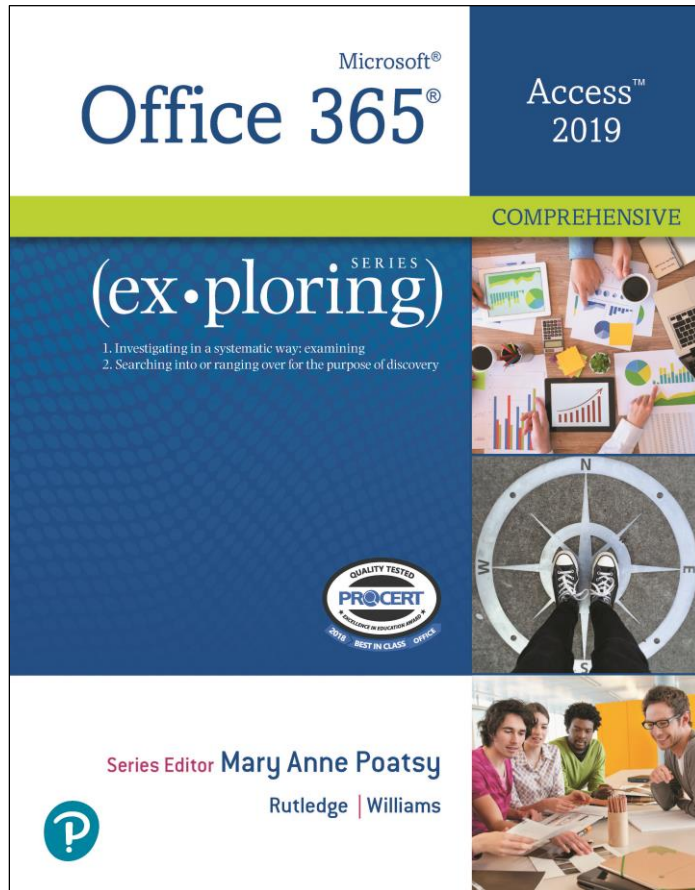


Microsoft® Office 365® Access™ 2019 Comprehensive



Chapter 7

Advanced Forms and Reports

Learning Objectives

7.1 Restrict Edits in a Form

7.2 Understand Combo Boxes

7.3 Set the Tab Order

7.4 Understand Subforms

7.5 Understand Controls

7.6 Understand Sections

Restrict Edits in a Form

The screenshot displays a Microsoft Access form titled "View Customer Data (No Edits)" and its associated "Property Sheet". The form contains the following data:

Field	Value
CustomerID	YS001
CompanyName	SVC Pharmacy
Address	2314 Stoooren Highway
City	Shepherd
State	MT
Zip	59079
Phone	555-280-6894

The "Property Sheet" is open, showing the "Data" tab. The "Form" dropdown is selected. The "Data" tab is active, and the "Allow Additions", "Allow Deletions", and "Allow Edits" properties are all set to "No".

Property	Value
Record Source	Customers
Recordset Type	Dynaset
Fetch Defaults	Yes
Filter	
Filter On Load	No
Order By	
Order By On Load	Yes
Wait for Post Processing	No
Data Entry	No
Allow Additions	No
Allow Deletions	No
Allow Edits	No
Allow Filters	Yes
Record Locks	No

Pearson Education, Inc. © 2020

Understanding Combo Boxes (1 of 3)

The screenshot shows a software window titled 'Calls' with a tabbed interface. The active tab is 'Calls Drop-Down'. The form contains the following fields:

Field Name	Value
CallID	001
CustomerID	YS012
RepID	5
CallTypeID	2
HoursLogged	12
OpenedDate	1/1/2020
ClosedDate	1/10/2020
CustomerSatisfaction	1

The 'CustomerSatisfaction' field is a combo box with a dropdown arrow. The dropdown menu is open, showing the following available choices:

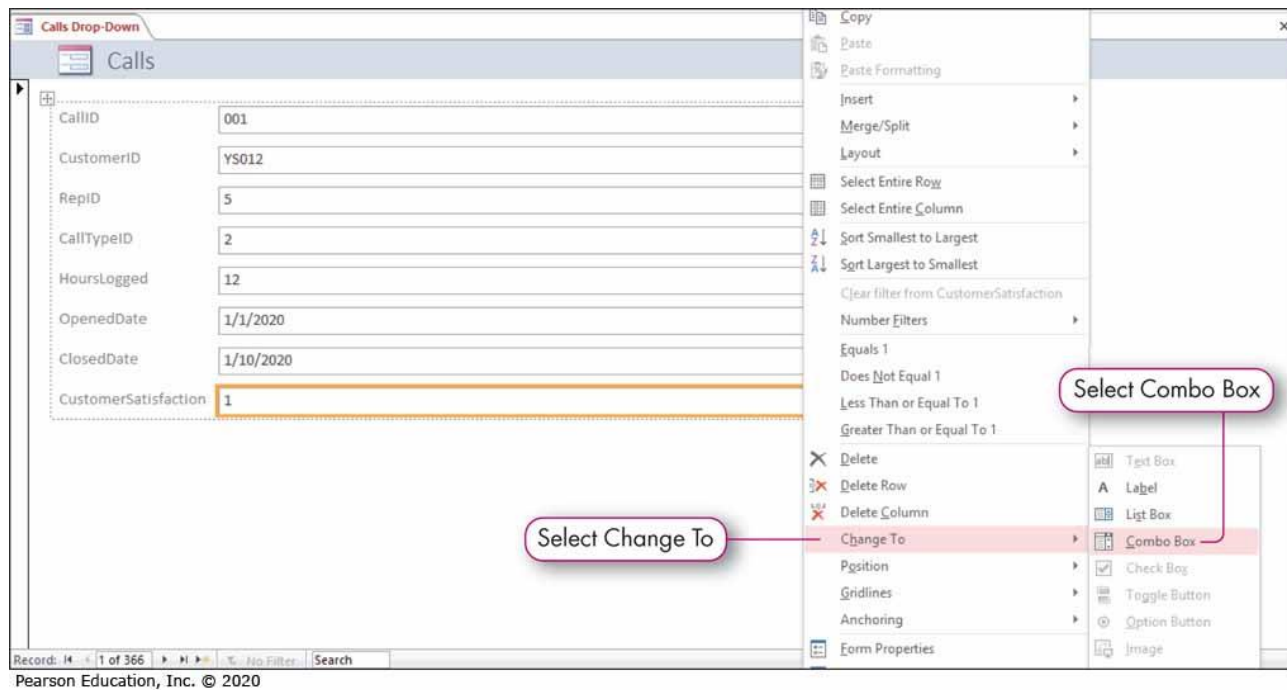
- 1
- 2
- 3
- 4
- 5

Annotations on the left side of the image point to the dropdown arrow and the list of choices.

