

Access 2007: Part III

Stephen Moffat, The Mouse Training Company

 Microsoft®
Office 2007

Access Part III



Stephen Moffat, The Mouse Training Company

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Part III



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Access 2007: Part I

Access 2007: Part II

Section 7 Forms

By the end of this section you will be able to

- Create a form with a wizard
- Create a form from design view
- Add and format controls
- Add and format data
- Use control wizard tools

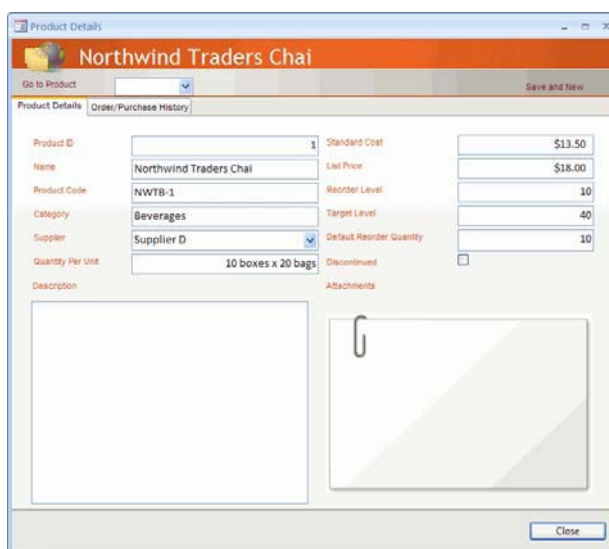
7.1 Creating Forms

So far in this manual we have learned a lot. You should now know how to enter data into a table, create different types of database objects, use templates, and get the tables of data to look the way you want. In this section we will learn more about the other major types of database objects like forms, reports, and queries.

What is a Form?

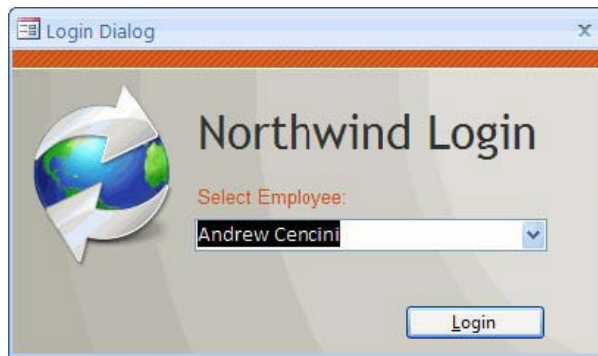
Simply put, a form is an easy way to input data into a database. It contains fields that let you type the information for each field in, it can have an input mask which will make the field look like an empty phone number field, and it can contain required field that you must enter in order for the database entry to be valid.

We have seen a few examples of forms along the way, such as those featured in the Northwind sample database template included with Access:



Forms can also include functionality not directly related to a table. For example, the Login window that appears when you open the Northwind sample database is actually a special type of form.

Bound vs. Unbound Controls

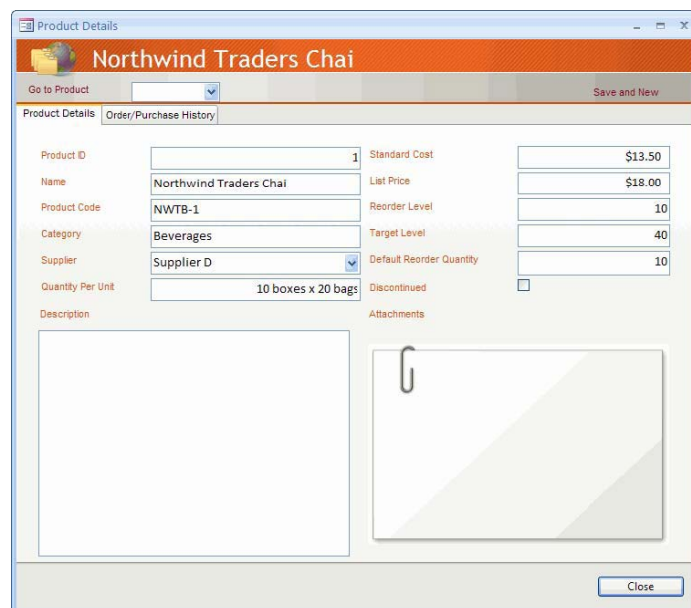


We can define a 'control' (in the context of a form) as some object contained in the form. For example, consider the Login window:

This form contains two controls: a combo box which allows you to select a name from the employees who work for Northwind and a Login button that will confirm the employee selection and open the Home page of the Northwind database (which is actually another form).

When creating a form, you will use at least one control; otherwise your form is not very useful! All controls in Access, no matter how they are used, fall into two categories, bound and unbound.

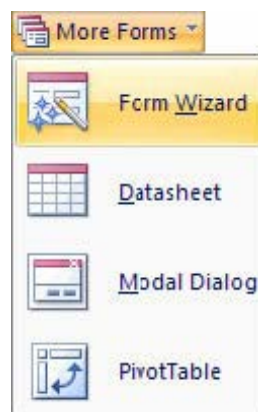
A bound control is one that is directly related to some aspect of a database object. Consider the following Product Detail form:



Every field listed here contains a text box where you can type in some data. The field is directly linked to the Products table in the database. So, when you have completed entering data for a record and make a new one, all of the data you entered in each field in the form gets entered to its respective field in the table.

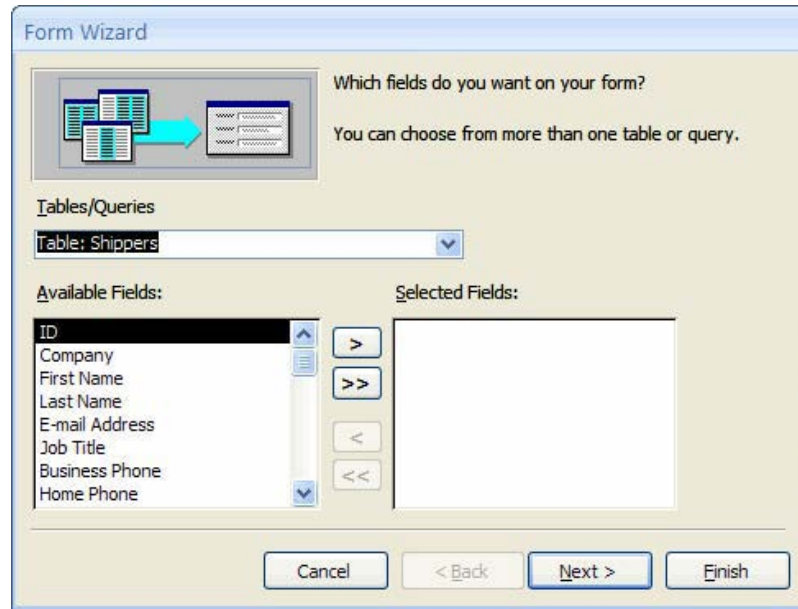
An unbound control is one not directly related to a database object but still serves some useful purpose. For example, the Login button in the Login window is a control that performs an action but has nothing to do with any data in the database. Another example would be a print button; it might be set up to call a query and construct a report, but has nothing to do with the actual data.

Creating a Form with the Wizard

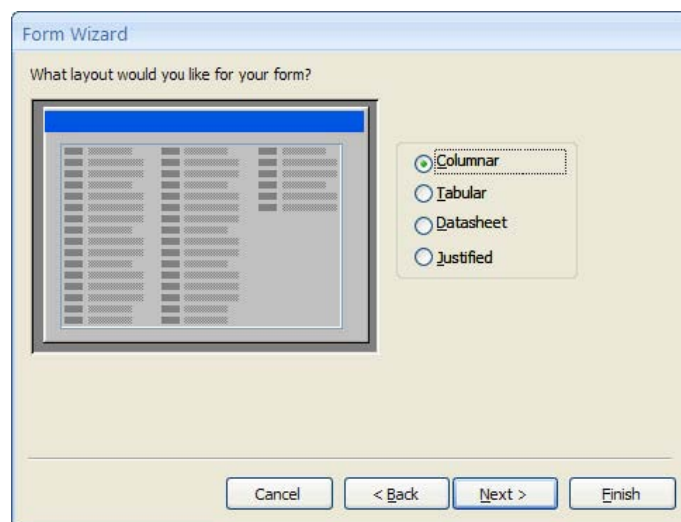


Access features a wizard that allows you to specify how you would like a form to look and what table it should be based upon. Access then does the hard work for you and creates a usable form in only a few clicks. To create a form using the Wizard, click the Create command tab and then click the More Forms command:

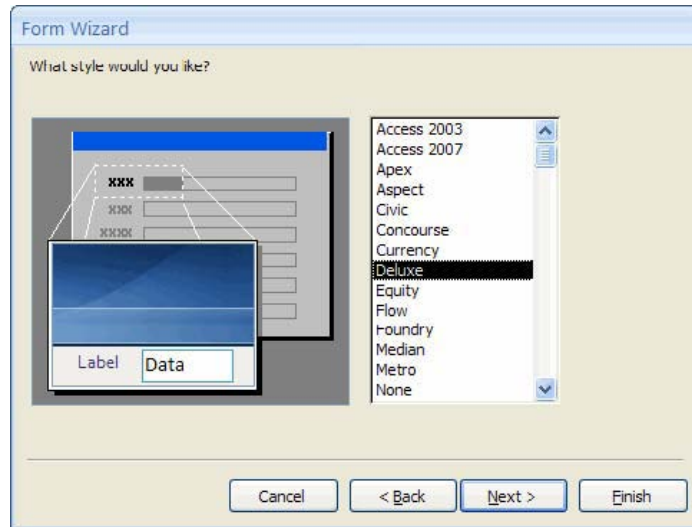
1. Form Wizard is the first option; click it to start the Wizard.
2. The first page allows you to select which table or query Access should link to the form:



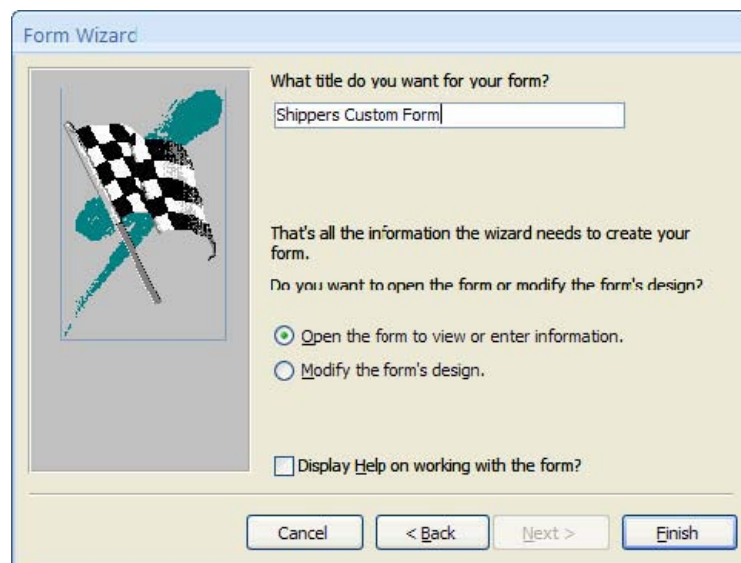
3. You can also specify which field or fields you want to use in the form. Click > to move the currently highlighted field from the Available Fields list to the Selected Fields list. Click >> to move all fields from one list to the other. Click Next to proceed.
4. The next step of the Wizard lets you choose the layout for your form. Select one of the layouts by clicking the appropriate radio button and then click -Next-:



- The next page allows you to style your form to make it catch the attention of the user. Click one of the styles from the list of those available; you will see a preview of each on the left side of the window:



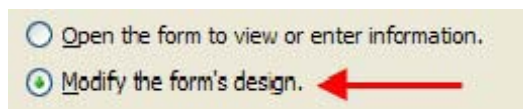
Select a style you like and click -Next-. The final page of the Wizard lets you name the form:



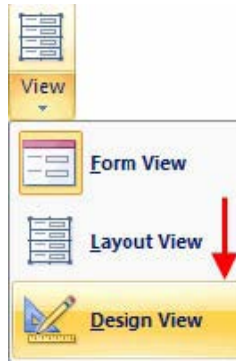
- By default, when you click Finish, the form will open so you can start using it right away. The second radio button option allows you to open the form in Design view where you can modify every aspect of a form. (We will discuss the basics of Design view in the next section of this lesson.)
- If you leave the first radio button selected, clicking Finish will open the form right away:

Using Design View to Modify Your Form

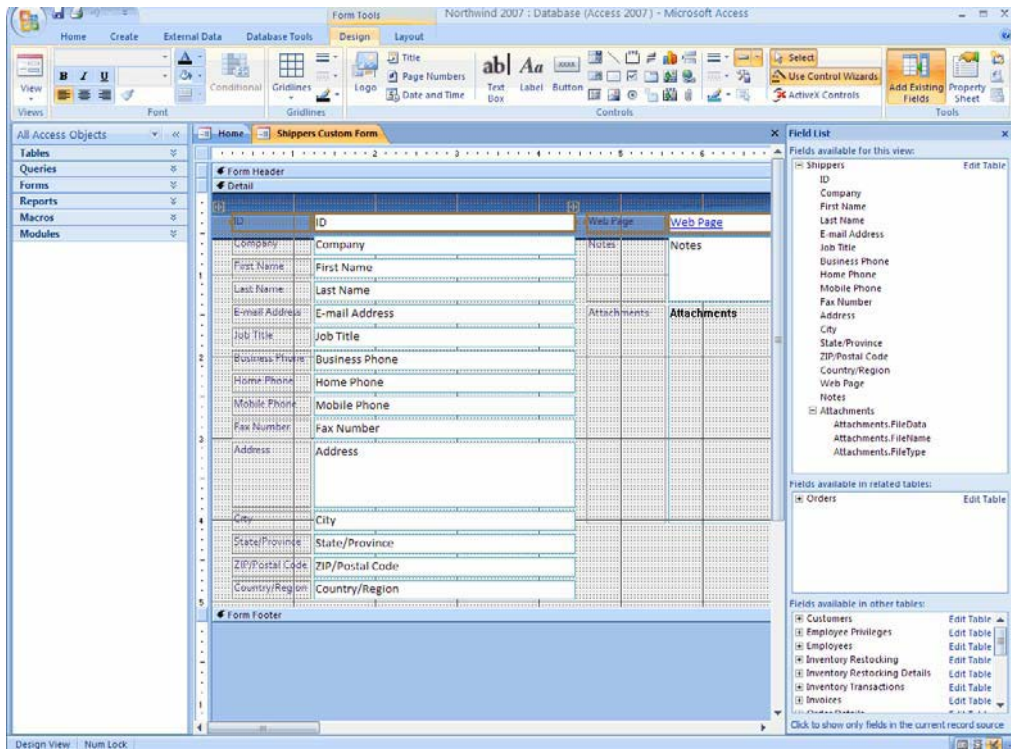
You may recall Design view from one of the Step-By-Step exercises in this manual. Design view allows you complete control over how a form should look. To enter Design view after using a Wizard to create a form, make sure you highlight the “Modify the form’s design” radio button in the final step of the wizard:



1. If you want to modify the design of an existing form, double-click the form object in the Navigation Pane and then select Design View from the View command in the Home ribbon:



2. Let's take a look at what's going on in form Design view:

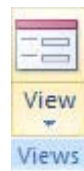


3. At the top of the window you will see two new contextual tabs appear: Form Tools - Design and Form Tools - Layout. In the centre of the window is the current working space (called a canvas).



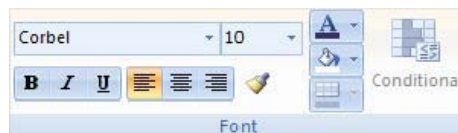
4. On the right-hand side you will see a special pane that lists the fields that are available for use in Design view:
5. The “Fields available for this view” section shows you all fields associated with the table(s) from which the form was directly constructed. (In the example above, Shippers is the main table.) The “Fields available in related tables” list shows the fields and table(s) that the main table shares a relationship with. (In the example above, the Shippers and Orders tables share a relationship.) Lastly, the “Fields available in other tables” list shows all the tables in the current database file and the fields you can use from each.
6. Though much of the use of Design view is beyond the scope of this manual, let’s take a look at the different groups of commands you can use to work on a form.
7. The following chart lists the overlying functionality of the Design Ribbon: _

Form Views



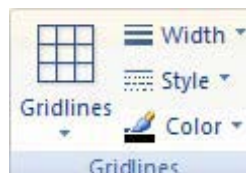
Click this command to cycle or choose a view of the form.

Font



This section allows you to modify the look and feel of the currently selected font.

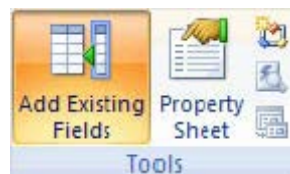
Gridlines



You can specify the look and feel of a grid that can be applied to a group of controls.

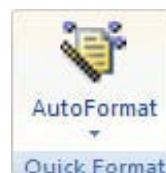
Controls

This section allows you to add a wide variety of bound and unbound controls to a form.

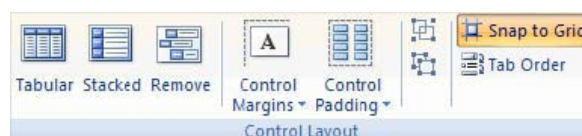
Tools

This section provides more of the background functionality associated with form design including the ability to modify properties and macro code linked to a control.

The other contextual tab that appears is a tab to control the Layout of a form:

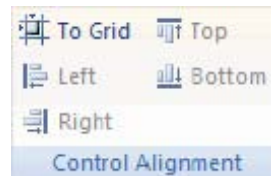
Quick Format

The AutoFormat command is used to quickly apply a particular design scheme to your entire form. AutoFormat features twenty-five different pre-made formatting options to use.

Control Layout

This section of the Layout ribbon allows you to modify the position of the controls in your form. You can move controls in a group or individually.

Control Alignment



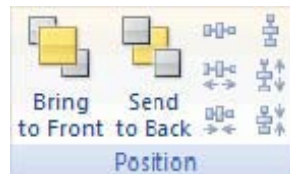
The commands in this section are used to align a group of controls to the overlaying design grid or to the position of a particular control in the form.

Size



If you have difficulty aligning controls by hand or, want to align controls quickly yet neatly, use the commands in the Size section of the Layout ribbon.

Position




Access 2007 gives the flexibility to arrange the order and position of different controls in your form.

Show/Hide



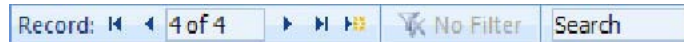
These commands let you show or hide different features of Design view itself (like gridlines).






Using Forms

To make use of a form, first double-click its name in the Navigation Pane to open it. Then it is simply a matter of clicking the new command in the Home ribbon ( New) and entering data into the fields:

ID	4
Company	Company D
First Name	Some
Last Name	Guy

Any fields that reference an AutoNumber field (such as a primary key) will advance to a new value. At the bottom of the form you may recognize the navigation buttons:



-  **_First** Moves to the first record in the table.
-  **Previous** Moves to the previous record.
-  **Next** Moves to the next record.
-  **Last** Moves to the last record in the table.
-  **New** Creates a new record at the end of the table.

