

8 Creating Custom Reports



LESSON OUTLINE

- 8.1 Using Report Design View
- 8.2 Creating a Report in Design View
- 8.3 Modifying a Report in Design View
- 8.4 Performing Report Calculations
- 8.5 Creating Labels Using the Label Wizard
- 8.6 Printing Reports
- 8.7 Concepts Review

Reinforce Your Skills

Apply Your Skills

Critical Thinking & Work-Readiness Skills

LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Create a report using Report Design View
- Modify reports
- Add report sorting and grouping levels
- Add graphics and other design elements to reports
- Add calculated controls to a report and calculate totals
- Create a labels report using the Labels Wizard

Reports summarize data into meaningful information for printing. As a result, reports serve as output objects for Access databases. Although reports often summarize data from a single database table, they can display data from multiple tables and queries. Whether you are customizing forms or reports, you can use many of the same techniques to position fields, group data, and add pictures and titles. One important feature of customized reports includes the capability of adding calculated controls to generate report subtotals and totals. In this lesson, you will create a report in Design view, modify the report, format the report, and create calculated and total controls on the report.

Student Resources

labyrinthlab.com/acc10

CASE STUDY

Reporting Data

Customized input forms are great database objects for entering data, displaying data, and printing raw data for records contained in database tables. Most businesses, however, want to summarize data, filter it, or sort it using one of the fields contained in a database table. Green Clean is no exception—the company wants a new report that summarizes the sales for each employee and prints the data with sales totals. Allen Sedgwick, manager of Computer Information Systems, has agreed to create a custom report to meet these needs. The first draft of the report design is shown here. After the CEO reviews the design, he completes a sample report for review by other executives.

green
clean

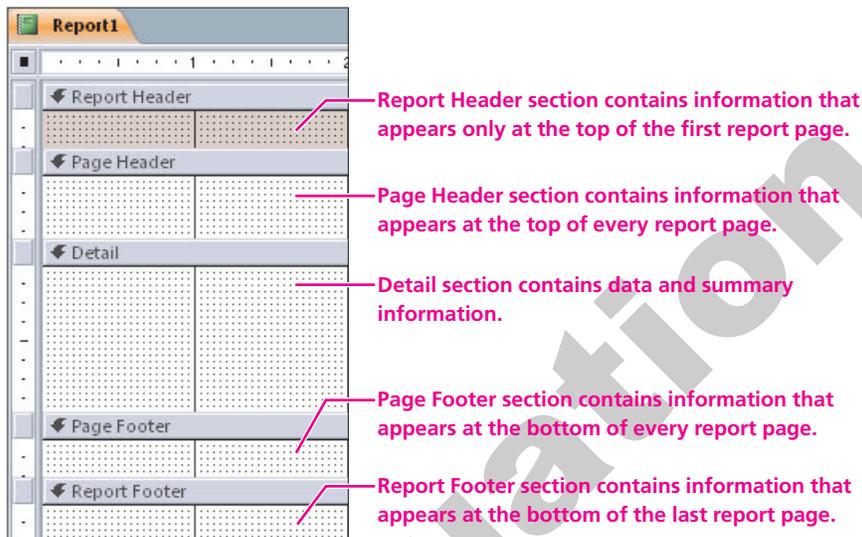


Order ID	Number Ordered	Price	Item Total	Sales Totals
Adams				
GC-24	10	\$65.82	\$658.24	
GC-35	10	\$64.57	\$645.70	
GC-5	2	\$59.58	\$119.15	
GC-5	2	\$55.43	\$110.86	
GC-5	2	\$59.58	\$119.15	
GC-10	1	\$6.50	\$6.50	
GC-10	1	\$91.42	\$91.42	
	28	57.5567		\$1,751.02