Record: 1 of 366 No Filter Search

Pearson Education, Inc. © 2020

Understanding Combo Boxes (2 of 3)



Understanding Combo Boxes (3 of 3)

The screenshot shows the 'Property Sheet' window for a 'Combo Box' control. The 'Data' tab is selected, and the 'Row Source' property is set to 'CustomerSatisfaction'. The 'Row Source Type' property is set to 'Table/Query'. The 'Limit To List' property is set to 'Yes'. The 'Available tables' list is expanded, showing a list of tables: 'Call Types', 'Calls', 'Customers', 'Hours Logged by Rep', 'Reps', and 'Satisfaction Results'. The 'Control Source' property is set to 'CustomerSatisfaction'.

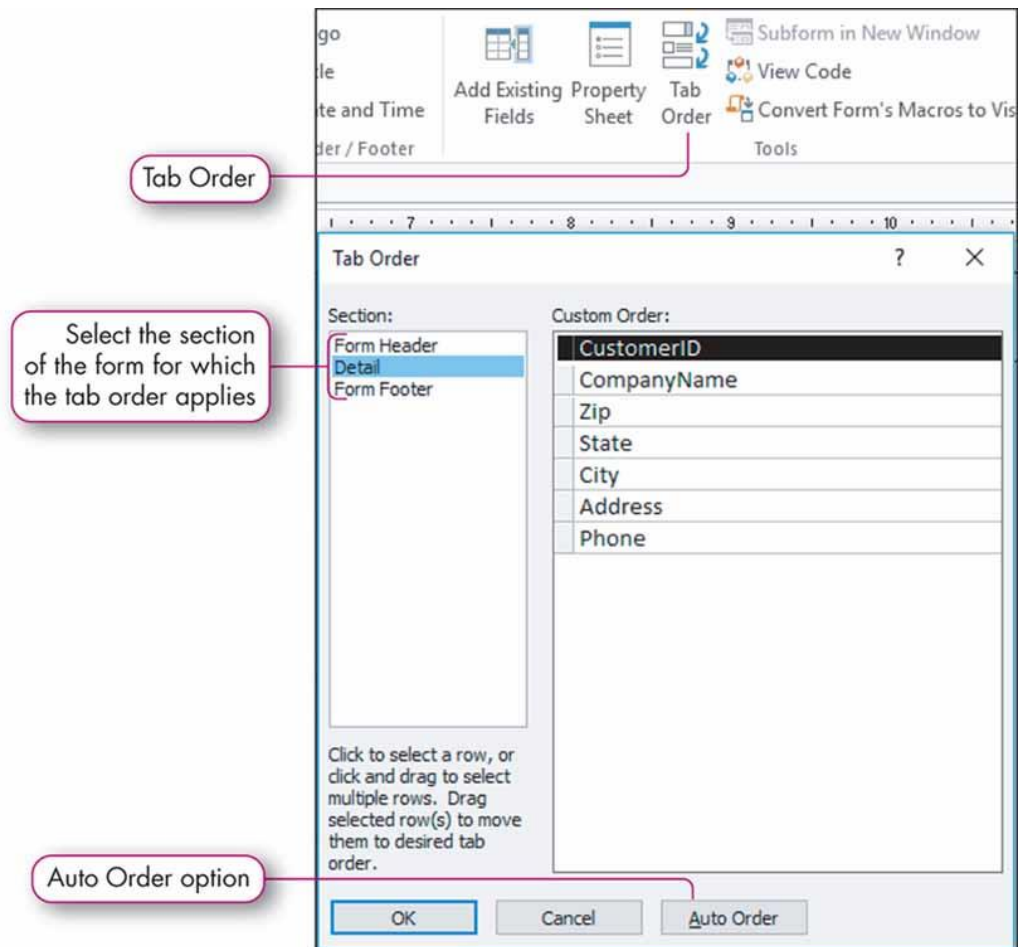
Annotations:

- Row Source property
- Row Source Type property
- Limit To List property
- Available tables

Property	Value
Control Source	CustomerSatisfaction
Row Source	CustomerSatisfaction
Row Source Type	Table/Query
Bound Column	
Limit To List	Yes
Allow Value List Edits	
List Items Edit Form	
Inherit Value List	
Show Only Row Source Value	No
Input Mask	
Default Value	
Validation Rule	
Validation Text	
Enabled	Yes
Locked	No
Auto Expand	Yes

Pearson Education, Inc. © 2020

Setting the Tab Order (1 of 2)



Pearson Education, Inc. © 2020

Setting the Tab Order (2 of 2)

Representatives

RepID: 1, RepFirst: Deborah, RepLast: Hernandez, City: Shepherd, State: MT, Zip: 59079, Phone: (555) 345-1267

Tab stop not needed for field with AutoNumber data type

Tab Stop property

Property Sheet

Selection type: Text Box

Property	Value
Name	RepID
Label Name	Label0
Datasheet Caption	
Enter Key Behavior	Default
ControlTip Text	
Tab Index	0
Tab Stop	No
Status Bar Text	Yes
Shortcut Menu Bar	No
Help Context Id	0
Auto Tab	No
Vertical	No
Allow AutoCorrect	Yes
IME Hold	No
IME Mode	No Control
IME Sentence Mode	None
Tag	