7.2 Basic Form Controls

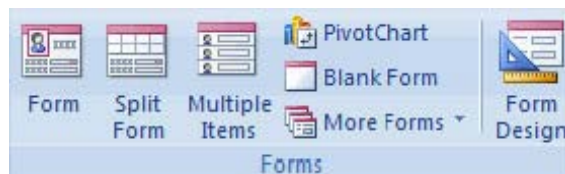
By now you should be very comfortable with creating and controlling data contained in the tables of your database. In the coming lessons, we will learn how to make the database more usable by using forms.

Forms in a database are just like paper forms: information is written on a form, and the information on the form is entered into a database or kept on file in some way for retrieval later. Access can make some very powerful and functional forms for use with your databases, so let's explore how they work.

Adding a Control

Forms have two basic functions: they provide a means to input data and they can perform actions on the database. Therefore, the things that you interact with on a form are either text fields where data is entered in some way, or controls that perform some action on the data in the form or on the database.

Every form includes some sort of control. In this lesson, we will explore some of the functionality provided by forms. Use the Create ribbon to view the Form commands:



Here is what the different commands do:

Form

This command is used to create a form based on a table in your database. Access will automatically create a form that contains all of the fields in the highlighted table.

Split Form

This command creates a form that contains two parts. The top part is just like datasheet view; you can see all records contained in the table or query upon which the form is based. The bottom section is a normal form.

Multiple Items

This command displays all the information in a table or query in a special datasheet view. This view allows you to see several records at a time, each displayed like a single form entry.

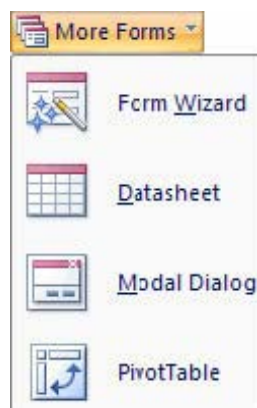
PivotChart

PivotCharts are used by Access as a way to quickly display information in a graphical way. Though they are beyond the scope of this manual, PivotCharts let you drag two or more fields to the axes of a chart. The numerical data contained in the fields will be displayed. The term 'pivot' means you can click and drag one or more fields from one axis to the other, therefore pivoting the data to display it in a different way.

Blank Form

This command creates a new empty form with a blank canvas.

More Forms



This command opens a small menu containing other commands relevant to the use of forms:

Form Wizard walks you through the creation of a form. The end result is a complete working form that can be used right away.


The Datasheet command creates a new empty form, but one that you can use to insert data like a table. Datasheet forms are beyond the scope of this manual.

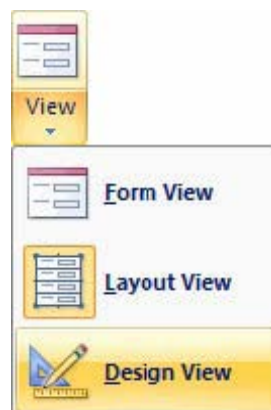
Modal dialogue allows you to create a new form that looks just like a dialogue box. Modal Dialogue forms also feature OK and Cancel buttons built in.

PivotTables are a way to display numerical data quickly. Just like PivotCharts, fields can be moved from one axis to another to display information about your data in a different way.

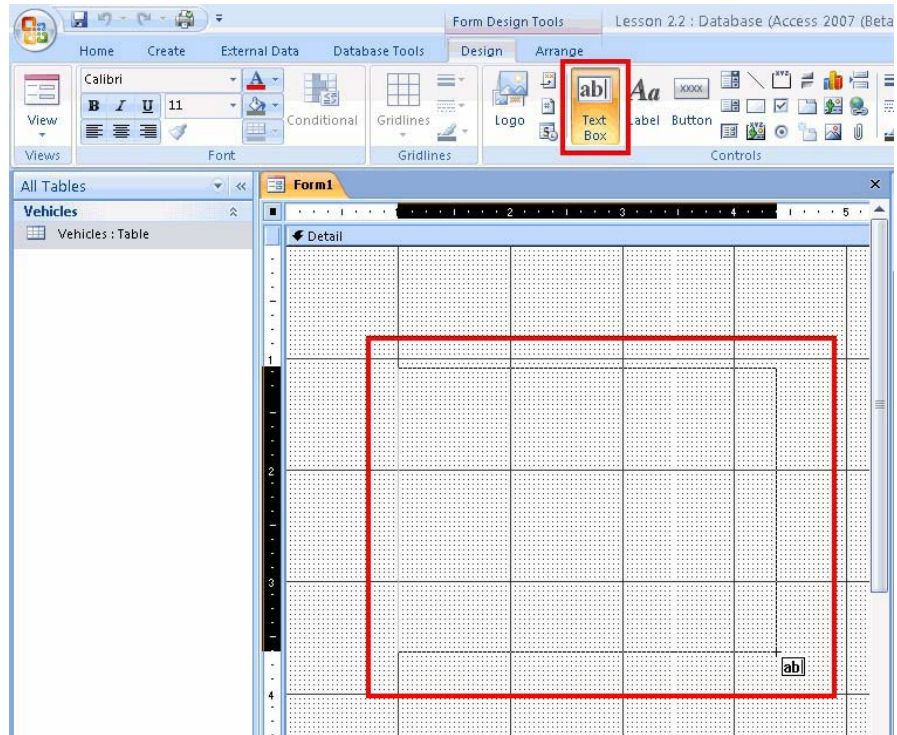
Form Design

This command opens the currently selected form in Design view.

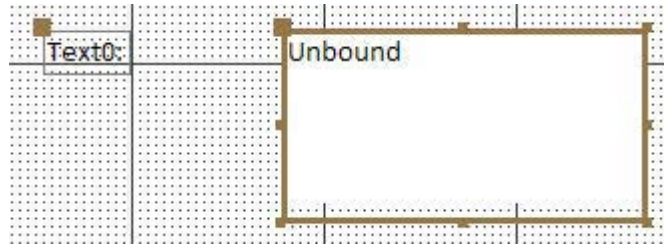
1. Let's add a control to a blank form. First, open a new blank form by clicking the Blank Form ( Blank Form) command in the Create ribbon.
2. Next, use the View menu in the Form Tools - Formatting or Home ribbon and switch to Design view:



3. The majority of controls in Access can be added to a form in Access by clicking and dragging an area you want to designate for the control. For example, if you wanted to add a Text box to the empty form, click the text box command and then drag an area:



- As you click and drag, you will see a certain area of the rulers turn black to indicate how large the control is. Don't worry about making the controls an exact size; every control can be moved and resized later. The text box can now have text added to it, and the label beside the text box can be modified to describe what the text box is for:



- Access 2007 features a wide range of commands that can be used in a form.



- Many of the commands you can use are very similar to ones used in the Microsoft Windows operating system. Let's quickly look at what each icon does:

Logo



The logo command prompts you for an image file to use in the Form Header section of the Form. It will always be present at the beginning of the page.

Title



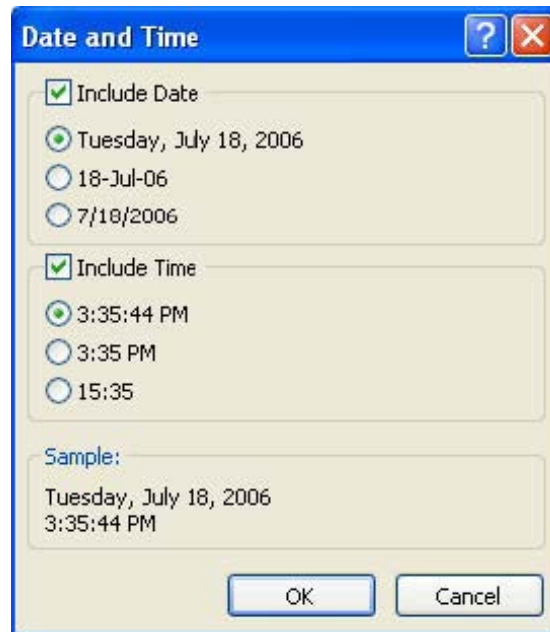
This command adds a title to the Form Header section.

Page Numbers

Click this command to show the Page Numbers dialogue box. Select the options and position you want to use for your form.

**Date and Time**

This command shows the Date and Time dialogue box. It allows you to select the formatting options you want for your form:



Text Box



Click this command and then click and drag an area on the canvas to add the text box. A text box can hold any type of data except graphical.

Label



Nearly every control has an associated label, one that tells you what the command is called. Click and drag an area in the canvas.

Button



A button is used to perform some sort of action, like the OK and Cancel buttons of a dialogue box. Click and drag the size of button you want.

Combo Box



You should be very familiar with the function of combo boxes by now. Use combo boxes to have the user pick an option out of a list of options by clicking the pull-down arrow.

List Box



A box that works similar to a combo box, but it can be expanded to show all of its contents. A user simply picks the option out of the list they want to use.

Subform/ Subreport



Lets you create a form inside a form or a report inside a report.

Line



Click and drag to draw a line in the form. Useful for dividing up the form components into groups so they are easier to read.

Rectangle



Draw rectangles in the form to help provide a visual group of related components.

Bound Object Frame



Allows you to enter and control various expressions and low-level operations that can be performed on the database.

Option Group



Click and drag a box around a group of controls to group them together. Useful when using radio buttons; users can select one option out of the group to perform a certain action.

Check Box

When checked, the condition bound to the checkbox is true or active. When unchecked, the condition is false or inactive

Option (Radio) Button

Used to select a certain option, and almost always in groups of two or more.

Toggle Buttons

A toggle button's command stays in effect when clicked and will remain so until it is clicked again.

Tab Control

Lets you create a series of tabs in your form, each with its own options. Useful if you have a large numbers of controls in a frame that can be categorized.

Insert Page

Use this command to insert a page into a certain section of a form.

Insert Chart



Click and drag an area in the form to open the Chart Wizard. This Wizard will analyze the data contained in a query or report and display data for you in a graphical way.

Unbound Object Frame



Allows you to create a special window inside a frame that you can use to view some other document while looking at your form. For example, you could have a small window containing a PDF document or a Access presentation.

Image



Allows you to place a picture in your form.

Page Break



Used to create a cut-off point when printing a document. Even though you may be able to see everything on your screen, a new page will always print off when a page break is encountered.

Hyperlink



This command will create a link to another file, Web page, or resource external to your database.

Attachment



Use this command to view non-alphanumeric data contained in your database.

Line Thickness



Choose the thickness of the line you have currently selected or are about to make.

Line Type



Choose a line pattern.

Line Colour



Choose a line colour.

Special Effect



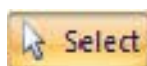
You can apply a special effect to a button or other control to make it look like it is 3-D, flat, or sunken into the form.

Set Control Defaults

Use this command to revert a control's properties back to the default setting.

Select All

Use this command to select all controls contained in a form.

Select

This command lets you select a control so you can move it around the canvas.

Use Control Wizards

Toggle this command to have Access automatically start a Wizard to help with the creation of different commands in a form.

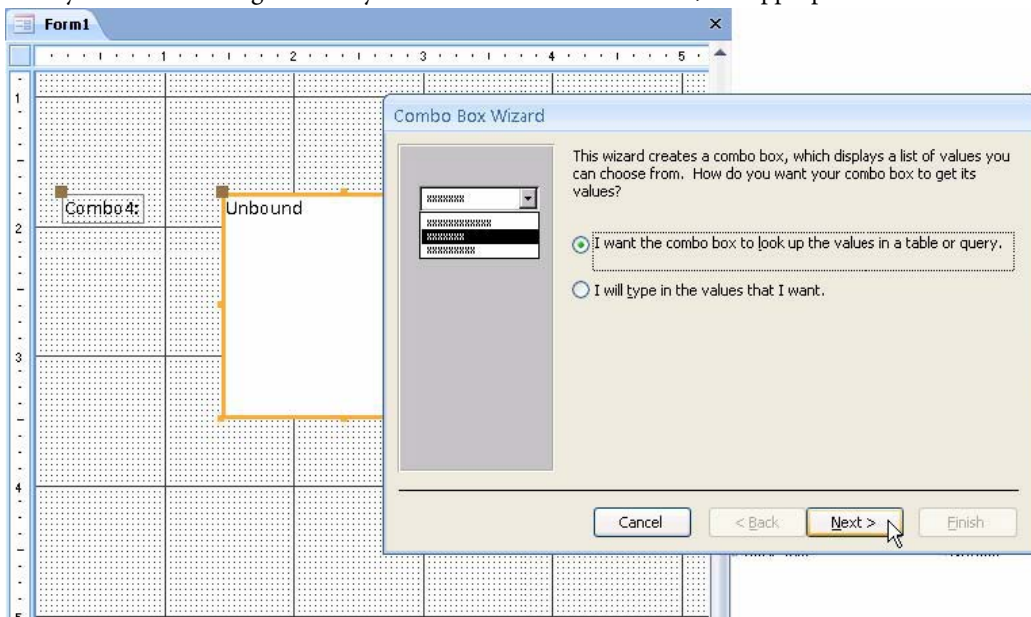
ActiveX Controls

ActiveX controls are special types of controls that are used to enhance the functionality of a form. They can be used as small toolbars or applications that execute from inside a form.

Using the Control Wizard

The Control Wizard option, when selected, will start the appropriate Wizard to guide you through setting up Option Groups, Combo Boxes, List Boxes, Command Buttons, Subforms, and Subreports. It is a good idea to leave this toggled (indicated as active when it is orange in colour) to guide you through setting up a control until you reach a point where you are comfortable designing a control on your own.

1. When you click and drag the area you want to use for the control, the appropriate Wizard will begin:

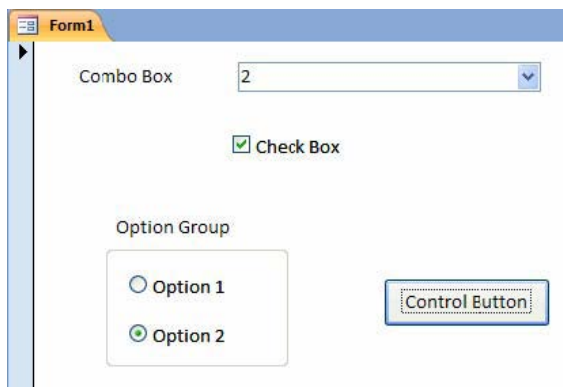


2. Follow the directions provided in the Wizard to format your control.

Cutting, Copying, Pasting, and Moving a Control

Thanks to the interactive and graphical control provided by most computer programs (including Microsoft Office) many objects can be cut, copied, and moved on your screen. When working with a form, Access lets you perform all of these options with your mouse.

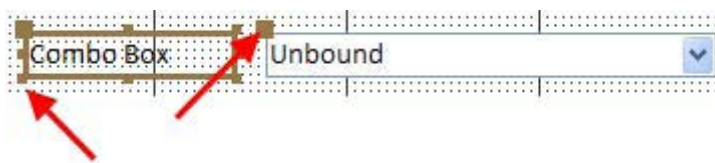
Let's consider the following form, complete with a few basic controls:



You decide that this form is no longer completely serving your purposes and needs some adjusting. The combo box is not needed, so it can be cut. You will use another check box, so you can copy and paste the one you already have. And everything can be shifted up in the form to account for the loss of the combo box.

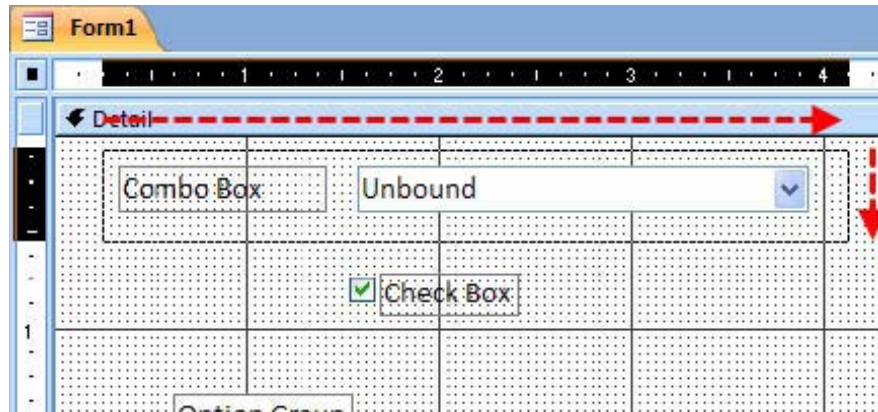
► To perform these actions,

1. Open the form in Design view. When you click on a form, you will see the following handles appear:

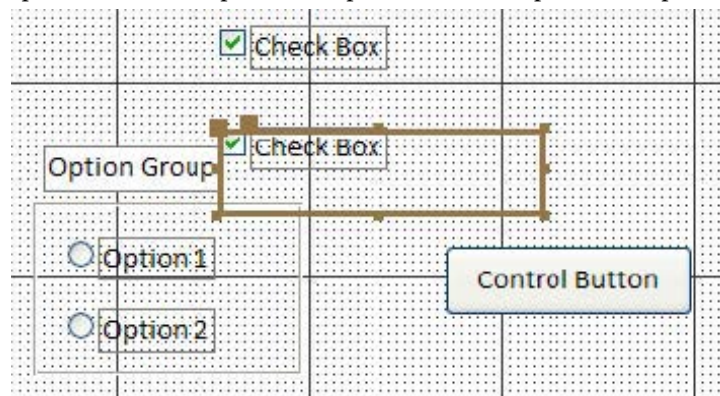


2. In the diagram above, the label for the combo box was clicked to select it. The large brown box in the upper left-hand corner of the control is used to move the control, and the smaller boxes around the outside edge are used to expand the object in a certain dimension. Notice too how there is a large brown box in the upper left-hand corner of the combo box itself; this means that the combo box is related to the label that is currently selected.
3. To cut the control when selected, press Ctrl + X on your keyboard. The label disappears and is placed in the clipboard of the computer, but the combo box itself stays behind. This might be useful in some scenarios to have only the combo box visible, but for this example we want to remove the entire combo box and label.

