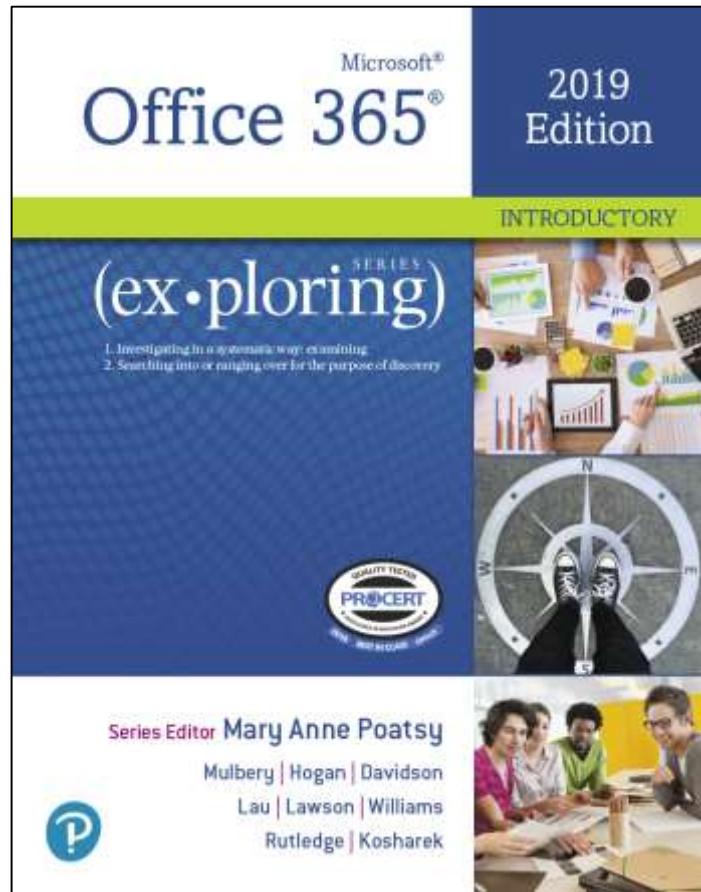


Exploring Microsoft Office 365

Introductory



Chapter 4

Basic Forms and Reports

Learning Objectives (1 of 2)

4.1 Create Forms Using Form Tools

4.2 Modify Forms

4.3 Use the Form Layout Control

4.4 Sort Records in a Form

4.5 Create Reports Using Report Tools

Learning Objectives (2 of 2)

4.6 Use Report Views

4.7 Modify a Report

4.8 Sort and Group Records in a Report

Creating Forms Using Form Tools

(1 of 13)

- Form—database object used to view, add, or edit data in a table
- Reasons exist for using forms:
 - Less likely to mistakenly edit the wrong record
 - A form can display data from more than one table simultaneously
 - Customized Access forms can be created to resemble the paper forms

Creating Forms Using Form Tools

(2 of 13)

Form Tool	Use
Form	Creates a form with a stacked layout that displays all the fields in the record source.
Form Wizard	Creates a custom form based on your answers to a series of step-by-step questions.
Navigation	Creates handy user-interface forms that enable users to switch between various forms and reports in a database. Six different Navigation form layouts are available from the list.
Split Form	Creates a two-part form with a stacked layout in one section and a tabular layout in the other.
Multiple Items	Creates a tabular layout form that includes all the fields from the record source.
Datasheet	Creates a form that resembles the datasheet of a table or query.

Creating Forms Using Form Tools

(3 of 13)

- Record source—table or query that provides the records for a form or report
- Form tool—most common tool for creating forms and data entry forms for tables
- Form layouts:
 - Stacked layout displays fields in a vertical column for one record at a time
 - Tabular layout displays data horizontally across the page

Creating Forms Using Form Tools

(4 of 13)



The screenshot shows a web application interface for managing products. At the top, there is a navigation bar with a 'Products' tab and a 'Add New Product' button. Below the navigation bar, the main form is titled 'Products'. The form contains several input fields for product details:

Product ID	P0001
Product Name	Coffee - Colombian Supreme
Description	24/Case, Pre-Ground 1.75 Oz Bags
Cost	\$18.40
Markup Percent	50.00%
Refrigeration Needed	☐
Brand	Discount
Year Introduced	2018

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Creating Forms Using Form Tools

(5 of 13)