Record: 14, 1 of 7, No Filter, Search

Pearson Education, Inc. © 2020

Understanding Subforms (1 of 3)

Subform displays records from Calls table

Edit Customers

Customers (Edit Data)

CustomerID: **YS001**

CompanyName: **SVC Pharmacy**

Address: **2314 Stooten Highway**

City: **Shepherd**

State: **MT**

Zip: **59079**

Phone: **555-280-6894**

Calls subform

HoursLogged	OpenedDate	ClosedDate
6	2/4/2020	2/15/2020
4	2/8/2020	2/11/2020
5	2/17/2020	2/22/2020
7	3/23/2020	3/30/2020
7	3/28/2020	4/1/2020

Record: 1 of 22 No Filter Search

Pearson Education, Inc. © 2020

Understanding Subforms (2 of 3)

SubForm Wizard

You can use an existing form to create your subform or subreport, or create your own using tables and/or queries.

What data would you like to use for your subform or subreport?

☒ Use existing Tables and Queries

☐ Use an existing form

Calls Drop-Down
Calls subform
Customers Old
View Customers

Choose the source

Cancel < Back Next > Finish

Pearson Education, Inc. © 2020

SubForm Wizard

Which fields would you like to include on the subform or subreport?

You can choose fields from more than one table and/or query.

Tables/Queries

Table: Calls

Available Fields:

CallID	>
RepID	>>
CallTypeID	<
CustomerSatisfaction	<<

Selected Fields:

CustomerID
HoursLogged
OpenedDate
ClosedDate

Source table or query

Selected Fields

Cancel < Back Next > Finish

Pearson Education, Inc. © 2020

Understanding Subforms (3 of 3)

Relationship between
form and subform

SubForm Wizard

Would you like to define which fields link your main form to this subform yourself, or choose from the list below?

☒ Choose from a list. ☐ Define my own.

Show Calls for each record in Customers using CustomerID
None

Show Calls for each record in Customers using CustomerID

Cancel < Back Next > Finish

Pearson Education, Inc. © 2020

Understanding Controls (1 of 8)

Control—object on a form or report

- Bound control—dynamic control whose source of data is a field in a table or query
- Unbound control—generally unchanging control not tied to a specific field
- A calculated control—unbound control that displays the result of an expression

Understanding Controls (2 of 8)

Labels are unbound controls

Customers (Edit Data)

Title is an unbound control

CustomerID	YS001
CompanyName	SVC Pharmacy
Address	2314 Stoooren Highway
City	Shepherd
State	MT
Zip	59079
Phone	555-280-6894

Field values are bound controls

Pearson Education, Inc. © 2020

Understanding Controls (3 of 8)

Control Name	Description
Text Box	Inserts a text box to display data from a record source or data that are the result of a calculation.
Label	Inserts a label to display a field name or other text.
Combo Box	Inserts a menu displaying a list of options.
Rectangle	Inserts a rectangle shape.
Subform/Subreport	Inserts a subform or subreport.
Insert Page Break	Inserts a page break.
Image	Inserts an image.
Chart	Inserts a chart based on table or query data.
Line	Inserts a line.

Understanding Controls (4 of 8)

The screenshot displays the Microsoft Access Design View of a form named 'Edit Customers'. The ribbon at the top includes 'File', 'Home', 'Create', 'External Data', 'Database Tools', 'Help', 'Design', 'Arrange', 'Format', and a search bar. The 'Design' ribbon is active, showing various controls like 'Text Box', 'Image', 'Form Header', and 'Form Footer'. A callout box labeled 'Text Box control' points to a text box on the form. The form itself has fields for 'Address', 'City', 'State', 'Zip', and 'Phone'. Below these is a subform named 'Calls subform' with fields for 'HoursLogged', 'OpenedDate', and 'ClosedDate'. On the right, the 'Property Sheet' is open, showing the 'Format' tab for 'Text28'. The 'Control Source' is set to '=Date()'. A callout box labeled 'Ellipses to open Expression Builder' points to the ellipsis button next to the 'Control Source' field. Another callout box labeled 'Text Box control in form with Date function' points to the 'Text28' control on the form.

