Microsoft Access 2010

Reports Summary & Groups

Microsoft Access 2010: Reports Summary & Groups
2.0 hours

Topics include customizing reports; working with sorting and grouping; using basic math functions; summary reports; special queries; and building reports from scratch. *This workshop requires completion of "Access: Basics", "Select Queries", and "Intro to Forms and Reports".*

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<u>**Report 1: Patients**</u>

Create a report using the wizard based on the Patients Table.

- Use all fields
- No Grouping
- No Sorting
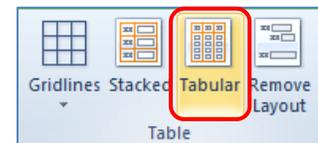- Tabular, Portrait, Adjusting fields
- Save as "Patients"

Change Margins and Adjust Results to Fit

1. On the Print Preview tab click the Page Setup button
   a. Set the Margins to 0.5" for the top, bottom, left, and right

2. Turn to Design view

3. Select everything in the Page Header and Detail sections

4. From the Arrange tab, in the Table group, click the Tabular button
   a. This will connect all the fields into one table

5. With all the fields still selected, size to narrowest
   a. From the right-click menu or from the Size/Space button on the Arrange tab

6. Move Page Number to under 7.5 inches

7. Reduce grid width to less than 7.5 inches

Wrap Text

1. Design view, select everything in the Detail section

2. Open the Property Sheet
   a. From the right-click menu or the Design tab

3. Change the **Can Grow** property to *Yes*

| Perez | Penelope | 2034 Banana Drive | Gainesville | FL |
| Glass | Gloria | 2343 Kale Lane | Gainesville | FL |
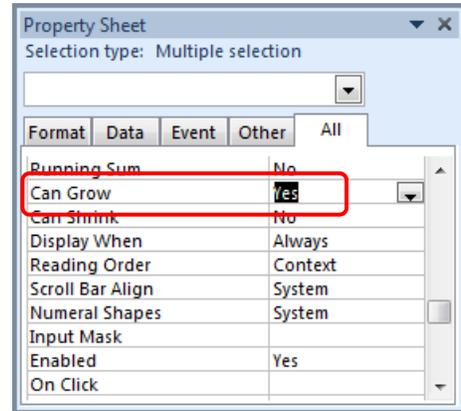
Sorting

1. In the Design or Layout view turn on the **Group and Sort**
   a. On the Design Tab in the Grouping and Totals group
   b. Or from the right-click menu (in grid)

2. In the **Group, Sort, and Total** pane at the bottom of the window, Click **Add a sort**
   a. Choose City
      i. Change with A on top to be with Z on top
   b. Click **Add a sort**; choose Last
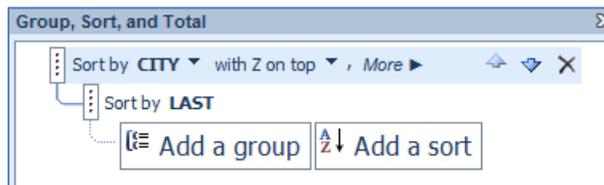
Calculate Number of Records

1. In the Design view, increase the size of the Report Footer by half an inch

2. Create a **Text box** from the controls on the Design tab

3. Change the label to *Number of Patients*

4. Change the **Unbound** text box to day *=Count([Med Rec])*
   a. **Common Functions**: Sum, Count, Max, Min, Avg, IIF
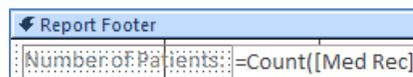
5. Delete the text box and label

"Total" Records

1. From the **Group, Sort, and Total** pane, click on the **More** button for City

2. Open the **With no totals** menu and click the Check box for **Show Grand Total**
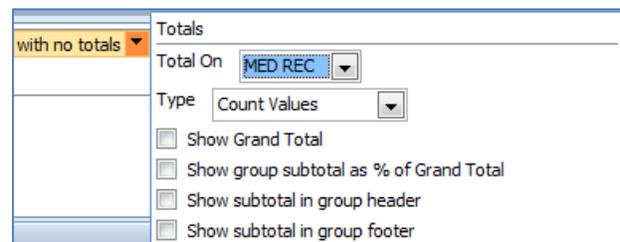
Report 2: Patients by City

Create a report using the wizard based on Patients.