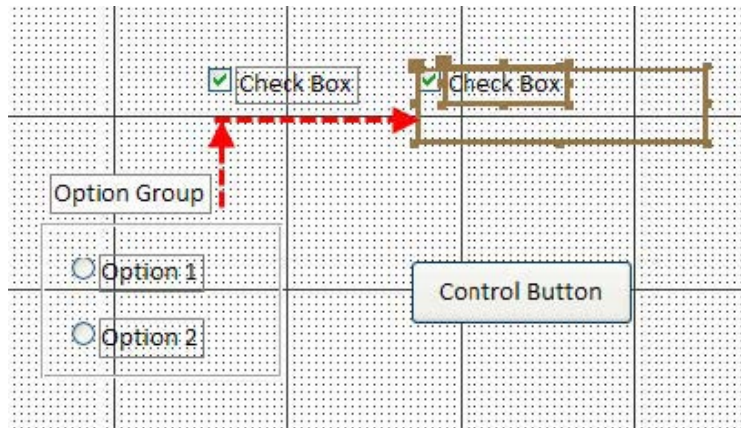
4. Press Ctrl + Z to undo the Cut operation, and instead click and drag a selection box around the controls:



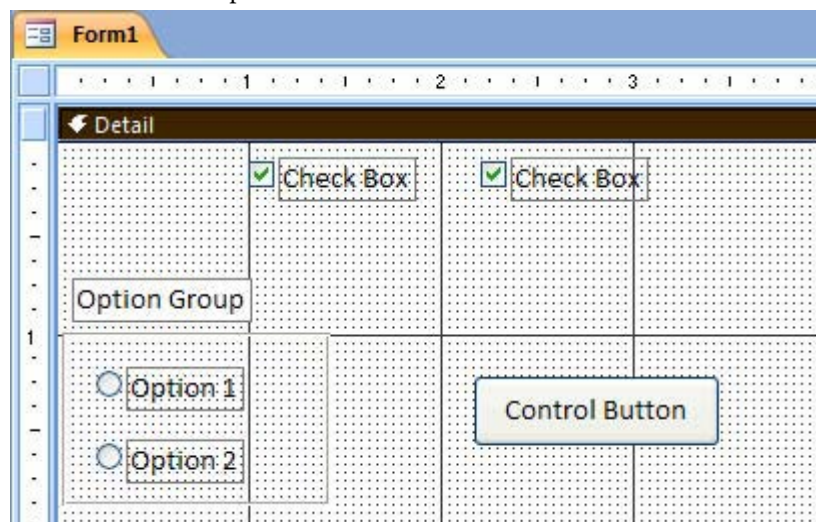
5. Now press Ctrl + X to cut the control. If you are planning on removing the combo box for good, you might consider just deleting it instead; simply highlight the object(s) and press Delete on your keyboard.
6. Click and drag a box around the Check Box and its label, and then press Ctrl + C. This stores a copy of the control in the clipboard of the computer. Now press Ctrl + V to paste the copied check box:



7. The new check box is pasted, but doesn't look very good when pasted on top of another control!



8. Use the arrow keys on your keyboard to move the control up and to the right of the first check box:
9. Now all of the controls in the form can be moved up to occupy the space left behind by the combo box. Click and drag a selection box around all of the controls, and then use the up arrow on your keyboard to shift all of the controls to the top of the form:



Formatting a Control

The default style of form may be functional but not very good looking. You can enhance the look of a control by using the Font section of the Form Tools - Design ribbon (or the Font section of the Home ribbon). If you are familiar with Microsoft Word or Excel, or other such software applications, this toolbar should look familiar:



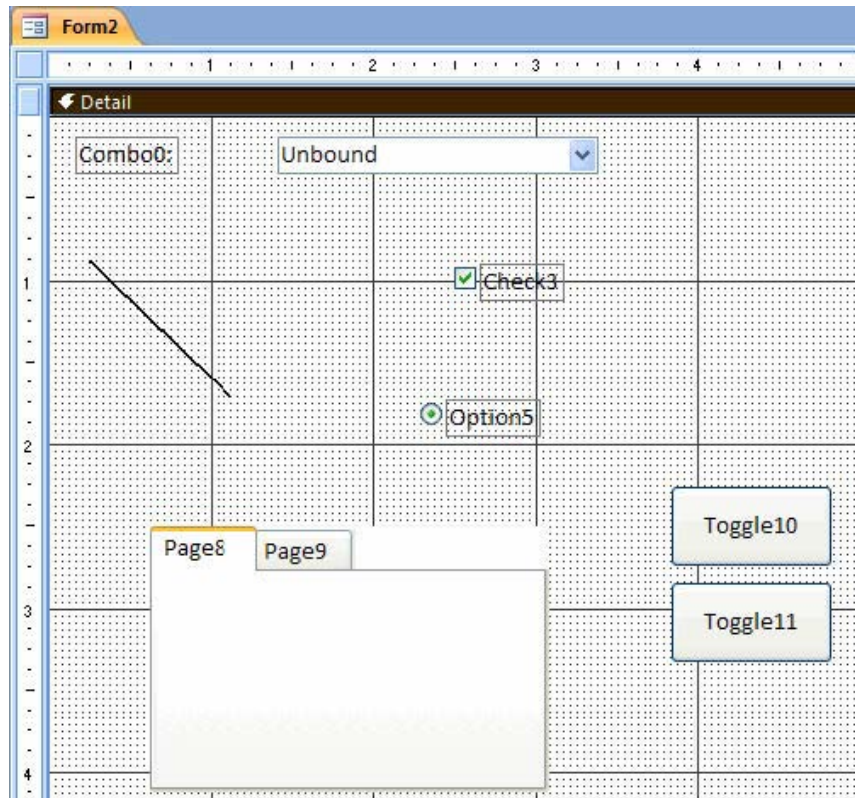
Here you can adjust the font, font size, make the font bold, change the colour, or apply a background colour. If you apply a new format to a control and don't like the look of it, you can press Ctrl + Z on your keyboard to undo the formatting change. Also, if you make a font larger but can't see the entire label, click the label you just modified and drag the small brown boxes around the outside edge in the dimension you need to expand.

7.3 Formatting Form Controls

In this lesson we will cover a few more commands that are available when working with a form.

Changing the Colour of a Control

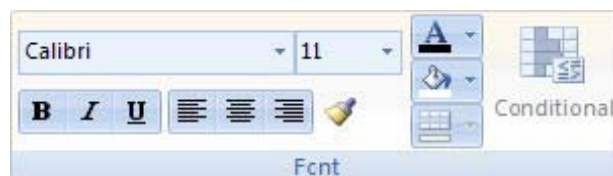
The look and feel of nearly every control can be modified in some way by making use of the Form Tools - Design ribbon. Consider the following form, complete with a few different controls:



1. The only one of the controls that cannot be modified are the tabs of the Tab Control object (with Page8 and Page9 as the tabs). Anything inside the tabs can, however, be modified.




2. The Line object can have a thickness, a style, and a colour, as defined in the Controls section of the ribbon:
3. Any of the other controls that include text of some sort can be modified by using the Font section of the ribbon:



Using Form Control Properties

Consider the check box in the following diagram:



It consists of two different objects; the checkbox itself and a label. Each object has its own set of individual properties. To view the properties of this or any object, select the object and click the Property Sheet command in the ribbon. Properties are modifiable by using a combo box, entering a value by hand, and occasionally using the  icon to open a Wizard or external resource in order to set a property. We will use the check box itself as an example.

Format Tab

Modify how the control will appear in the form including how wide the border around the check box will be, what sort of style the check box will have, the colour of the border, and how much space is around the check box.

Data Tab

A check box can have a control source (such as a Boolean or true/false) from a table, a validation rule, whether the option is enabled and/or locked, and even if you would like to have a 'triple state' check box (one that is either true, false, or null.)

Event Tab

Controls what the check box will do when it is interacted with. This includes what will happen if the mouse is moved on top, is clicked, is double-clicked, and how the check box responds when a key is pressed.

Other Tab

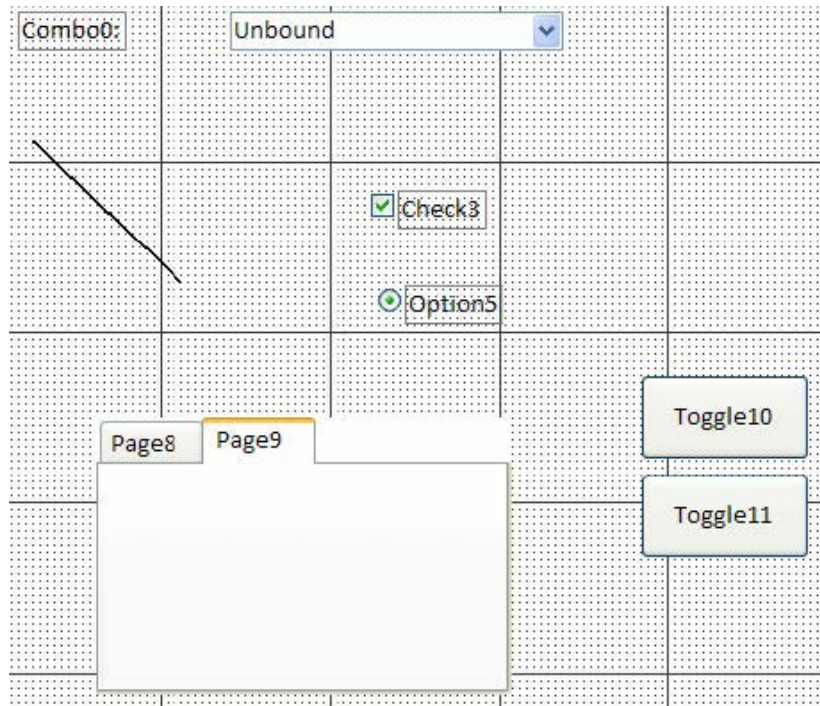
You can modify other properties of the check box such as its name, if it can be reached and interacted with when the Tab key is pressed, and if it will display text in the Status Bar. (The status bar is visible at the bottom of the Access window while in Form view. It tells a user what the control does or what change it has on the form/database).


All Tab

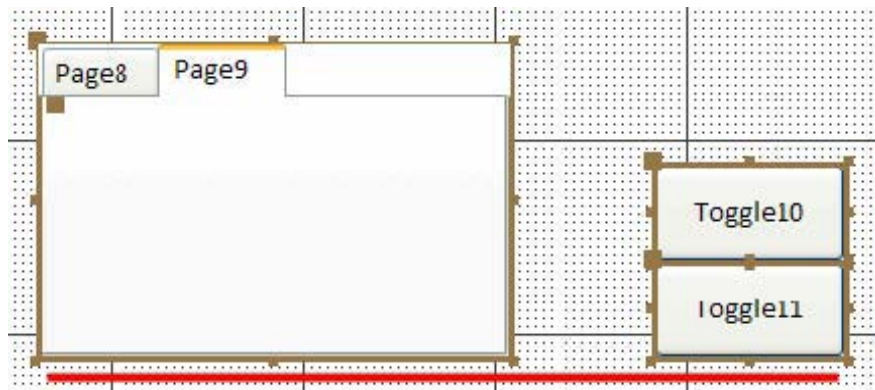
All controls combined.

Aligning Form Controls

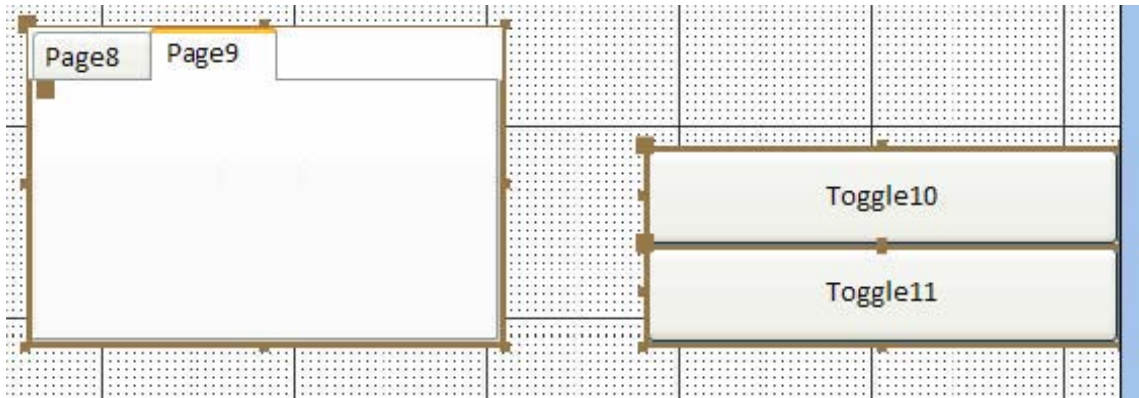
Changing the size of the design grid and using the mouse works fine for small forms. But in the case of forms with many controls, or in the interest of saving time, Access has a number of alignment commands built into the Form Tools - Arrange ribbon. Consider the following group of controls that we would like to format:



1. We will cover the full functionality of the Layout ribbon in the next lesson. For now, select two objects like the control group and toggle buttons. Click the Bottom command ( Bottom) in the Control Alignment section of the ribbon.
2. This will align all controls to the bottom of the lowest control in the form:

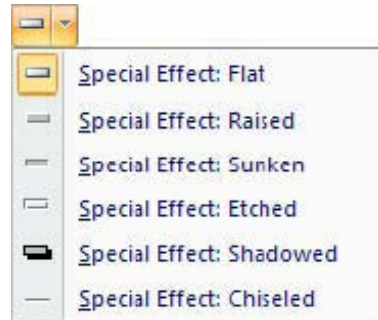


3. Clicking the To Widest command expands all controls to the same width as the widest one currently selected:

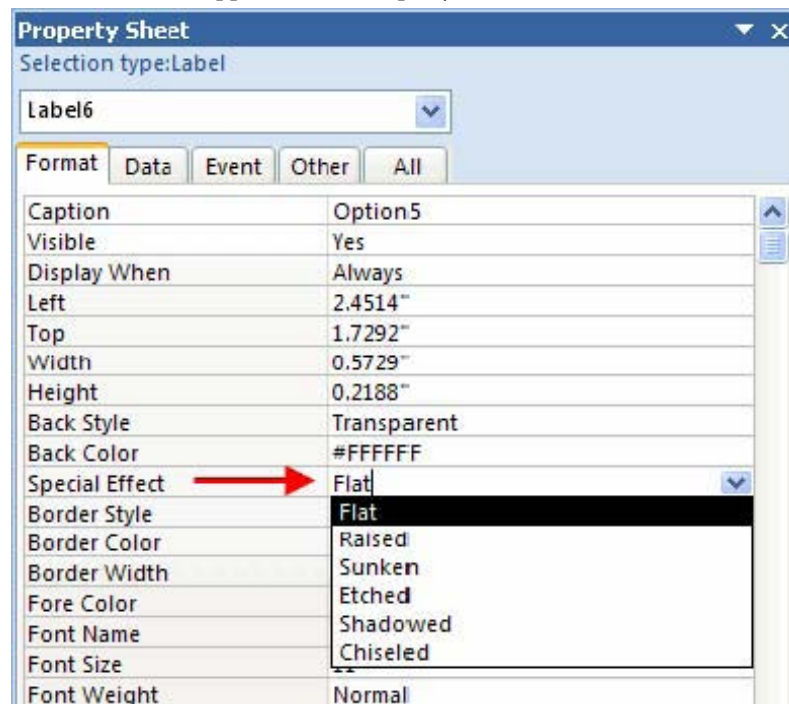


Applying Special Effects

Nearly every control in a form can have some sort of special effect applied to it to make the control look a bit more stylized. If a control can have an effect applied to it, the special effects command will become active in the Form Tools - Design ribbon.



1. Click the pull-down arrow beside the command to show the available effects you can choose:
2. The special effects can also be applied in the Property Sheet:

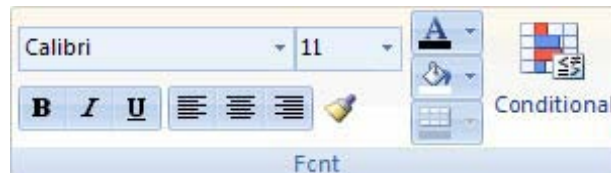


7.4 Formatting Form Records

In the final lesson on forms, we will cover the last of the commands and functionality available for use.

Modifying Fonts

Regardless of if you are in Layout or Design view, you always have the ability to change the font quickly and easily. Use the Font section of the Home ribbon (which is always accessible), the Form Tools - Formatting ribbon while in Layout view, and the Form Tools - Design ribbon when in Design view.



Using AutoFormat

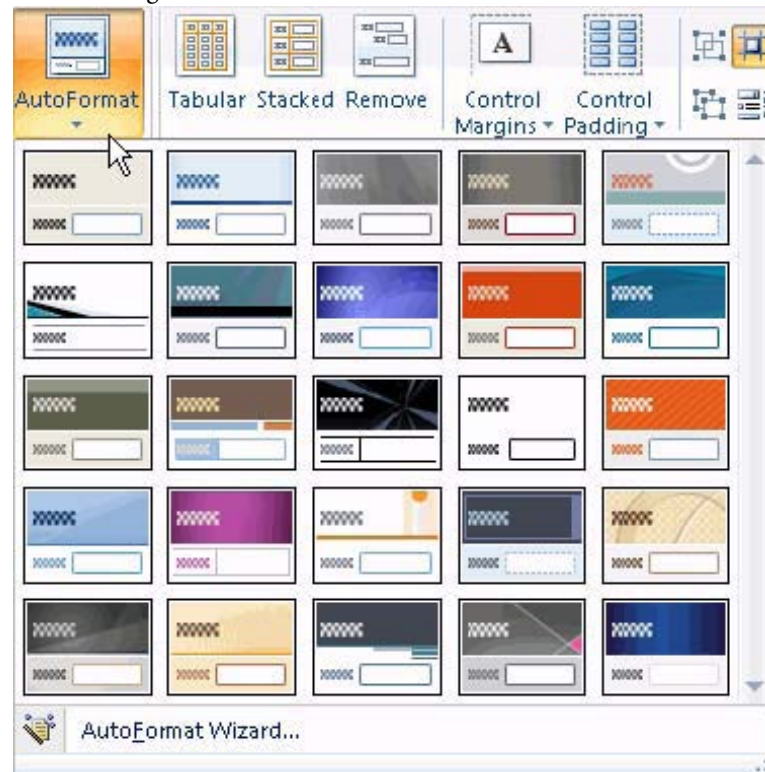
When you first begin making forms, you will likely use the form Wizard to get you started. However, the Wizard may not provide the functionality you need. Designing forms by hand is a bit more time consuming, and sometimes making a form look a bit presentable gets pushed down the list of importance. Luckily, Access features formatting colour schemes that can be applied anytime before, during, or after the creation of a form.

1. Consider the Employee Details form from the Northwind sample database:

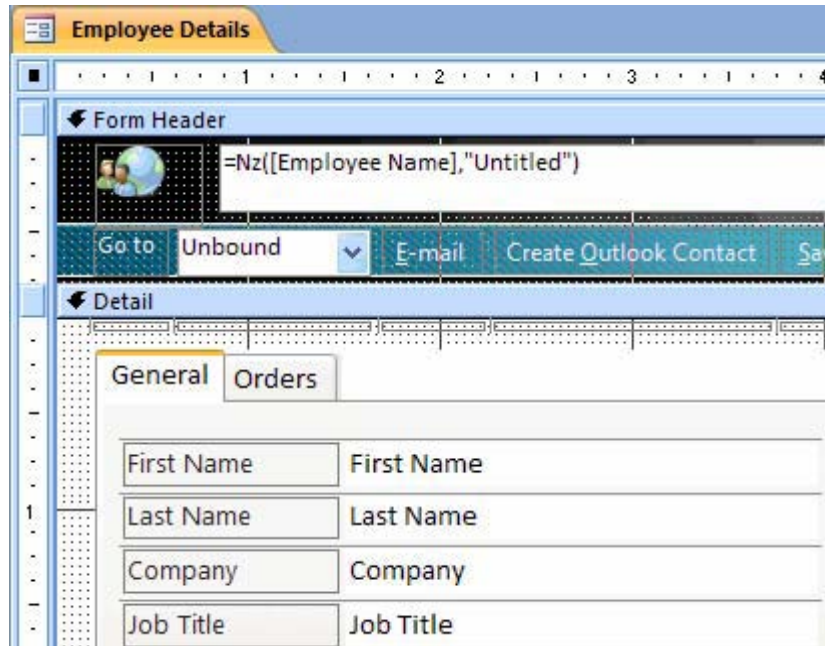


2. The links at the top of the page have a certain look, the labels each have their own font size and colour, and the text boxes are all bright and easy to read.
3. However, if the form was currently unformatted, or if you didn't like the look of the form, you can use the AutoFormat command to apply a formatting change.

