
CREATING FORMS AND REPORTS

USING MICROSOFT ACCESS

MICROSOFT ACCESS FORMS AND REPORTS

LESSON 1 - CREATING BASIC FORMS	1
Using Forms	2
Using the Form Wizard	2
Viewing Records in a Form.....	4
Printing Records in a Form.....	6
Basing a Form on a Query.....	7
Using AutoForm.....	8
Adding a Record using a Form.....	9
LESSON 2 - CREATING BASIC REPORTS.....	11
Using Reports	12
Using the Report Wizard.....	12
Using Print Preview.....	14
Printing Pages of a Report.....	16
Basing a Report on a Query.....	17
Using AutoReport.....	18
LESSON 3 - USING ADVANCED FORM DESIGN.....	22
Using Forms in Design View	23
Creating a Combo Box	24
Creating a List Box.....	26
Creating an Option Group	28
Setting the Tab Order Automatically.....	30
Setting the Tab Order Manually	31
Adding a Form Header and Footer	31
Creating a Blank Form	33
LESSON 4 - USING ADVANCED REPORT DESIGN	35
Using Reports in Design View	36
Creating a Calculated Control	36
Grouping Data in a Report	38
Creating a Header for Each Group	39
Creating a Running Summary	40

Inserting a Date/Time Control.....	41
Inserting a Page Break.....	42
Changing the Report Margins	43
Using the Label Wizard.....	44
Creating a Blank Report	45
LESSON 5 - USING SUBFORMS/SUBREPORTS.....	47
Working with Subforms/Subreports.....	48
Creating a Subform/Subreport.....	49
Editing the Layout of a Subform	50
Displaying a Subform in Datasheet View	51
Adding a Subform Header/Footer	52
Displaying a Subform Total	54
LESSON 6 - USING OTHER FORM TECHNIQUES.....	57
Viewing the Properties of an Object	58
Changing a Control Property	59
Adding a Logic Control.....	60
Adding a Command Button.....	62
Saving a Form as a Report.....	63
Creating a Form Letter	64
INDEX.....	67

LESSON 1 - CREATING BASIC FORMS

In this lesson, you will learn how to:

- Use forms
- Use the Form Wizard
- View records in a form
- Print records in a form
- Base a form on a query
- Use AutoForm
- Add a record using a form

USING FORMS

Discussion

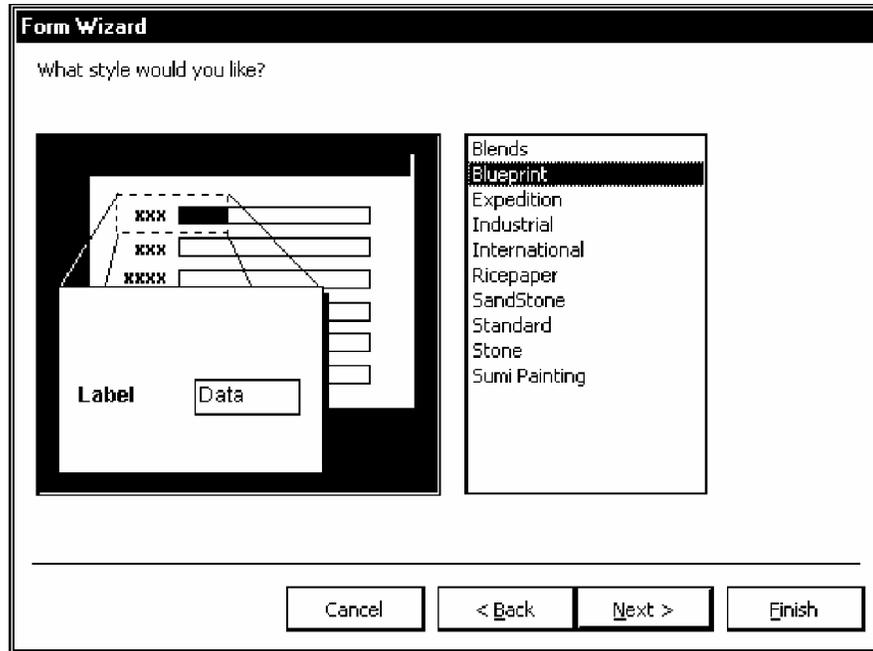
Forms, like datasheets, can be used for viewing and editing data. However, you can also use them to present data in a more attractive format and layout than a datasheet. They can be designed to display all the fields for a record on one screen, eliminating the need to scroll to display all the fields. You can also display data from related tables in a form.

Access includes four basic types of forms: columnar, tabular, datasheet, and justified. In a columnar form, the field names are listed on the left side of the form, with the field values in a column to the right. If space on the screen permits, there can be more than one column. In a tabular form, the field names are listed across the top of the form with the values in the appropriate columns beneath them. A datasheet form is similar to **Datasheet** view for tables and queries. In a justified form, the field names and values appear in alternate rows evenly spaced across the page. Field values appear under the appropriate field names.

USING THE FORM WIZARD

Discussion

You can create a form quickly and easily using the Form Wizard. The Form Wizard guides you through the process of creating a form. First, you choose the table or query on which you want to base the form and then you select the fields you want to include. Next, you select the type of layout for the form: columnar, tabular, datasheet, or justified. In the next step, you choose a style from a number of different styles with various backgrounds and color schemes. The last step in the wizard is to name the form.



The Form Wizard

- If you base a form on an object that is associated with two or more tables, the Form Wizard asks you on which table you want to base the view of the data. This page in the Form Wizard appears after you have selected the fields you want to use for your form and before you are asked if you want to select a grouping level.

- You can also activate the Form Wizard by double-clicking the **Create form by using wizard** option in the **Forms** object list in the Database window, or by selecting the **Insert** menu and then selecting the **Form** command.

➔ **Steps**

1. Open the desired database.
2. Display the **Forms** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select **Form Wizard**.
5. Select **OK**.

6. Select the **Tables/Queries** list.
7. Select the table or query on which you want to base the form.
8. Add the desired field(s) from the **Available Fields** list box.
9. Select **Next**.
10. Select the layout for the form.
11. Select **Next**.
12. Select the style for the form.
13. Select **Next**.
14. Type a name for the form.
15. Select **Finish**.

VIEWING RECORDS IN A FORM

Discussion

Navigating records in a form is similar to navigating records in **Datasheet** view. You use buttons on the bottom of the Form view window to navigate in a form. The buttons available in **Form** view are listed in the following table:

Button	Description
	Displays the first record
	Displays the previous record
	Displays the next record
	Displays the last record

The screenshot shows a form window titled "Customer Data Entry" with the following data:

Customer Number	1014	Note	Sent new brochure 6/10/93.
Store Name	Athletic Supplies Co		
Contact Name	Alex Feodorov		
Phone Number	202-732-50	Region	Northeast
Fax Number	202-732-51	Sales Rep	SJS
Address	11692 J St. NW	Credit Limit	8000
City	Washington	Contract Date	6/8/98
State/Province	DC		
Postal Code	20013		
Country	U.S.A.		

Record: 1 of 54

A record displayed in a form created with the Form Wizard

- You can also use the keyboard to move through records. The **[Ctrl+Home]** key combination displays the first record while the **[Ctrl+End]** key combination displays the last record.
- If the report is columnar, the **[Page Down]** and **[Page Up]** keys display the next and previous records, respectively.
- You can also go directly to a record by selecting the record number in the **Record** text box, typing the number of the record you want to display, and pressing **[Enter]**.

→ **Steps**

1. Open the desired database.
2. Display the **Forms** object list.
3. Open the form in **Form** view.
4. Click the **Last Record** button  at the bottom of the Form view window.
5. Click the **First Record** button  at the bottom of the Form view window.
6. Click the **Next Record** button  at the bottom of the Form view window.

7. Click the **Previous Record** button  at the bottom of the Form view window.

PRINTING RECORDS IN A FORM

Discussion

You can print the current form using the Print dialog box. You can choose to print all the records, specified pages, or selected records.

If you use the **Print** button to print all the data, Access fits as many whole forms as possible on a single page. It does not break a form in the middle. However, if a form is large and there are numerous records in a table, you may be using a large amount of paper and printer time.

The Print dialog box, on the other hand, allows you to select specific pages or records to print, thereby saving time and paper.

- You can also open the Print dialog box by right-clicking in the Database window and then selecting the **Print** command.

→ Steps

1. Open the desired database.
2. Display the **Forms** object list.
3. Open the form in **Form** view.
4. Select the **File** menu.
5. Select the **Print** command.
6. Select the **Selected Record(s)** option.
7. Select **OK**.

BASING A FORM ON A QUERY

Discussion

Forms can draw information from a query. If the RecordSet in the query cannot be updated, then you cannot use the form to add or edit records. However, the form can be used to present the RecordSet in a more attractive manner.

- If you create a form based on a query with a join line between two different fields, the Form Wizard asks you how you want to view the data.

- You can also activate the Form Wizard by double-clicking the **Create form by using wizard** option in the **Forms** object list in the Database window, or by selecting the **Insert** menu and then selecting the **Form** command.

→ Steps

1. Open the desired database.
2. Display the **Forms** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select **Form Wizard**.
5. Select **OK**.
6. Select the **Tables/Queries** list.
7. Select the table or query on which you want to base the form.
8. Add the desired field(s) from the **Available Fields** list box.
9. Select **Next**.
10. Select the layout for the form.
11. Select **Next**.
12. Select the style for the form.
13. Select **Next**.
14. Type a name for the form.

15. Select **Finish**.

USING AUTOFORM

Discussion

The fastest way to create a form is to use AutoForm. AutoForm creates a simple columnar, tabular, or datasheet form from a selected table or query automatically, without displaying any dialog boxes or needing any input. However, you must remember to select a table or query before you create the form. All fields in the table or query will appear on the form and the title of the form is the name of the table or query.

AutoForm does not save the form for you automatically. When you close the form for the first time, a message box opens, asking if you want to save the changes.

Access includes three AutoForm options in the New Form dialog box. There is also an **AutoForm** option in the **New Object** list and on the **Insert** menu. These options do not produce the same result. The AutoForm options in the New Form dialog box produce columnar or tabular reports that contain formatting, headers, and footers. The **AutoForm** option in the **New Object** list or on the **Insert** menu is very simple; there are no formats, headers, or footers.

Order Number	1001	Full Name	Henry Norris
Customer ID	4128	Catalog	-1
Sales Rep	GEA		
Order Date	6/3/95		
Shipping Date	6/5/95		
Shipping Method	UPS		
Shipping Cost	10		
Terms	FOB		
Note			

Record: 1 of 86

A form created with AutoForm

- AutoForm options for the three types of forms are available in the New Form dialog box. If you choose one of these options, you must select the table or query in the New Form dialog box. The wizard creates the form using the most recent defaults for the style.