- Use all fields
- Group by City
- No Sorting
- Outline, Landscape, Adjusting fields
- Save as "Patients by City"

Headers

1. Move the Report Header (1st page) to the Page Header (every page)
   a. In the Design view select the Report Header label and cut
   b. Click on the Page Header section and Paste

2. Right-click on grid and choose **Report Header/Footer**
   a. There should be no confirmation message. If there is, click cancel and make sure the section is blank

3. Delete City Label and Increase the size of the font for City text box and adjust the box as necessary

Sort and Group

1. In the Design view turn on the **Group and Sort**

2. Change sort order to have City Descending (Z on top)

3. Click on the **More** button for City

4. Change **do not keep group together on one page** to *keep whole group together on one page*

Page Breaks

To put each city on its own page we will need to create a **City Footer** and then insert a page break control in the new section. Be careful not to have any space after the page break or you will end up with blank pages in your report.

1. If necessary, in the Design view turn on the **Group and Sort**

2. Click on the **More** button for City

3. Change **without a footer section** to *with a footer section*
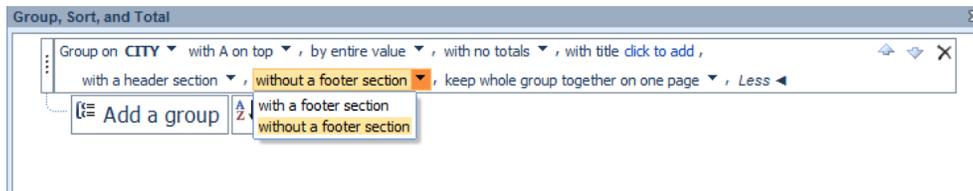
4. Create a **Page Break** from the controls on the Design tab

5. Remove all the space under the page break
    a. Move top of Page footer section as high up as it will go

6. Expand Page header

7. Move labels in City Header to Page header

8. Collapse or turn off City Header
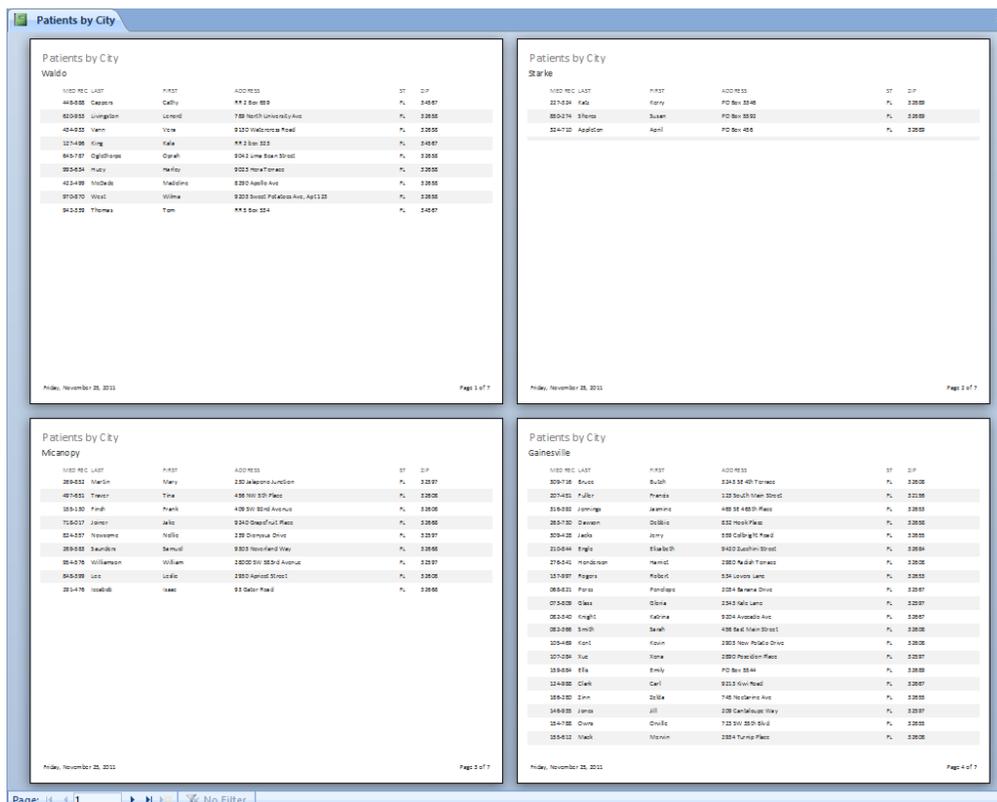
Report 3: Patients One City

Report 2: Patients by City put each city on its own page, but still provided a report for all the records in the Patient table. This report will show us the data for only one city. In the Queries workshop we learned how to have a query request a Parameter Value that would set our criteria.

