Lab 4 Introduction to MS Access Forms and Reports

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In this session we will again use Northwind Sample Database. Open Northwind.mdb file as before from Help menu.

1. Form
1.1 Introduction

![Image of a form and data entry form]

To easily view, enter, and change data directly in a table, create a form. When you open a form, Microsoft Access retrieves the data from one or more tables and displays it on screen using the layout you chose in the Form Wizard or using a layout that you created from scratch.

1.2 Kinds and Purposes
- **Data entry form:** To enter data into a table
- **Custom dialog box:** To accept user input and then carry out an action based on that input
- **Switchboard:** To open other forms or reports
1.3 Information in a Form

Most of the information in a form comes from an underlying record source. Other information in the form is stored in the form's design.
1.4 Link between a form and its record

You create the link between a form and its record source by using graphical objects called controls. The most common type of control used to display and enter data is a text box.

1.5 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 Forms  Create form by using wizard in database window, you will see 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. You can experiment with Columnar, Tabular, Datasheet and Justified to find the most suitable layout for you.
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 modify the design in Design view.
6. Click on Finish.
Option 2:
1. Click menu **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. In the dialog box shown in Fig. 2, if you clicked any of the three Autoform options, Microsoft Access automatically creates your form and uses the autoformat you last specified either in the Form Wizard or by using the AutoFormat command on the Format menu in Design view.
2. If the resulting form doesn’t look the way you want, you can ALWAYS change it in **Design view**.

Creating a form without a wizard
1. Click menu **Insert → Form**, then choose **Design View** in 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. Then click **OK**.
   **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. With this option you can TOTALLY customize and control everything you would like to have and see in your forms. Please refer to Fig. 3.
2. Report
2.1 Introduction
2.2 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.

2.3 Link between a report and its record source
2.4 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. Click menu Insert ➔ Report ➔ AutoReport. You can choose columnar or tabular. Refer to 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. Click OK then.
   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.
1. Click menu Insert → Report → Report Wizard or just choose Form → Create Report by Using Wizard in database window.
2. Click the table or query that contains the data you want to base your report on. Click OK then. **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. 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 customize it in **Design view** as shown in **Fig. 4**.

**Ways to customize a report**

**Fig. 4 Ways to Customize a Report**

**2.5 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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Quiz 4

(Due at the start of next class)

1. Create a form that would allow the Dealership to enter new vehicles into its inventory
2. Create a form that would allow the Dealership to track its customers
3. Create a report that would allow the Dealership to view its current inventory, grouped by VehicleName (VehicleName assumes a particular model, and each VehicleID identifies a unique instance of the model. For example: Corolla-ID#1Z49J05324HW01).
4. Create a form which serves as the switchboard by allowing the user to easily access the forms and report you built before. Use Access help if you have questions on how to create a switchboard form.

Further instructions:
For the quiz, please provide:
• screenshots for ALL forms, and try to fit each form on a separate page
• printout of the report.

To do a screenshot capture, open the window which you want to capture, maximize it (or size it appropriately) and then do Alt+Print Screen. Then just do a Paste command in your word processing software to import the image into your document.