- You can also create a form using AutoForm by selecting the table or query you want to use, selecting the **Insert** menu, and then selecting the **AutoForm** command, or by clicking the arrow on the **New Object** button on the **Database** toolbar and selecting the **AutoForm** command. When you use one of these methods, the form appears in a standard columnar format.

- To use any AutoForm option, you must select a table or query before activating the option.

→ Steps

1. Open the desired database.
2. Select the **Forms** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select the AutoForm option you want to use.
5. Select the **Choose the table or query where the object's data comes from** list.
6. Select the desired table or query.
7. Select **OK**.

ADDING A RECORD USING A FORM

✎ Discussion

Forms are frequently used to add records. Well designed forms are easier to work with than tables because all the fields can appear on screen at once, eliminating the need to scroll.

You can use the **[Enter]** key to move between fields when you are entering data. If you want to skip several fields, you can press the **[Tab]** key until the insertion point appears in the desired field or click in the field where you want to enter data. If you press the **[Enter]** key after entering data in the last field of a record, Access automatically saves the record and displays a blank form to enter another record.

- You use the **[Shift+Tab]** key combination to move to the previous field.

→ Steps

1. Open the desired database.
2. Display the **Forms** object list.
3. Open the form in **Form** view.
4. Click the **New Record** button  on the **Form View** toolbar.
5. Type the desired data in the first field.
6. Press **[Enter]**.
7. Enter data in the fields as desired.

LESSON 2 - CREATING BASIC REPORTS

In this lesson, you will learn how to:

- Use reports
- Use the Report Wizard
- Use Print Preview
- Print pages of a report
- Base a report on a query
- Use AutoReport

USING REPORTS

Discussion

Although you can print records in a table or form, a report provides more precise control over the final output. Reports can include page headers and footers, calculated totals and subtotals, and even graphics. Reports can be used for invoices, orders, presentations, and mailing labels.

There are two basic types of reports: columnar and tabular. In a columnar report, the field names are listed on the left side of the report, with the field values listed on the right. If space on the page permits, there can be more than one column. In a tabular report, the field names are listed across the top of the report, with the field values in the appropriate columns beneath them.

Reports can include data from a single table or related tables. Reports can also be based on queries.

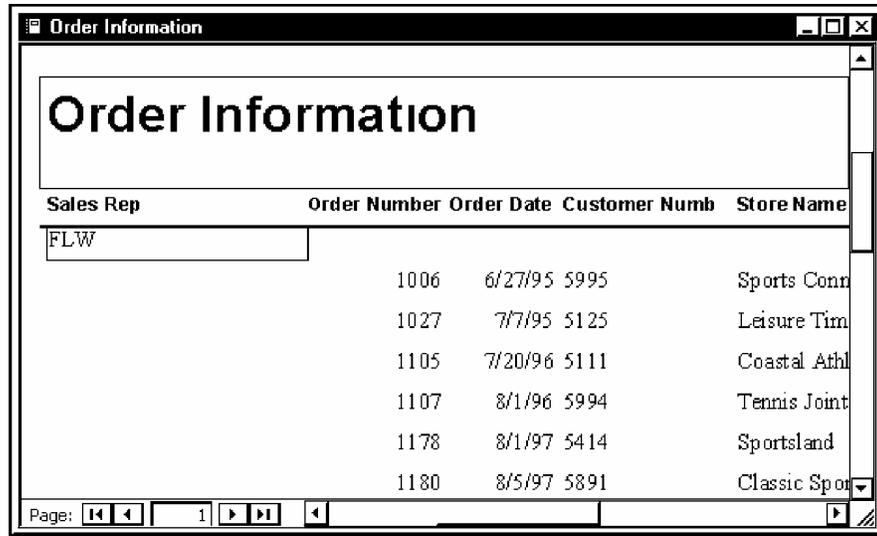
USING THE REPORT WIZARD

Discussion

You can create a report quickly and easily using the Report Wizard. There are seven basic steps in creating a report using the Report Wizard:

1. Selecting the table(s) you want to use and the fields you want to include in the report.
2. Grouping the data.
3. Adding grouping levels.
4. Sorting the data.
5. Selecting the layout.
6. Selecting the style.
7. Naming the report.

When you have finished creating the report, the Report Wizard displays the report in Print Preview. This option allows you to view the report before you print it.



A report created with the Report Wizard

- If you base a report on an object that is only associated with one table, you do not need to specify the table on which you want to base the view of the data.
- You can also activate the Report Wizard by double-clicking the **Create report by using wizard** option in the **Reports** object list in the Database window, or by selecting the **Insert** menu and then selecting the **Report** command.

➔ **Steps**

1. Open the desired database.
2. Display the **Reports** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select **Report Wizard**.
5. Select **OK**.
6. Select the **Tables/Queries** list.
7. Select the table or query on which you want to base the report.
8. Add the desired field(s) from the **Available Fields** list box.
9. Select the **Tables/Queries** list.

10. Select the next table or query on which you want to base the report.
11. Add the desired field(s) from the **Available Fields** list box.
12. Select **Next**.
13. Select how you want to view the data in the **How do you want to view your data?** list box.
14. Select **Next**.
15. Select a grouping level in the **Do you want to add any grouping level?** list box, if desired.
16. Select **Next**.
17. Select the appropriate field list.
18. Select the field by which you want to sort.
19. Select **Next**.
20. Select the desired layout for the report under **Layout**.
21. Select the desired orientation for the report under **Orientation**.
22. Select **Next**.
23. Select the desired style for the report.
24. Select **Next**.
25. Type a name for the report.
26. Select **Finish**.

USING PRINT PREVIEW

Discussion

When you open a report, it appears in Print Preview. This option allows you to see the way the report looks before you print it.

The Print Preview window has options to help you view the report. By default, the report appears magnified at 100%, which is the same size as the printout. You can also zoom out to see more of the report or zoom in to see a portion of the report in more detail. You can display the report in **One Page**, **Two Pages**, or **Multiple Pages** view. The buttons at the bottom of the window allow you to navigate through the pages and the scroll bars allow you to view different parts of the page.

 You cannot edit data in a report.

- You can also access Print Preview by right-clicking in the Database window and then selecting the **Print Preview** command.

→ **Steps**

1. Open the desired database.
2. Display the **Reports** object list.
3. Select the report you want to preview.
4. Select the **Preview** button  on the Database window toolbar.
5. Click the **Zoom** button  on the **Print Preview** toolbar on the **Print Preview** toolbar to change the magnification to fit the window.
6. Click the **Two Pages** button  on the **Print Preview** toolbar to display two pages of the report.
7. Click the **One Page** button  on the **Print Preview** toolbar to display one page of the report.
8. Click the **Zoom** button  on the **Print Preview** toolbar to change the magnification back to 100%.
9. Click the **Next Page** button  at the bottom of the Print Preview window to display the next page of the report.
10. Click the **Last Page** button  at the bottom of the Print Preview window to display the last page of the report.
11. Click the **Previous Page** button  at the bottom of the Print Preview window to display the previous page of the report.
12. Click the **First Page** button  at the bottom of the Print Preview window to display the first page of the report.

PRINTING PAGES OF A REPORT

Discussion

You can choose to print specific pages of a report. This option is useful if the report contains numerous pages and you only need information from particular pages. The Print dialog box allows you to specify specific pages to print.

- You can print a report from the Database window or from Print Preview.

- To print an entire report, click the **Print** button.

- You can also open the Print dialog box by right-clicking in the Database window and then selecting the **Print** command.

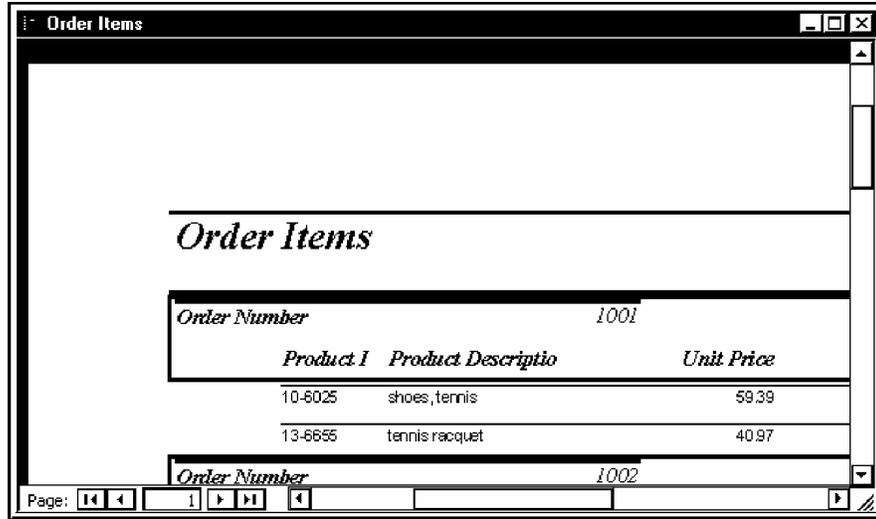
→ Steps

1. Open the desired database.
2. Display the **Reports** object list.
3. Select the report you want to print.
4. Select the **File** menu.
5. Select the **Print** command.
6. Select the **Pages** option.
7. Type the number of the first page you want to print.
8. Select the **To** text box.
9. Type the number of the last page you want to print.
10. Select **OK**.

BASING A REPORT ON A QUERY

✎ Discussion

You can use a query as the basis for a report. The RecordSet of the query appears as the data in the report and changes in the RecordSet data are reflected in the report the next time it is opened or printed.



A report based on a query

- If you base the report on two or more tables, the Report Wizard asks you on which table you want to base the view of the data. This Report Wizard page appears after you have selected the fields you want to use for your report and before you are asked if you want to select a grouping level.
- You can also activate the Report Wizard by double-clicking the **Create report by using wizard** option in the **Reports** object list in the Database window, or by selecting the **Insert** menu and then selecting the **Report** command.

➔ Steps

1. Open the desired database.
2. Display the **Reports** object list.

3. Select the **New** button  on the Database window toolbar.
4. Select **Report Wizard**.
5. Select **OK**.
6. Select the **Tables/Queries** list.
7. Select the table or query on which you want to base the report.
8. Add the desired field(s) from the **Available Fields** list box.
9. Select **Next**.
10. Select how you want to view the data in the **How do you want to view your data?** list box.
11. Select **Next**.
12. Select a grouping level in the **Do you want to add any grouping level?** list box, if desired.
13. Select **Next**.
14. Select the appropriate field arrow.
15. Select the field by which you want to sort.
16. Select **Next**.
17. Select the desired layout for the report under **Layout**.
18. Select the desired orientation for the report under **Orientation**.
19. Select **Next**.
20. Select the desired style for the report.
21. Select **Next**.
22. Type a name for the report.
23. Select **Finish**.