Select all controls

Each highlighted box is a control

Products	
Product ID	P0001
Product Name	Coffee - Colombian Supreme
Description	24/Case, Pre-Ground 1.75 Oz Bags
Cost	\$18.40
Markup Percent	50.00%
Refrigeration Needed	☐
Brand	Discount
Year Introduced	2018

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Creating Forms Using Form Tools

(6 of 13)

Form views:

- Form view—user interface primarily used for data entry and data changes
- Layout view—enables changes to be made to the layout while simultaneously viewing the data in the form
- Design view—enables changes to be made to advanced design settings that are not available in Layout view

Creating Forms Using Form Tools

(7 of 13)

The screenshot shows a web form titled 'Products' with a light blue header. The form contains several input fields and a dropdown menu. The fields are labeled on the left and their current values are in the input boxes on the right. The 'Refrigeration Needed' field has a checkbox. The 'Brand' field has a dropdown menu with a list of options. Two callout boxes provide additional information: one points to the checkbox and says 'Form check box indicates Yes/No field', and the other points to the dropdown menu and says 'Forms may include lists'.

Product ID	P0001
Product Name	Coffee - Colombian Supreme
Description	24/Case, Pre-Ground 1.75 Oz Bags
Cost	\$18.40
Markup Percent	50.00%
Refrigeration Needed	☐
Brand	Discount
Year Introduced	Discount
	House
	Premium

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Creating Forms Using Form Tools

(8 of 13)

The screenshot shows a web application interface for managing products. At the top, there is a tab labeled 'Products' and a header area with the title 'Products'. Below the header, a form is displayed with the following fields:

Product ID	P0001
Product Name	Coffee - Colombian Supreme
Description	24/Case, Pre-Ground 1.75 Oz Bags
Cost	\$18.40
Markup Percent	50.00%
Refrigeration Needed	☐
Brand	Discount
Year Introduced	2018

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Creating Forms Using Form Tools

(9 of 13)

The screenshot displays a form design interface for a 'Products' form. The form is organized into three main sections: 'Form Header', 'Detail', and 'Form Footer'. The 'Form Header' section contains a title 'Products'. The 'Detail' section contains several fields: 'Product ID', 'Product Name', 'Description', 'Cost', 'Markup Percent', 'Refrigeration Needed' (with a checked checkbox), 'Brand' (with a dropdown arrow), and 'Year Introduced'. The 'Form Footer' section is currently empty. A callout box with the text 'Views on status bar' points to the status bar at the bottom right of the form design area.

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Creating Forms Using Form Tools

(9 of 13)

Sales Reps1

Sales Reps

Sales Rep ID: Gender:
 Last Name: Birth Date:
 First Name: Hire Date:
 Address: Highest Degree:
 City: Current Salary:
 State: Previous Salary:
 Zip Code: Date of Last Raise:
 Home Phone: SalesRepPhoto:
 Cell Phone:
 Social Security Number:

Subform displays related records

Customer ID	Customer Name	Contact	E-mail Address	HomePage	Address1
C0001	McAfee, Rand, & Karahalidis	Paula Fields		www.mrk.org	5000 Jefferson L
C0003	Advantage Sales	Tracy Beck	service@advantagesales.com		4215 South 81 St
C0006	Lugo Computer Sales	StudentFirst Studer	service@lugocomputer.net		6000 Tigertail Av

Record: 1 of 3 No Filter Search

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Creating Forms Using Form Tools

(10 of 13)

Orders

Order ID: O0001

Order Date: 1/3/2020

Customer ID: C0001

Payment Type: Cash

Comments:

Splitter bar

Order ID	Order Da	Customer ID	Payment Type	Comments
O0001	1/3/2020	C0001	Cash	
O0002	1/3/2020	C0002	Cash	
O0003	1/5/2020	C0003	Check	
O0004	1/6/2020	C0004	Credit Card	
O0005	1/6/2020	C0005	Purchase Order	
O0006	1/6/2020	C0001	Check	
O0007	1/7/2020	C0003	Purchase Order	
O0008	1/10/2020	C0006	Credit Card	
O0009	1/10/2020	C0007	Check	

Bottom half enables quick switching between records

Record: 1 of 31 No Filter Search

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Creating Forms Using Form Tools

(11 of 13)

