General Medicine
Edward	Wood	400 Roderigo Avenue	Coral Springs	FL	33072	(954) 555-5555	Cardiology
Michelle	Quintana	3990 NW 3 Street	Coral Springs	FL	33071	(954) 888-1221	Internal Medicine
Kristine	Park	9290 NW 59 Steet	Coral Springs	FL	33072	(954) 777-1111	Exercise Physiology
William	Williamson	108 Los Pinos Place	Coral Springs	FL	33071	(954) 888-4554	General Medicine
Holly	Davis	8009 Riviera Drive	Coral Springs	FL	33072	(954) 388-7676	Cardiology
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David	Tannen	50 Main Street	Coral Springs	FL	33171	(954) 777-2211	Hematology
Jeffrey	Jacobsen	490 Bell Drive	Coral Springs	FL	33070	(954) 388-9999	Internal Medicine
Patsy	Clark	200 Harding Blvd	Coral Springs	FL	33070	(954) 777-1087	Cardiology
Keith	Mast	102 SCC	E. Norriton	PA	19401	(610) 555-1212	General Medicine

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

Report Wizard

Do you want to add any grouping levels?

StudyID

VolunteerID, FirstName, LastName, Address, City, State, ZipCode, PhoneNumber, Gender, BirthDate, Weight

VolunteerID
FirstName
LastName
Address
City
State
ZipCode
PhoneNumber
Gender
BirthDate

Priority

Grouping Options ...   Cancel   < Back   Next >   Finish

Add Sorting and Summary Options

Report Wizard

What sort order and summary information do you want for detail records?

You can sort records by up to four fields, in either ascending or descending order.

1 LastName ▼ Ascending
2 FirstName ▼ Ascending
3 ▼ Ascending
4 ▼ Ascending

Summary Options ...

Cancel   < Back   Next >   Finish

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.

Report Wizard

How would you like to lay out your report?

Layout
- ● Stepped
- ○ Block
- ○ Outline

Orientation
- ● Portrait
- ○ Landscape

A

☑ Adjust the field width so all fields fit on a page.

Cancel   < Back   Next >   Finish

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

Report Wizard

What title do you want for your report?

Volunteers Grouped by Study

That's all the information the wizard needs to create your report.

Do you want to preview the report or modify the report's design?

○ Preview the report.

○ Modify the report's design.

Cancel   < Back   Next >   Finish

Previewing the Report

Volunteers Grouped by Study

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

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

Avg 178.25

S02							
	Campbell	Patsy	125	V001	900 Sunset Drive	Coral Springs	FL
	Miller	Joe	210	V007	310 West Drive	Coral Springs	FL
	Roberts	Betsy	145	V006	400 Granada Blv	Coral Springs	FL

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

Avg 160

S03							
	Glatstein	Victor	188	V017	2998 Leafy Way	Coral Springs	FL
	Mayhew	Mary	165	V018	200 SW 20 Stree	Coral Springs	FL

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

Avg 176.5

S04							

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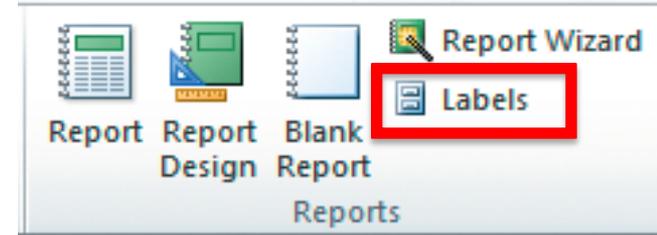
- Click a Table or Query, then click Reports > Labels

- 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
- Print Preview it. Too wide. Page Setup > Landscape. Print Preview.
- 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