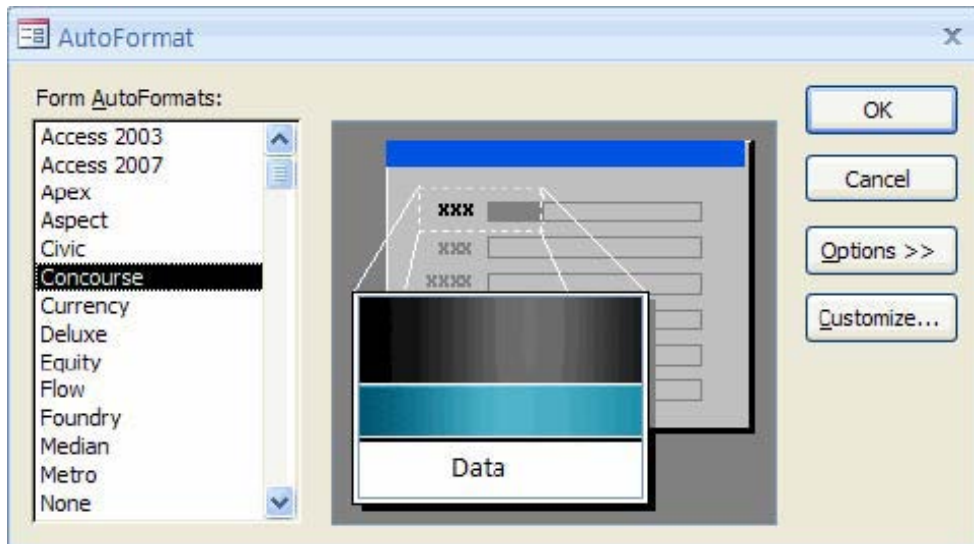
4. Open the form in Design view, and then click the pull-down arrow underneath the AutoFormat command in the Form Tools - Arrange ribbon:



- Choose any of the 25 pre-defined formats to apply to your form:



- Access also gives you the ability to customize a particular format. Click the AutoFormat Wizard button at the bottom of the AutoFormat pull-down menu to open the AutoFormat dialog box:

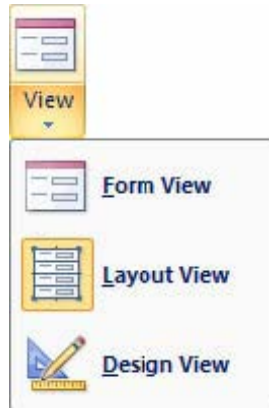


- Then, click the Customize button on the right-hand side to modify the specifics of a template.

Using the Format Ribbon

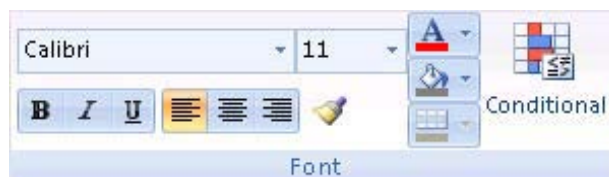
The Format ribbon is visible when viewing a form in Layout view. Let's examine what each section of the ribbon is used for:

Views



Use this pull-down command to switch between different views in the form:

Font



This section is used to modify the font and style of text. The Conditional command is used to apply different formatting styles according to certain scenarios. For example, if you are calculating monetary figures, all positive values can be bold and black while all negative values can be highlighted in red.

Formatting



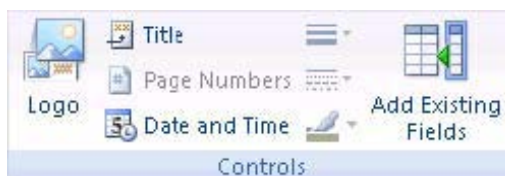
The formatting section is used to apply a different text style to certain numerical data. For example, clicking the \$ command will format a number to look like currency.

Gridlines



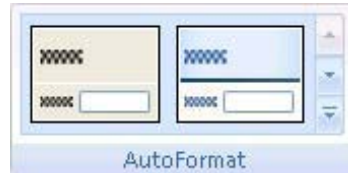
If you create a form based upon an existing table, all of the fields in the form are constructed as a table. Use the commands in this section to change the look of the dividing lines in the table or grid.

Controls



The controls section lets you add other fields to the table, add a logo, title, date and time, as well as modify the look of any lines or rectangles your form may already contain.

AutoFormat

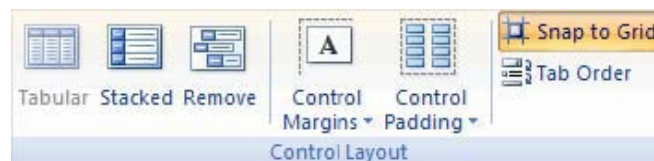


Click the up and down arrows on the right-hand side of the section to scroll through the available formats. Click the pull-down arrow to display all available format options.

Using the Arrange Ribbon

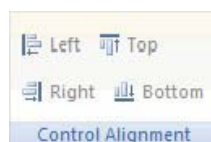
In Layout view, the Layout ribbon contains the basic controls needed to adjust the position of the objects in the form:

Control Layout



This section allows you to move a control or group of controls around the form, set margins of free space around controls, and set the tab order of the different controls.

Control Alignment



This section allows you to line up two or more commands so that they are all as left as the leftmost, as right as the rightmost, or as high or low as the highest or lowest command in the selected group. These commands are very useful when building a form by hand and keeping everything neat and tidy.

Position



These commands deal with how objects in your form relate to each other in position. The Anchoring command allows you to pin a control to the form or to another control such that if the parent control should be changed, the pinned control is formatted in the same way. Other controls involve moving controls as if they were in layers, where one control is concealed or on top of another.

Tools



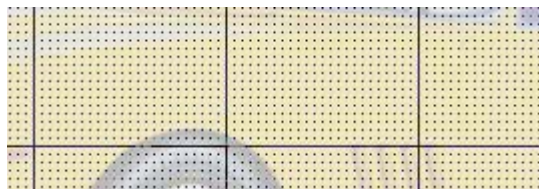
This section contains the command to open the properties relating to the currently selected object.

7.5 Formatting Your Form

We have seen how to adjust the properties of the controls in a form. In this lesson we will explore a few more useful options and customizable features of forms.

Formatting Gridlines

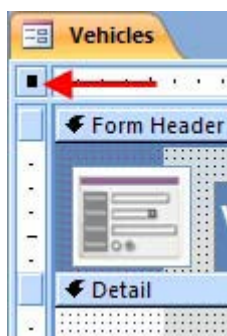
If you have tried to move a control using your mouse, you have no doubt become a little frustrated trying to get everything lined up neatly. Fortunately, Access gives you the ability to use the grid layout that is visible in form Design view:



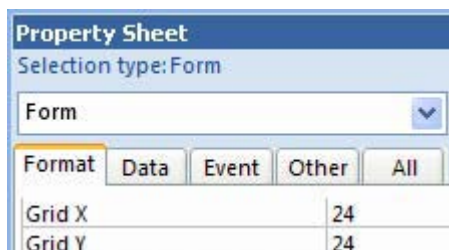
The solid black lines are defined as a 1" grid. You can modify the resolution of the dot matrix visible in Design view.

► To modify this setting,

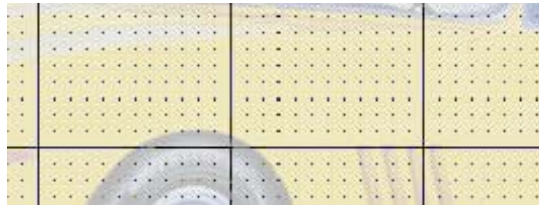
1. Open the Property Sheet for the form or double-click the form selector button while in Design view:



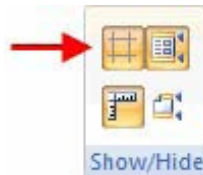
2. Click the Format tab in the Properties window and scroll down until you can see the Grid X and Grid Y properties:



- The numbers in each field denote how much you can subdivide the 1” square grid visible in Design view. The default value is 24, meaning that the space between the dots is 1/24th of an inch. You can adjust these properties from 1 to 64. Both values can be adjusted independently, though it is a good idea to keep both values either the same or multiples of each other.
- Changing the values to 12 for each field decreases the resolution by half:



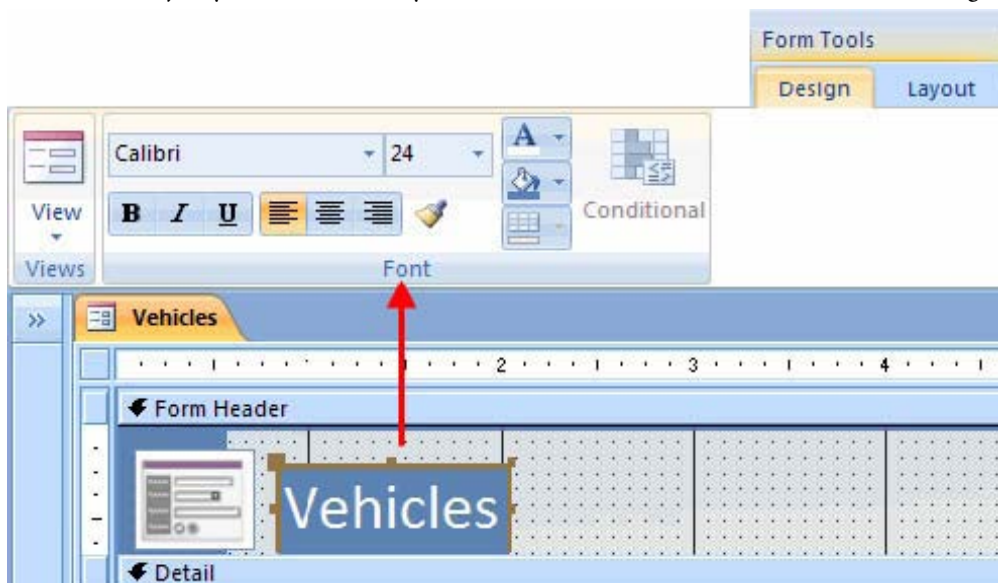
- If you want to turn off the gridlines completely, click the Show Grid command in the Form Tools - Arrange ribbon:



Modifying the Font

Fonts can easily be changed at any time in either Design or Layout view.


- Click the form object you want to modify and use the Font section of the Form Tools - Design ribbon:



- You can change the font, size, style, orientation, and colour with these commands. But imagine you have a very large form with several fields you want to modify at once, such as the Employee Details form:

- Apply the formatting you wish to use for the form to a single control in Design view:

First Name	First Name
Last Name	Last Name
Company	Company
Job Title	Job Title

- Double-click the Format Painter () command in the Font section of the ribbon. Now click every control that you want to look the same:

First Name	First Name
Last Name	Last Name
Company	Company
Job Title	Job Title
Phone Numbers	
Business Phone	Business Phone
Home Phone	Home Phone

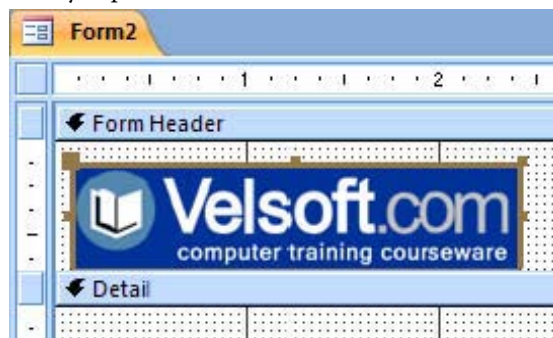
5. When you have finished using the Format Painter, click the command once more to stop using it.
6. If you only want to use the Format Painter once, click one object (and modify it to your liking), click the Format Painter command once, and then click another object. This will copy the formatting from one object to another and then deselect the Format Painter.

Adding Logos



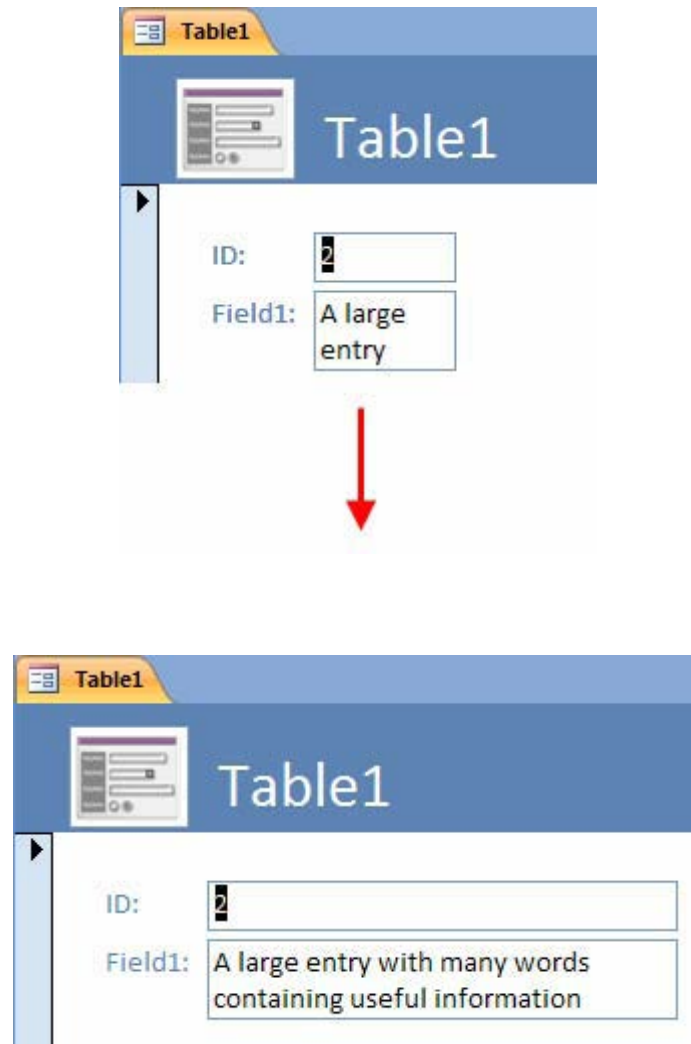
Though previous versions of Access allowed you to create a logo in a Form header automatically, Access 2007 contains a ready-made logo command in the Form Tools - Design ribbon.

1. Click the command to open the Insert Picture dialogue box. Navigate to the picture file you wish to use as the logo. Access automatically expands the Form Header section of the form and inserts the picture for you:



Changing the Layout

When designing a form, Access gives you two modes to use. We are already familiar with Design view; it allows you to adjust every underlying aspect of your form. Layout view, which is new to Access 2007, lets you modify how the form will look while viewing data contained in the form at the same time. For example, if you have a text field that possibly contains a long entry, use Layout view to view the data and then adjust the size of the text box accordingly:



2. Using Layout view, along with other techniques such as changing the resolution of the formatting grid, lets you create a form exactly to your liking. If you don't like a certain change you made, press Ctrl + Z on your keyboard to undo the operation.

Section 8 Reports

By the end of this section you will be able to

- Create a report with a wizard
- Add and format controls
- Set up report for printing
- Format data
- Use control wizard tools

8.1 Working with Reports

Now that we have a little more understanding about how queries work, it would be handy to be able to display the data that was retrieved in a clean and easy to read way. Access makes use of reports as a way of displaying query results in a printable and presentable way.

What is a Report?

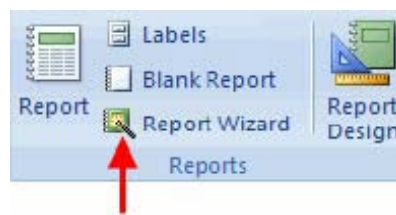
A report is a formal way of displaying data that has been retrieved from a query. Reports, like forms, are completely customizable and easy to create by using a Wizard. If the Wizard is not specific enough, you can change the colour, layout, style, and more, to suit your tastes.

If the data in your database has changed, you don't need to design a whole new report. Simply reissue the report and when Access runs the background query again, the data changes will be taken into account automatically.

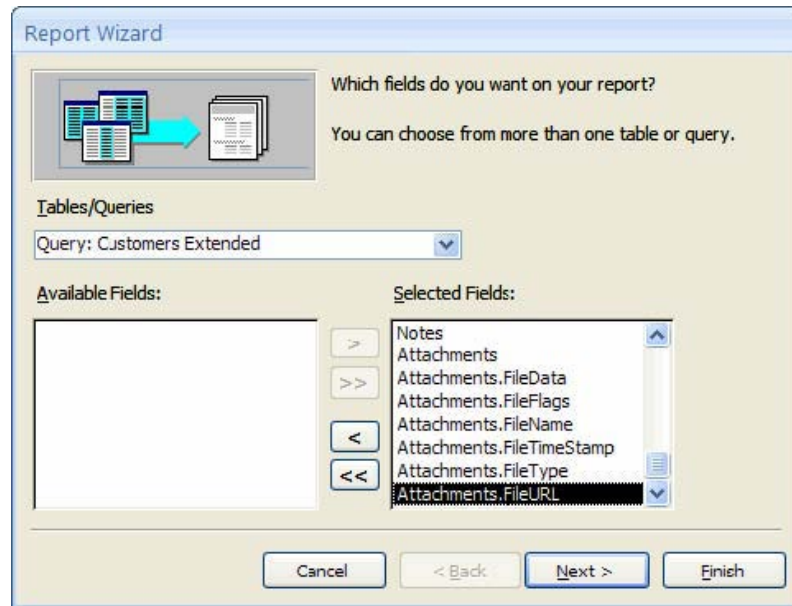
Creating a Report with the Wizard

Many of the reports you create will simply be an exercise in displaying the data in a certain way. Since reports are made from queries, and most of the queries will have already been built, creating reports using the Wizard is easy.