Field:	Patients.*	CITY
Table:	Patients	Patients
Sort:		
Show:	✓	☐
Criteria:		[Which City?]
or:		

Enter Parameter Value

Which City?

| |

OK   Cancel

The database has a query called **Patients for One City**. We can use this query and the first report that we created to make this new report.
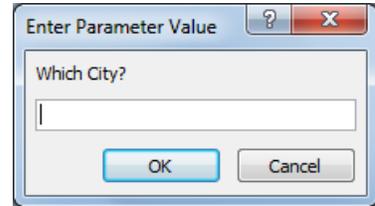
Modifying Existing Reports

As long as the fields in the query match the fields being used in the report, all we really need to do is just "Save As" to make copy of the report; or copy and paste the database object in the navigation pane.

1. Select the report **Patients**

2. Copy and Paste, use the name **Patients One City**

3. Open new report in design view

4. Open the Property Sheet for the Report Properties
   a. **Record Source** to *Patients One City*
   b. **Caption** to *Patients One City*

Creating a Contextual Title

Each time we run the report, we want the Report Header to reflect the new dataset.

1. In the Design view of the report, widen the label (Patients) in the Report Header

2. Right-click the label,
   a. choose **Change To** -> **Text Box**

3. Replace Unbound with *="Patients for " & [City]*
   a. Don't forget the equal at the beginning and the space inside the quotes
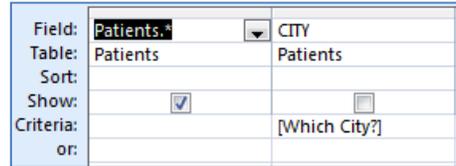
Patients One City

Patients for Waldo

MED REC	LAST	FIRST	ADDRESS	CITY	ST	ZIP
448-888	Cappers	Cathy	RR 2 Box 659	Waldo	FL	34567
993-634	Huey	Harley	9023 Hera Terrace	Waldo	FL	32658
127-496	King	Kala	RR 2 box 323	Waldo	FL	34567
620-953	Livingston	Lenord	789 North University Ave	Waldo	FL	32658
422-499	McDade	Madeline	8290 Apollo Ave	Waldo	FL	32658
645-787	Oglethorpe	Oprah	9042 Lima Bean Street	Waldo	FL	32658
942-339	Thomas	Tom	RR 5 Box 534	Waldo	FL	34567
434-933	Vann	Vera	9130 Watercress Road	Waldo	FL	32658
970-870	West	Wilma	9203 Sweet Potatoes Ave, Apt 123	Waldo	FL	32658

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Page: 1   No Filter

Report 4: Doctors by Reason

- Create a report using the wizard based on three tables
    - **DocFirst** from Table **Doctors**
    - **Reason** from Table **Reasons**
    - **Length** from Table **Visit Info**

- View the data by *Doctors*

- No further grouping options

- Sort by **Reason**
    - Click on the **Summary Options…**
    - *Sum* the Length

- Outline Layout, Portrait

- Title: **Doctors by Reason**

Doctors by Reason

Doctor Sallye

Reason	Length
Allergies	240
Backache	345
Cold/Flu	405
Followup	240
Heartburn	120
Nausea	390
Physical	240
Sore Throat	270
Sum	2250

Doctor Samuel

Reason	Length
Allergies	285
Backache	330
Cold/Flu	240
Followup	240
Headache	45
Heartburn	180
Nausea	285
Physical	345
Sore Throat	255
Sum	2205

Doctor Sidney

| Reason	Length
Allergies	300
Backache	210
Cold/Flu	315
Followup	315
Heartburn	60
Nausea	240
Physical	330
Sore Throat	525
Sum	2295
Grand Total	6750

Create a Reason Group with a Sum Total

The wizard does not provide the report shown on Page 6. The Doctor total and Grand total are correct, but we see each individual visit reason and its length. But on this report we don't want to see the details, we want the total amount of time each Doctor spent on each Reason.

Sore Throat	60
Sore Throat	30
Sore Throat	60
Sore Throat	75
Sore Throat	30
Sore Throat	15
Sum	2295
Grand Total	6750

We don't need the *Detail* for each Reason, we need a *Reason group*.