Text Box control

Text28

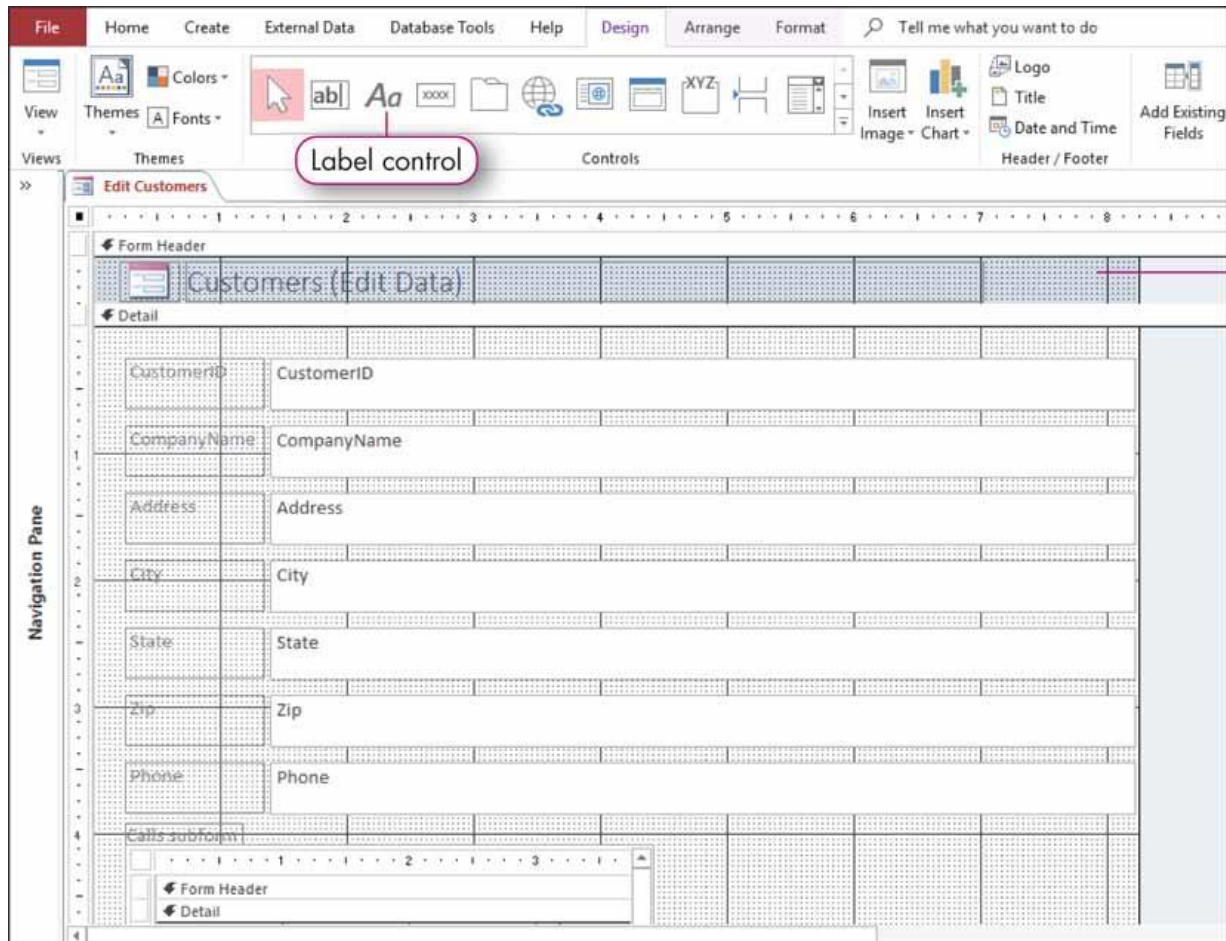
Control Source: =Date()

Ellipses to open Expression Builder

Text Box control in form with Date function

Pearson Education, Inc. © 2020

Understanding Controls (5 of 8)



Pearson Education, Inc. © 2020

Understanding Controls (6 of 8)

The screenshot displays the Microsoft Access Design View interface. A bar chart titled "Q4 Hours Logged by Rep" is inserted into a report. The chart shows the sum of hours logged for six representatives: Gutierrez, Hernandez, Jayaraman, Kato, Mia, Patil, and Xu. The Y-axis represents the sum of hours logged, ranging from 0 to 160. The X-axis lists the representatives. The chart is titled "Q4 Hours Logged by Rep" and the legend indicates "Sum Of Hours Logged".

Annotations and settings shown:

- Chart control inserted into a report:** Points to the chart area.
- Insert Chart:** Points to the "Insert Chart" button in the ribbon.
- HoursLogged (Sum) chosen as Values (Y axis):** Points to the "HoursLogged (Sum)" field in the "Values (Y axis)" section of the "Chart Settings" task pane.
- Replast chosen as Axis (Category):** Points to the "Replast" field in the "Axis (Category)" section of the "Chart Settings" task pane.
- Chart Title property:** Points to the "Chart Title" property in the "Property Sheet" task pane.
- Query chosen as data source:** Points to the "Hours Logged by Rep" query in the "Data Source" section of the "Chart Settings" task pane.
- Select Axis (category) field:** Points to the "HoursLogged" field in the "Axis (Category)" section of the "Chart Settings" task pane.
- Select field to change aggregation options:** Points to the "HoursLogged" field in the "Legend (Series)" section of the "Chart Settings" task pane.
- Select Values (Y axis) field:** Points to the "HoursLogged (Sum)" field in the "Values (Y axis)" section of the "Chart Settings" task pane.

Rep	Hours Logged
Gutierrez	140
Hernandez	100
Jayaraman	140
Kato	100
Mia	80
Patil	120
Xu	140

Pearson Education, Inc. © 2020

Understanding Controls (7 of 8)