8.1 Using Report Design View

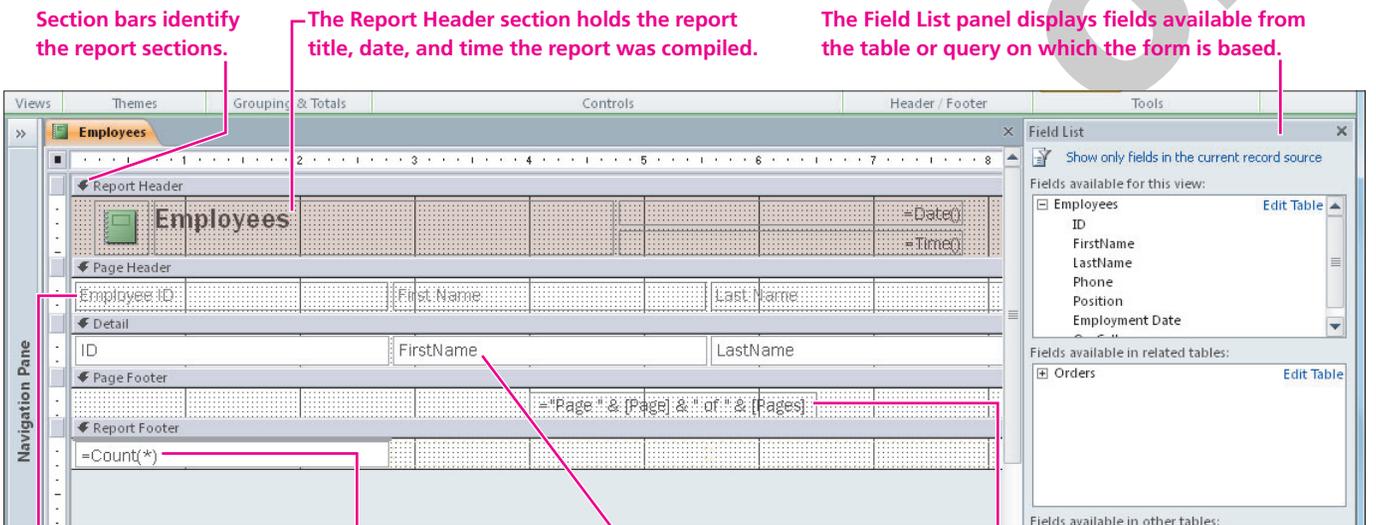
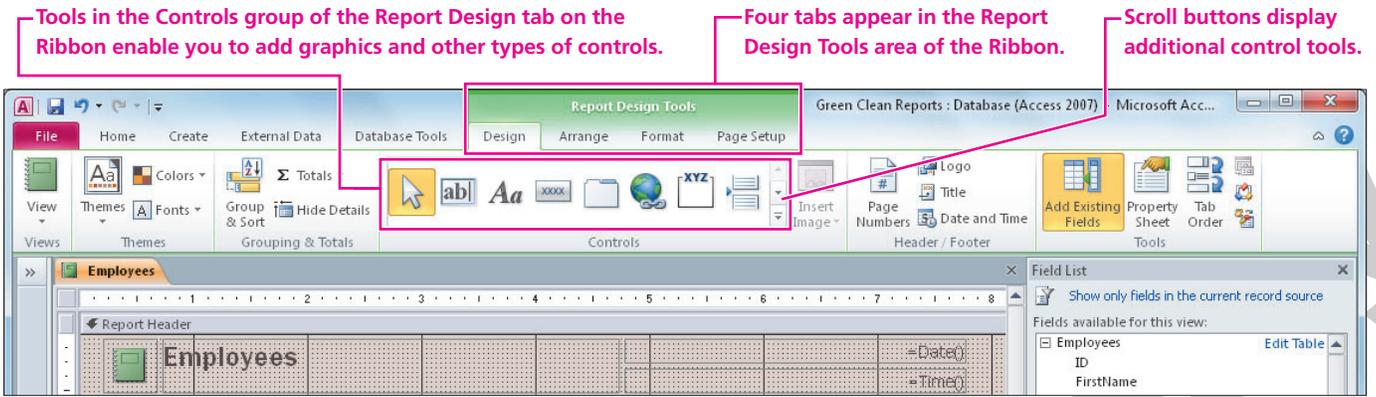
Video Lesson labyrinthelab.com/videos

Report Design View displays the sections of each report, identifies each control contained in the report, and holds the basic layout and design elements for the report. If you have explored Form Design View, you know that it enabled you to view different form sections such as Form Header, Detail, and Form Footer. Report Design View displays numerous sections as well, and each is identified by a section bar. In addition to the Detail section, the report sections used most frequently include the Report Header/Footer sections and Page Header/Footer sections.



