University Computing & Communications Services

ACCESS 2003

REPORTS

WORKSHOP DESCRIPTION

Reports are used to retrieve and present data as meaningful information in hard copy format. Different types of reports include mailing labels, invoices, and monthly reports. Reports can group records into many levels, compute totals and averages by checking values from many records at once, and can be attractive and distinctive because you have control over the size and appearance of everything on the printed page.

PREREQUISITE

Access 2003 Queries and Access 2003 Forms

OBJECTIVES

Participants attending this workshop will:

- Identify terms associated with report creation
- Become familiar with report sections and formatting tips
- Create mailing labels
- Create a summary report
- Use bound and unbound controls in report modification

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What is a Report?

Reports are used to retrieve and present data as meaningful information. Different types of reports include mailing labels, invoices, monthly reports, yearly summaries, and department phone lists.

- Reports display only the information you want, the way you want to see it.
- Reports group records into many levels and compute totals and averages by checking values from many records at once.
- Reports can be attractive and distinctive because you have control over their design.

Terms to Know

Control

Everything added to a report – text, a picture, a graph, even a field from a table is a control.

Bound Control

A bound control is a control on a report, whose contents are bound to a particular field in the underlying table or query. For example, a text box that displays an employee's last name is bound to the Last Name field in the Employees table. Binding is the act of setting up the controls on the report.

Unbound Control

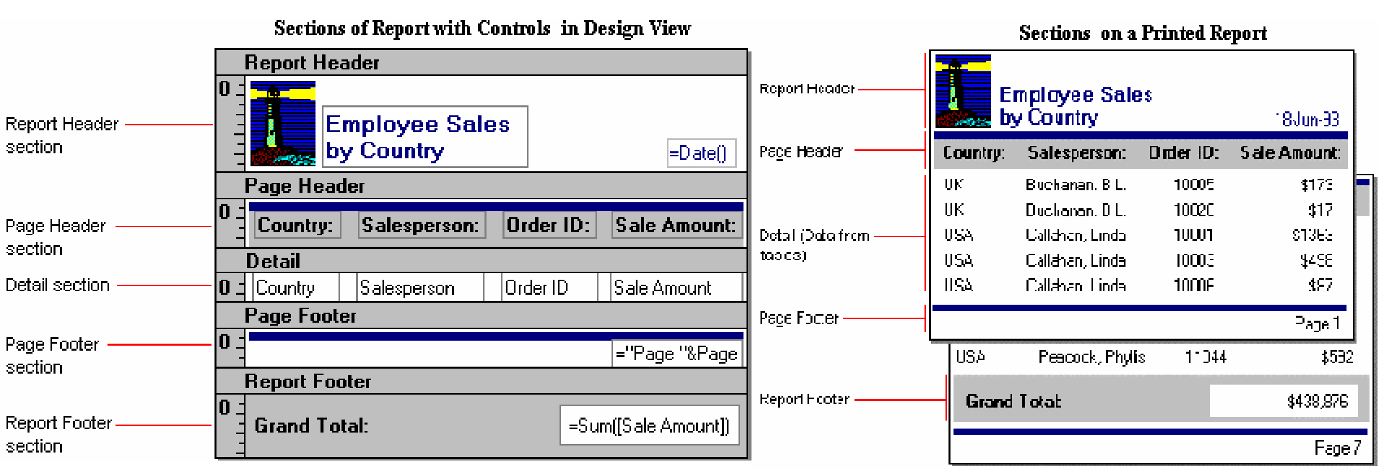
Information in a report you specify with the use of either the Wizard or Design View such as title and/or column headings or labels.

Calculated Control

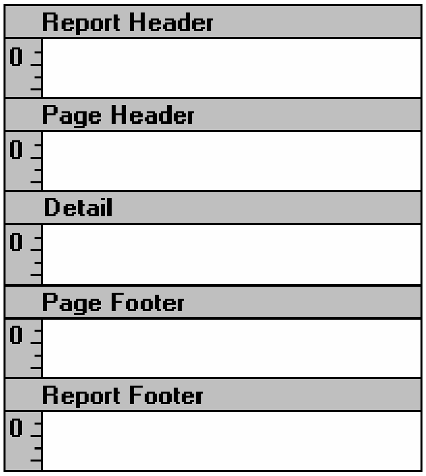
Any control in a report that involves a calculation of one or more fields, a date and/or time expression, or a page number.