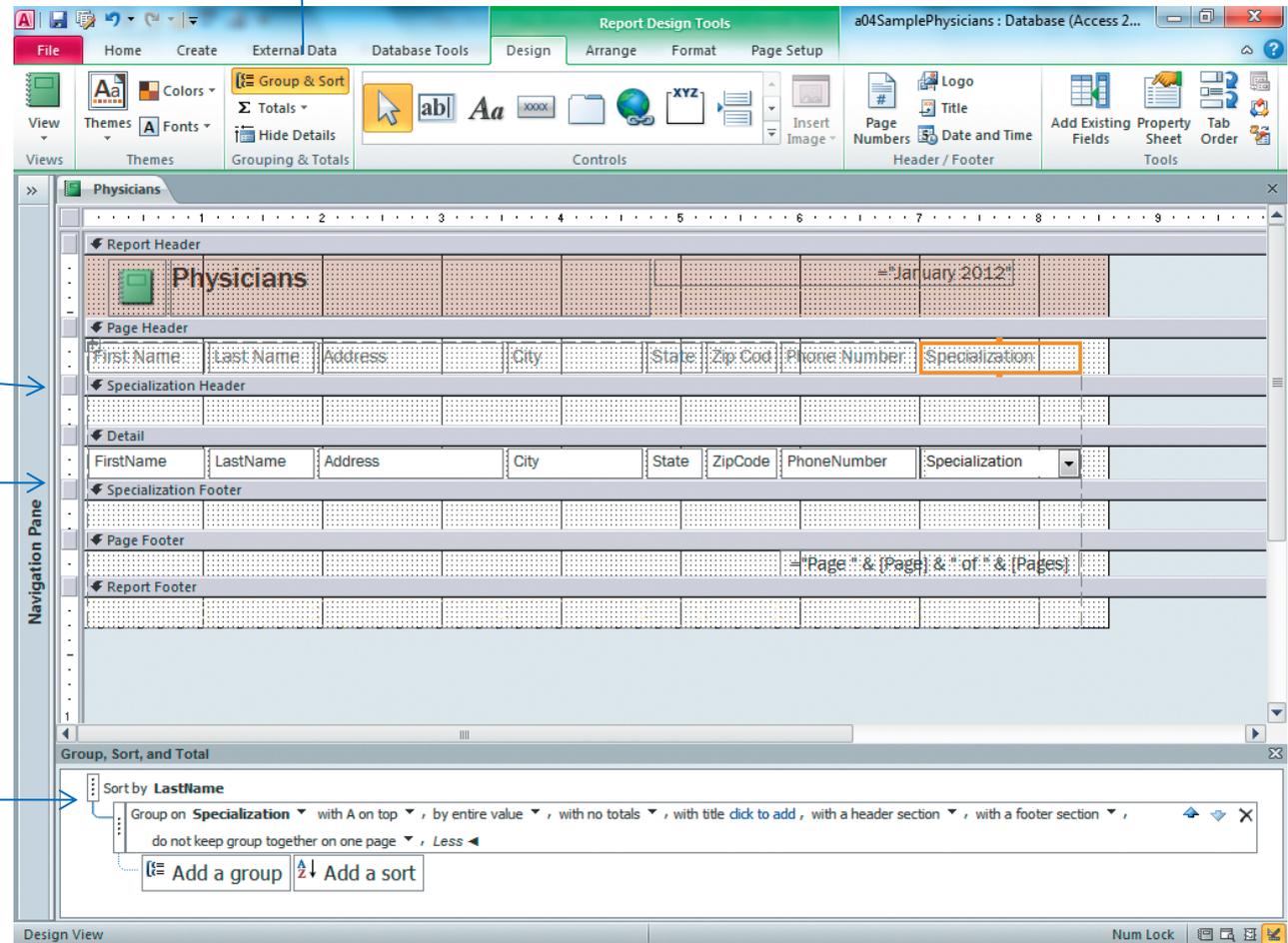Page header

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

Hepp			
	Buckingham	$2.63	1/6/2012 Stirrers - Plastic
	Buckingham	$12.25	1/6/2012 Tea Bags - Decaf
	Buckingham	$60.00	1/6/2012 Creamers - Liquid
	Buckingham	$30.00	1/6/2012 Coffee - Mild Blend
	Buckingham	$72.00	1/6/2012 Coffee - Colombian Supreme
	Buckingham	$40.00	1/23/2012 Creamers - Assorted Flavors
	Buckingham	$36.00	1/23/2012 Sugar Packets
	Buckingham	$28.50	1/23/2012 Styrofoam Cups - 12 ounce
	Buckingham	$4.50	1/25/2012 Coffee Filters
	Buckingham	$28.50	1/25/2012 Styrofoam Cups - 12 ounce
	Buckingham	$38.00	1/25/2012 Popcorn - Buttered
	Buckingham	$28.50	1/25/2012 Sugar Substitute
	Buckingham	$68.00	1/25/2012 Popcorn - Plain
	Buckingham	$38.00	1/26/2012 Popcorn - Buttered
	Buckingham	$17.50	1/26/2012 Tea Bags - Regular
	Buckingham	$4.00	1/26/2012 Milk - 1 quart
	16	$508.38	
Mast			
	Doylestown	$36.00	1/3/2012 Sugar Packets
	Doylestown	$92.00	1/3/2012 Coffee - Hazelnut
	Doylestown	$40.00	1/3/2012 Creamers - Assorted Flavors
	Doylestown	$60.00	1/11/2012 Creamers - Liquid
	Doylestown	$30.00	1/11/2012 Coffee - Decaf
	Doylestown	$30.00	1/11/2012 Coffee - Mild Blend
	Doylestown	$17.50	1/11/2012 Tea Bags - Regular
	Doylestown	$2.63	1/11/2012 Stirrers - Plastic
	Doylestown	$24.00	1/11/2012 Coffee - Colombian Supreme
	New Britain	$92.00	1/13/2012 Coffee - Hazelnut
	Doylestown	$48.00	1/14/2012 Soup - Variety Pak

Count is shown at the bottom of each sales rep

Total revenue is shown at the bottom of each sales rep

Report Sections

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

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

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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.

Report Demo 7

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.
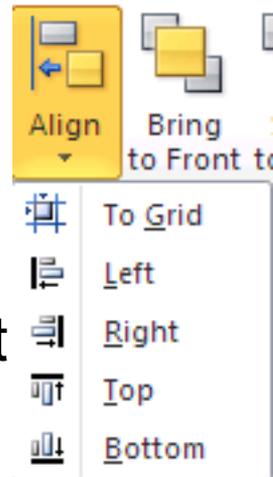
Summary

- 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.