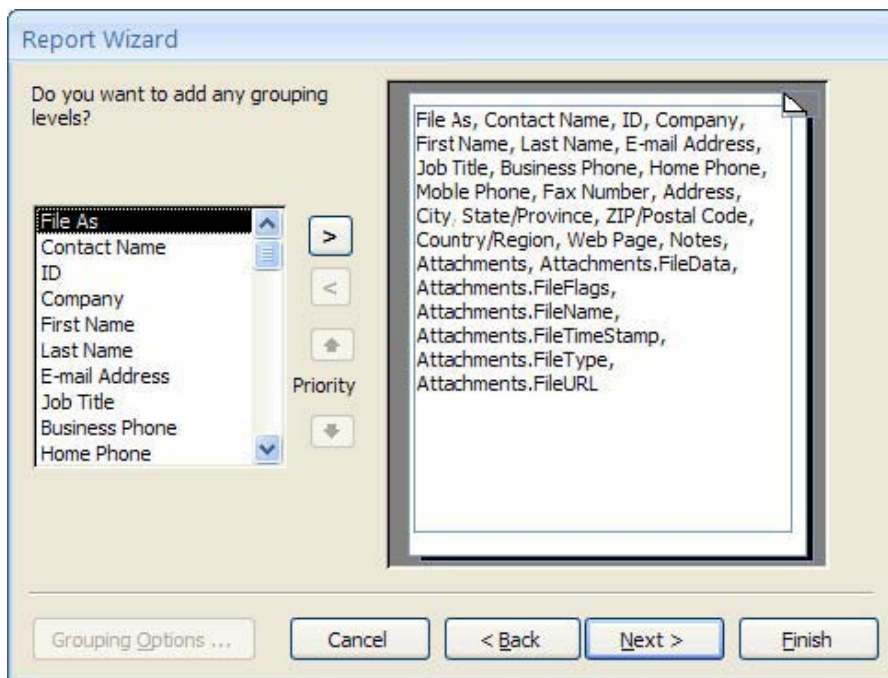
1. The Report Wizard command can be found in the Create ribbon:



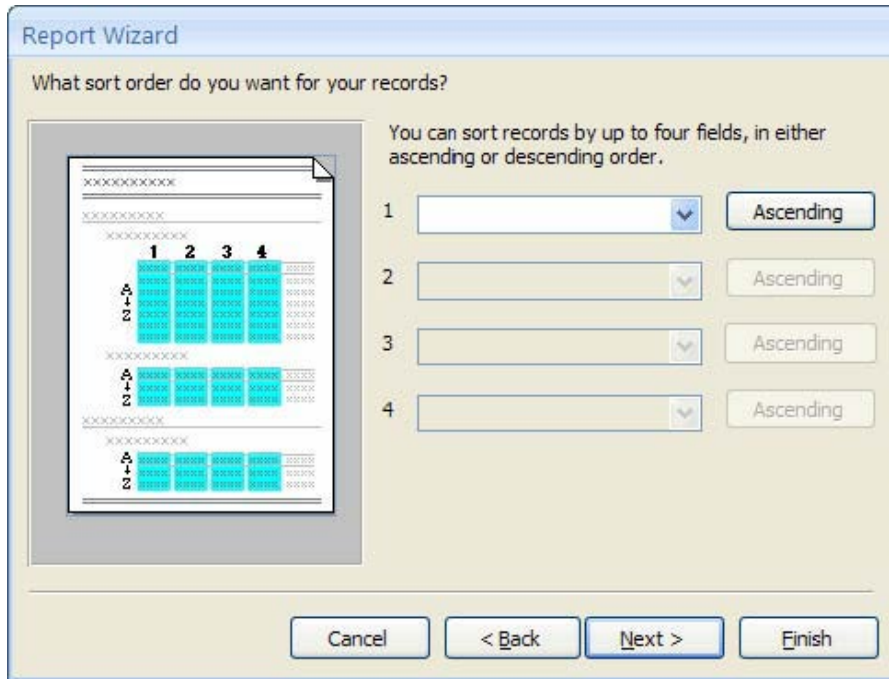
2. The first page of the Report Wizard should be pretty familiar to you by now; it was used to create a form and a query:



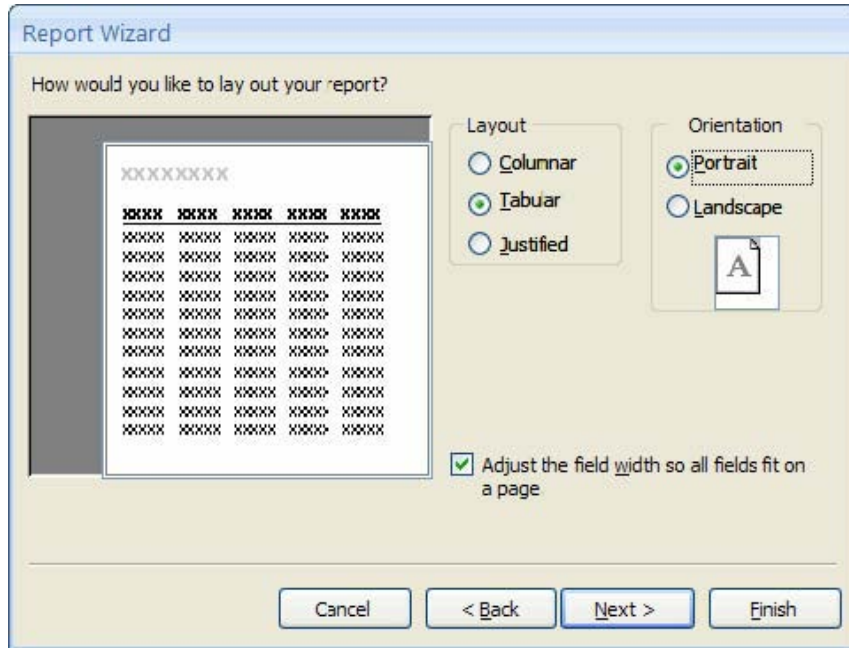
3. For this example, we will make a report based on the full results from the Customers Extended query. The next screen of the Report Wizard allows you to apply levels of grouping to the report:



4. Grouping levels are useful in certain queries to help categorize the data returned from a query. For example, if you ran a query to list all the different times that a product was ordered, you could group based on the product. Each date the product was sold would then be categorized under each product name. For the purpose of this example, no grouping will be used. The next page of the Wizard lets you organize fields in the report in ascending or descending order:



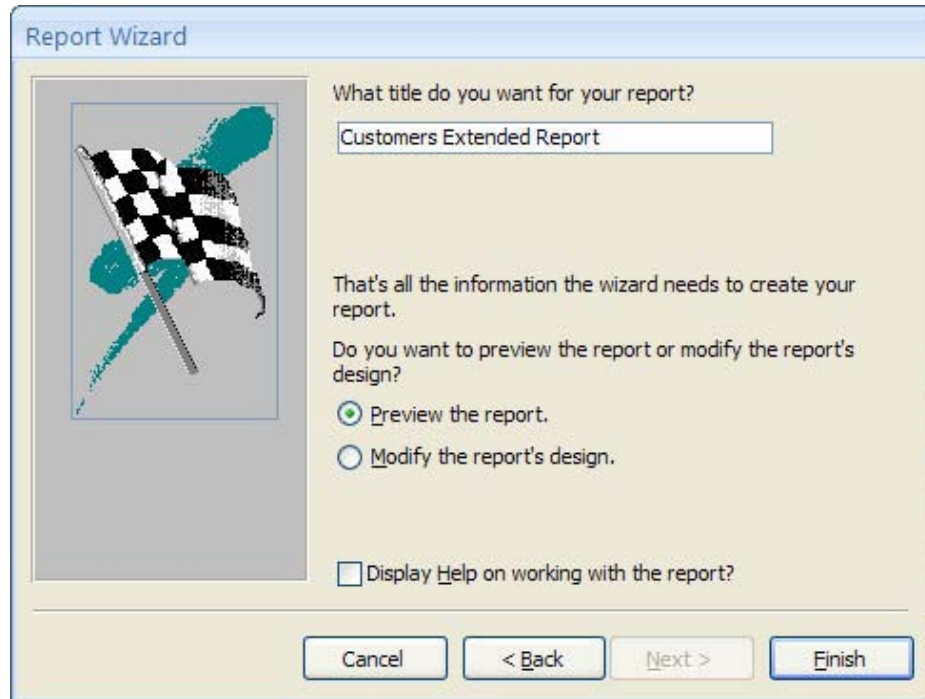
5. Select a field from the combo box. If you want to sort based on descending order, click the Ascending button to change the nature of the sort order.
6. The Wizard then asks how you want to organize the items in your report:



7. Click the different layout radio buttons to see a preview of how each field will look in the report. The checkbox at the bottom of the window will help to squeeze all of the data into the same page. This may not always be the best course of action if some fields contain large entries. Should the Wizard not produce the results you want, you can always delete the report and start again or use Design view to modify the layout.
8. At the next screen, you can choose a style for your report to make it more appealing if you are going to print it:



9. Finally, the last screen allows you to give the report a name and either view it right away or modify its properties in Design view:



10. Click Finish to view the report:

Customers Extended Report								
File As	Contact Na	ID	Company	First Name	Last Name	E-mail Add	Job Title	Business
Bedecs , Anna	Anna Bedecs	1	Company A	Anna	Bedecs		Owner	(123)456-7890

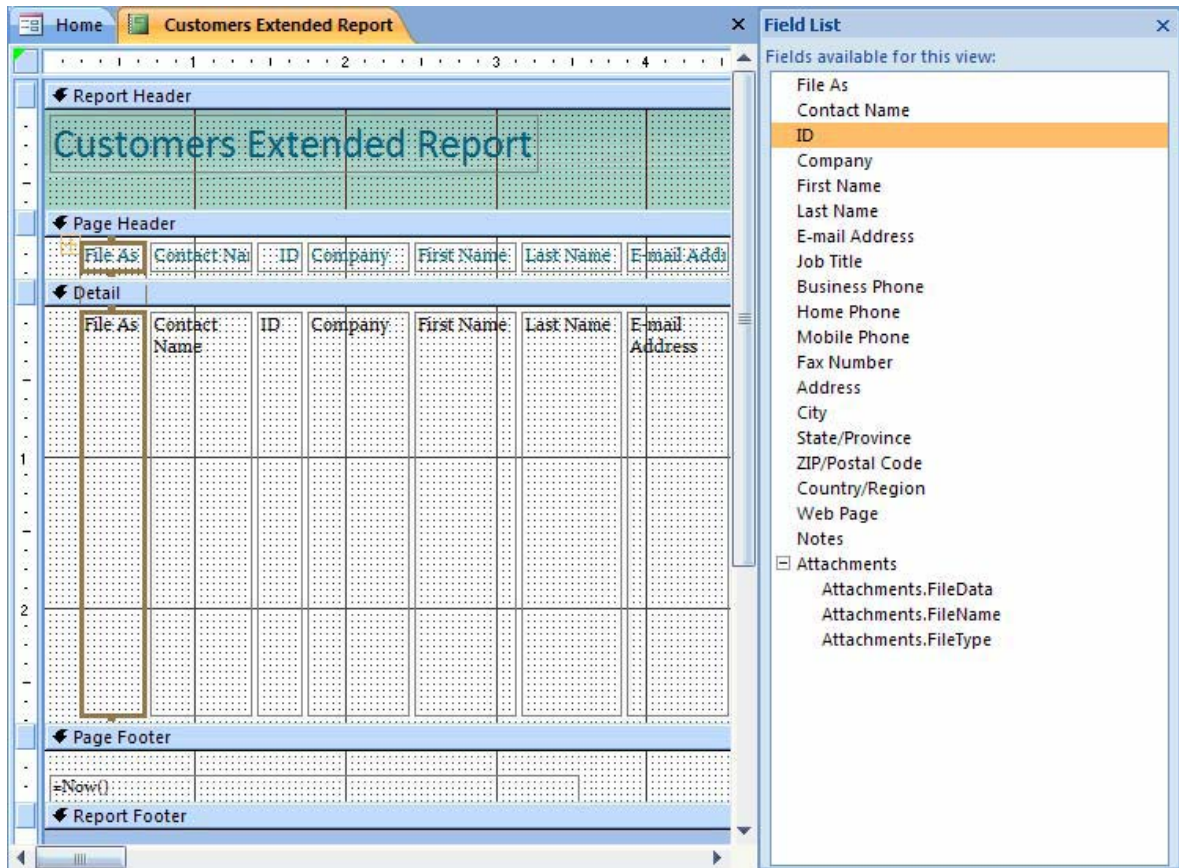
Using Design View to Modify a Report

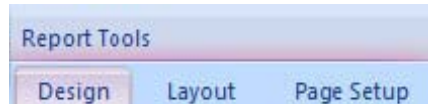
Like forms and queries, you can enter report Design view by using one of two methods

1. Click the “Modify the report’s design” radio button before closing the wizard.

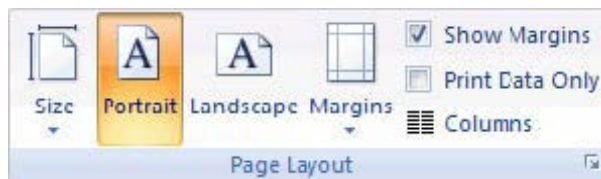
Or

2. Use the View menu after opening a report.

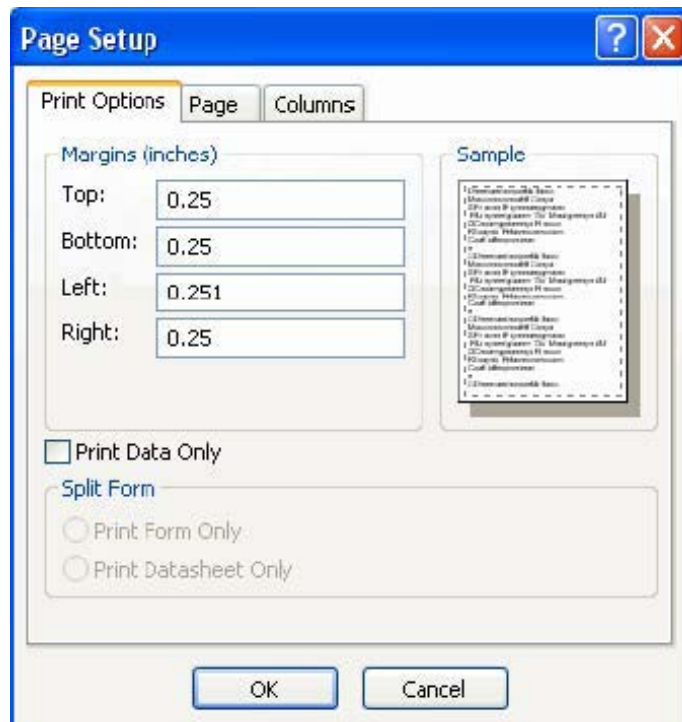




3. Report Design view lets you drag and drop the various fields from the Field List pane. Reports use headers and footers like the Design view of a form. Reports also have three of their own contextual tabs:
4. The Design and Layout tabs contain the same commands as the Design view of forms. In addition to listing only query results, you can add interactivity to the report to do things like show charts and calculate data values from user input.



5. Design view for reports also features a Page Setup ribbon to customize how the report will look on a printed page:
6. This section of the ribbon also contains a Page Layout button (the arrow in the bottom right hand corner). This button opens a dialogue that can be used to precisely modify page settings:



Using Reports

To view a report, simply double-click its object name in the Navigation Pane. The report will open in the main part of the Access window:

Employee Address Book Wednesday, July 05, 2006

File As	Employee Name	Address	City	State/Province	Zip/Postal Code	Country
C						
	Andrew Cencini	123 Any Street	Any City	WA	99999	USA
F						
	Nancy Freehafer	123 Any Street	Any City	WA	99999	USA
G						
	Laura Giussani	123 Any Street	Any City	WA	99999	USA
H						
	Anne Hellung-Larsen	123 Any Street	Any City	WA	99999	USA

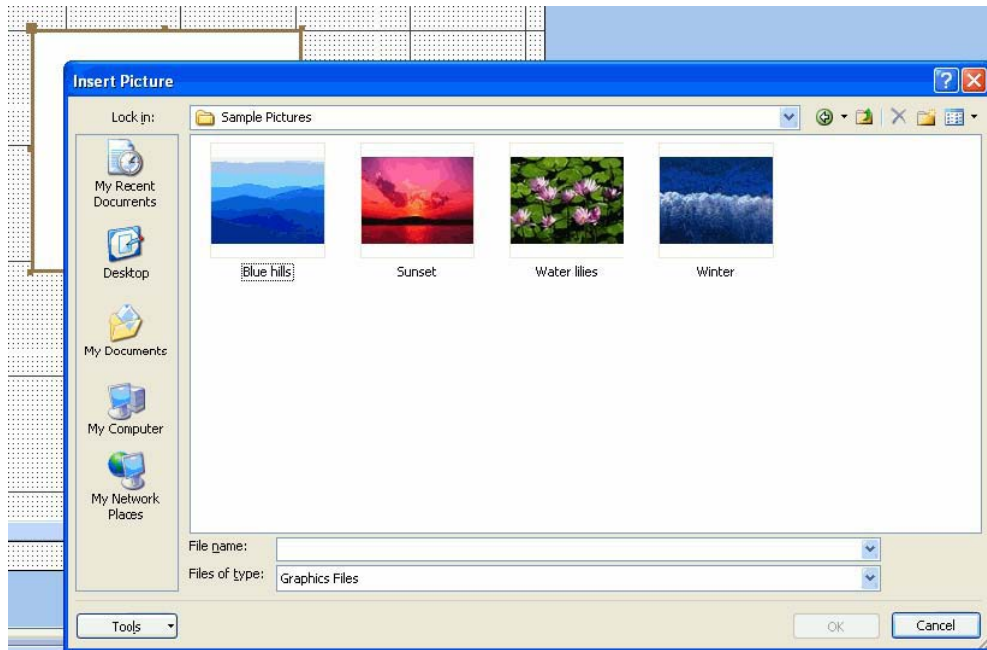
This Report View will let you scroll through all the details of the report. We will discuss how to print and further view a report later in this manual.

8.2 Common Report Tasks

As all the pieces of your report begin to come together, you can apply the formatting and ensure that the report gives you the information you need to know. Then your report will be ready to publish and print as handouts or catalogues. In the final lesson of this section, we will discuss how to give a report some extra flair to effectively present your product or data.

Adding a Photo

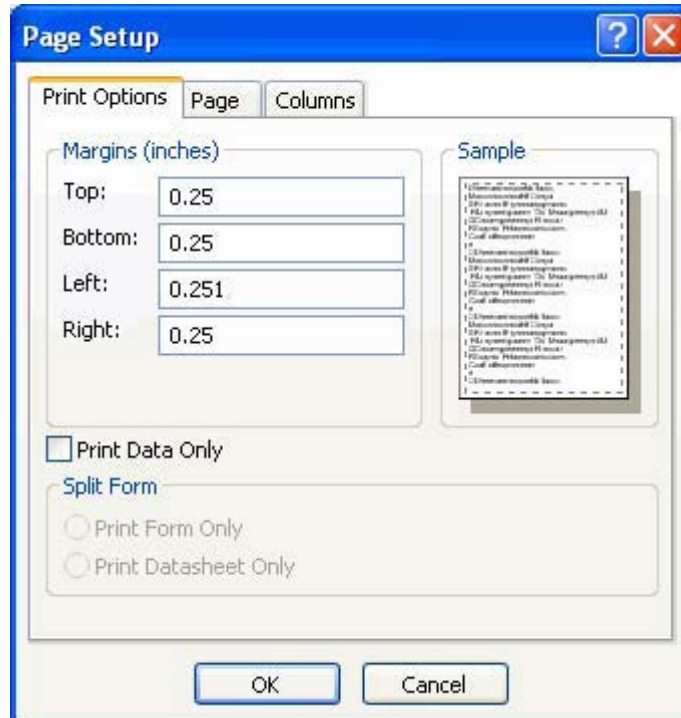
Adding a photo to a report is just like adding any other control to a report. To add a photo, click the Image command in the Report Tools - Design ribbon and then click and drag somewhere in the appropriate section you want the photo to appear:



Navigate your computer to find the picture file you want to insert into the report, and then click OK. The image will be inserted as a best fit into the area you specified.