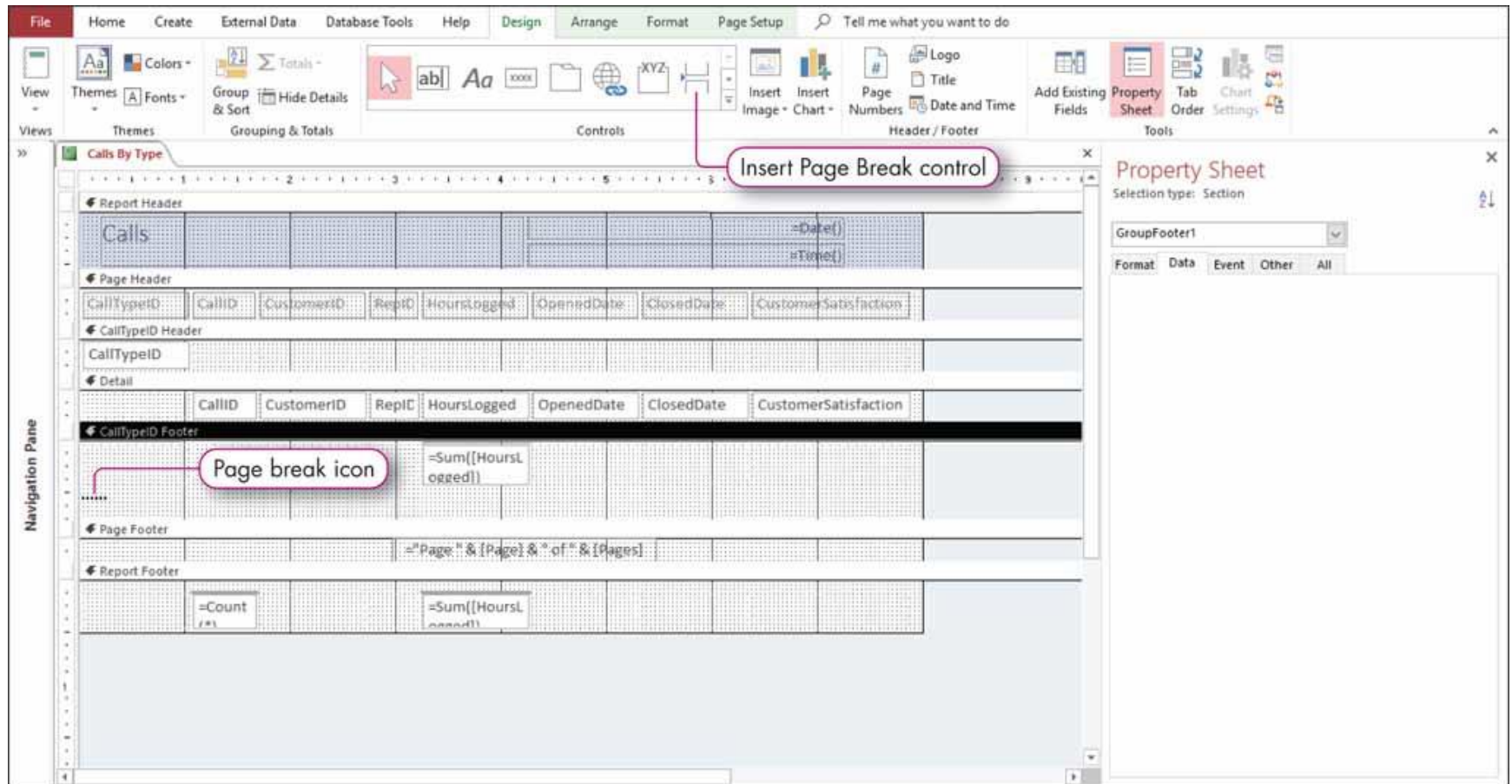
The screenshot displays the Microsoft Access design view for a form named "Customers (Edit Data)". The ribbon at the top includes tabs for File, Home, Create, External Data, Database Tools, Help, Design, Arrange, and Format. The "Format" tab is active, showing options for Shape Fill and Shape Outline. Callouts from the right side of the image point to these options. The form is divided into a "Form Header" section and a "Detail" section. The "Form Header" section contains a label "Customers (Edit Data)" and a blue rectangular control. The "Detail" section contains a table with fields: CustomerID, CompanyName, Address, City, State, Zip, and Phone. A "Navigation Pane" is visible on the left side of the form. The bottom of the image shows the text "Pearson Education, Inc. © 2020".

Shape Fill

Shape Outline

Pearson Education, Inc. © 2020

Understanding Controls (8 of 8)



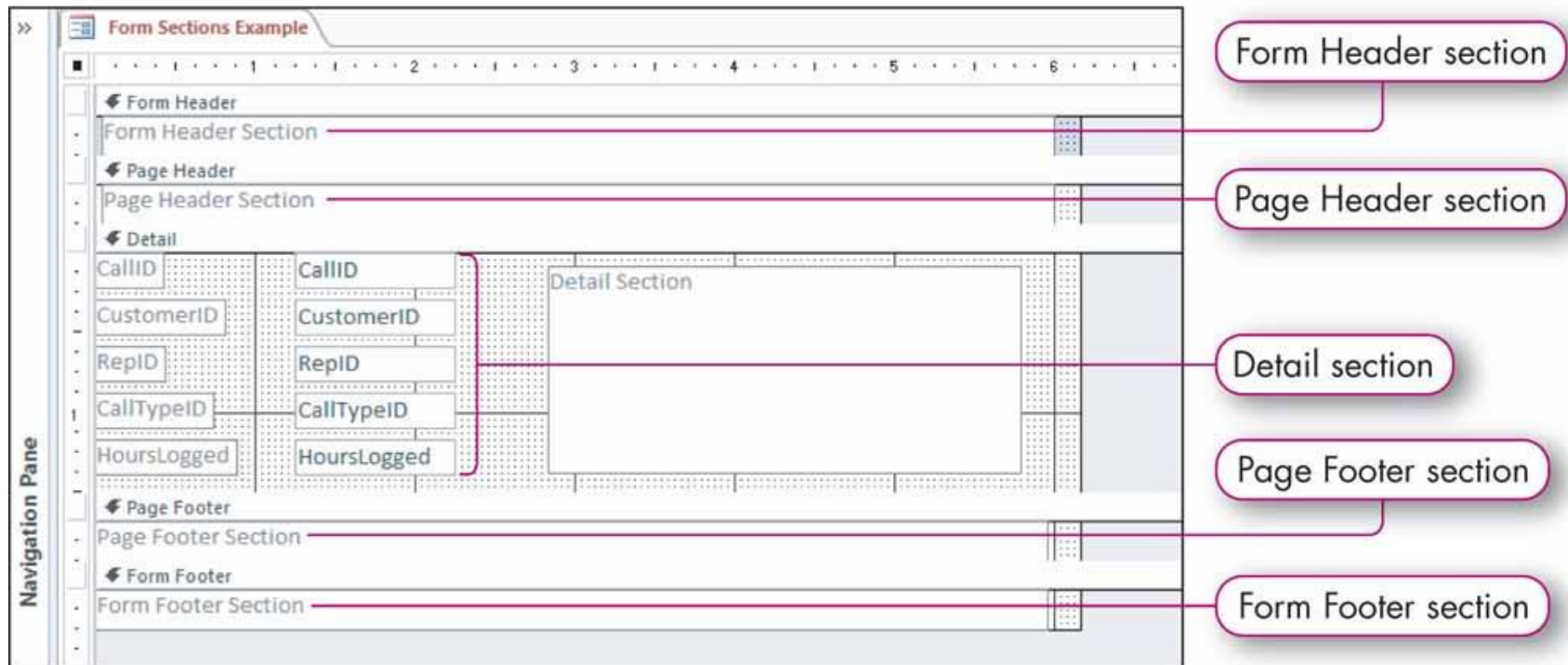
Pearson Education, Inc. © 2020

Understanding Sections (1 of 11)

