

# **Introduction to Computer Applications**

**CISY 1225**

**Zahoor Khan, PhD**

**Last updated: June 2014**

## **CISY 1225 Custom book**

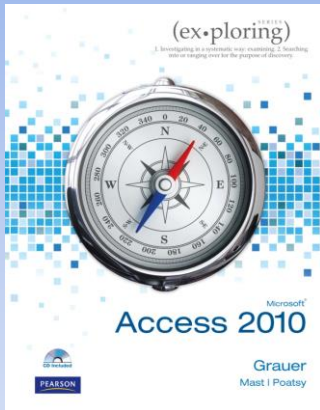
Chapter 12

Creating and Using Professional Forms and Reports

2

# Exploring Microsoft Access 2010

by Robert Grauer, Keith Mast,  
Mary Anne Poatsy



## Chapter 4 Creating and Using Professional Forms and Reports

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

3

## Objectives

### Forms

- Create forms
- Modify a form
- Sort records in a form
- Identify form sections
- Revise forms using form views

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

4

## Objectives (continued)

### Reports

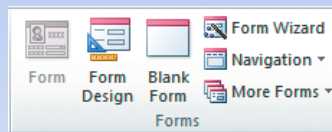
- Create reports
- Modify a report
- Sort records in a report
- Identify report sections

## 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 different tools for creating forms
- Forms group
- Navigation forms
- More Forms



Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

7

## Identify a Record Source

- Record source
  - the table or query that supplies the records for a form or report
- Sketch the form first
- Use the Form Tool

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

8

## The Form Tool

- Stacked Layout
- Tabular Layout
- Layout view

Layout view

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

9

## 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

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

EmployeeID	LastName	FirstName	Gender	Title	Salary	Location	Performance
1	Lacher	Tom	M	T01	\$31,200.00	L01	Good
2	Fantis	Laurie	F	T01	\$18,000.00	L01	Good
3	Flaming	Karen	F	T01	\$41,100.00	L01	Average
4	Mc Key	Boo	F	T01	\$19,600.00	L01	Good
5	Daniels	Phil	M	T01	\$42,600.00	L01	Good
6	Spah	Johnny	M	T01	\$48,400.00	L01	Excellent
7	Johnson	Debbie	F	T01	\$19,700.00	L01	Excellent
8	Dubin	Lolly	F	T01	\$17,000.00	L01	Good
9	Tolley	David	M	T01	\$46,200.00	L01	Good
10	Grippando	Joan	F	T01	\$26,100.00	L01	Average

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

10

## Create a Multiple Items Form

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

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	Tittley	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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

11

## Modifying a Form

- 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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

12

## Sorting Records in a Form

- Change the sorting in a form
- Remove sorting in a form

## Identify Default Form Sections

- Form header section
- Detail section
- Form footer section
- Modifying the Default Form Sections

## Report Basics

- Report
  - a printed document that displays information from a database in a format that provides meaningful information to its readers
- Identifying a record source
- Report tool
- Modifying a report

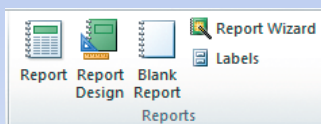
## Questions before Creating a Report

- 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
  - Design View



Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

17

## Identify the Record Source

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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

18

# 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 Street	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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

19

# Use the Report Tool

Report  
created with  
the Report  
tool

Information  
is presented  
in tabular  
format

Physicians							January 2012
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 Rodrigo 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 Street	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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

20

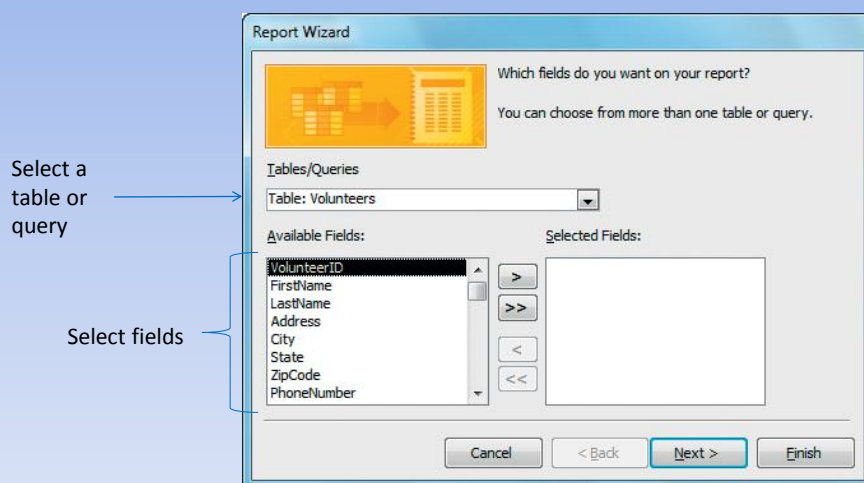
## Use the Report Wizard

- Report Wizard asks questions
  - Uses 6 dialog boxes to collect information
- Generates report based on answers

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

21

## Starting the Report Wizard



Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

22

## Add Grouping to the Report Wizard

Do you want to add any grouping levels?