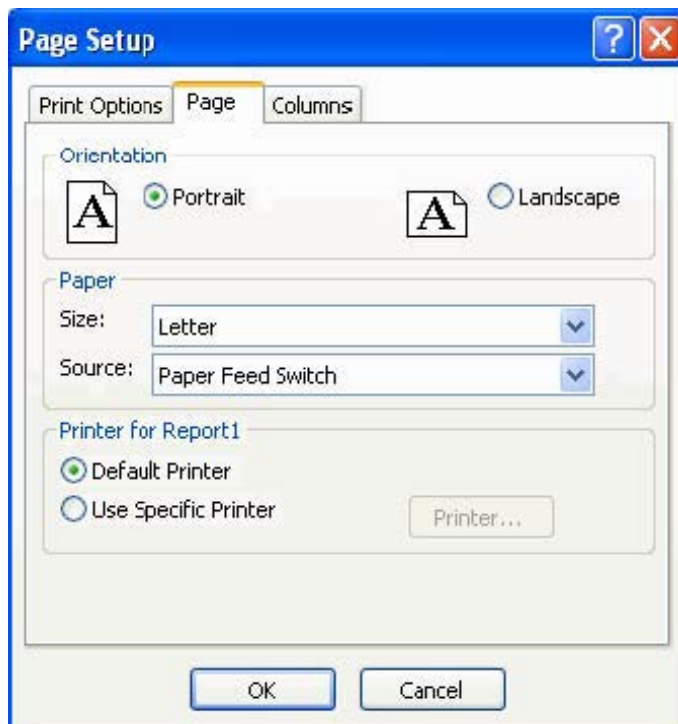
Adjusting Page Properties

Access 2007 features a number of page formatting options. Click the Report Tools - Page Setup tab to see the most common commands available for use. You can also click the Page Setup button to see extra commands:



Print Options Tab

Adjust the size of the margins for your page. If you would prefer to print only the data and not any logos or pictures, click the Print Data Only check box.



Page Tab

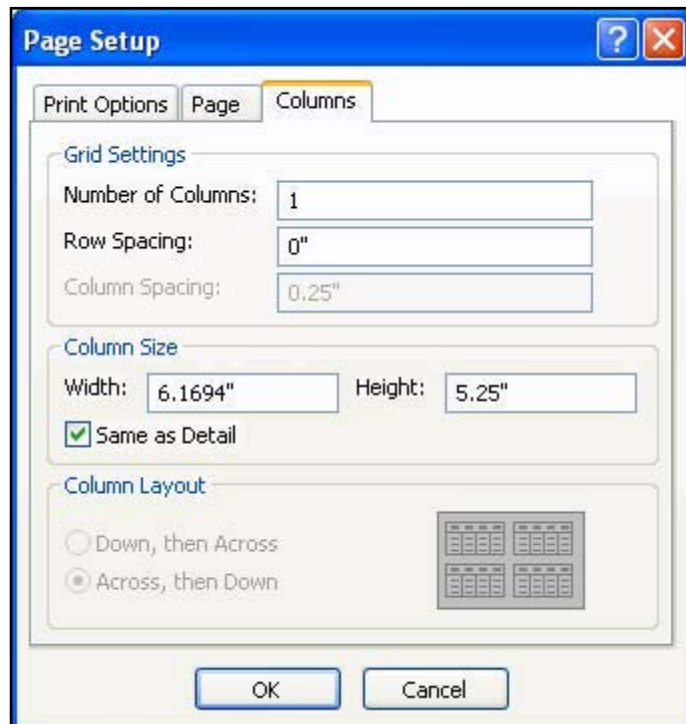
The Page Tab allows you to adjust the page orientation (portrait or landscape) as well as the size of paper you can print with using your current printer.

Columns Tab

The Columns tab is used if you want to print two or more pages of a report on one piece of paper. The number of columns, row spacing, and column spacing fields allow you to specify the dimensions between the multiple pages on your report.

The column size fields specify how large you would like each page of the report to be on the printed page. You can also check the Same as Detail checkbox to make the printed size the same as the current dimensions of the Detail section.

Lastly, you can choose how the layout of the report pages will be ordered by choosing one of the radio buttons. (The Column Layout control group is only active when you have two or more columns.)



Adding Headers and Footers



If you build a report from scratch in Access, you won't see the Report Header or Footer right away.

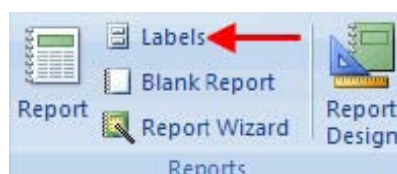
1. Click the Report Header/Footer command in the Show/Hide section of the Report Tools - Arrange ribbon:
2. Report Headers and Footers appear at the very beginning and end of the report, respectively. Report Headers can be used as title pages and footers can be used as acknowledgements or contact information that will be shown at the very end of the report.
3. If you don't need a certain report section, click and drag the bottom of the canvas or the top of another section up to the top of the above section. For example, if you want a report footer but no header, click and drag the Page Header up to meet the bottom of the Report Header. You will still see the blue bar that spans the width of the report, but that section of the report will be empty.

Adding Page Numbers

1. If you have experimented with the Northwind sample database, you have likely noticed that some reports have page numbers at the bottom in the Page Footer. The page numbers are a type of calculated control; they are a text box with a formula in the Control Source property:
="Page " & [Page] & " of " & [Pages]
2. The text in between the quotations is shown on the page, and the combination of ampersands and [Page] references are values used by Access to denote the page numbers of the report.
3. You can add page numbers in any section of the report you like. You can also apply font style and colour changes as you would to any other control.

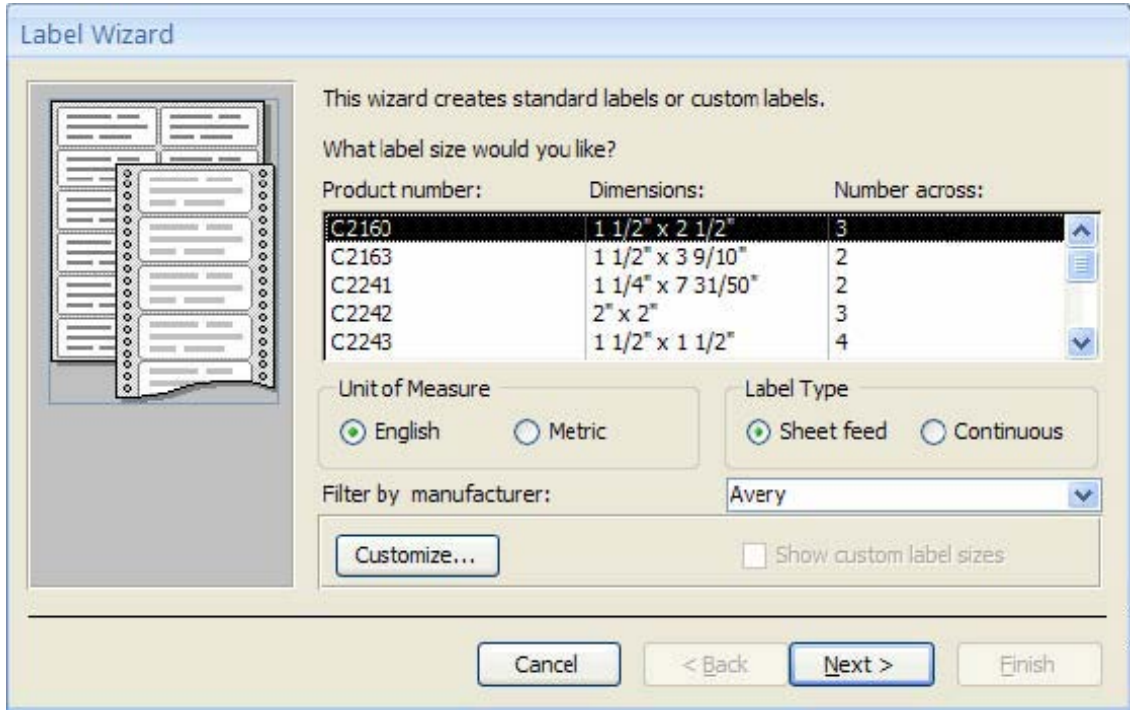
Using the Label Wizard

One of the nice things about databases on computer is that they allow you quick access to a lot of data in a hurry. If you were the marketing manager of Northwind and wanted to send a catalogue out to all of your customers, it would take you hours to type or copy and paste the addresses into a word processing document for printing onto labels or envelopes.

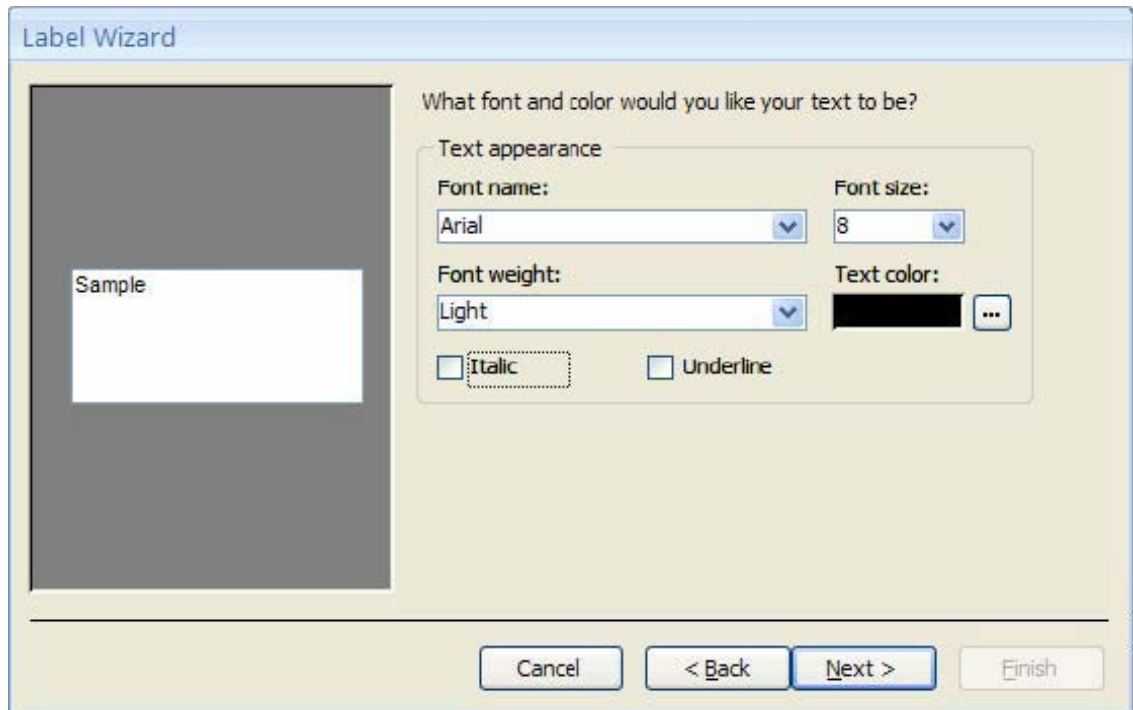


Fortunately, you don't have to do any of that should you need to create a mailing list. Access has a handy Label Wizard built right in! Select a query or table in the Navigation Pane you want to use as the source data for your labels.

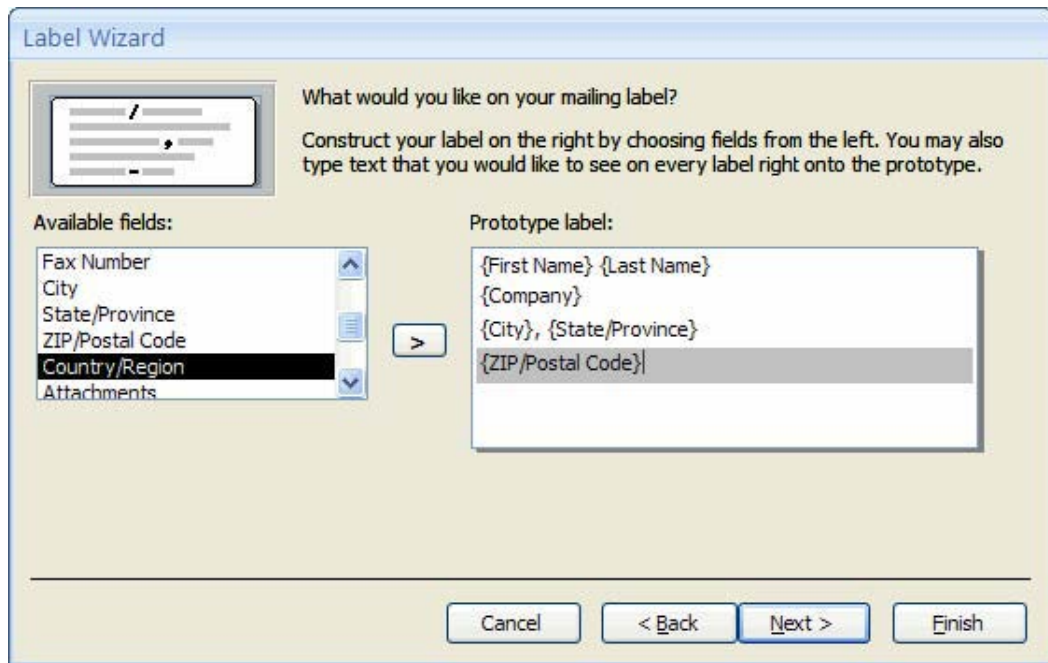
1. Click the Labels command in the Reports section of the Create ribbon:
2. The first step of the Label Wizard asks you what sort of labels you want to use:



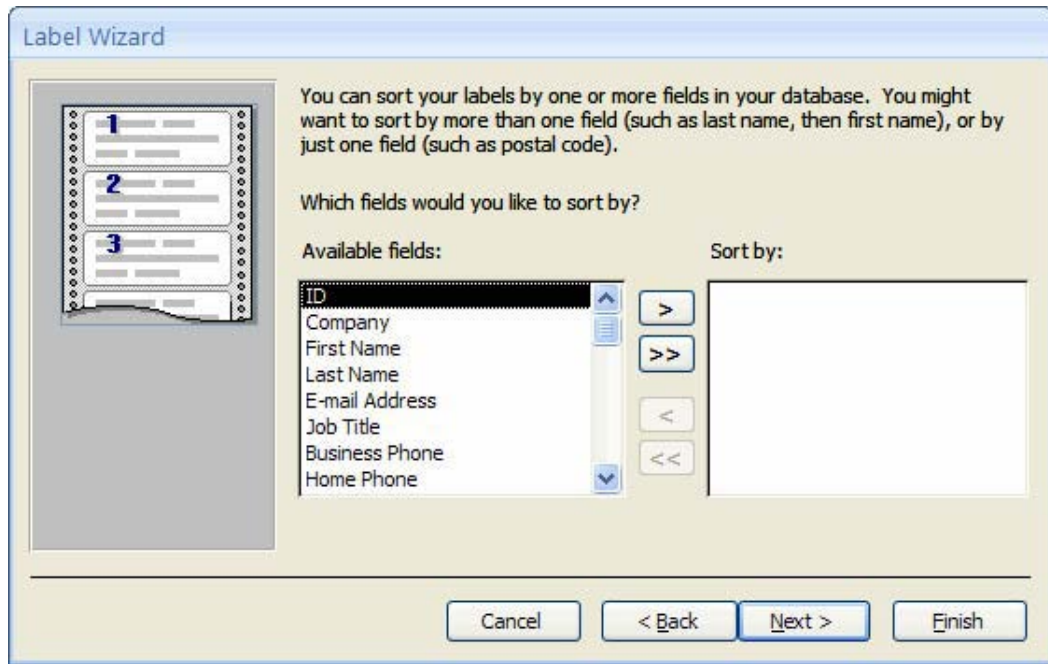
3. There are a wide number of manufacturers, shapes, and sizes to suit your needs. You can also enter custom dimensions by clicking the Customize button. The next step of the Wizard asks you to design the text that the Wizard will use to create the labels:



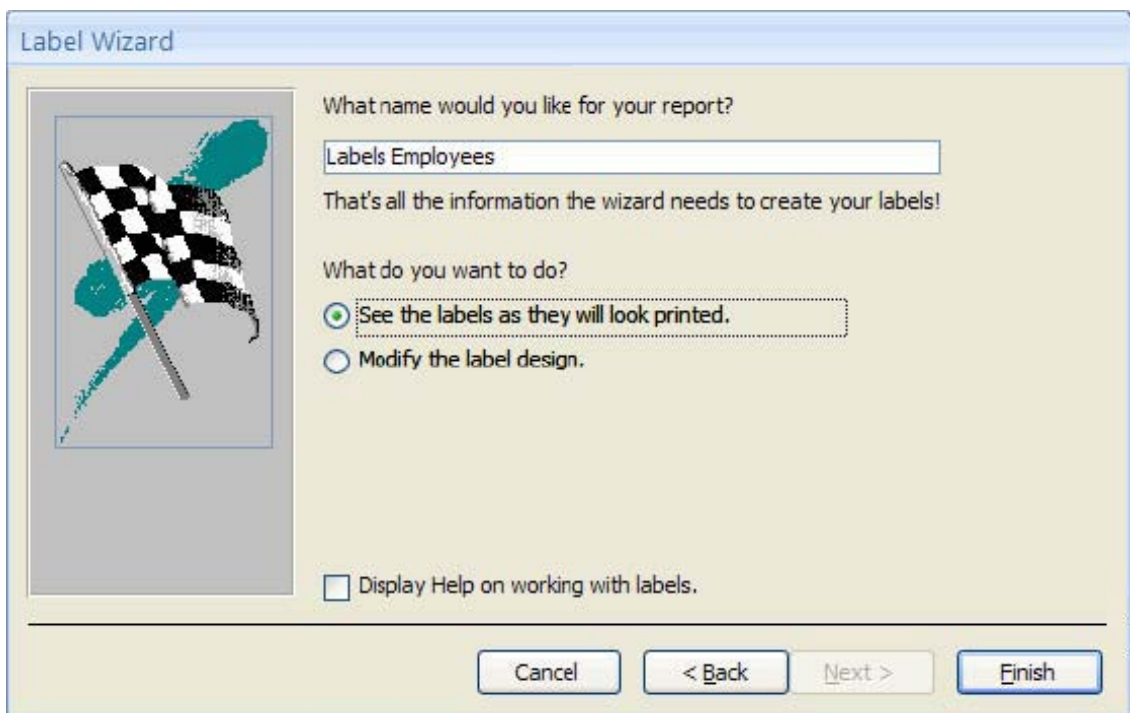
- The next stage of the Wizard has you construct the label on the screen:



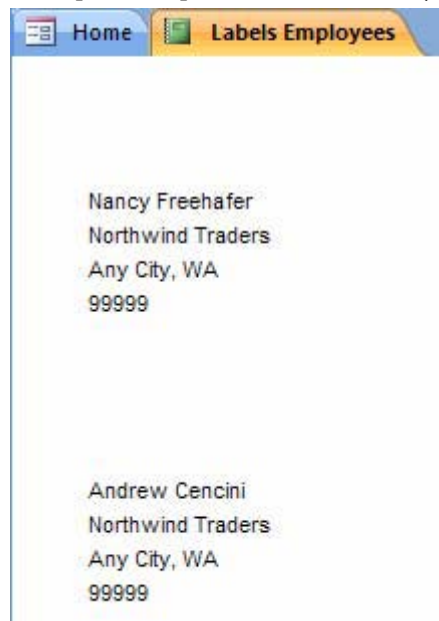
- To build the label, click the one of the available fields and click the (>) button to transfer the field to the label. The currently active row is highlighted in grey. Click anywhere inside the prototype label diagram to make that row of text become active. At any point, you can also type any special characters you like, such as spaces, colons, or commas.
- The next step of the Wizard allows you to sort the label order based on a sorting filter.