Identifying Report Design View Elements

The design elements you will see as you work with Report Design View resemble those that were available for designing forms. If you have customized forms, many of these elements will be familiar to you.



QUICK REFERENCE IDENTIFYING REPORT DESIGN ELEMENTS	
Report Element	Description
Sections	The major parts of the report, such as the Report Header, the Report Footer, the Detail, the Page Header, and the Page Footer. Section bars divide report sections.
Controls	Items on a form or report that display data, perform actions, and decorate the object. Access uses three main types of controls on reports—bound controls, unbound controls, and calculated controls. Each control consists of two parts—control label and control text box—that are tied to a field in a database table.
Bound control	A control that ties, or binds, data displayed on a report to a field in a database table so that the field value appears on the report. Bound controls normally appear in the Detail section of a report.
Unbound control	An item on a report that is independent of data and fields in a database table. Unbound controls can be lines, rectangles, pictures, and so forth. Unbound controls can appear in any report section.

QUICK REFERENCE IDENTIFYING REPORT DESIGN ELEMENTS (continued)	
Report Element	Description
Calculated control	A control that is tied to an expression created for the report or to a calculated field constructed in a query. Calculated controls normally appear in the Detail or Report Footer section of the report.
Control label	The part of a control that contains text to identify the data displayed on the report. Normally, the control label text is the field name or caption set for the field. For example, <i>Employee Number</i> is a label that identifies the <i>Employee#</i> field.
Control text box	The part of a control that displays data from a field in an Access table. For example, <i>ToliP01</i> is the data contained in the <i>Employee#</i> field.
Report Header/ Footer	The sections of a report that contain text, pictures, and other items that are repeated at the top (header) or bottom (footer) of the report.
Detail section	The main section of a report, which normally displays data from database tables that varies from record to record.
Page Header/ Footer	The sections of a report that contain text and other items that are repeated at the top (header) or bottom (footer) of every <i>page</i> of the report.
Group Header/ Footer	The sections that identify a field on which data in the report is grouped (<i>Group Header</i>) and enables you to report summary data for the group (<i>Group Footer</i>). The name of the grouped field appears in the <i>Group Header</i> and Footer bars.

Displaying Report Views

As you design reports, you will find that there are three views available—Report View, Layout View, and Design View. Working with these views is similar to working with views in Form design. Each view has its own distinct purpose:

QUICK REFERENCE USING REPORT VIEWS		
View	Description	Use this view to . . .
Report	Displays when you open a report. Report View does not permit modification of formatting or data. Report View presents the report as it will print.	<ul style="list-style-type: none"> ■ Preview a report layout before printing. ■ View summarized data.
Layout	Displays a “run” of a report layout with sample data displayed so that you can size and position controls appropriately. You can modify formatting in this view as well as use many of the same design tools that are available in Design View.	<ul style="list-style-type: none"> ■ Preview a report with data. ■ Size and position controls and ensure that all data contained in a field displays properly on a report. ■ Add a limited number of controls to a report.
Design	Displays the design palette containing sections and section bars, controls, labels, design elements, and other report features. In addition, tools for adding many additional controls are available in Design View.	<ul style="list-style-type: none"> ■ Format and design a report. ■ Add summary data and controls. ■ Add design elements.

Switching Between Views

It is a simple matter to switch between Layout View and Design View when required tools are available only in Design View. The Home and Design tabs on the Ribbon both contain controls that allow you to switch the View.