VolunteerID  
 FirstName  
 LastName  
 Address  
 City  
 State  
 ZipCode  
 PhoneNumber  
 Gender  
 BirthDate

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

Grouping Options ... Cancel < Back Next > Finish

Access adds StudyID automatically

Add a group

Select a field to group by

Remove a group

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

23

## Add Sorting and Summary Options

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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

24

## 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

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

Cancel < Back Next > Finish

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

25

## Save and Name the Report

Type a report name

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

Click Finish to see a preview of the report

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

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

26

## 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							

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

27

## Use the Label Wizard

**Label Wizard**

What would you like on your mailing label?

Construct your label on the right by choosing fields from the left. You may also type text that you would like to see on every label right onto the prototype.

Available fields:

- PhysicianID
- FirstName
- LastName
- Address
- City
- State

Prototype label:

Dr. {FirstName} {LastName}

{Address}

{City} {State} {ZipCode}

Buttons: Cancel, < Back, Next >, Finish

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

28

## Modifying a Report

- Add a Field to a Report
- Delete a Field from a Report

## Modifying a Report (continued)

- Work with Report Layout Control
- Adjust Column Widths in a report
- Add a Theme to a report

## Sorting Records in a Report

Select FirstName for the second sort

LastName is the first sort

First Name	Last Name	Address	City	State	Zip Cod	Phone Number	Specialization
Warren	Braunington	9470 SW 25 Street	Coral Springs	FL	33071	(954) 888-7654	Hematology
Patry	Clark	200 Harding Blvd	Coral Springs	FL	33070	(954) 777-1087	Cardiology
Bonnie	Clinton	10000 SW 59 Court	Coral Springs	FL	33071	(954) 777-8889	Obstetrics
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
Jeffrey	Jacobson	490 Bell Drive	Coral Springs	FL	33070	(954) 388-9999	Internal Medicine
Keith	Mast	102 SOC	E. Norriton	PA	19401	(610) 555-1212	General Medicine
Kristine	Park	Street	Coral Springs	FL	33072	(954) 777-1111	Exercise Physiolog

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall. 31

## Identifying Report Sections

Report header

Page header

Detail

Page footer

Report footer

First Name	Last Name	Address	City	State	Zip Code	Phone Number	Specialization
First Name	LastName	Address	City	State	ZipCode	PhoneNumber	Specialization

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall. 32



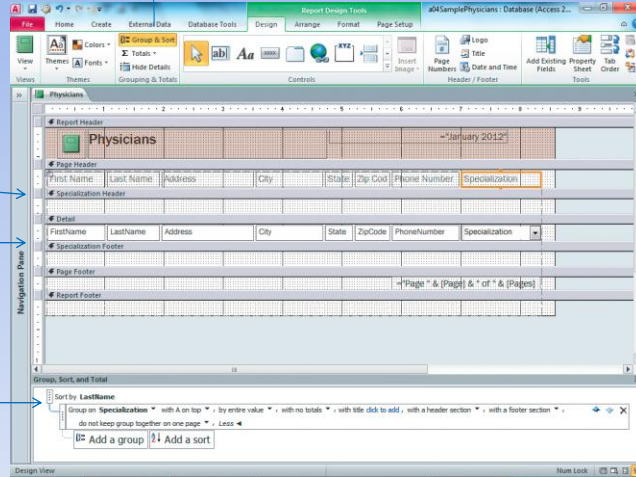
# Adding a Group Header/Footer

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

Count is shown at the bottom of each sales rep

Hepp			
Buckingham	\$1.63	1/6/2012	Stirrers - Plastic
Buckingham	\$11.25	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	1/23/2012	Coffee Filters
Buckingham	\$28.50	1/23/2012	Styrofoam Cups - 12 ounce
Buckingham	\$38.00	1/23/2012	Popcorn - Buttered
Buckingham	\$28.50	1/23/2012	Sugar Substitute
Buckingham	\$68.00	1/23/2012	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	\$408.38	
Mast			
Doylstown	\$36.00	1/7/2012	Sugar Packets
Doylstown	\$91.00	1/7/2012	Coffee - Hazelnut
Doylstown	\$40.00	1/7/2012	Creamers - Assorted Flavors
Doylstown	\$60.00	1/21/2012	Creamers - Liquid
Doylstown	\$30.00	1/21/2012	Coffee - Decaf
Doylstown	\$30.00	1/21/2012	Coffee - Mild Blend
Doylstown	\$17.50	1/21/2012	Tea Bags - Regular
Doylstown	\$1.63	1/21/2012	Stirrers - Plastic
Doylstown	\$24.00	1/21/2012	Coffee - Colombian Supreme
New Britain	\$92.00	1/23/2012	Coffee - Hazelnut
Doylstown	\$48.00	1/24/2012	Soup - Variety Pak

Total revenue is shown at the bottom of each sales rep

## Revising Reports Using Report Views

- Layout View
- Print Preview
- Design View
- Report View

## Summary

- In this chapter, 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.

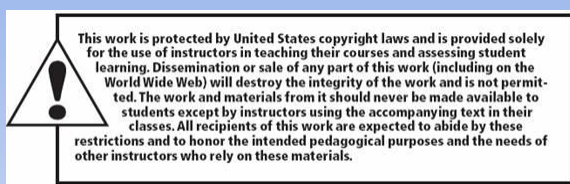
# Questions



Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

37

# Copyright



All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher. Printed in the United States of America.

Copyright © 2011 Pearson Education, Inc. Publishing as Prentice Hall.

38