- 7. The final stage of the Wizard lets you name the labels as a group. By default, Access will name them Labels <tablename>:



8. If you click Finish, the labels will open in Report view and are ready to be printed:



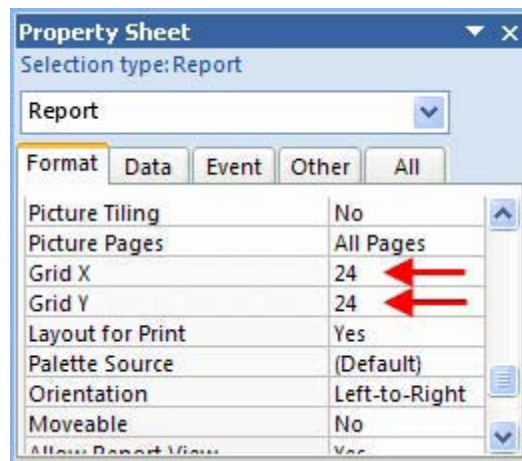
9. The Label Wizard is fairly thorough so you will rarely modify labels. However, using the label Design view lets you add other graphical elements to labels such as logos or dividing lines.

8.3 Formatting Reports

We have seen that building reports and forms is a pretty easy job with a little planning and care. Once you have decided what information you would like in the report and have added the elements, you can begin the task of making your report look nice.

Formatting Gridlines

Gridlines are adjustable in reports by the same means as in forms. Double-click the report selector button in the upper-left hand of the report to open the Report Properties. The Format tab contains the Grid X and Grid Y properties:



Enter a number from 1 to 64 to divide each square inch of the report into that many increments. If you would rather work without the gridlines, click the Gridlines command in the Show/Hide section of the Report Tools - Arrange ribbon:

Modifying the Font

Modification of a font in a report is as simple as highlighting the control or object you want to format and then using the Font section of the Report Tools - Design or Home ribbon:



If you don't like the style of a control, simply change the control back to what it was or use the Undo Command (Ctrl + Z on your keyboard). Remember that you can use the Format Painter to change the look of many objects with a single click.

Adding Logos

While in Design or Layout view, use the Logo command in the Controls section to apply a logo to the top of your form. Access will prompt you to locate the image you want to use as a logo:



Any logo you apply will be placed in the Report Header by default. You can use the Label command to make a title to go alongside the logo if you wish:



Changing the Layout

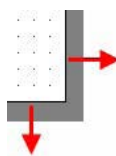
Now that you have all elements you want in your report and looking the way you want, you can fine-tune the layout to meet your requirements. By using the gridlines and a good resolution, you can adjust the layout of components down to the nearest 64th of an inch. Once you have everything looking the way you like, you can adjust many background attributes of a report using the Property Sheet function.

However you decide to style your report is up to you; after all, it is your report! But consider the following tips as you build your report:

Adjust the Grid Size

This is more of a matter of preference, yet it is good to have even horizontal and vertical grid resolution. 8x8 is a good size to use because the rulers along the top and left side of the Design view window are divided in 1/8" portions. However, if you have an application requiring a grid 7x33, Access lets you pick whatever resolution works for you. You can also change the resolution at any time without moving the controls already in place.

Adjust the Canvas Size



Maximizing the report Design view window will give you the best working experience when layout is concerned.

You can make any report section, such as a header or footer, as big as you like. Simply move your mouse to the section header, then click and drag up or down to increase or decrease the size. Move your mouse to the edge of the canvas to drag left or right, using the horizontal ruler as a guide.

Snap to Grid

Snap to Grid is a feature already built into Access' Design view. It automatically aligns the upper-left corner of any control to the closest point on the grid.

Once a control is in place, click the large brown box in the upper left-hand corner of the control to move the control itself, or any of the smaller boxes on the other sides and corners to adjust the height and/or width of a control.

Lastly, Snap to Grid makes it very easy to align controls using the arrow keys on your keyboard. Each keystroke in any direction moves the control one unit of measurement defined by your grid size.

Group Selection and Moving

At any point, you can select a number of controls and move them as a whole unit. Click in an empty space of the canvas to deselect any objects that might be selected. Click and drag a box around the objects, and then click and drag the objects as a group. This technique is useful if you have already constructed some controls based on one grid resolution and then change to another grid resolution. Instead of moving each control again, select all of them at once and move them together.

Try, Try Again!

If you make a formatting error that causes a large disruption in the layout of your controls, don't panic; you can undo the action and restore the controls to their previous state.

Press Ctrl + Z to undo a command. Access saves the last 20 commands, so if you made a mistake several clicks ago, you will likely be able to back out of your problem and try again.

Save Frequently

Often when designing things, we get a bit too wrapped up in what we were doing and forget to save our changes. If the power should go out or if your computer becomes unresponsive, you will lose any changes since the last save or AutoSave.

Remember that you can either backup the database before you perform a lot of operations or save a copy of a particular database object before you start working. Should you get in over your head, you can always pull out the backup and try again.

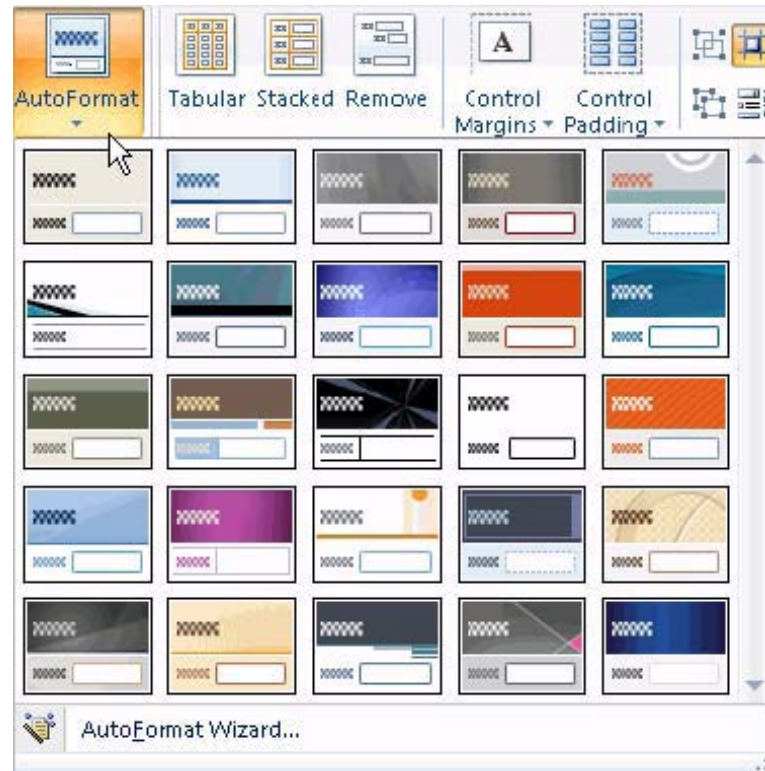
Using AutoFormat

Some people have a real knack for style and design, but often the look of a report becomes a low priority next to getting the actual report constructed. Fortunately, Access features an AutoFormat command that will format your report in one of two ways

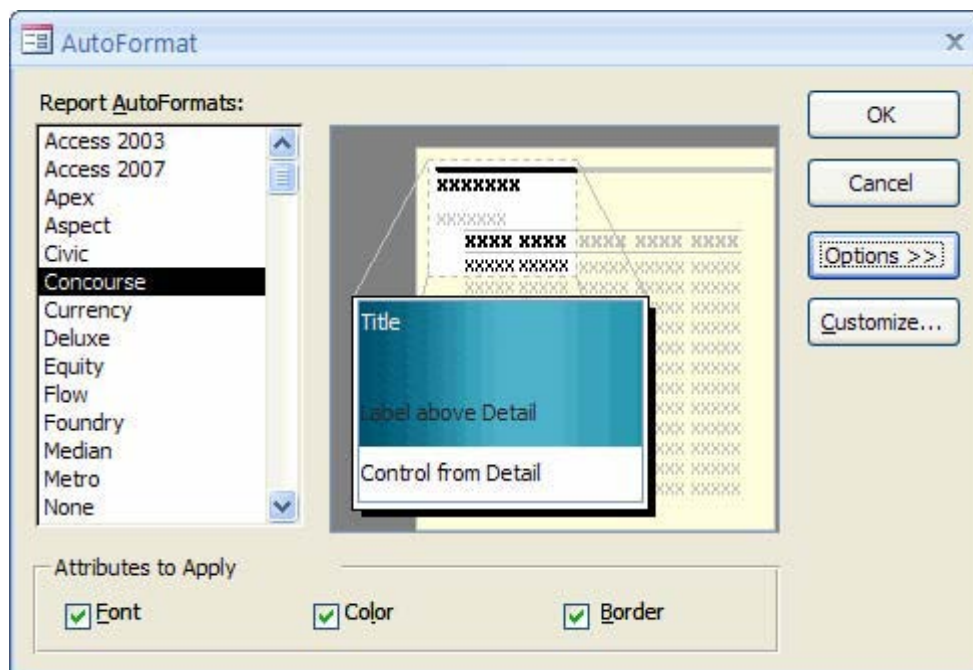
If you have chosen to build your report using the Wizard, you will be prompted to pick a style from one of the pre-formatted styles built into Access. Each level of header and footer as well as the style of each control stays consistent throughout.

If you have built your report manually, you can apply any of the pre-made formatting styles

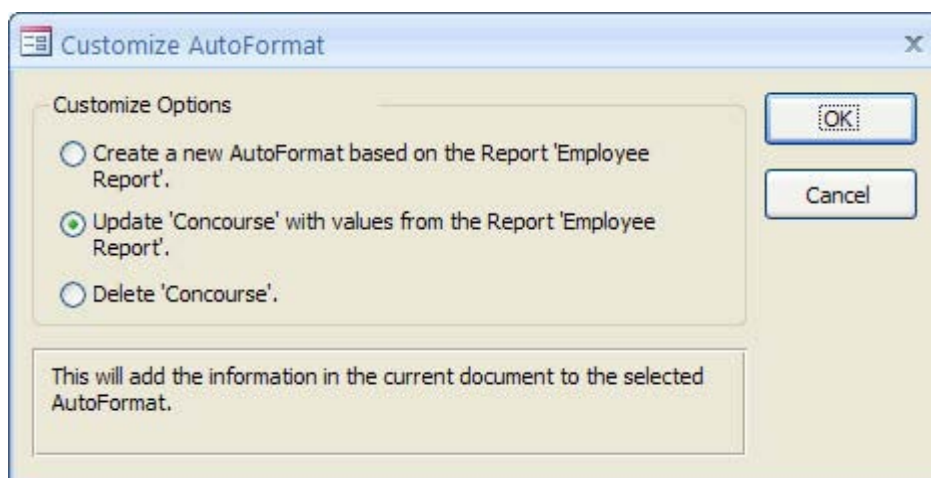
1. Click the AutoFormat command in the Report Tools - Arrange ribbon.



2. Select a theme from the pull-down menu. In addition to selecting a format, you can modify certain elements of an existing theme. From the AutoFormat pull-down menu, click AutoFormat Wizard.



3. Then, click the Options button to decide which elements to modify:
4. Then, click the Customize button to modify elements of the theme:



5. Choose an option and click OK, then adjust the elements as you see fit.

Section 9 Printing


By the end of this section you will be able to

- Print records from reports
- Add headers and footers
- Set printing options

9.1 Printing a Database Object

Access 2007 lets you print every database object except macros and modules. To print properly in Access, you need to have a printer installed on your computer or have access to a printer on your business network.

Using the Quick Print Icon

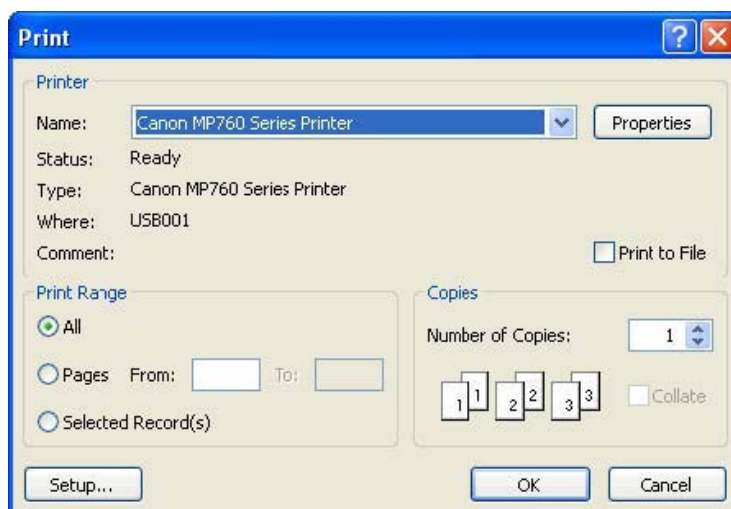
The Quick Print icon () is a direct shortcut to print an entire object. The icon itself is located in the Quick Access toolbar.



Clicking the icon will directly print the currently displayed database icon to the default printer installed on your machine.

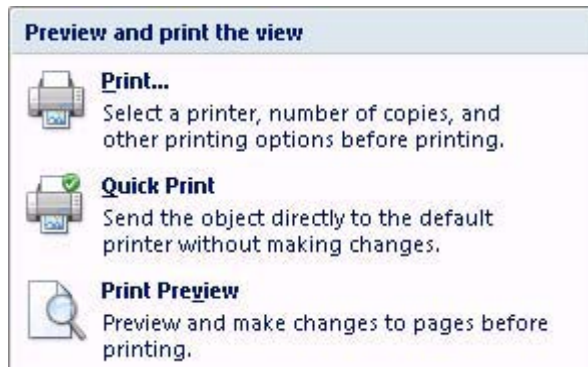
Using the Print Menu

The Print icon located in the Quick Access toolbar is great for printing objects that are prepared and ready to go. However, in most cases you may only want to print a small amount of data.



The Print command in the Office Menu has two functions.

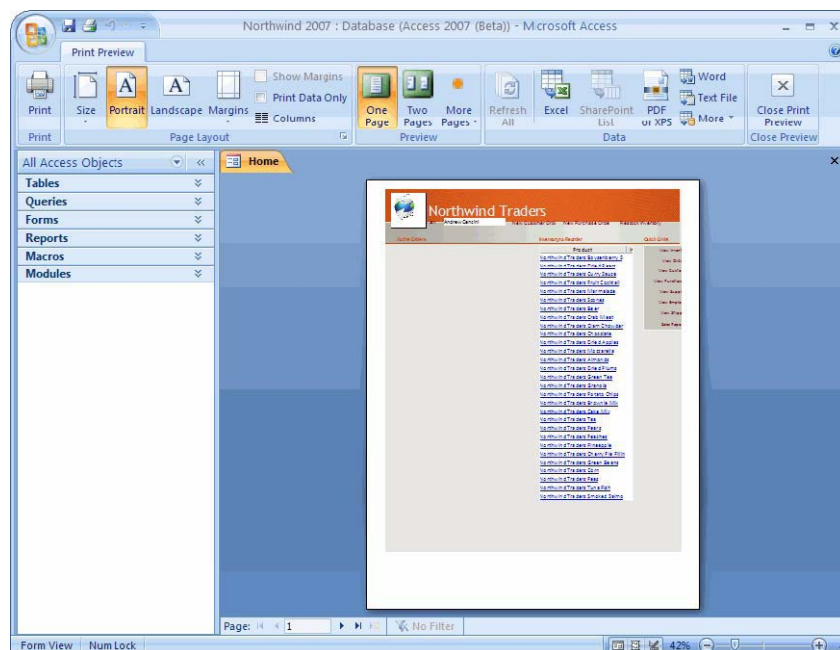
1. If you click the Print command directly, you will see the Print dialogue box appear. Use this to specify which pages to print as well as how many copies. Then, click OK to print the document:



- The second part of the Print icon, the expand arrow, lets you open the Print dialogue (Print), directly print the entire document (Quick Print), or see what the printed document will look like (Print Preview):

Using Print Preview

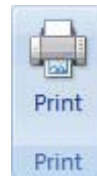
Print Preview is used to view a document in full form before actually printing it. To open this view, click the Office Menu, point to the right-facing arrow by the Print command, and then click Print Preview:



The Print Preview ribbon will give you the option to modify how the finished product will look. Use the Zoom Bar in the lower right-hand corner of the window to zoom in or out of the current document.

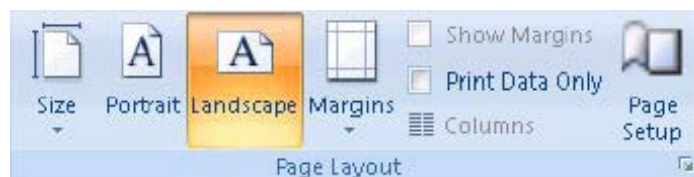
The Print command on the far left-hand side of the ribbon will open the Print dialogue box. If you have finished printing or are not ready to print yet, click Close Print Preview on the far right-hand side.

Using the Print Preview Ribbon

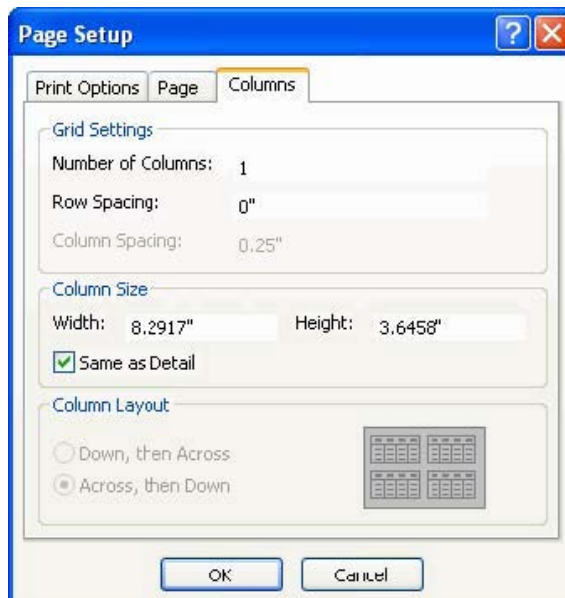


Let's explore the functionality of the Print Preview ribbon.

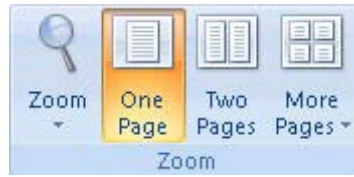
1. The first command, Print, opens the Print dialogue box.
2. The Page Layout section lets you adjust properties of the page.