Sales Reps1

Sales Reps

Sales Rep ID	Last Name	First Name	Address	City	State	Zip Code	Home Phone
S0001	Garcia	Rodrigo	476 Frosty Drive	Webber	KS	66970-	(555) 555-1222
S0002	Xu	Huan	371 Rodeo Circle	Mine Hill	NJ	07803-	(555) 555-1222
S0003	Mukopadhyay	Priyanka	842 Purcell Road	Mount Vernon	NY	10557-	(555) 555-1222
(New)							

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Creating Forms Using Form Tools

(12 of 13)

Customer Information Order Information

Customer Information

Address1 4215 South 81 Street

Address2

City East Greenville

State PA

Zip Code 18041-

Phone (555) 444-5555

Fax (555) 444-5556

Service Start Date 1/5/2019

Credit Rating B

Sales Rep ID S001

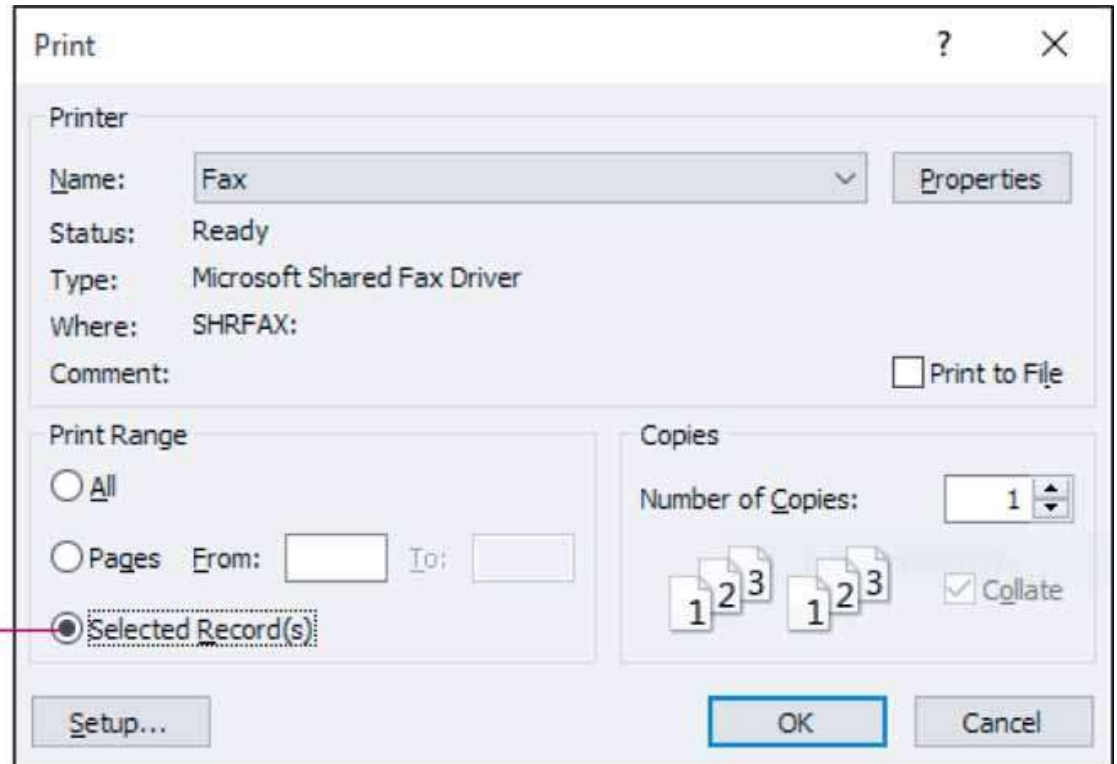
	Order ID	Order Date	Payment Type	Comments
+	00003	1/5/2020	Check	
+	00007	1/7/2020	Purchase Order	

Tabs in Navigation form

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Creating Forms Using Form Tools

(13 of 13)



