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".

<table>
<thead>
<tr>
<th>Report 1: Patients</th>
<th>Change Margins and Adjust Results to Fit</th>
<th>Wrap Text</th>
<th>Sorting</th>
<th>Calculate Number of Records</th>
<th>&quot;Total&quot; Records</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>..................................................</td>
<td>..........................</td>
<td></td>
<td>..................................................</td>
<td>..........................</td>
</tr>
<tr>
<td>Report 2: Patients by City</td>
<td>Headers</td>
<td>Sort and Group</td>
<td>Page Breaks</td>
<td>..................................................</td>
<td>..........................</td>
</tr>
<tr>
<td>Report 3: Patients One City</td>
<td>Modifying Existing Reports</td>
<td>Creating a Contextual Title</td>
<td>..................................................</td>
<td>..........................</td>
<td></td>
</tr>
<tr>
<td>Report 4: Doctors by Reason</td>
<td>Create a Reason Group with a Sum Total</td>
<td>Note about Totals</td>
<td>..................................................</td>
<td>..........................</td>
<td></td>
</tr>
<tr>
<td>Report 5: Happy Birthday Posters</td>
<td>Create Report in Design View</td>
<td>..................................................</td>
<td>..........................</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Report 1: Patients**
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

   ![Image of Property Sheet]

**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

   ![Image of Group, Sort, and Total]

**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

   ![Image of Report Footer]

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**

![Group, Sort, and Total dialog box showing options to add a group with or without a footer.]

4. Create a **Page Break** from the controls on the Design tab

![Page Break icon 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

![Example of a report with a City Footer and page breaks.]

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**Page 4**
**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.

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
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
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.

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

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

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