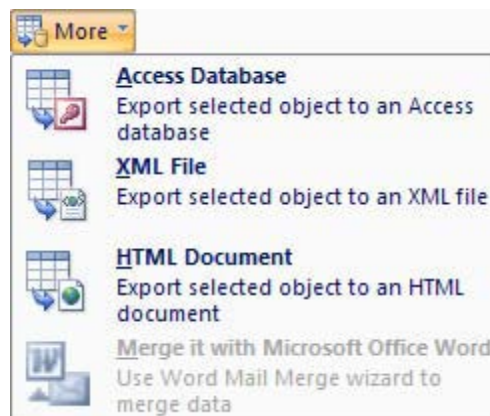
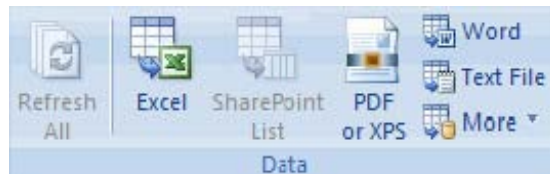
3. Choose from a number of paper output sizes, choose a page orientation, and choose a normal, wide, or thin margin. The Print Data Only command will not print any graphics or background colours. The Columns command lets you print pages of your report like newspaper columns. The Page Setup button opens the full Page Setup dialogue box containing all of the above functionality and more:



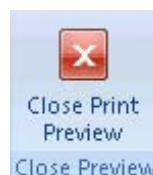
- The Zoom commands let you preview multiple pages at once.



- You can view one, two, four, eight, or twelve pages at a time using the More Pages command.
- The Data section of the ribbon allows you to save a digital copy of a database object instead of printing a paper hard copy.



- You have quick links to export an object to an Excel file, SharePoint List, PDF or XPS file, Microsoft Word (RTF) file, a plain text file, as well as many other options using the More command:
- When you're done, click the Close Print Preview button.



- This command will close the current Print Preview window and return to the database file.

Printing vs. Exporting

We learned in the last lesson that the Print Preview ribbon provides the functionality to export a particular database object to some other digital form instead of printing a hard copy. Exporting a database object in Access 2007 has its advantages.

Since Access stores data in a table very similarly to the way Microsoft Excel stores data in a spreadsheet, exporting to Excel is a good option versus printing a table. For example, if you do not have Access on your home PC but do have Excel installed, you can export a table as Excel, work on the data at home, and then import the data back into Access using the Import command.

A big addition to Access 2007 versus previous versions is the ability to publish to a PDF file. The PDF format is reasonably compact in file size and easily viewable on nearly every computer platform. With the near-indispensable use of USB flash drives, even very large data files fit nicely on these small and ultra-portable storage devices. Consider exporting a database object as a PDF versus printing a long report and then making photocopies.

If you are planning on using the raw data from Access in another database management software package, exporting as a plain text file sure beats printing out every last bit of data and typing it all in by hand again! The standard character set saved as a plain text file is readable on virtually every computer platform in one way or another.

If you have need in your organization to produce services over the Internet, XML and XPS are common file formats that are quickly gaining a lot of popularity. Consult with your IT department or website administrator to see if their job might be made easier if a database file or object was exported in XML or XPS form.

Section 10 Getting Help

By the end of this section you will be able to

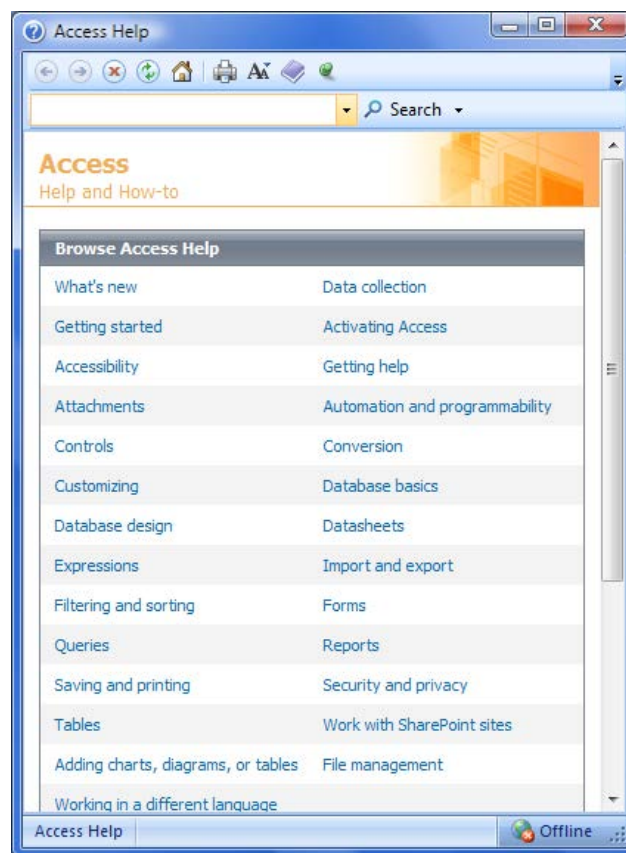
- Access Help from various sources
- Search for specific help
- Access online & offline help

10.1 To Access Help

When all else fails, you can always ask for help. All programs included in the Office 2007 package make extensive use of the Office Online functionality if an Internet connection is available at the time. If your computer does not have access to the internet, no need to worry – Access' offline help file is essentially the same, only with no updates to the files nor any tips and tricks to help improve your working style.

Help is available at any time in Access 2007, so let's explore how to make use of the help file.

1. Click the help button below the title bar on the far right OR press f1. The Help window will open:



2. This is very similar to a web page
 3. You may enter search criteria and press Enter (like a search when on the internet)
 4. The window will display the topics that match your search. Click on a topic in order for it to be displayed
- To Find a specific topic
5. The contents page allows you to select from a list of topic headings. Like search results on the internet these are hyperlinks to help files.
 6. You may need to be online to access some of the help links. The search will be more extensive if you are online as it will search online help files from Microsoft.

7. Single click to access the help topic you need.

► Using ScreenTips:

Use ScreenTips to see information about different items on the screen.

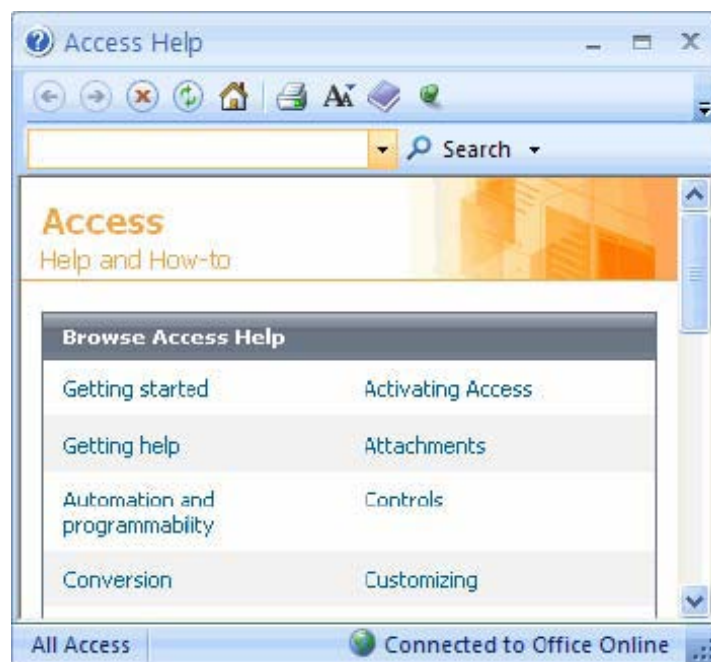
If the dialog box does not have a Question Mark button look for a Help button or press F1.

Opening the Help Screen

Help is available at any time by clicking the help button (🔍) or by pressing the F1 key on your keyboard. The Access 2007 help file will appear in a new dialogue box that is independent of other objects in the Access screen.

Overview of the Help Screen

The Help Screen in Access is similar in design to a web browsing program. It contains navigation buttons to browse through the different help pages, a search bar that lets you browse for a specific keyword or phrase, and a viewing area to see the actual help file:



Let's learn about the controls of the Help file. The navigation buttons are always visible at the top of the window:



► Let's look at each command

Back



Go back through the visited help pages.

Forward



If you went back too far, click forward to advance through your history.

Stop



Will stop loading a particular help topic.

Refresh



Will reload the current help topic from Office Online.

Home



Will return to the Help welcome page.

Print

Prints the help topic you are currently viewing.

Increase/Decrease Font Size

Makes the font larger or smaller if you are having difficulty reading the help topic.

Table of Contents

Lists all the different Access help files into categorized sections.

Pin on Top \ Not on Top

The Access help file is contained in its own separate window. If this icon is set to be pinned on top () then no matter what, anytime the Access window becomes active the help file will always be 'pinned' on top. If the Help file is set to not on top, it will only be on top if you specifically click the Help file's button on the Windows taskbar.

Add/Remove Buttons

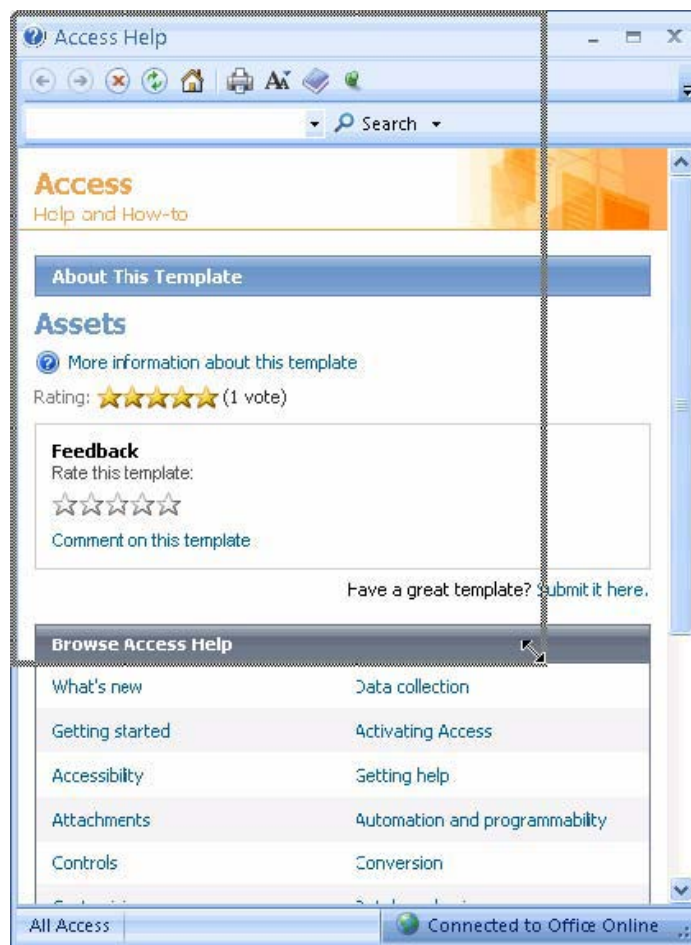
Finally, clicking the small pull-down arrow in the right-hand side of the window will let you add or remove icons you don't want in the Navigation bar. Click the pull-down arrow, point to Add or Remove Buttons, point to Standard and then click an option to check or uncheck it.


Underneath the Navigation buttons is the search bar:



The left side of the search bar is a text field where you can enter a keyword or phrase about your search topic. The right-hand side of the search bar includes a pull-down menu listing the different locations/categories of help the help file can use. We will explore how to search for certain help topics later in this lesson.

At the very bottom of the Help window is the status bar. It states which section of help it is currently referencing, as well as its connection status to Office Online.



In the bottom right-hand corner of the help window is the resize handle (). If you wish to make the help window larger or smaller, move your mouse over this corner; it will change to a double-headed arrow. Then, just click and drag to make the window larger or smaller.


Online Help vs. Offline Help

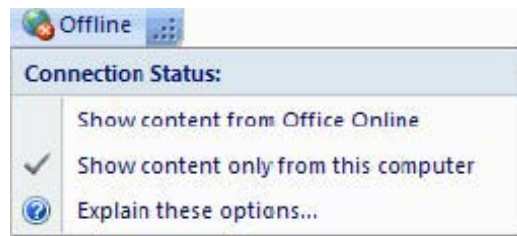


Though the Office 2007 package relies heavily on the Office Online features to extract information about a help topic, Access 2007 also has a full-featured offline help section. If your computer is currently connected to the Internet, Office Online will be automatically used to the most current help information about your topic.

If your computer is not currently connected to the Internet you still have access to Access' help features; simply click the help button or press F1 to open the Access Help window:

The status bar at the bottom of the Help window states that the Offline Access Help is currently being used. The icon on the right of the Status bar also shows that the help file is being browsed offline.

If your computer is connected to the Internet but you would still rather use the offline help file, click the current connection status icon on the right-hand side of the Status bar (shown as  Offline in the picture above). A small pop-up menu will appear giving you the option to change your connection status:



When it comes down to finding help about a particular topic, both Online and Offline help will be suitable for your own needs. However if you want to have access to new templates and the latest information about program \changes, online help is best to use, provided you have access to the Internet.

Searching for Help

There are three main ways to search for help using Access 2007's Help file: Browse, Table of Contents, and Keyword Search.



Browse

When the Access Help window is opened, the starting page contains a listing of all of the main help topics:

Browse Access Help	
Getting started	Activating Access
Getting help	Attachments
Automation and programmability	Controls
Conversion	Customizing
Data	Database basics
Database design	Expressions
External data	Filtering and sorting
Forms	Queries
Reports	Security and privacy
Tables	Adding charts, diagrams, or tables
Saving and printing	File management
Language-specific features	


1. Click any of the topics listed to see several of the most commonly asked questions and procedures regarding a particular topic.
2. For example, if you click the Forms link, you will be shown a list of topics relating to the use of forms:

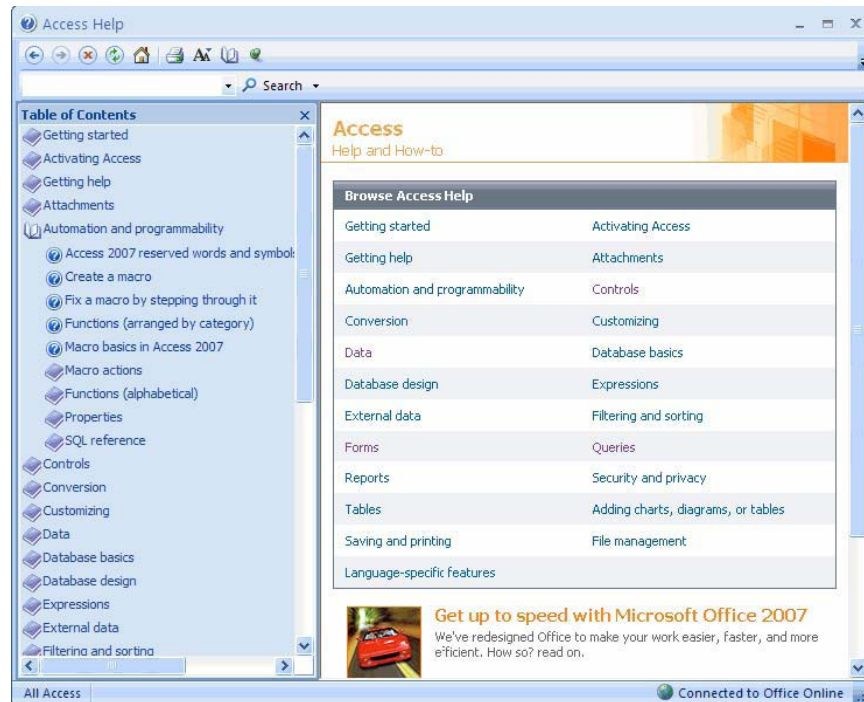
Forms

Topics	11 items
 Create a form	
 Add a field to a form or report	

3. You can then click any link to view that help topic.

Table of Contents

The Browse functionality mentioned above actually contains the same information contained in the Table of Contents. However, using the Table of Contents () might be a little easier for some people:

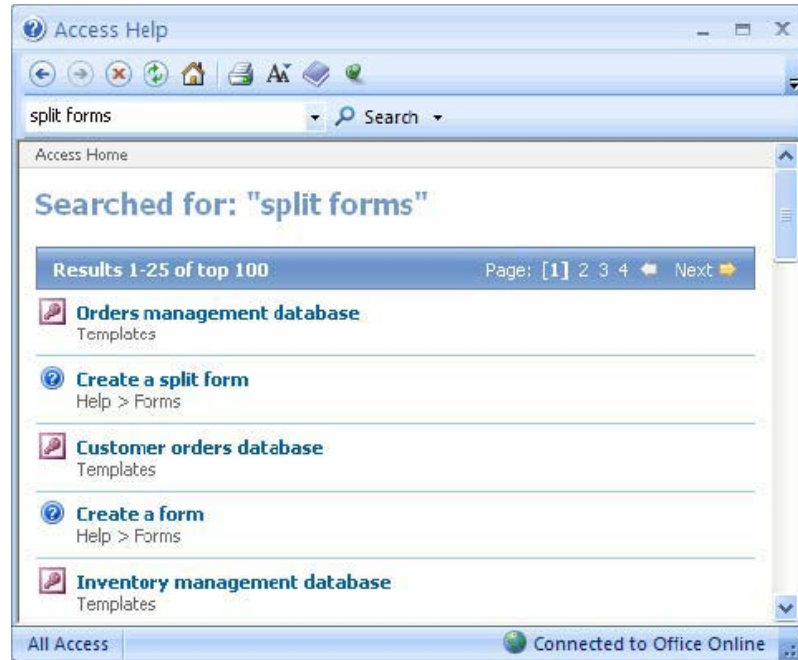


1. The Table of Contents appears in a pane on the left-hand side of the Help window, as shown in the diagram above. The Table of Contents is displayed in a tree structure. Double click each closed book icon (📖) to expand the topics contained inside. Each help topic is shown as a question mark (❓). Like the browse window, just click a link to see the information. To close a particular section of the Table of Contents, double-click the 'open book' icon (📖) to collapse the topics.

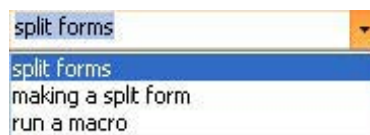
Keyword

You can also search for a particular topic by entering a keyword or phrase into the Search bar.

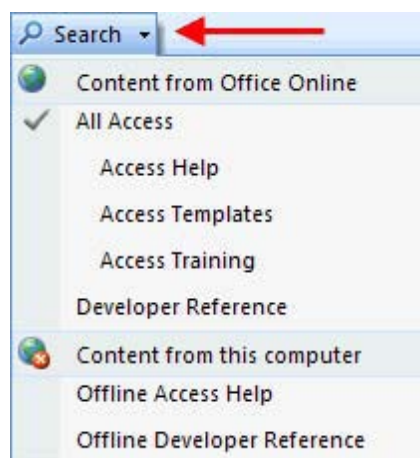
1. Type in a keyword or phrase and press Enter on your keyboard:



2. Clicking the small pull-down arrow on the right side of the search text box will display a small listing of the previous searches you have performed:



3. The search bar also gives you the option of which section of Access to search. Click the small pull-down arrow beside the Search button and select the area of Access you want to search.



4. Using this button enables you to switch back and forth from the general help designed for more casual and end users, to the advanced help topics for developers. Though the topics in Developer's Help are beyond the scope of this manual, they include help and reference for the people who design the background code and interconnectivity associated with advanced database concepts.
5. Created by Stephen Moffat on the 23rd November 2007