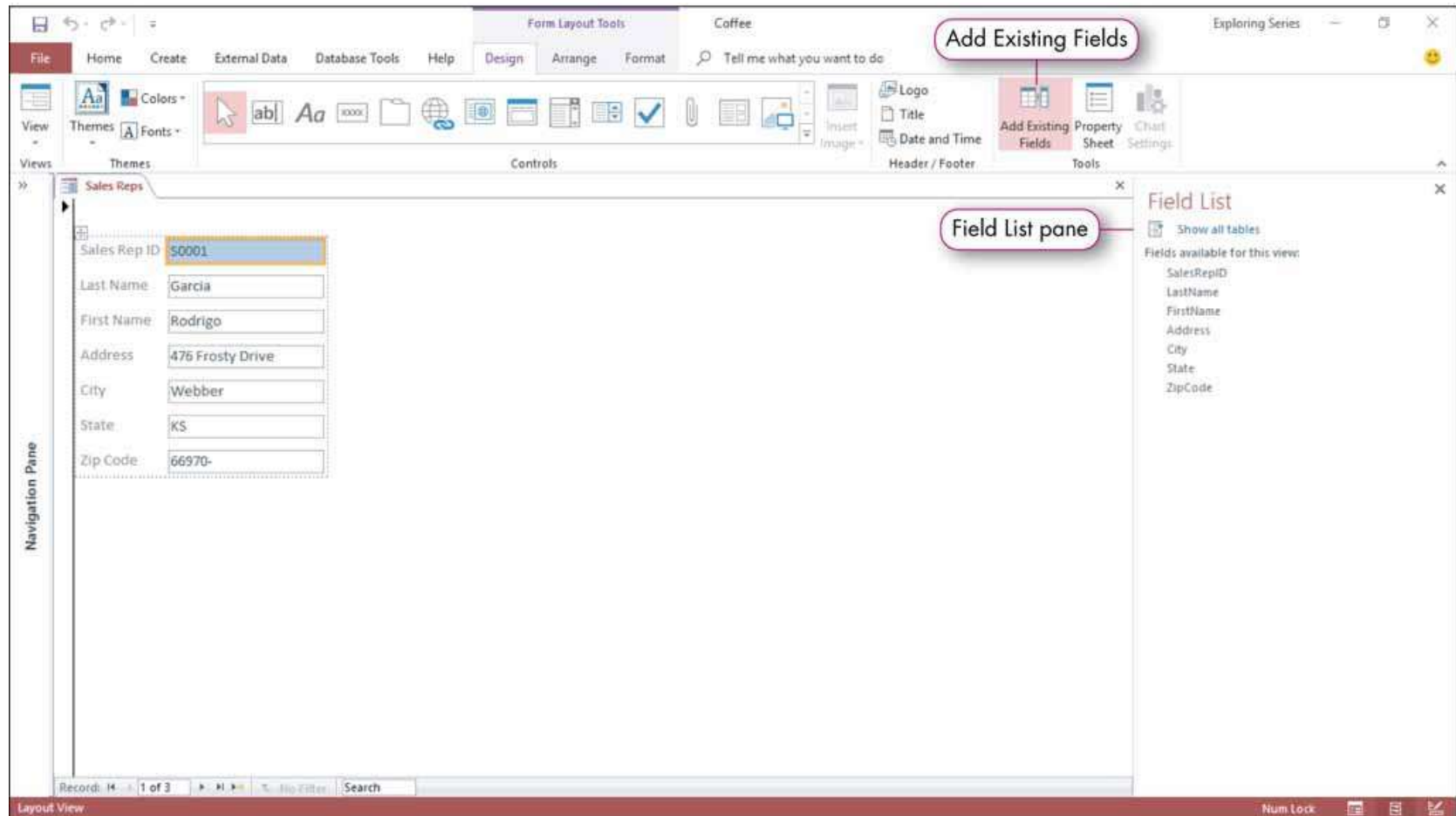
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Modifying Forms (1 of 3)

Form editing:

- Use Form view to add, edit, and delete data in a form
- Use Layout view to modify the form design while viewing the data
- Column widths adjusted in a form with a stacked layout, increases and decreases all field sizes together

Modifying Forms (2 of 3)



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Modifying Forms (3 of 3)

Format	Method to apply format
Font size	Click the Font Size arrow in the Font group.
Font emphasis	Click Bold, Italic, or Underline in the Font group.
Alignment	Click Align Left, Center, or Align Right in the Font group.
Background color	Click the Background Color arrow in the Font group.
Font color	Click the Font Color arrow in the Font group.
Number format	Use the tools in the Number group to select number formats such as Currency, Percent, Comma formatting, or to increase or decrease decimal places.