1. In the Design view turn on the **Group and Sort**

2. Choose Sort by Reason and click the **More** option

3. Change **without a header section** to *with a header section*
   a. This will automatically change the **Sort by Reason** to *Group on Reason*
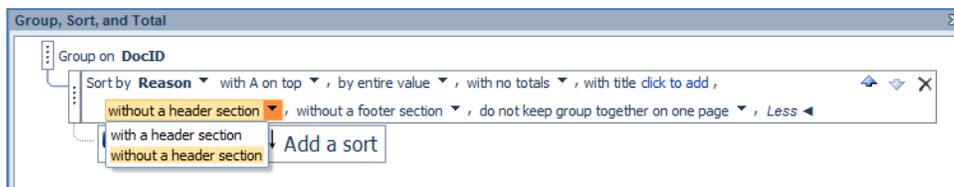
4. Move everything from the detail section into the Reason Header section

5. Shrink the detail view so that none of the grid shows through

6. View the report, it looks more like we our final report
   a. But notice the reason numbers don't add up to the correct totals
   b. Since we have not given them an equation, we are seeing the very first value for each reason for that doctor

Length	
30	
60	
45	
45	
30	=315
30	
15	
60	
2250	

7. Change **Length** in the Reason header to be *=Sum([Length])*

8. Format them to appear the same

Note about Totals

The sum for each Doctor and the Grand total are both initially correct.

If we look at the equations for these numbers we will see the equations themselves are identical: **=Sum([Length])**.

The difference is the placement of the equation on the report.

When the equation is placed in the **Doctor** footer it sums the **Length** for each Doctor.

When the same equation appears in the Report Footer, it sums the **Length** for the entire Report.
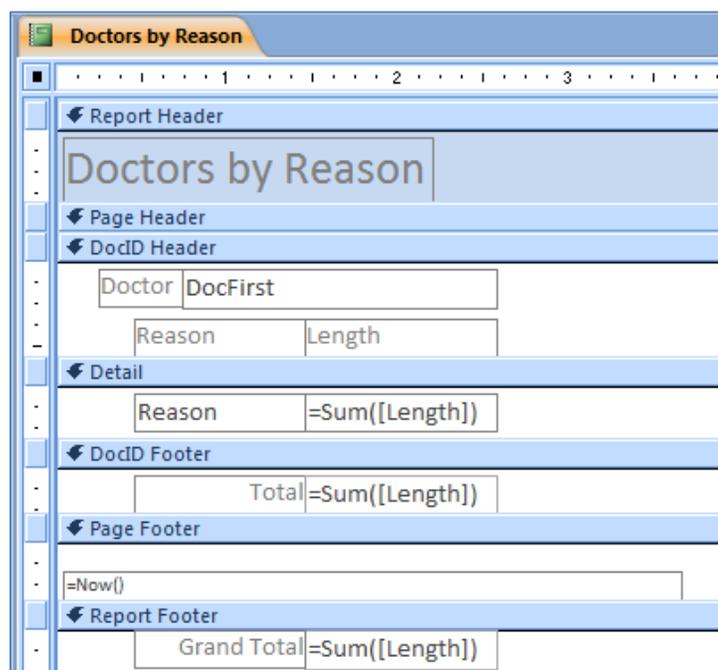
Report 5: Happy Birthday Posters

Happy Birthday Rafe!
January 8

Happy Birthday Quintin!
February 16

Happy Birthday Niara!
March 17

Happy Birthday Frances!
March 14

Happy Birthday Kaitlin!
April 30

Happy Birthday Annie!
June 18

Happy Birthday Harry!
July 30

Happy Birthday Ophelia!
November 13

Create Report in Design View

1. On the Create tab click Report Design

2. Remove Page Header and Footer

3. Open Property Sheet
   a. Report **Record Source** to *Employees*
   b. Report **Width** to *8"*
   c. Detail **Height** to *3"*

4. Add Picture from the Field List
   a. Delete Picture Label
   b. Set Frame properties – **Width** to *3"*, **Height** to *2"*

5. In Layout View change Size Mode property of the picture
   a. Clip, Stretch, Zoom
   b. Set **Size Mode** to *Zoom*
   c. Properties: **Width** to *3"*, **Height** to *3"*

6. Print Preview, should have two or three happy faces
   a. Detail **Height** to at least *5.3"* (will only fit one record per page)

7. Add **Emp First Name** and **Emp Birthday** from Field List
   a. Create two new text boxes, delete their labels
   b. Text 1: *="Happy Birthday " & [Emp First Name] & "!"*
   c. Text 2: Emp Birthday
      i. Change **Format** property of the Emp Birthday to *mmmm d*

8. Format to make it "pretty"

9. Change Report **Record Source** to *Employee Birthdays*