Section—part of a form or report that can be manipulated separately from other parts of a form or report

- Header—section that displays one time at the top of a form or a report
- Footer—section that displays one time at the bottom of a form or a report
- Page header—section that displays at the top of each page in a form or report
- Page footer—displays once at the bottom of each page in a form or report
- Detail—section that is the body of the form or report

Understanding Sections (2 of 11)



Pearson Education, Inc. © 2020

Understanding Sections (3 of 11)

The screenshot displays a software interface titled "Form Sections Example". The form is divided into three main sections:

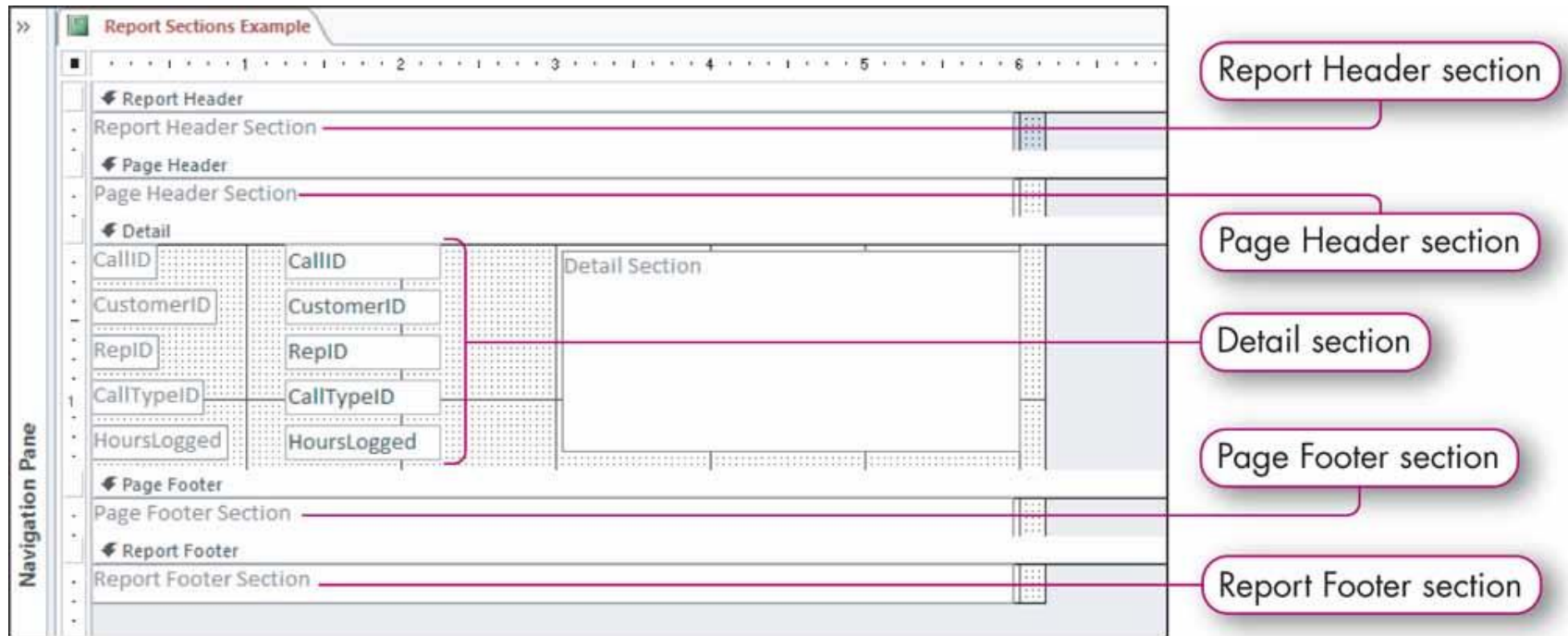
- Form Header Section:** Located at the top of the form area.
- Detail Section:** The central area containing a list of input fields:
 - CallID: 001
 - CustomerID: YS012
 - RepID: 5
 - CallTypeID: 2
 - HoursLogged: 12
- Form Footer Section:** Located at the bottom of the form area.

On the left side, a vertical "Navigation Pane" is visible. At the bottom of the window, a status bar shows "Record: 1 of 366", "No Filter", and a "Search" button. Three callout boxes with lines pointing to the form sections contain the following text:

- Form Header displays at top
- Detail section
- Form Footer displays at bottom

Pearson Education, Inc. © 2020

Understanding Sections (4 of 11)



Pearson Education, Inc. © 2020

Understanding Sections (5 of 11)

Report Sections Example

Report Header Section

Page Header Section

Navigation Pane

CallID	CustomerID	RepID	CallTypeID	HoursLogged
001	YS012	5	2	12
002	YS038	3	2	3
003	YS020	5	4	3
004	YS009	2		