Using the Form Layout Control

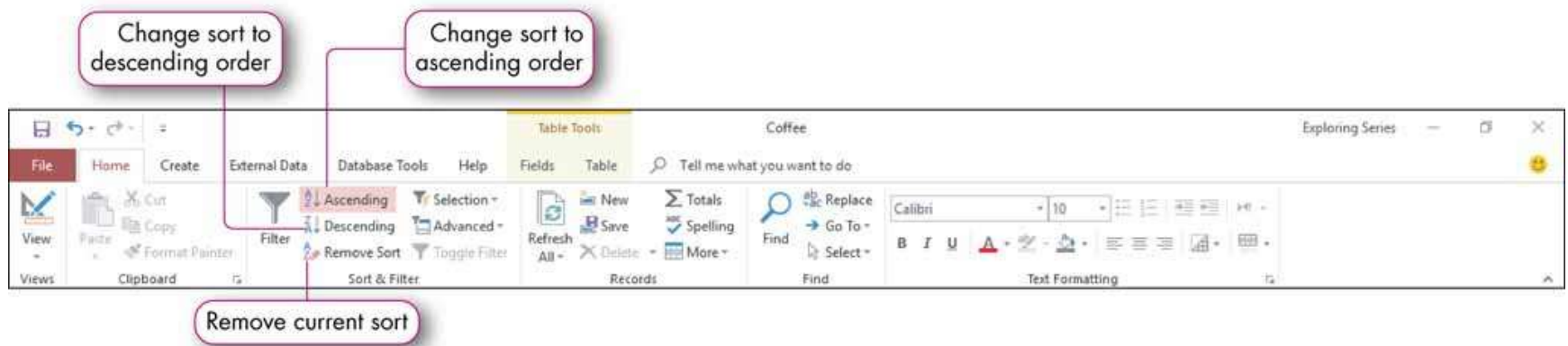
The screenshot displays a web application interface for managing products. On the left is a vertical 'Navigation Pane'. The main area is titled 'Products' and contains a form with the following fields:

- Product ID: P0001
- Product Name: Coffee - Colombian Supreme
- Description: 24/Case, Pre-Ground 1.75 Oz Bags
- Cost: \$18.40
- Markup Percent: 50.00%
- Refrigeration Needed: ☐
- Brand: Discount (dropdown menu)
- Year Introduced: 2018

Below the 'Description' field, there is a section of the table with dashed lines, indicating where new rows can be inserted. A callout box labeled 'Inserted rows' points to this section.

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Sorting Records in a Form



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Creating Reports Using Report Tools

(1 of 12)

- Report—document that displays meaningful information from a database
- Access reports can be:
 - Printed
 - Viewed onscreen
 - Saved as files

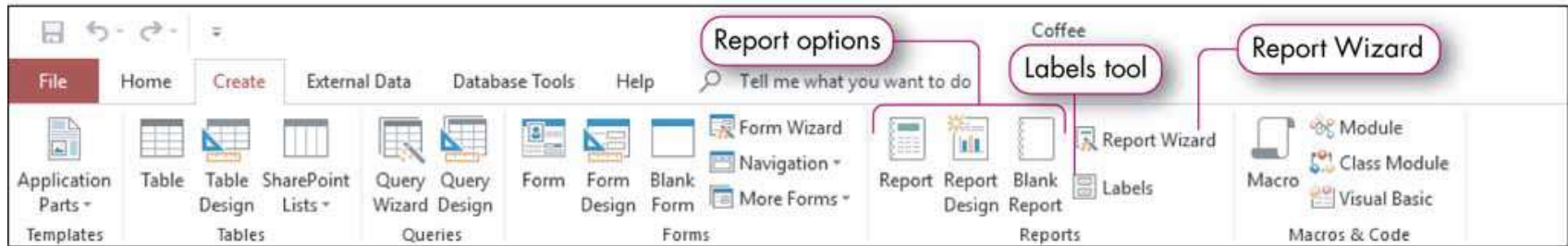
Creating Reports Using Report Tools

(2 of 12)

- Reports can contain:
 - Text
 - Numeric data
 - Formatting
 - Calculated fields
 - Graphics

Creating Reports Using Report Tools

(3 of 12)



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Report Tool	Usage
Report	Create a tabular report that displays all the fields in the selected record source (table or query).
Report Design	Create a new blank report in Design view. Add fields and controls manually.
Blank Report	Create a new blank report in Layout view. Drag and drop to add fields and controls manually.
Report Wizard	Answer a series of step-by-step questions, and Access will design a custom report for you.
Labels	Select a preformatted label template and create printable labels.