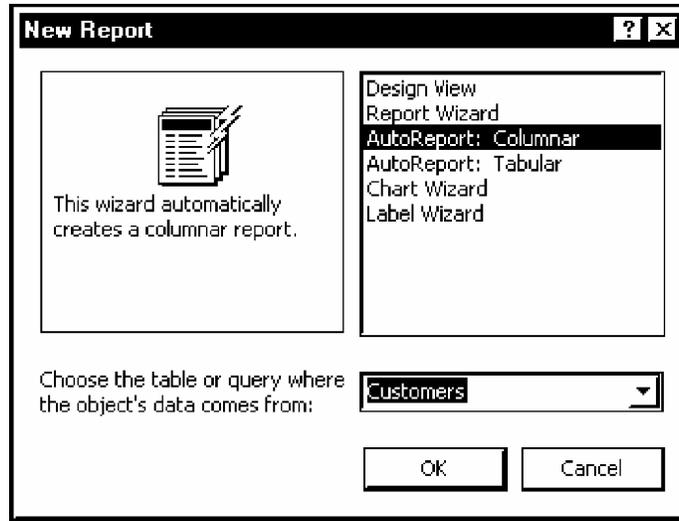
USING AUTOREPORT

Discussion

You can use AutoReport to create a report quickly. AutoReport creates a simple columnar or tabular report from a selected table or query automatically, without displaying any dialog boxes or needing any input. However, you must remember to select a table or query first. All fields in the table or query will appear in the report and the title of the report is the name of the table or query.

AutoReport does not save the report for you automatically. The first time you close the report, a message box opens, asking if you want to save the changes.

Access includes two AutoReport options in the New Report dialog box. There is also an **AutoReport** option in the **New Object** list and on the **Insert** menu. These options do not produce the same result. The AutoReport options in the New Report dialog box produce columnar or tabular reports that contain formatting, headers, and footers. The **AutoReport** option in the **New Object** list or on the **Insert** menu is very simple; there are no formats, headers, or footers.



The New Report dialog box

- AutoReport options for the two types of reports are available in the New Report dialog box. If you choose one of these options, you must select the table or query in the New Report dialog box. The wizard creates the report using the most recent defaults for the style.
- To use any AutoReport option, you must select a table or query before activating the option.
- You can also create a report using AutoReport by selecting the table or query you want to use, selecting the **Insert** menu, and then selecting the **AutoForm** command, or by clicking the arrow on the **New Object** button on the **Database** toolbar and then selecting the **AutoReport** command.

→ Steps

1. Open the desired database.
2. Select the **Reports** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select the AutoReport option you want to use.
5. Select the **Choose the table or query where the object's data comes from** list.
6. Select the desired table or query.
7. Select **OK**.

💡 Step-by-Step

From the Student Data directory, open **WORLD7.MDB**.
Use AutoReport to create a report based on a table.

If necessary, display the **Reports** object list.

<i>Steps</i>	<i>Practice Data</i>
1. Select the New button on the Database window toolbar. <i>The New Report dialog box opens.</i>	Click 
2. Select the AutoReport option you want to use. <i>The AutoReport option is selected and a description of the AutoReport option appears in the left panel of the New Report dialog box.</i>	Click AutoReport: Columnar
3. Select the Choose the table or query where the object's data comes from list. <i>A list of tables and queries in the database appears.</i>	Click Choose the table or query where the object's data comes from 
4. Select the desired table or query. <i>The table or query name appears in the Choose the table or query where the object's data comes from text box.</i>	Click Customers

<i>Steps</i>	<i>Practice Data</i>
5. Select OK . <i>The New Report dialog box closes and the report appears in Print Preview.</i>	Click OK

View the report. Close Print Preview and save the report as **Customers**.
Close **WORLD7.MDB**.

LESSON 3 - USING ADVANCED FORM DESIGN

In this lesson, you will learn how to:

- Use forms in Design view
- Create a combo box
- Create a list box
- Create an option group
- Set the tab order automatically
- Set the tab order manually
- Add a form header and footer
- Create a blank form

USING FORMS IN DESIGN VIEW

✎ Discussion

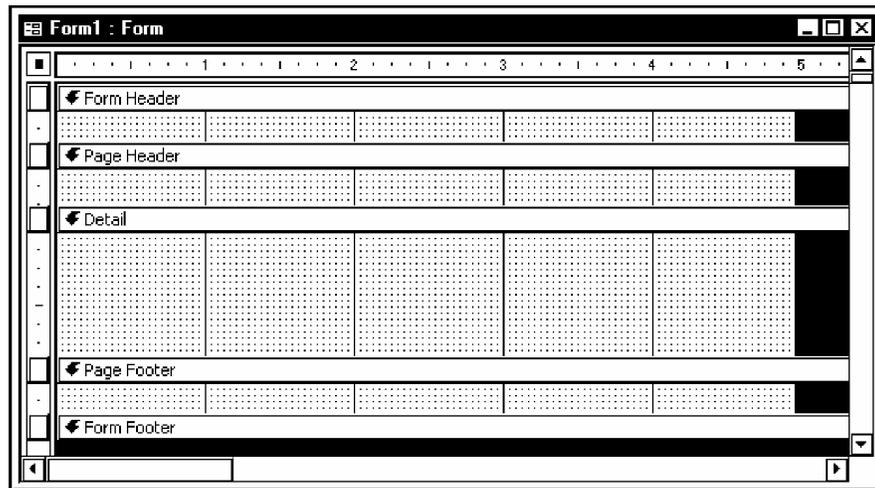
You can create or customize a form in **Design** view. A form has three basic sections: **Detail**, **Form Header/Footer**, and **Page Header/Footer**.

The **Detail** section contains the information from the table or query. You create controls in the **Detail** section that allow you to display or enter information. Access provides a variety of control types you can add to the form to simplify the data entry process. For example, you can replace a text box with a list box or an option group so that you can select a value rather than type it during data entry. In many cases, it is quicker and easier to select a value from a list rather than to remember the value you want to use and then type it. Having a list of choices also helps to ensure the consistency of the data being entered.

The **Form Header** and **Form Footer** sections display at the top and bottom of a form in **Form** view. They are stationary when you scroll the **Detail** section, making them useful for displaying titles or instructions you want visible on the form at all times. If you print the form, these sections appear at the top of the first page and at the bottom of the last page. You can also place controls, including images, labels, and fields in the form header or footer.

The **Page Header** and **Page Footer** sections display at the top and bottom of the form in **Design** view. They do not appear in **Form** view. They display at the top and bottom of every page when the form is printed. Page headers and footers can contain images, lines, text, or any other controls you want printed on every page.

When you enable the display of either header and footer section, both the header and the footer appear. You can drag the header and footer sections to size them.



A form with form and page headers and footers in Design view

- To save a table, query, form, or report in the HTML format so that it may be viewed in a browser, the object must be exported as HTML. To export an object, select the object, select the **File** menu, and then select the **Export** command. In the Export As dialog box, enter a file name in the **File name** text box, select **HTML Documents** from the **Save as type** list, and select a storage location. If you want to immediately view the object in a browser upon saving, select the **AutoStart** option. When you have finished making selections, select the **Save** button.

CREATING A COMBO BOX

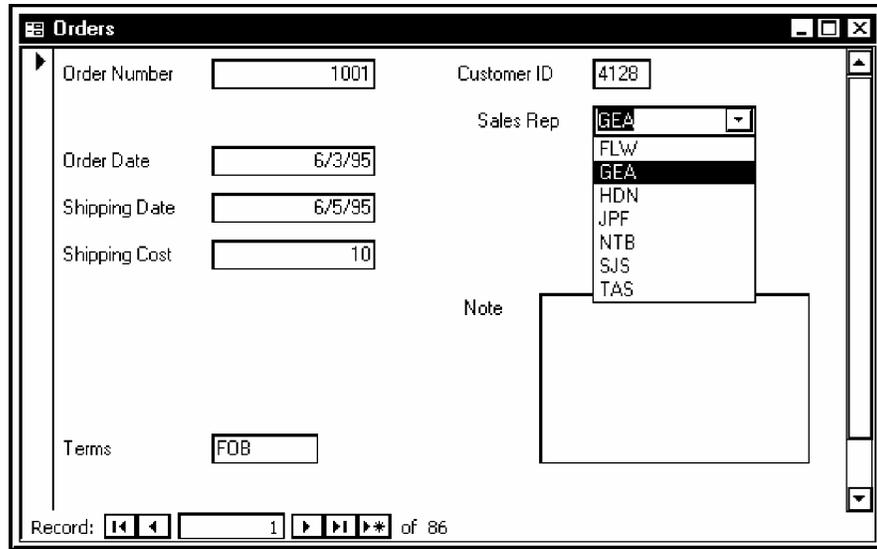
Discussion

You can create a combo box on a form. A combo box provides you with a list of values from which you can choose. Choosing from a list is much faster and more accurate than remembering a value to be typed. However, you can also type a value directly into a combo box if the appropriate value is not available from the list.

A combo box can be bound to a field, meaning that when you select or enter a value, the value is entered into that field in the corresponding table. A combo box can also be unbound, meaning that when you select or enter a value, it is held in memory to be used in another control or calculation.

Access has a Combo Box Wizard that guides you through the process of creating a combo box. You can select the list of values from an existing table or query, or you can create the values for the list yourself. If you choose to select the list from an existing table or query, the wizard prompts you to enter the table or query and the field name. If you choose to create the list of values yourself, the wizard displays a column for the entries. Either way, once the values are entered into the wizard, you then specify whether the values should be entered into a field in the table or held in memory for later use. You complete the combo box by entering a label.

When you use the **Combo Box** tool, the mouse pointer changes into a copy of the tool with a plus sign (+) above and to the left of it.



A combo box added to a form

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Display the toolbox.
4. Click the **Combo Box** tool  in the toolbox.
5. Click in the form in the location where you want the combo box to appear.
6. Select the desired option for the source of the combo box values.
7. Select **Next**.
8. Select the desired view option.
9. Select the table or query containing the values for the combo box in the **Which table or query should provide the values for your combo box?** list box.
10. Select **Next**.
11. Select the field containing the values from the **Available Fields** list box.
12. Select **Next**.
13. Adjust the width of the column, as necessary.