Detail Section

Detail Section

Detail Section

Detail Section

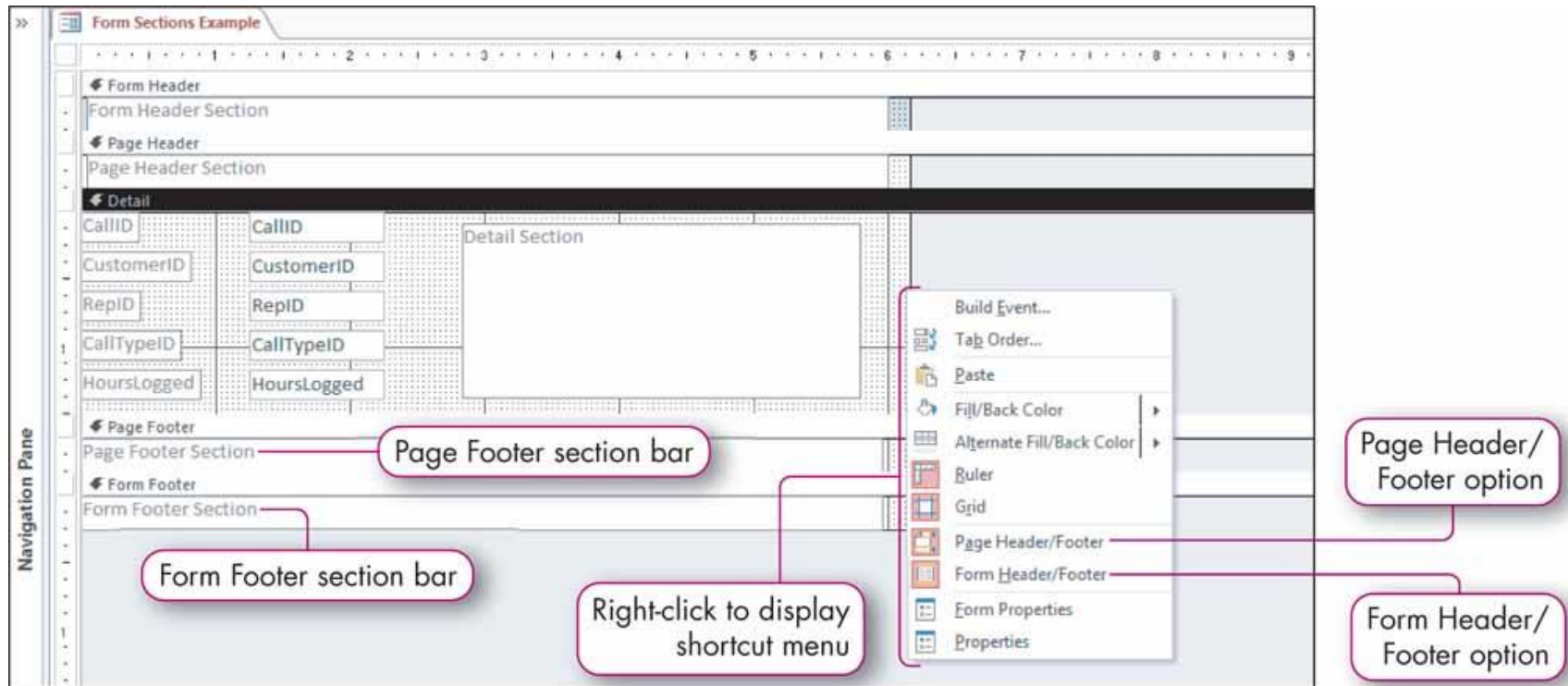
Report Header displays once at top of first page

Page Header displays at top of each page

Detail section repeats for each call

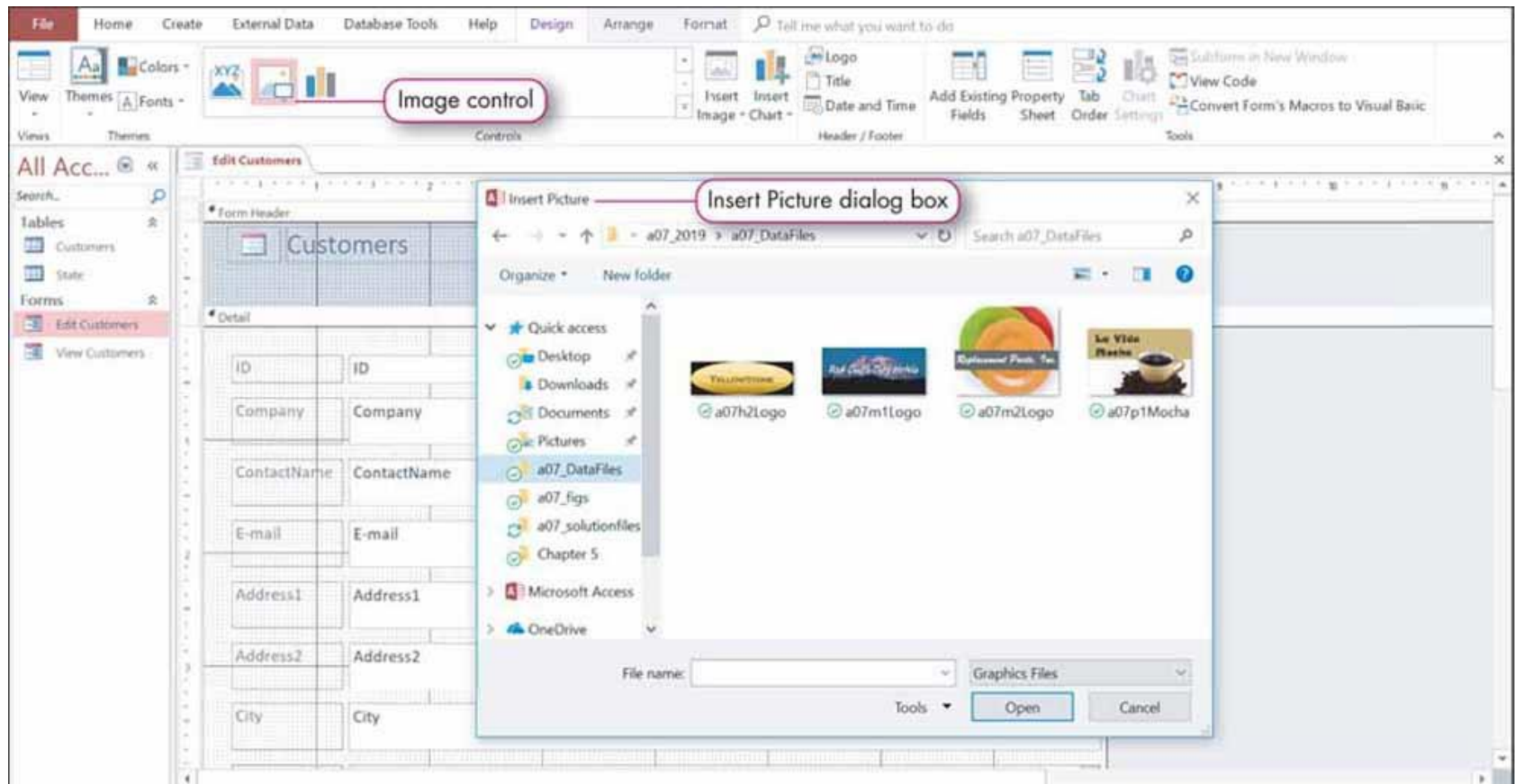
Pearson Education, Inc. © 2020

Understanding Sections (6 of 11)