Creating Reports Using Report Tools

(4 of 12)

Sales Reps													
Sunday, April 1, 2018													
2:42:12 PM													
Sales Rep ID	Last Name	First Name	Address	City	State	Zip Code	Home Phone	Cell Phone	Social Security Number	Gender	Birth Date	Hire Date	Highest Degree
S0001	Garcia	Rodrigo	476 Frosty Drive	Webber	KS	66970-	(555) 555-1222	(555) 555-5556	111-11-1111	M	1/1/1968	1/1/2007	Master's Degree
S0002	Xu	Huan	371 Rodeo Circle	Mine Hill	NJ	07803-	(555) 555-1222	(555) 555-5556	111-22-3333	F	11/23/1981	3/15/2014	Bachelor's Degree
S0003	Mukopadhyay	Priyanka	842 Purcell Road	Mount Vernon	NY	10557-	(555) 555-1222	(555) 555-5556	111-33-5555	F	1/1/1961	1/1/2009	Master's Degree

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Creating Reports Using Report Tools

(5 of 12)

The screenshot shows the 'Report Wizard' dialog box. It has a title bar 'Report Wizard' and a subtitle 'Which fields do you want on your report? You can choose from more than one table or query.' Below this is a 'Tables/Queries' section with a dropdown menu showing 'Table: Products'. To the right of this is a callout box labeled 'Fields in the report' pointing to the 'Selected Fields' list. Below the 'Tables/Queries' section are two lists: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list contains 'ProductID', 'MarkupPercent', 'RefrigerationNeeded', and 'YearIntroduced', with 'YearIntroduced' selected. The 'Selected Fields' list contains 'ProductName', 'Description', 'Cost', 'OnHand', and 'Brand', with 'Brand' selected. Between these two lists are four buttons: '>', '>>', '<', and '<<'. A callout box labeled 'Add or remove fields' points to these buttons. At the bottom of the dialog are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is highlighted with a blue border.

Select Tables/Queries from which to add fields

Fields in the report

Add or remove fields

Report Wizard

Which fields do you want on your report?
You can choose from more than one table or query.

Tables/Queries
Table: Products

Available Fields:
ProductID
MarkupPercent
RefrigerationNeeded
YearIntroduced

Selected Fields:
ProductName
Description
Cost
OnHand
Brand

Cancel < Back Next > Finish

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Creating Reports Using Report Tools

(6 of 12)

Records grouped
by Brand

Add or remove
grouping levels

Report Wizard

Do you want to add any grouping levels?

Brand

ProductName, Description, Cost, OnHand

ProductName
Description
Cost
OnHand

>
<
Priority
↑
↓

Grouping Options ... Cancel < Back Next > Finish

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Creating Reports Using Report Tools

(7 of 12)

Report Wizard

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

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

1	ProductName	Ascending
2		Ascending
3		Ascending
4		Ascending

Summary Options ...

Cancel < Back **Next >** Finish

Summary Options
(only available when
grouping is present)

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Creating Reports Using Report Tools

(8 of 12)

Choose oggregate functions

Choose detail level

Show overall percentages

Summary Options

What summary values would you like calculated?

Field	Sum	Avg	Min	Max
Cost	☐	☐	☐	☐
OnHand	☐	☐	☒	☐

Show

☒ Detail and Summary

☐ Summary Only

☐ Calculate percent of total for sums

OK

Cancel

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Creating Reports Using Report Tools

(9 of 12)

Layout options

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

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Creating Reports Using Report Tools

(10 of 12)

Report name

Grouping field
displays as its
own column

Products				
Brand	Product Name	Description	Cost	ind
Discount	Coffee - Colombian Supren	24/Case, Pre-Ground 1.75 Oz Bags	\$18.40	10
	Coffee - Decaf	24/Case, Pre-Ground 1.75 Oz Bags	\$23.00	10
	Creamers - Assorted Flavor	400/Case, 8 50-count Boxes	\$23.00	10
	Stirrers - Plastic	1000/Box	\$1.72	10
	Stirrers - Wood	1000/Box	\$1.44	10
	Sugar Substitute	500/Case, 1-Serving Bags	\$21.85	10
House	Ceramic Mug	SD Company Logo	\$5.75	10
	Coffee - Assorted Flavors	18/Case, Pre-Ground 1.75 Oz Bags	\$26.45	10
	Coffee - Mild Blend	24/Case, Pre-Ground 1.75 Oz Bags	\$23.00	10
	Coffee Filters	500/Case, Fits 10-12 Cup Coffee Maker	\$3.45	10
	Milk - 1 pint	Delivered Daily	\$1.15	10
	Milk - 1 quart	Delivered Daily	\$2.30	10
	Napkins	3000/Case, White	\$23.00	10
	Popcorn - Buttered	36/Case, 3.75 Oz Microwave Bags	\$10.92	10
	Popcorn - Plain	36/Case, 3.75 Oz Microwave Bags	\$9.78	10

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Creating Reports Using Report Tools

(11 of 12)

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.