14. Select **Next**.
15. Select the desired storage option for the field.
16. Select the **Store that value in this field** list, if applicable.
17. Select the desired field name, if applicable.
18. Select **Next**.
19. Type a label for the combo box.
20. Select **Finish**.

CREATING A LIST BOX

Discussion

You can create a list box on a form. A list box provides you with a list of values from which you can choose. Choosing from a list is much faster and more accurate than remembering a value to be typed. However, unlike a combo box, you can only choose an item from the list; values not present on the list cannot be entered into the table.

A list box can be bound to a field, meaning that when you select or enter a value, the value is entered into a field in the corresponding table. A list box can also be unbound, meaning that when you select or enter a value, it is held in memory to be used in another control or calculation.

Access has a List Box Wizard that guides you through the process of creating a list box. You can select the list of values from an existing table or query, or you can create the values for the list yourself. If you choose to select the list from an existing table or query, the wizard prompts you to enter the table or query and the field name. If you choose to create the list of values yourself, the wizard displays a column for the entries. Either way, once the values are entered into the wizard, you then specify whether the values should be entered into a field in the table or held in memory for later use.

When you use the **List Box** tool, the mouse pointer changes into a copy of the tool with a plus sign (+) above and to the left of it. The center of the plus sign (+) indicates the position of the top left corner of the list box.

The screenshot shows an Access form window titled "Orders". It contains the following fields:

- Order Number: 1001
- Customer ID: 4128
- Order Date: 6/3/95
- Shipping Date: 6/5/95
- Shipping Cost: 10
- Shipping Method: A list box with "US Mail" selected, and "UPS" and "FedEx" as other options.
- Terms: FOB
- Note: An empty text area.
- Sales Rep: GEA (dropdown menu)

At the bottom of the form, the status bar indicates "Record: 1 of 86".

A list box added to a form

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Display the toolbox.
4. Click the **List Box** tool  in the toolbox.
5. Drag to draw the list box in the desired location on the form.
6. Select the desired option for the source of the list box values.
7. Select **Next**.
8. Type the number of columns for the list box.
9. Press **[Tab]**.
10. Type the first value for the list box.
11. Press **[Tab]**.
12. Continue to type values as desired.
13. Adjust the width of the column, as necessary.
14. Select **Next**.
15. Select the desired storage option for the field.
16. Select the **Store that value in this field** list, if applicable.

17. Select the desired field name, if applicable.
18. Select **Next**.
19. Type a label for the list box.
20. Select **Finish**.

CREATING AN OPTION GROUP

Discussion

You can create an option group on a form. An option group provides you with a limited set of values from which you can choose. Choosing from a set of values is often much faster and more accurate than remembering a value to be typed. With an option group, you can only select one option from the set of alternatives. Therefore, option groups are best utilized when there are five or less values from which to choose. Adding more than five values to an option group can crowd a form and is less effective for quick data entry.

An option group has a frame that encloses the set of values. These values appear beside option buttons or check boxes, or on top of toggle buttons.

An option group can be bound to a field in a table or query. However, only the frame is bound to the field. Within the frame, Access assigns each option a numeric value. When the option is selected, this numeric value is entered into the corresponding table. Access assigns a number because the value of an option group cannot be text. For example, you can use an option group to display a **Yes/No** field. By default, Access assigns the number **1** to the **Yes** option, and the number **2** to the **No** option. You only see the **Yes** and **No** options on the form, but Access stores the **Yes** option as the number **1** in the corresponding table and the **No** option as the number **2**.

Access has an Option Group Wizard that guides you through the process of creating an option group.

When you use the **Option Group** tool, the mouse pointer changes into a copy of the tool with a plus sign (+) above and to the left of it. The center of the plus sign (+) indicates the position of the top left corner of the option group.

The screenshot shows an Access form window titled "Orders". The form contains several fields: "Order Number" (text box with value 1001), "Customer ID" (text box with value 4128), "Sales Rep" (dropdown menu with value GEA), "Order Date" (text box with value 6/3/95), "Shipping Date" (text box with value 6/5/95), "Shipping Cost" (text box with value 10), "Shipping Method" (dropdown menu with value US Mail), "Terms" (text box with value FOB), and "Note" (text area). An option group is added to the form, titled "Send catalog?", with two buttons labeled "Yes" and "No". The status bar at the bottom indicates "Record: 1 of 86".

An option group added to a form

● The Option Group Wizard is not included in the default installation. You can choose to install it with the initial installation, or it can be installed by itself at a later time.

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Display the toolbox.
4. Click the **Option Group** tool  in the toolbox.
5. Drag to draw the option group in the desired location on the form.
6. Type the desired label for the first option.
7. Press [**Tab**].
8. Type other labels as desired.
9. Select **Next**.
10. Select the desired option for the default.
11. Select **Next**.
12. Type the value for the first label.
13. Press [**Tab**].

14. Type other values as necessary.
15. Select **Next**.
16. Select the desired storage option for the field.
17. Select the **Store the value in this field** list, if applicable.
18. Select the desired field name, if applicable.
19. Select **Next**.
20. Select the desired option for the control type.
21. Select the desired style option.
22. Select **Next**.
23. Type the caption for the option group.
24. Select **Finish**.

SETTING THE TAB ORDER AUTOMATICALLY

Discussion

The tab order determines the order in which form fields and controls are selected when you press the **[Tab]** key during data entry. The default tab order is the order in which the fields or controls were added to the form. If you have added, rearranged, or deleted fields or controls, the tab order may not be suitable for data entry. You can choose to have Access automatically rearrange the tab order to reflect the order of the fields on the form. The fields are then accessed from left to right across each row.

- You can also open the Tab Order dialog box by right-clicking in the Design window and then selecting the **Tab Order** command.

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Select the **View** menu.
4. Select the **Tab Order** command.

5. Select **Auto Order**.
6. Select **OK**.

SETTING THE TAB ORDER MANUALLY

Discussion

The tab order determines the order in which form fields and controls are selected when you press the **[Tab]** key during data entry. The default tab order is the order in which the fields or controls were added to the form. If you have added, rearranged, or deleted fields or controls, the tab order may not be suitable for data entry. You can adjust the tab order manually to reflect whatever order is best for your data entry needs.

→ Steps

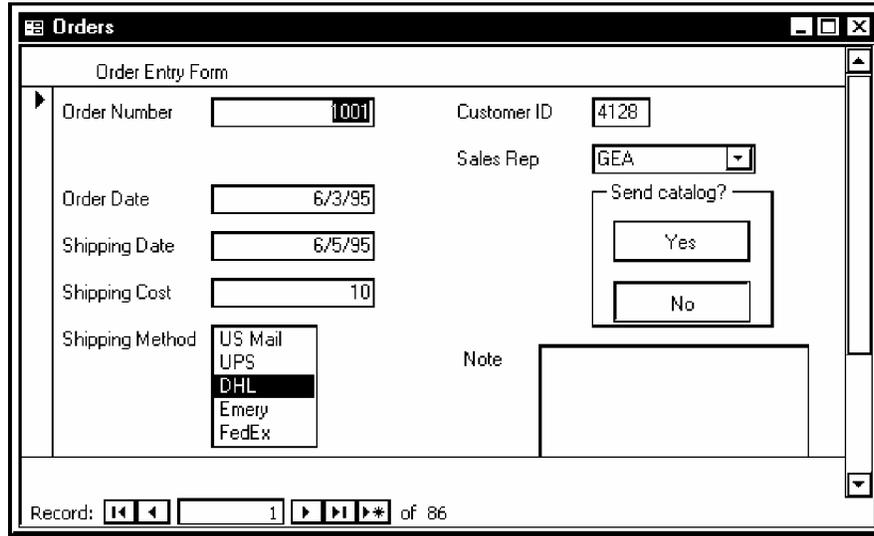
1. Open the desired database.
2. Open the desired form in **Design** view.
3. Select the **View** menu.
4. Select the **Tab Order** command.
5. Point to the record selector to the left of the field you want to move.
6. Select the record selector to the left of the field you want to move.
7. Drag the field to the new position.
8. Select **OK**.

ADDING A FORM HEADER AND FOOTER

Discussion

The **Form Header** and **Form Footer** sections display at the top and bottom of the form in **Form** view. They are stationary when you scroll the **Detail** section, making them useful for displaying titles or instructions you want visible on the form at all times. If you print the form, these sections appear at the top of the first page and the bottom of the last page.

You can place controls, including images, labels, and fields, in the form header or footer.



A label added to the Form Header section

- You can also display the **Form Header** and **Form Footer** sections by right-clicking in the Design window and then selecting the **Form Header/Footer** command.
- You can also add **Page Header** and **Page Footer** sections to a form by selecting the **View** menu and then selecting the **Page Header/Footer** command. Page headers and footers only appear when the form is printed.

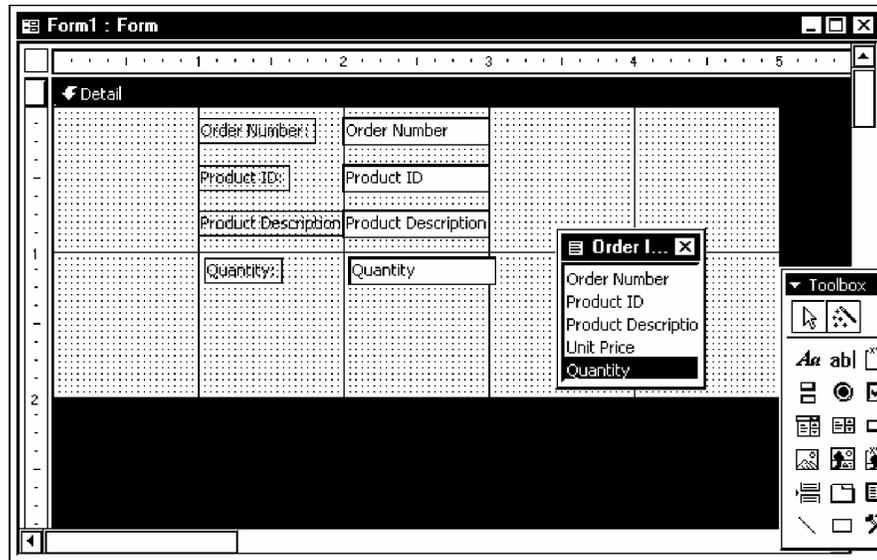
→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Display the toolbox.
4. Select the **View** menu.
5. Select the **Form Header/Footer** command.

CREATING A BLANK FORM

✎ Discussion

You can create a form from scratch in **Design** view. For example, if a form does not currently exist for a particular table or query, you can create one using the fields in the selected table or query. You can then determine the design of the form by adding fields, control, and options.