Sections of a Report

Information will appear on the report depending upon where certain controls are placed in the design of the report.



How to Set up a Report



The **title and column headings** of the report are stored in the report design and are placed in the **Report Header and Page Headers** respectively.

Data is retrieved from the underlying table or query which the report is based on and can be viewed in the **Detail section** of the report.

Totals come from an expression which is stored in the report design. Totals can be placed in either the **Report Footer** or the **Page Footer**.

- If data is retrieved from more than one table, the report must be based on a query.
- Prevent blank pages by making sure the report width plus the margins do not exceed the paper size specified in **Print Setup**.
- Set page/print orientation in **File**, **Print Setup**, **Orientation** prior to creating a report.
- To move and/or size any report controls, the sizing/moving handles must be active.

Create a Report

Creating a report using the AutoReport Wizard

This is the easiest way to create a report in Access. The wizard sets up margins, alignments, and indentations where necessary. After the report is created, you may alter it to your specifications.

1. Open the **Northwind** database.
2. In the Database Window, click the **Tables** button and select the **Customers** table.
3. Use the drop-down list next to the **New Object** button and choose **AutoReport**.
4. Save the report as **rpttblCustomers**.
5. Close the report.
6. Close the **Customers** table.

Creating a report using the Report Wizard

1 In the Database Window, click the **Reports** button.

2 Click **New.**

The New Report Dialog Box will appear.

3 Choose the table or query that contains the information on which the report will be based. Choose the **Employees** table.

4 Choose the Wizard to be used. Choose **Report Wizard**.

5 Click **OK**.

6 Add the following fields **FirstName**, **LastName**, **Title**, **Address**, **City**, **Region**, and **PostalCode**.

7 Click **Next**.

8 Add **Title** for the grouping level. Click **Next**.

9 Sort by **LastName** and then **FirstName**. Click **Next**.

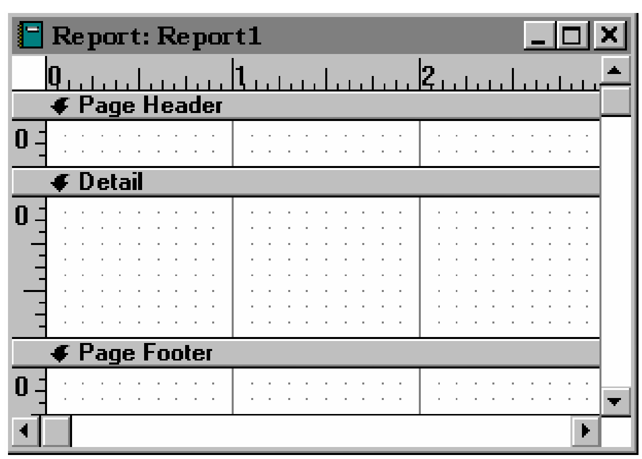
10 Choose the **Stepped** layout and click **Next**.

11 Choose a style and click **Next**.

12 Name your report **rpttblEmployees** and click **Finish**.

13 Close the report.

Using Design View



1 In the Database Window, click the **Reports** button.

2 Click **New**.

The New Report Dialog Box appears.

3 Choose the table or query that contains the information on which the report will be based. Choose **Suppliers**.

4 Click **OK**

5 The report window in Design View will open.

Note: It is often best to create a form using the most basic form of the Report Wizard and then make modifications in the Design View. In this way, the margins and formats for the headers, footers and detail section will be created automatically.

6 Open the field list and add the following fields: **CompanyName**, **ContactName**, **ContactTitle**, **Address**, **City**, **Region**, **PostalCode**, and **Country**.

7 View the report in **Print Preview** mode.

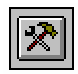
8 Save the report as **rpttblSuppliers**.

Adding Controls to a Report

Labels

Labels are placed in the page header to represent the field headings.

1 **Open** the **rpttblSuppliers** report in **Design View**.