Select from Available fields

Available fields:

- Address2
- City
- State
- ZipCode
- Phone
- Fax

Prototype label:

{CustomerName}
{Address1}
{Address2}
{City}, {State} {ZipCode}

Label fields should be exactly as you want them to display

Cancel < Back Next > Finish

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Creating Reports Using Report Tools

(12 of 12)

Labels Customers		
Advantage Sales 4215 South 81 Street East Greenville, PA	Baker Auto Supply 4508 N.W. 7 Street Jarrettsville, MD	Bethune Appliance Sales 276 Brickell Avenue Suite 1403 Tunnel Hill, IL
Computer Informations Systems 1238 Walsh Drive Suite 2202 Estcourt Station, ME	Coulter Office Supplies 1000 Main Street Buckingham, PA	Department of CIS 1238 Walsh Drive Suite 2202 Galway, NY
Howard Animal Hospital 455 Bargello Avenue McLemoresville, TN	Katie's Casual Wear 9522 S.W. 142 Street Glenwood, NJ	Kinzer & Sons 9020 N.W. 75 Street Suite 302 Lawrenceville, GA
Kline Bait & Tackle	Little, Joiner, & Jones	Lugo Computer Sales

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Using Report Views (1 of 2)

- Report view—view a report onscreen in a continuous page layout
- Print Preview—see exactly what the report will look like when it is printed
- Portable Document Format (PDF)—is a file type for exchanging documents

Using Report Views (2 of 2)

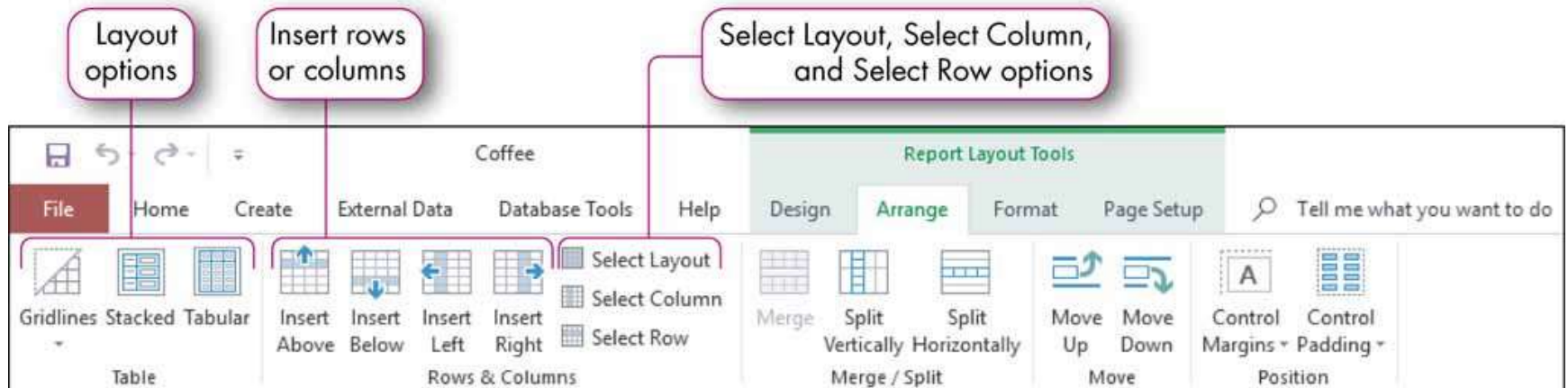
- Layout view—used to modify the report's design while still viewing the data
- Layout view is used to:
 - Add or delete fields in the report
 - Modify field properties
 - Change the column widths
 - Group, sort, and summarize data

Modifying a Report (1 of 5)

Common report changes:

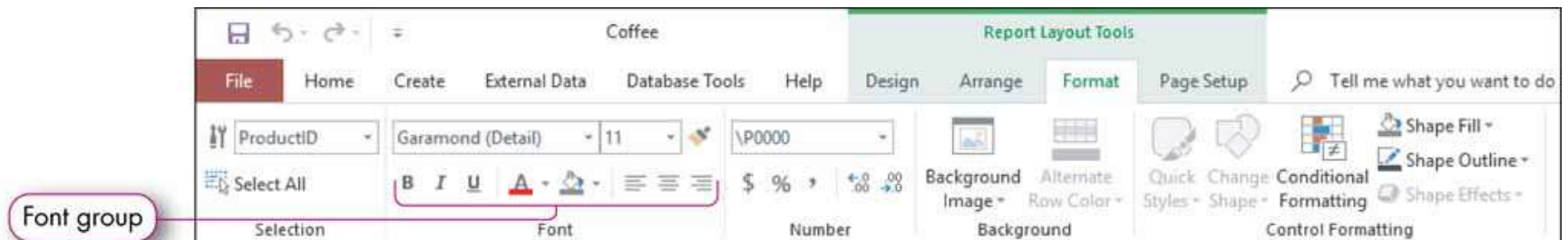
- Adding and deleting controls
- Changing the arrangement
- Changing widths
- Formatting controls
- Modifying the title

Modifying a Report (2 of 5)



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Modifying a Report (3 of 5)



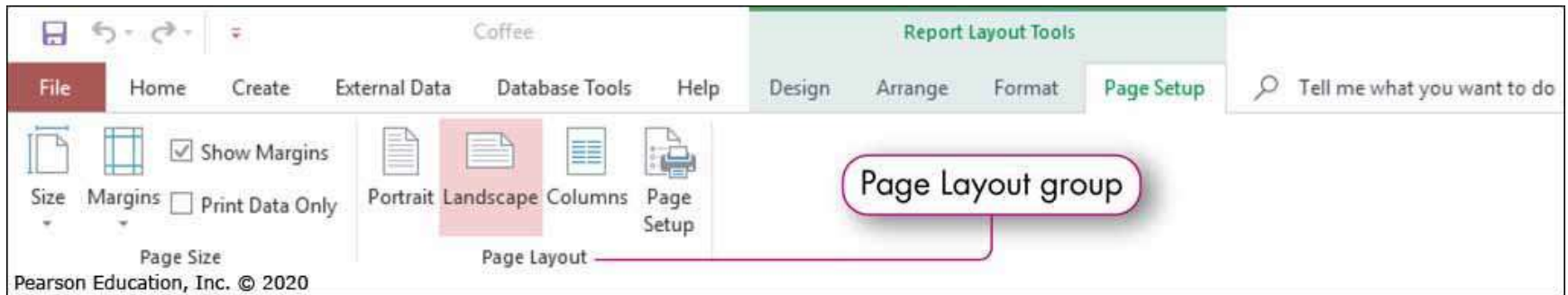
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Modifying a Report (4 of 5)

Further report modifications:

- To add a field to a report, click and drag the field to the location on the report
- To remove a field from a report, click the field and press Delete
- To adjust column widths, point to the right border and drag to increase or decrease the width

Modifying a Report (5 of 5)



Sorting and Grouping Records in a Report

Products Report Sunday, April 1, 2018 4:03:37 PM

Brand	Product ID	Product Name	Description	Cost	OnHand	Markup Percent	Refrig ³
Discount							
	P0001	Coffee - Colombian Supreme	24/ Case, Pre-Ground 1.75 Oz Bags	\$18.40	10	50.00%	☐
	P0005	Coffee - Decaf	24/ Case, Pre-Ground 1.75 Oz Bags	\$23.00	10	50.00%	☐
	P0008	Creamers - Assorted Flavors	400/Case, 8 50-count Boxes	\$23.00	10	100.00%	☐
	P0015	Stirrers - Plastic	1000/Box	\$1.72	10	75.00%	☐
	P0016	Stirrers - Wood	1000/Box	\$1.44	10	100.00%	☐
	P0012	Sugar Substitute	500/Case, 1-Serving Bags	\$21.85	10	50.00%	☐
House							
	P0011	Ceramic Mug	SD Company Logo	\$5.75	10	100.00%	☐
	P0004	Coffee - Assorted Flavors	18/Case, Pre-Ground 1.75 Oz Bags	\$26.45	10	50.00%	☐
	P0003	Coffee - Assorted Flavors	24/Case, Pre-Ground 1.75 Oz Bags	\$23.00	10	50.00%	☐

Group, Sort, and Total

Sort by Brand

Group on Brand

Sort by ProductName with A on top, More ▶

Add a group Add a sort

Multiple sort and group fields

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