A form created from scratch

➔ Steps

1. Open the desired database.
2. Display the **Forms** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select **Design View**.
5. Select the **Choose the table or query where the object's data comes from** list.
6. Select the table or query on which you want to base the form.
7. Select **OK**.
8. Add items to the form as desired.

LESSON 4 - USING ADVANCED REPORT DESIGN

In this lesson, you will learn how to:

- Use reports in Design view
- Create a calculated control
- Group data in a report
- Create a header for each group
- Create a running summary
- Insert a date/time control
- Insert a page break
- Change the report margins
- Use the Label Wizard
- Create a blank report

USING REPORTS IN DESIGN VIEW

Discussion

You can create or customize a report in **Design** view. A report has three basic sections: **Detail**, **Report Header/Footer**, and **Page Header/Footer**.

The **Detail** section contains the information from the table or query. You create controls in the **Detail** section that display information. You can display either one record per page or multiple records per page.

The **Report Header** and **Report Footer** sections display at the top and bottom of the report in **Design** view. When you print the report, these sections appear at the beginning and the end of the report only. The header can be used for report titles, while the footer can be used for report totals or other summaries.

The **Page Header** and **Page Footer** sections display at the top and bottom of the report in **Design** view. When the report is printed, these sections appear at the top and bottom of every page. Page headers and footers can contain images, lines, text, or any other controls you want printed on every page.

When you enable the display of either header and footer section, both the header and the footer appear. You can drag the header and footer sections to size them.

CREATING A CALCULATED CONTROL

Discussion

You can add a calculated control to a form or report. A calculated control is not bound to a field. It contains an expression that uses information from fields to calculate a result. The result is not stored in a table. It is calculated when the report or form is run. The **Control Source** property defines the expression that calculates the result.

Product Description	Unit Price	Quantity	Item Total
tennis	59.39	10	\$593.90
racquet	40.97	5	\$204.85
basketball	62.25	5	\$311.25
aerobic	42.87	7	\$300.09

Page: 1

A calculated control created in a report

- You can also open the property sheet by right-clicking the new text box and then selecting the **Properties** command or by selecting the **View** menu and then selecting the **Properties** command.
- You can also create an expression using the Expression Builder by clicking the **Expression Builder** button to the right of the **Control Source** property on the **Data** page in the property sheet, by clicking the **Build** button on the **Form Design** toolbar, or by right-clicking in the **Control Source** property and then selecting the **Build** command.

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Display the toolbox.
4. Click the **Text Box** tool  in the toolbox.
5. Click in the desired location for the control.
6. Click the **Properties** button  on the **Report Design** toolbar.
7. Select the **Data** tab.

8. Type the desired calculated control expression.
9. Click the **Close** button to close the property sheet.
10. Select the label box paired with the control.
11. Press [**Delete**].

GROUPING DATA IN A REPORT

Discussion

You can group data in reports that have a common field. It is often easier to read reports when data is grouped, since you can then easily find the pertinent data. For example, you can group a sales report by region so that regional personnel can easily locate the data for their region.

A grouped report automatically sorts the table by the data in the grouped field. You can nest groups inside one another, up to ten levels. For example, in the regional report, you may want to group by state within each region.

When you group data, you can display a group header and footer that can be used to display information at the top or bottom of each group. For example, you can add a calculated control in a group footer that calculates summary information, such as a total or an average for each group.

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Click the **Sorting And Grouping** button  on the **Report Design** toolbar.
4. Select the **Field/Expression** list.
5. Select the desired field.
6. Select the corresponding **Sort Order** field.
7. Select the **Sort Order** list.
8. Select the desired sort order.
9. Select the **Group Header** property box.

10. Select the **Group Header** list.
11. Select the desired option.
12. Select the **Group Footer** property box.
13. Select the **Group Footer** list.
14. Select the desired option.
15. Select the **Group On** property box.
16. Select the **Group On** list.
17. Select the desired option.
18. Click the **Close** button.

CREATING A HEADER FOR EACH GROUP

Discussion

You can create a header for each group that appears in a grouped report. The header displays at the top of each group. Often, the group header contains the control for the grouped field, meaning that the common value on which the grouping is based, such as the region, appears only once at the top of each group.

Order Number	Product ID	Product Description	Unit Price	Quantity
1001				
	10-6025	shoes, tennis	59.39	10
	13-6655	tennis racquet	40.97	5
1002				
	10-4430	shoes, basketball	62.25	5
	13-9672	steps, aerobic	42.87	7
	12-8390	ball, racquet	1.64	3
	14-8417	badminton set	17.74	3

Page: 14 | 1

A group header in a report

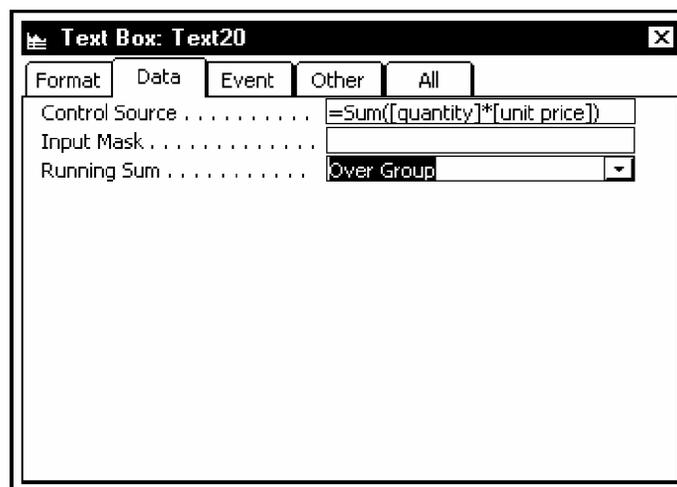
→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Select the control you want to insert into the group header.
4. Click the **Cut** button  on the **Formatting (Form/Report)** toolbar.
5. Click the desired group header section where you want the header to appear.
6. Click the **Paste** button  on the **Formatting (Form/Report)** toolbar.

CREATING A RUNNING SUMMARY

✎ Discussion

In a grouped report, you can create a running summary of the items in the group. Often, the running summary is positioned in the group footer, which appears at the bottom of every group. For example, in a sales report grouped by region, you can create a calculated field that displays information in a running summary. After each group, a cumulative total for all the groups above appears.



An expression used to create a running summary in a report

- You can also open the property sheet by right-clicking the new text box and then selecting the **Properties** command or by selecting the **View** menu and then selecting the **Properties** command.

- You can also create an expression using the Expression Builder by clicking the **Expression Builder** button to the right of the **Control Source** property on the **Data** page in the property sheet, by clicking the **Build** button on the **Form Design** toolbar, or by right-clicking in the **Control Source** property and then selecting the **Build** command.

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Display the toolbox.
4. Click the **Text Box** tool  in the toolbox.
5. Click in the location for the control.
6. Click the **Properties** button  on the **Report Design** toolbar.
7. Select the **Data** tab.
8. Type the desired calculated control expression.
9. Select the **Running Sum** property.
10. Select the **Running Sum** list.
11. Select the desired option.
12. Click the **Close** button to close the property sheet.

INSERTING A DATE/TIME CONTROL

Discussion

You can insert a control that displays the current date and/or time in a report. This control updates automatically every time the report is previewed or printed. By

default, a date/time control is inserted into the **Report Header** section. However, you can easily move it to another section. For example, you could place the date in the **Report Footer** section so that it would be readily visible on the last page of the report.

- If you create a report with the Report Wizard, Access automatically inserts a date/time control in the **Page Footer** section.

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Select the **Insert** menu.
4. Select the **Date and Time** command.
5. Select or deselect options as desired.
6. Select **OK**.
7. Drag the date control to the desired position in the report.

INSERTING A PAGE BREAK

✎ Discussion

When you print a report, Access automatically starts a new page when necessary. You can control the pagination by inserting a page break. You can insert a page break in the **Group Footer** section to place each group on its own page, or you can insert a page break in the **Report Header** section to create a separate title page for a report.

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Display the toolbox.

4. Click the **Page Break** tool  in the toolbox.
5. Click in the location for the page break.

CHANGING THE REPORT MARGINS

Discussion

By default, the margins for a report are one inch on all sides. You can control the margin settings to fit more or less data on a page as necessary. The margins you set for a report are saved and applied each time you print the report.

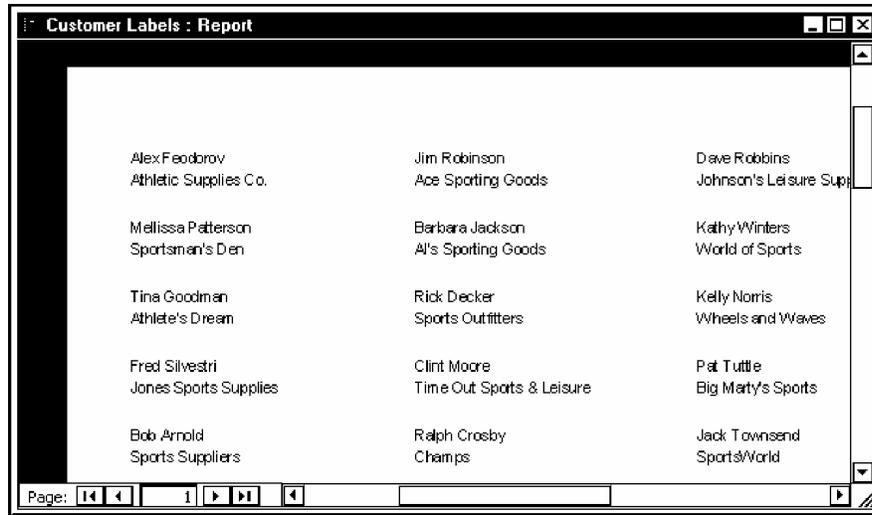
→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Select the **File** menu.
4. Select the **Page Setup** command.
5. Select the text in the **Top** text box.
6. Type the new measurement for the top margin.
7. Select the text in the **Bottom** text box.
8. Type the new measurement for the bottom margin.
9. Select the text in the **Left** text box.
10. Type the new measurement for the left margin.
11. Select the text in the **Right** text box.
12. Type the new measurement for the right margin.
13. Select **OK**.

USING THE LABEL WIZARD

✎ Discussion

Access has a Label Wizard that guides you through the process of creating a report that prints labels. You can choose from many standard types of labels, or you can create your own custom label definition.