Pearson Education, Inc. © 2020

Understanding Sections (7 of 11)



MollyEire/Shutterstock second left; Eshma/Shutterstock third left;
Big Pants Production/Shutterstock

Pearson Education, Inc. © 2020

Understanding Sections (8 of 11)

Navigation Pane

Calls By Type

Report Header									
Calls							=Date()		
							=Time()		
Page Header									
CallTypeID	CallID	CustomerID	RepID	OpenedDate	ClosedDate	CustomerSatisfaction			
Detail									
CallTypeID	CallID	CustomerID	RepID	OpenedDate	ClosedDate	CustomerSatisfaction			
Page Footer									
				=Page & [Page] & of & [Pages]					
Report Footer									
	=Count(*)								

Group, Sort, and Total

Add a group — Add a group Add a sort

Pearson Education, Inc. © 2020

Understanding Sections (9 of 11)

The screenshot displays the Microsoft Access Report Designer interface for a report titled "Calls By Type". The report is structured into several sections, each with a grid of fields:

- Report Header:** Contains a title "Calls" and two fields: "Date()" and "Time()".
- Page Header:** Contains fields: "CallTypeID", "CallID", "CustomerID", "RepID", "OpenedDate", "ClosedDate", and "CustomerSatisfaction".
- CustomerID Header:** Contains the field "CustomerID".
- Detail:** Contains fields: "CallTypeID", "CallID", "CustomerID", "RepID", "OpenedDate", "ClosedDate", and "CustomerSatisfaction".
- Page Footer:** Contains the field "Page" and "Page" (likely for page numbering).
- Report Footer:** (Empty)

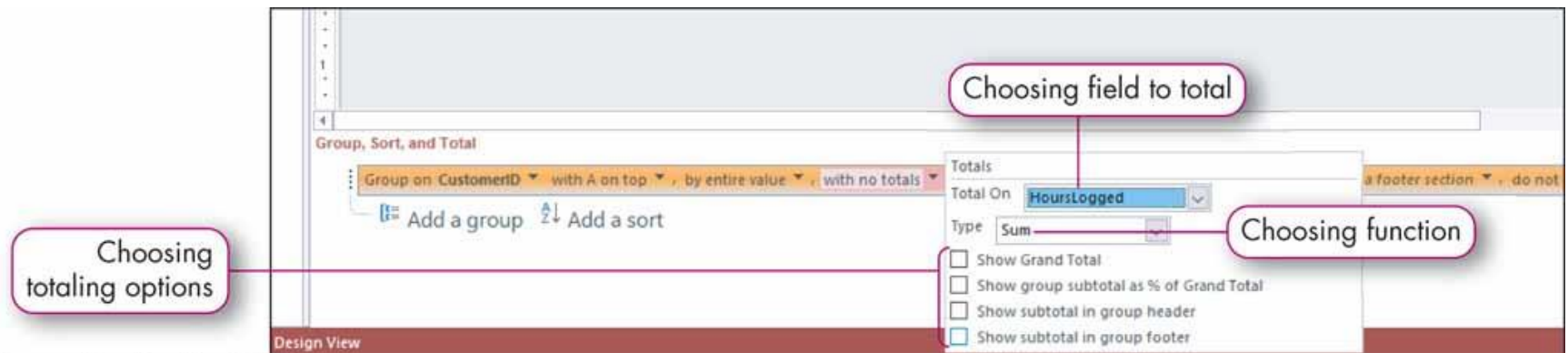
At the bottom, the "Group, Sort, and Total" bar is visible. It shows the following settings:

- Group on: CustomerID
- with A on top
- by entire value
- with no totals
- with title click to add
- with a header section
- without a footer section** (highlighted by a callout box)
- do not keep group together on one page

A callout box with the text "Change group footer section visibility settings" points to the "without a footer section" option in the "Group, Sort, and Total" bar.

Pearson Education, Inc. © 2020

Understanding Sections (10 of 11)



Pearson Education, Inc. © 2020

Understanding Sections (11 of 11)

Navigation Pane

Calls By Type

CustomerID YS007

3	098	YS007	3	4/9/2017	4/15/2017	3
3	024	YS007	6	1/20/2017	1/28/2017	4
9	298	YS007	2	10/23/2017	11/1/2017	1
7	205	YS007	3	7/28/2017	8/8/2017	3
5	148	YS007	4	6/2/2017	6/12/2017	4
2	133	YS007	7	5/12/2017	5/20/2017	1
8	073	YS007	7	3/11/2017	3/16/2017	4
5	023	YS007	5	1/19/2017	1/29/2017	1
6	017	YS007	7	1/13/2017	1/24/2017	3
5	012	YS007	6	1/6/2017	1/15/2017	4
1	067	YS007	6	3/2/2017	3/4/2017	5
6	314	YS007	5	11/9/2017	11/20/2017	4
2	186	YS007	7	7/2/2017	7/9/2017	1
6	008	YS007	5	1/4/2017	1/9/2017	1
93						

Totals display after each customer

CustomerID YS009

6	294	YS009	1	10/22/2017	11/1/2017	2
3	132	YS009	3	5/10/2017	5/17/2017	5
8	119	YS009	7	4/27/2017	4/28/2017	4

Pearson Education, Inc. © 2020

Copyright



This work is protected by United States copyright laws and is provided solely for the use of instructors in teaching their courses and assessing student learning. Dissemination or sale of any part of this work (including on the World Wide Web) will destroy the integrity of the work and is not permitted. The work and materials from it should never be made available to students except by instructors using the accompanying text in their classes. All recipients of this work are expected to abide by these restrictions and to honor the intended pedagogical purposes and the needs of other instructors who rely on these materials.