2 If the toolbox is not open, click the **Toolbox button**. 

3 Choose the **Label Tool**. 

4 Click to place an insertion point in the page header.

5 Type the label **Suppliers**.

6 Resize, format, or move the label if necessary.

Changing the Text Box defaults

You can change the defaults for the controls such as the text box. One default that is particularly useful to change is making the label not appear when the text box is created.

1 Select the **Text Box** tool.

2 Choose **View**, **Properties**.

3 Change the following:

Auto Label:	No
Auto Colon:	No
Label X:	0 in
Label Y:	0 in

4 Change the default back to: Yes, Yes, -1, and 0.

Viewing the Report Header and Footer

1 With the report open in **Design View**, choose **Report Header/Footer** from the **View** menu.

Calculated Text Box

A calculated text box contains calculated fields or information not associated with the table or query. Information such as the time, date or a page number can be placed in a report with the proper commands.

Time/Date Text Box

1 With the **rpttblSuppliers** report open in **Design View** and the **Toolbox** open, click the **Text Box** tool.

2 Click to place the text box on either the Report Header or Footer.

3 Delete the label of the text box if necessary.

4 Place the insertion point in the text box by clicking in it.

5 To place the current date: **=Date()**

5(a) To place the current time: **=Time()**

6 Size, format, or move the text box as needed.

Page Number Text Box

1 Add a **Text Box** onto the Page Footer.

2 If necessary, delete the label of the text box.

3 Click inside the text box.

4 To place just the page number type: **=Page**

4(a) To place the code for Page # of # type: **="Page " & Page & " of " & Pages**

5 Close the report.

Grand Total Text Box

1 Create a new report in **Design View** based on the **Orders** table.

2 Open the **Field List** Box.

3 Click on the **Text Box** tool.

4 Click on the field to be calculated. Choose the **Freight** field, hold down the left mouse button and drag the field onto the section of the report where the total will appear. Release the mouse button.

5 Change the label to **Freight Total**.

6 In the text box, type the following: **=Sum(Freight)**

Note: If the fieldname has a space, use brackets around the fieldname: **=Sum([fieldname])**

7 Save the report as **rpttblOrders(Freight)**.

Adding a Picture

A picture or any OLE object can be placed onto a report. You can use the object frame or the **Image** button.

1 Open the **Toolbox**.

2 Click the **Image** Button.

3 Click on the **Report Header** to place the frame.

   The **Insert Picture** Box appears.

4 Navigate to **c:/Windows** and choose a graphic file (e.g. **Coffee Bean.bmp**).

5 Click **OK**.

6 Once the picture is placed, open its properties.

7 In the **Format** tab, change **Size Mode** to Zoom.

8 Resize the picture to fit in the design of the report.

   Note: You can double-click on the image sizing border to automatically size the graphic.

Print Setup, Previewing, and Printing

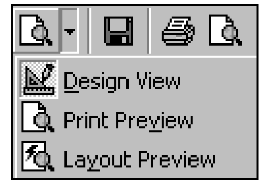
As you are nearing the end of setting up the controls of the report, it is necessary to set up the printing options of the report. Unless the defaults are changed, all reports will be oriented to print portrait-style with 1-inch margins on all sides.

Page Setup Dialog Box

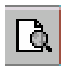
- Select **File**, **Page Setup**.
- Under **Page**, **Orientation**, choose either **Portrait** or **Landscape**.
- Change the margins as needed.

Setup Preview Buttons

Layout Preview Button



Available in **Design View**, the layout preview shows the basic layout of the current report with a limited number of records displayed. If you wish to view the report exactly as it will be printed, choose **Print Preview** instead.

Print Preview Button 

Shows how a report, form, datasheet, or module will appear when printed. Includes all records in the report.

Creating Labels Using the Labels Wizard

Figure 1. Database Window with the Reports Tab activated

The quickest way to create printed labels based on a table or a query is to use the **Labels Wizard**.

1 Close any open reports. In the database window, click on the **Reports** button.

2 Click the **New** button.

3 In the **New Report** window use the drop-down list to select the table or query that contains the data you will use for your labels, choose the **Customers** table.

Figure 2. New Report window

4 Select **Label Wizard**, and click the **OK** button.

The label wizard will now activate.