Labels created using the Label Wizard

➔ Steps

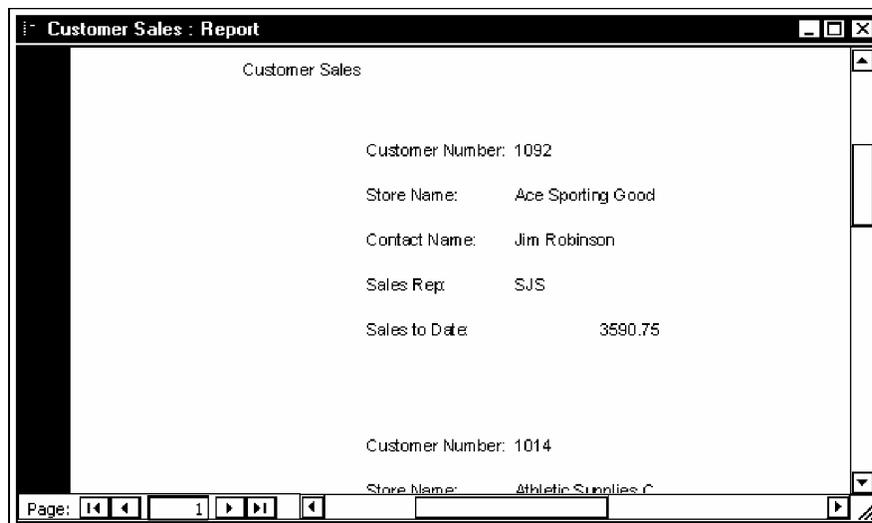
1. Open the desired database.
2. Display the **Reports** object list in the Database window.
3. Select the **New** button  on the Database window toolbar.
4. Select **Label Wizard**.
5. Select the **Choose the table or query where the object's data comes from** list.
6. Select the desired table or query.
7. Select **OK**.
8. Select the desired unit of measurement under **Unit of Measure**.
9. Select the **Filter by manufacturer** list.

10. Select the desired label manufacturers.
11. Select the desired label type under **Product number** in the **What label size would you like?** list box.
12. Select **Next**.
13. Select the desired font and color options.
14. Continue selecting the desired font and color options.
15. Select **Next**.
16. Select the field for the first row from the **Available fields** list box..
17. Press **[Enter]**.
18. Continue adding fields from the **Available fields** list box, as appropriate.
19. Select **Next**.
20. Add the field by which you want to sort from the **Available fields** list box.
21. Select **Next**.
22. Type a name for the report.
23. Select **Finish**.

CREATING A BLANK REPORT

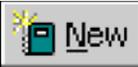
Discussion

You can create a report from scratch in **Design** view. For example, if a report does not currently exist for a particular table or query, you can create one using the fields in the selected table or query. You can then determine the design of the report by adding fields, control, and options.



A report created from scratch

→ Steps

1. Open the desired database.
2. Display the **Reports** object list.
3. Select the **New** button  on the Database window toolbar.
4. Select **Design View**.
5. Select the **Choose the table or query where the object's data comes from** list.
6. Select the table or query on which you want to base the report.
7. Select **OK**.
8. Add items to the report as desired.

LESSON 5 - USING SUBFORMS/SUBREPORTS

In this lesson, you will learn how to:

- Work with subforms/subreports
- Create a subform/subreport
- Edit the layout of a subform
- Display a subform in Datasheet view
- Add a subform header/footer
- Display a subform total

WORKING WITH SUBFORMS/SUBREPORTS

Discussion

You can display a form or report within a form or report. The main form or report includes information from one table and the subform or subreport includes information from a second, related table.

You can show a form or report within a form or report to more effectively show the linked data from tables with one-to-many relationships. The main form/report and the subform/subreport are linked by a common field between the tables. The main form/report represents the one side of the one-to-many relationship and the subform/subreport represents the many side. When viewing a record in the main form/report (one side relationship), the subform/subreport displays the related records from another table (many side relationship). For example, you have a **Customer** table and an **Orders** table. Each customer has several orders. In the **Customer** form (bound to the **Customer** table), you can include an **Orders** subform (bound to the **Orders** table). The tables would probably be linked by a **Customer ID** field; a field present in both tables. As you view a customer's record displayed in the main form, the order records of that customer appear in the subform. When you move to the next customer record in the main form, the order records in the subform are updated to display that customer's orders. Just as you can manipulate table data in a form, you can also manipulate the related table data using the subform. Using the same example, you can edit the customer records or the order records.

Subform data can be displayed in either **Form** view (one record at a time) or **Datasheet** view (many records displayed at once), while subreport data can only be displayed in Print Preview.

You can add any number of subforms or subreports to a form or report as well as add a subform or subreport within another subform or subreport. You should keep in mind that the purpose of a form or report is to make viewing and entering data easier. You can avoid cluttering the form or report (which can cause confusion) by positioning the subform(s) or subreport(s) carefully, assigning a different background color to each, and removing any unnecessary items, such as scroll bars. Viewing the properties of the subform or subreport is helpful when considering these options.

The Subform and SubReport Wizards provide the easiest method for creating a subform or subreport. If you choose not to use the Subform or Subreport Wizards, you will need to design a form or report and then insert it into another form or report. You may not want to use the wizard if you are designing a subform or subreport that is very different in appearance from the form or report the wizard produces.

CREATING A SUBFORM/SUBREPORT

✎ Discussion

When you add a subform/subreport to an existing form, it is best to start by creating the main form/report before you create the subform/subreport. The form/report can then be edited so that it contains only the information you need, as well as the desired layout. This form can be added to the design of the main form where it will take on the properties of a subform/subreport.

You can create a subform that will appear in **Form** view, **Datasheet** view, or both views. When the form is created using the SubForm Wizard, a subform is created that can be viewed in both **Form** and **Datasheet** views. You can customize the subform in **Design** view by adding headers, footers, color, fonts, totals, etc.

The SubForm/SubReport Wizard prompts you for the following information:

1. If you want to use an existing form/report as the subform/subreport or build a new one from tables and queries.
2. If you want to define the link between the main form/report and subform/subreport yourself or choose from a list of available link options.
3. A name for the subform or subreport.

The screenshot shows a Microsoft Access form window titled "Orders". The main form contains several text boxes with the following values: Order Number (1001), Customer ID (4128), Order Date (6/3/95), Terms (FOB), Shipping Date (6/5/95), Note (empty), and Shipping Cost (10). Below these fields is a subform titled "Order Items of Company". This subform contains four text boxes with values: Order Number (1001), Product ID (10-6025), Quantity (10), and Unit Price (59.39). At the bottom of the main form, there are navigation buttons and a record indicator showing "Record: 1 of 2". At the bottom of the subform, there are similar navigation buttons and a record indicator showing "Record: 1 of 85".

A subform within a form

- Although it is not necessary to click the **Control Wizards** button before creating a subform or subreport, it is recommended. Clicking this button enables the control wizards that assist you in creating a subform or subreport.

→ Steps

1. Open the desired database.
2. Open the desired form or report in **Design** view.
3. Click the **Control Wizards** button  in the toolbox, if necessary.
4. Click the **Subform/Subreport** button  in the toolbox.
5. Click in the form or report where you want to place the top left corner of the subform or subreport.
6. Select the desired option for the source of the subform or subreport.
7. Select the desired form or report you want to insert as a subform or subreport.
8. Select **Next**.
9. Select the desired link option.
10. Select the desired link for the subform or subreport from the list box.
11. Select **Next**.
12. Type a name for the subform or subreport.
13. Select **Finish**.

EDITING THE LAYOUT OF A SUBFORM

✎ Discussion

In order to improve the efficiency or appearance of a subform/subreport, you can change its layout the same way you would change the layout of a form/report. In **Design** view for the main form/report, the subform/subreport is a control that you can move, resize, align, add, and delete as you would any other control. Since the subform/subreport control contains a form/report, you can open it in **Design** view and

make any editing changes to its controls. Any changes to the layout of the subform/subreport are performed in **Design** view.

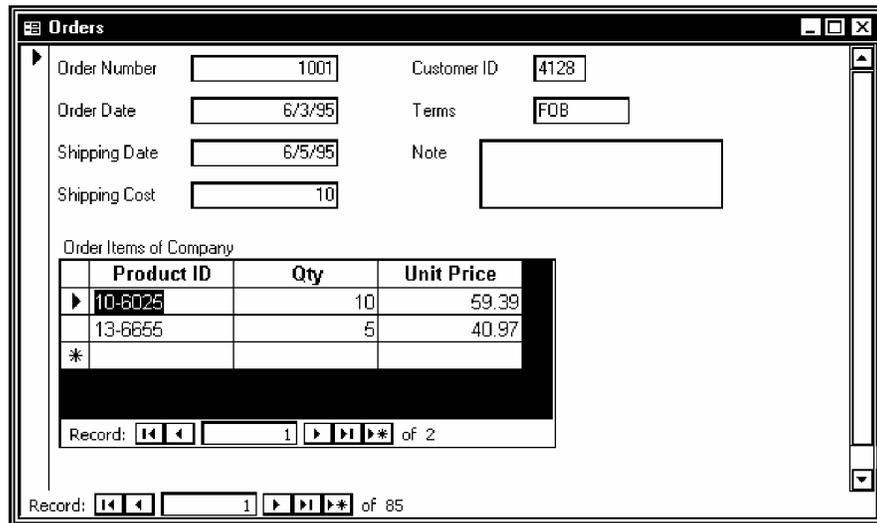
→ **Steps**

1. Open the desired database.
2. Open the main form in **Design** view.
3. Double-click the subform control you want to edit.
4. Double-click the subform control text to select it.
5. Make the desired editing changes.

DISPLAYING A SUBFORM IN DATASHEET VIEW

✎ **Discussion**

You can display a subform in **Datasheet** view. This option allows you to view many subform records at once, rather than viewing them one at a time in **Form** view. Since the benefit of using subforms is to display the “many” side of a one-to-many relationship, **Datasheet** view is generally preferred.



A subform in Datasheet view

- You can add a record to both the main form and the subform by selecting the **Insert** menu and then selecting the **New Record** command.

- You can also display a subform in **Datasheet** view by right-clicking in the desired field and then selecting the **Subform Datasheet** command.

→ Steps

1. Open the desired database.
2. Open the main form in **Form** view.
3. Select a field in the subform.
4. Select the **View** menu.
5. Select the **Subform Datasheet** command.