5 Select the appropriate **Avery** number based on the dimensions of the label sheet you will be using and click **Next**. Choose **C2354**. Click **Next**.

Note: to customize the label size: 1. Choose **Customize**. 2. In the next window, choose **New**. 3. Give your label a custom name and change the size by clicking in the fields that are set to **0.00**. 4. Click the **OK** button. 5. If you have created custom label sizes, you can view them by clicking the **Show custom label sizes** checkbox after starting the label wizard.

6 Choose the formatting options you would like. Change the font to **Times New** Roman, **10** point size, **Normal** font weight and click **Next**.

7 Choose the fields you would like to include on your labels by selecting the field from the **Available fields:** list and clicking the add field button when on the appropriate line. 
Choose the following fields: **CompanyName**, **ContactName**, **Address**, **City**, **Region**, **PostalCode**, and **Country**.

Note: in the **Prototype label:** panel, be sure to add the appropriate spaces and punctuation.

8 Click **Next**.

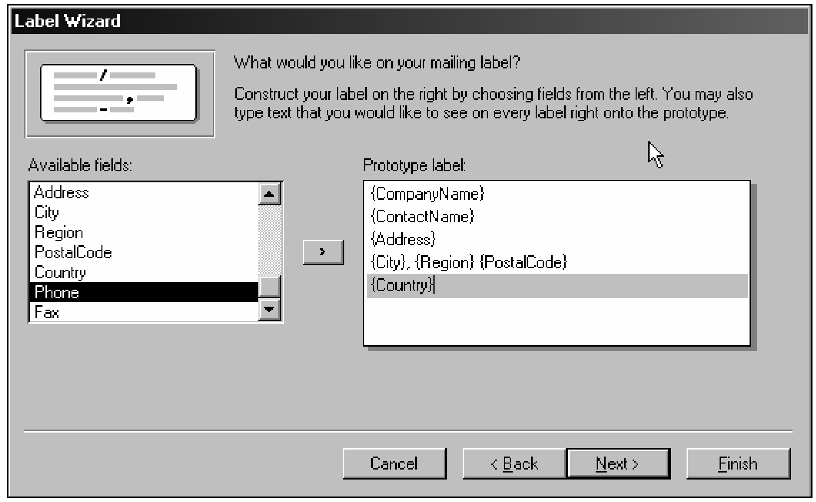


Figure 3. The Labels Wizard Fields window

9 Choose the fields you would like to sort your labels by and click **Next**. Choose **Country** and **Company Name** and click **Next**.

10 Name your report **rpttblCustomers(Labels)** and click **Finish**. Close the report.

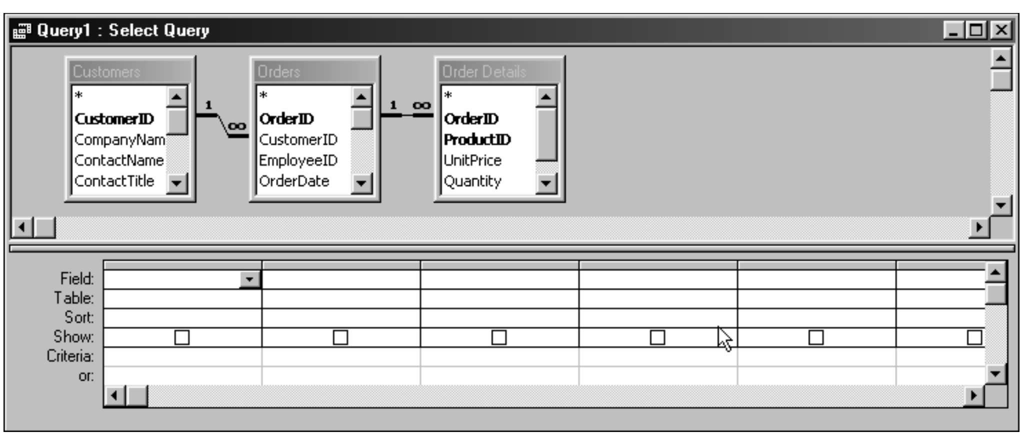
Creating a Summary Report

Create the New Total Orders query

1 Select the **Queries** button.

2 Click **New**, **Design View**, then **OK**.

3 Add the **Customers**, **Orders**, and **Order Details** tables to the grid then close the **Show Table** window.



4 Add **CompanyName** from the **Customers** table; **OrderID** from the **Orders** table; and **UnitPrice**, **Quantity**, and **Discount** from the **Order Details** table.

5 Save the query as **qryNewTotalOrders**.

6 Sort **Ascending** by **CompanyName**.

7 Add a total price calculating fields to the right of the **Discount** field by clicking in the field row and typing **Total: [UnitPrice]*[Quantity]**. Run the query to test the results.

Note: to view or write the contents of a calculated field it is often easier to **Zoom** the field by pressing **Shift+F2**.

8 Add a second calculating field to the right of the **Total** field by typing **WithDiscount: [Total]-[Total]*[Discount]**. Run the query to check your calculation.

9 Save and close the query.

Create the New Total Orders Summary report

1 Click the **Reports** button.

2 Click **New** then select **Report Wizard** and **qryNewTotalOrders** query. Click **OK**.

3 Add all of the fields to the report then click **Next**.

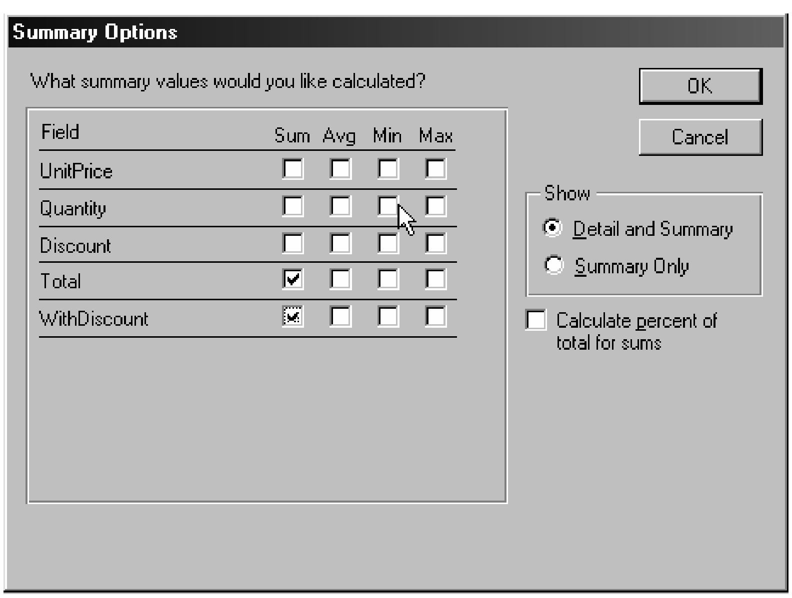
4 In the **How do you want to view your data?** panel, choose **by Customers**, then click **Next**

5 Do not add a grouping. Click **Next**.

6 Sort ascending by **Total**.

7 Set **Summary Options** to sum **Total** and **With Discount**.

8 Show **Detail** and **Summary**.



9 Click **OK** then **Next**.

10 Use the **Stepped** layout in **Landscape**, then click **Next**.

11 Set the style to **Bold**, then click **Next**.

12 Title the report **rptOrderDetailandSummary**.

13 Click **Finish** to display the report.

Modifying the Report

1 Open the **rptOrderDetailandSummary** report in **Design View**.

2 Change the **Sum** calculation fields to currency format.

Note: View the properties of the fields and click on the **Format** tab.

3 Edit the report header control **rptOderDetailandSummary** to read **Order Detail and Summary**.

4 Edit the page header control **WithDiscount** to read **Adjusted Total**.

5 Change the **Company Name** to **bold**, ***italic*** and **10** point.

6 Change the spacing and alignment in the **Detail** and **Page Header** sections to align the data.

7 In the **CompanyName** footer area list only the count information. Delete the following: **=”Summary for “ & “’CompanyName’ = “ & “ “ &**. Add the **=** to the beginning of the calculation.

Note: The field should now contain the following: **=[CompanyName] & " (" & Count(*) & " " & IIf(Count(*)=1,"detail record","detail records") & ")"**

8 Preview the changes.

9 Close the report.