ADDING A SUBFORM HEADER/FOOTER

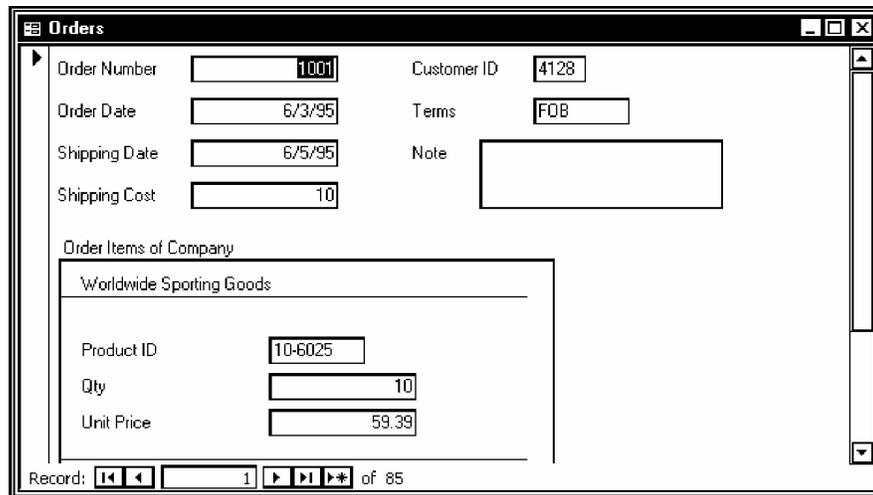
Discussion

You can add headers and footers to subforms/subreports when the subform/subreport is open in **Design** view. Access includes page headers and footers and form/report headers and footers. Page headers and footers appear on each page of a form, whereas form/report headers and footers only appear once on a form/report (form/report headers at the beginning of the subform/subreport and form/report footers at the end). Headers are generally used to provide information about the subform/subreport, such as a title, while footers are generally used to display summary information about the subform/subreport data, such as a total.

The different headers and footers are described in the following table:

Type	Description
Page Header	Displays information you want at the top of every page, such as a title or column heading.
Page Footer	Displays information you want at the bottom of every page, such as a page number or filename.

Type	Description
Form/Report Header	Displays information at the top of the first printed page only, such as instructions on using the form/report. A button could be included here that could open a related form/report. The Form/Report Header does not appear in Datasheet view.
Form/Report Footer	Displays information at the bottom of the last printed page only, such as instructions on using the form/report. A button could be included here that could open a related form/report. The Form/Report Footer does not appear in Datasheet view.



A form header displayed in a subform

- You can also add a form header/footer by right-clicking in the **Detail** section and then selecting the **Form Header/Footer** command.
- You can add a report header/footer in the same way that you add a form header/footer. However, instead of selecting the **Form Header/Footer** command, you would select the **Report Header/Footer** command.

→ Steps

1. Open the desired database.
2. Open the main form in **Design** view.
3. Double-click the subform **Detail** header.
4. Select the **View** menu.
5. Select the **Form Header/Footer** command.
6. Click the **Label** button  in the toolbox.
7. Click in the location in which you want to add the form header or footer.
8. Type the desired text for the header or footer.
9. Click outside the label box to enter the text into the subform.

DISPLAYING A SUBFORM TOTAL

Discussion

Forms and reports often include totals of the information they contain. These totals are easily created by adding a calculated control to the form/report that contains an expression to find the desired total. Expressions are used to obtain information you cannot obtain directly from the tables in your database. For example, if you have a table that contains the quantity and cost of various items, you could use an expression to multiply the quantity and the cost to obtain the current inventory value. Every time you use a form/report, Access calculates any expressions contained in the form/report, helping you keep your information as accurate as possible.

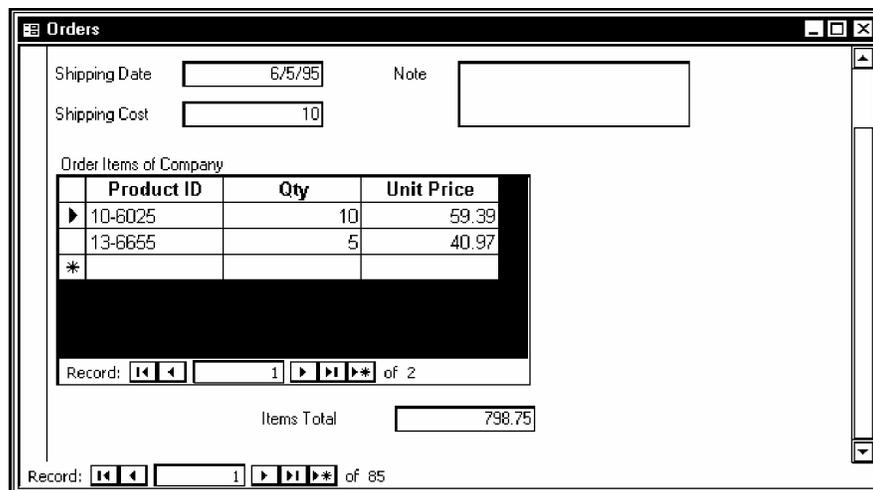
Some examples of expressions are listed in the following table:

Control Name	Expression	Result
Total	= $[Cost]+[Shipping]+[Markup]$	Adds the value of the Cost field, the value of the Shipping field, and the value of the Markup field of an item to produce the Total field
Discount	= $[Price]*.15$	Multiplies the Price field of an item by a constant discount of 0.15
Date	=Date()	Provides the current date in your computer system

You may want to include a total of information, contained in a subform/subreport, in the main form/report total. For example, an **Orders** form may contain a control for shipping charges. The information in the **Product** subform may include a total, such as the total cost of all the products ordered. You can display this subform total on the main form so that you can add the shipping charges to this total to create a grand total. This option is performed by adding a control to the main form/report, which refers to the desired subform/subreport total control, to display the information.

The expression in the main form/report control that refers to the subform/subreport control defines the name of the subform/subreport and the name of the subform/subreport control being used in the following format:

= *[Name of the Subform/Subreport]![Name of the Subform/Subreport Control]*



A subform total displayed in the main form

- You can also display a subreport total in the main report using the same methods that you use to display a subform total.

- You can also display the property sheet by selecting the **View** menu and then selecting the **Properties** command or by right-clicking a form or report in **Design** view and then selecting the **Properties** command.

→ Steps

1. Open the desired database.
2. Open the form in **Design** view.
3. Click the **Text Box** button  in the toolbox.
4. Click in the form where you want to insert the control.
5. Select the label box.
6. Select the text in the label box.
7. Type a label in the label box.
8. Select the text box.
9. Click the **Properties** button  on the **Form Design** toolbar.
10. Select the **Data** tab.
11. Type the expression that refers to the desired subform control.
12. Click the **Close** button to close the property sheet.

LESSON 6 - USING OTHER FORM TECHNIQUES

In this lesson, you will learn how to:

- View the properties of an object
- Change a control property
- Add a logic control
- Add a command button
- Save a form as a report
- Create a form letter

VIEWING THE PROPERTIES OF AN OBJECT

Discussion

Every object in Access has properties that define its characteristics. Database objects, such as tables, queries, and forms, have very general properties, such as their name and description. Other objects, such as fields in a table or controls on a form, have many properties that control their appearance, such as font size and color, the number of decimal places, and the control source. You can change the properties of the objects on a form or report in **Design** view using the property sheet. The properties displayed on the property sheet depend on what type of object is selected. For example, the properties for a label box differ from the properties for the **Detail** section of a form. You can also change the properties for page and form headers and footers.

The properties of objects are grouped into five categories:

Category	Description
Format	Specifies the appearance of objects, such as font characteristics of a text box or whether or not scroll bars appear on a form.
Data	Determines the characteristics of the data displayed, such as the data's control source, default value, or whether or not it can be edited.
Event	Specifies a procedure that Access executes when an event occurs. Some examples of events include clicking a control (OnClick), deleting data (onDelete), and opening the form (OnOpen). The procedure can be an expression, a macro, or a Visual Basic for Access routine.
Other	Shows additional features of the control, such as the name of the control or whether or not a control is in the tab order.
All	Displays all the properties of the object in one list.

- You can also display the property sheet by selecting the **View** menu and then selecting the **Properties** command or by right-clicking a form or report in **Design** view and then selecting the **Properties** command.

- The name of the selected object appears in the title bar of the property sheet.

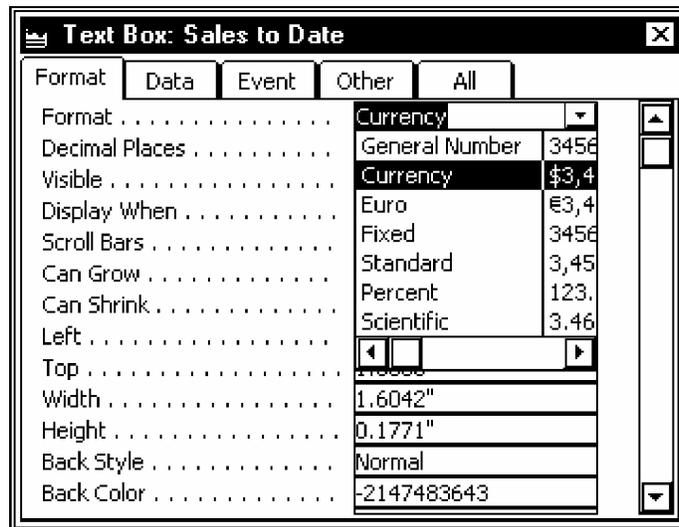
→ **Steps**

1. Open the desired database.
2. Open the desired form or report in **Design** view.
3. Select the desired object.
4. Click the **Properties** button  on the **Form Design** toolbar.
5. Select the desired tab on the property sheet.

CHANGING A CONTROL PROPERTY

✎ **Discussion**

The properties of a control define many of its aspects, including the source of the information displayed in the control, its name, if it is displayed or hidden, and its appearance (font size, color, etc.). Properties of controls and other objects can be easily changed to suit your needs. For example, you may have a form with records you want to keep constant. You can select **No** in the form's **Allow Edits** property box to prevent any editing of the records.



The Format page of the property sheet

- You can change the properties of several controls at once. For example, you can select several text boxes and change the font type and size for all of them at the same time, rather than individually.

- You can double-click a label box or text box to quickly change a property setting. This option is especially helpful for properties that can be set to **Yes** or **No** only.

→ Steps

1. Open the desired database.
2. Open the desired form or report in **Design** view.
3. Select the desired control.
4. Click the **Properties** button  on the **Form Design** toolbar.
5. Select the desired tab on the property sheet.
6. Select the desired property you want to set.
7. Select the list for the property, if appropriate.
8. Type the desired property setting or choose a property setting from the list.
9. Click the **Close** button to close the property sheet.

ADDING A LOGIC CONTROL

✎ Discussion

Some tables contain fields that have a **Yes/No** field type. These fields can contain a Yes (True) value, a No (False) value, or no value at all.

When working with a form that contains a **Yes/No** field, you can create a logic control that is bound to the **Yes/No** field. Logic controls give a visual display of the value in a **Yes/No** field, such as a check box where a check mark appears when the field value is Yes and does not appear when the value is No. Another type of logic control is the toggle button, which appears “sunken” for a value of Yes and “raised” for a value of No. The logic control for a field with a null value (neither Yes nor No is chosen) appears the same as the field with a No value.

Logic controls improve the visual effectiveness of a form and facilitate data entry. With a logic control, the value of a **Yes/No** field is selected with a single click of the mouse button rather than multiple keystrokes.

The way in which the different controls indicate a Yes or No value are described in the following table:

Control	Appearance
Toggle button	Appears “sunken” with a Yes value and “raised” with a No value.
Option button	Contains a dot with a Yes value and appears empty with a No value.
Check box	Appears checked with a Yes value and unchecked with a No value.

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Click the desired logic control tool in the toolbox.
4. Click in the form where you want the logic control to appear.
5. Select the label box of the logic control.
6. Click in the text in the label box.
7. Select the default text.
8. Type the desired logic control name.
9. Select the logic control.
10. Click the **Properties** button  on the **Form Design** toolbar.
11. Select the **Data** tab.
12. Select the **Control Source** list.
13. Select the **Yes/No** field you want bound to the logic control.
14. Click the **Close** button to close the property sheet.

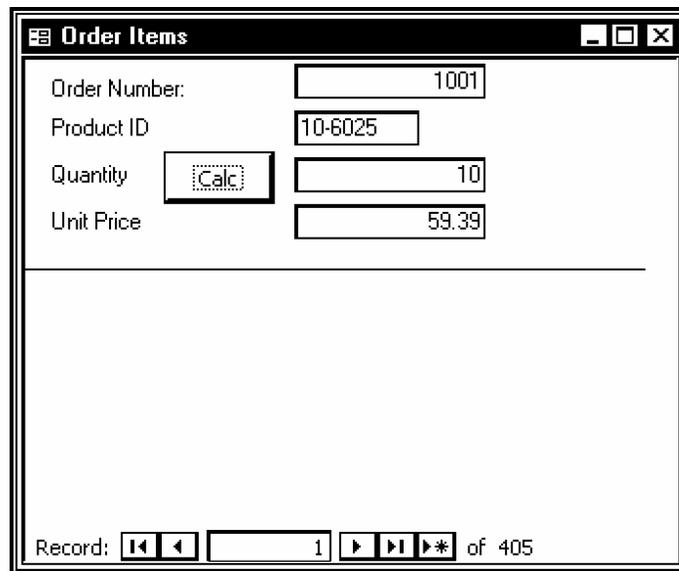
ADDING A COMMAND BUTTON

Discussion

You can design one or more command buttons to appear on a form. These command buttons can then be used to access commonly used functions. For example, if you frequently use the Calculator, you can create a command button that can simply be clicked to instantly access the Calculator.

Command buttons are particularly useful because they do not require the database user to know the Microsoft Access menu structure. For example, instead of making the user select the **Print** command from the **File** menu to print a displayed form, you could add the **Print** function to a command button on the form.

Access provides different actions for you to use, which are available in the following categories: **Record Navigation**, **Record Operations**, **Form Operations**, **Report Operations**, **Application**, and **Miscellaneous**.



Adding a command button

- If you click the **Control Wizards** button before you create a command button, Access provides you with a wizard that helps you create the command button.

→ Steps

1. Open the desired database.
2. Open the desired form in **Design** view.
3. Click the **Control Wizards** button  in the toolbox.
4. Click the **Command Button** tool  in the toolbox.
5. Click in the form where you want to insert the command button.
6. Select the desired category from the **Categories** list box.
7. Select the desired action from the **Actions** list box.
8. Select **Next**.
9. Type the path to the application you want to run.
10. Select **Next**.
11. Select whether you want text or a picture to display on the button.
12. Select the text in the **Text** text box or select the desired picture.
13. Type the text you want to appear on the button, as necessary.
14. Select **Next**.
15. Type the desired name for the button.
16. Select **Finish**.

SAVING A FORM AS A REPORT

✎ Discussion

If you have an existing form you print often, you can save the form as a report. It is possible to print a form directly, but reports are more suitable for presenting information on paper, especially if you need to include group totals. Once a form is saved as a report, its structure can be modified in **Report Design** view to suit your needs.

- You can also open the Save As dialog box by selecting the desired form in the Database window, selecting the **File** menu, and then selecting the **Save As** command.

→ Steps

1. Open the desired database.
2. Display the **Forms** object list.
3. Right-click the form you want to save as a report.
4. Select the **Save As** command.
5. Type a name for the report.
6. Select the **As** list.
7. Select the desired **Report** or **Form** item.
8. Select **OK**.

CREATING A FORM LETTER

✎ Discussion

You can create a form letter with Access. A form letter is a report that contains static (constant) text, such as the body of a letter or an invoice form, and has controls that are bound to table data and embedded in the appropriate locations on the form letter. A simple example of a form letter is a report in which the text “Dear” is in the label box of a control and the text box of the control is bound to the **First Name** field of a table. When this report is run, the greeting of each form letter appears as follows:

Dear Joseph:

Dear Emily:

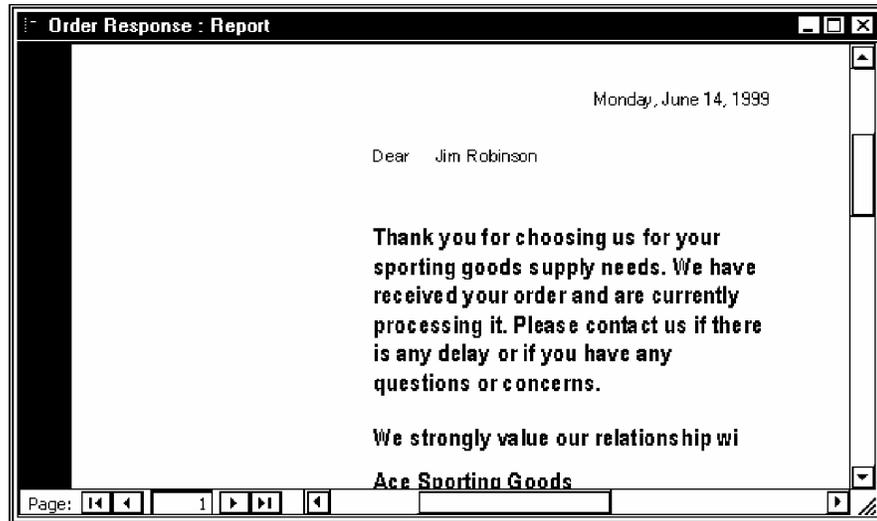
Dear Susan:

The “Dear” remains as constant text and the first names are supplied by the table.

When you create a form letter, you need to tell Access which table or query you want to use to provide the data that will be used in the form letter.

When you create a form letter in Access, it is important to remember that the label boxes contain the static, or unchanging, text of the letter. The text boxes are bound controls that change to display the appropriate field data from each record. When you use the toolbox in **Report Design** view to add a text box control, a label box control automatically appears to the left of it. You can delete the label box if you do not need it.

In most cases, it is necessary to insert at least one page break to ensure that the letters are printed individually.



A form letter

→ Steps

1. Open the desired database.
2. Open the desired report in **Design** view.
3. Click the **Label** tool  in the toolbox.
4. Click in the report where you want the static text to appear.
5. Type the desired static text.
6. Click the **Text Box** tool  in the toolbox.
7. Click in the report where you want the text box to appear.
8. Select the label box control.
9. Press [**Delete**].
10. Select the text box control.
11. Click the **Properties** button  on the **Formatting (Form/Report)** toolbar.
12. Select the **Data** tab.

13. Select the **Control Source** list.
14. Select the field name you want bound to the text box control.
15. Click the **Close** button to close the property sheet.

INDEX

- AutoForm
 - using, 8, 9
- AutoReport
 - using, 18, 20
- Calculated controls
 - creating, 36, 37
- Combo boxes
 - creating, 24, 25
- Command buttons
 - adding, 62, 63
- Controls
 - adding logic, 60, 61
 - changing a property, 59, 60
 - creating calculated, 36
- Date control
 - inserting, 41, 42
- Footer
 - adding to a form, 32
- Form letters
 - creating, 64, 65
- Form Wizard, 2
- Forms
 - adding a form footer, 31, 32
 - adding a form header, 31, 32
 - adding records, 9, 10
 - AutoForm, 8, 9
 - basing on a query, 7
 - columnar, 2
 - creating, 2, 3
 - creating a combo box, 24, 25
 - creating a list box, 26, 27
 - creating an option group, 28, 29
 - creating blank, 33
 - datasheet, 2
 - Form Wizard, 2, 3
 - printing records, 6
 - saving as a report, 63, 64
 - sections, 23
 - setting the tab order automatically, 30
 - setting the tab order manually, 31
 - tabular, 2
 - using, 2
 - using in Design view, 23
 - viewing records, 4, 5
- Group headers
 - creating, 39, 40
- Header

Creating Forms and Reports Using Access 2000

- adding to a form, 32
- Label Wizard
 - using, 44
- List boxes
 - creating, 26, 27
- Margins
 - changing, 43
- Objects
 - viewing properties, 58, 59
- Option groups
 - creating, 28, 29
- Page breaks
 - inserting, 42
- Printing
 - pages in a report, 16
 - records in a form, 6
- Records
 - viewing in forms, 4, 5
- Report Wizard
 - using, 12, 13
- Reports
 - AutoReport, 18, 20
 - basing on a query, 17
 - changing the margins, 43
 - columnar, 12
 - creating a calculated control, 36, 37
 - creating a header for each group, 39, 40
 - creating a running summary, 40, 41
 - creating blank, 45, 46
 - grouping data, 38
 - inserting a date control, 41, 42
 - inserting a page break, 42
 - inserting a time control, 42
 - Print Preview, 14, 15
 - printing pages, 16
 - Report Wizard, 12, 13
 - sections, 36
 - tabular, 12
 - using, 12
 - using in Design view, 36
 - using the Label Wizard, 44
- Running summary
 - creating, 40, 41
- Subforms
 - adding a form footer, 52, 54
 - adding a form header, 52
 - creating, 49, 50
 - displaying a total, 54, 56
 - displaying in Datasheet view, 51, 52
 - editing the layout, 50, 51
 - working with, 48

Subreports

- adding a report footer, 52
- adding a report header, 52
- creating, 49, 50
- displaying a total, 54
- editing the layout, 50, 51
- working with, 48

Tab order

- setting automatically, 30
- setting manually, 31

Time control

- inserting, 41, 42