QUICK REFERENCE**SWITCHING AMONG REPORT VIEWS**

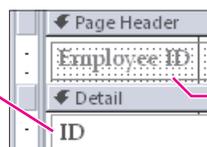
Task	Procedure
Display Report View	<ul style="list-style-type: none"> ■ Open a report. ■ From Layout View, choose Design→Views→View menu ▼ and choose Report View. <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> ■ From any view, choose Home→Views→View menu ▼ and choose Report View.
Display Design View	<ul style="list-style-type: none"> ■ Right-click a report name in the Navigation Pane and choose Design View. <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> ■ From Layout View, choose Design→Views→View menu ▼ and choose Design View. <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> ■ Open a report and choose Home→Views→View menu ▼ and choose Design View.
Display Layout View	<ul style="list-style-type: none"> ■ Right-click a report name in the Navigation Pane and choose Layout View. <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> ■ From Design View, choose Format→Views→View menu ▼ and choose Layout View. <p style="text-align: center;"><i>or</i></p> <ul style="list-style-type: none"> ■ Open a report and choose Home→Views→View menu ▼ and choose Layout View.

DEVELOP YOUR SKILLS 8.1.1**Display Report Views**

In this exercise, you will open an existing report and display it in all three report views.

1. **Open** the Green Clean database from your Lesson 08 folder and **save** the file using the filename **Green Clean Reports**.
2. Open the **Employees** report to display the report in **Report View**.
3. Choose **Home→Views→View menu ▼** on the Ribbon and choose Design View.
4. Follow these steps to locate associated controls:

A Click the **ID** control text box in the Detail section.



B Locate the connected control label in the Page Header section.

5. Choose **Home→Views→View menu ▼** on the Ribbon and choose **Layout View**.

From this point forward, the instructions for switching views will simply instruct you to switch to the appropriate view. For example, switch to Design View or switch to Layout View.



6. Follow these steps to identify features in Layout View:

A Click EmployeeID value GSE-001.

B Locate the associated column heading that displays a dotted border.

C Review the tools on the Design tab of the Ribbon.

Employee ID	First Name	Last Name
GSE-001	Tommy	Choi
GSE-002	Mary	Wright

7. **Close** the report without saving changes.



The appearance of buttons on the Ribbon may be different from those shown here due to screen resolution and monitor size.

8.2 Creating a Report in Design View

Video Lesson labyrinthlab.com/videos

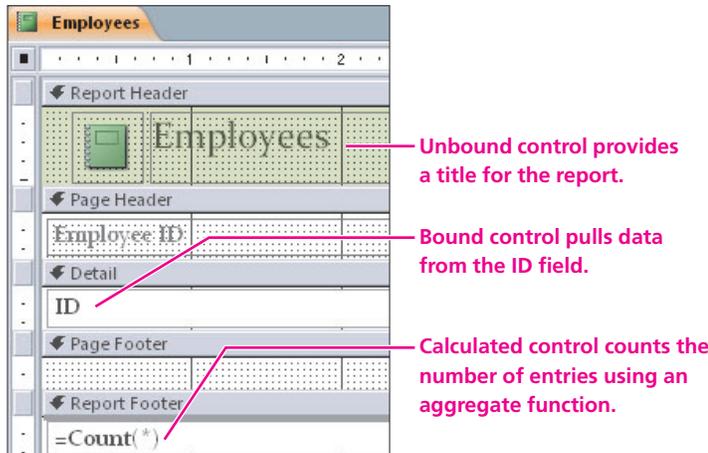
Now that you are familiar with many of the features found in reports and Report Design View, you may find building a report from scratch using Design View more efficient—especially when you want to include only a few fields from a table in the report. When you create a new report in Design View, you select the table that contains the fields you want to include in the report, drag fields to report sections, and insert group sections. When the basic structure of the report is complete, you can add controls to create titles, add graphics, and insert footer controls. Many of the tools you use to build a report in Design View appear on the Design tab of the Ribbon.

Working with Report Controls

The controls you selected on the report when it was displayed in both Layout View and Design View are bound controls that display data contained in database tables. Access has three basic types of controls that you can add to reports—and these controls parallel those you can add to forms.

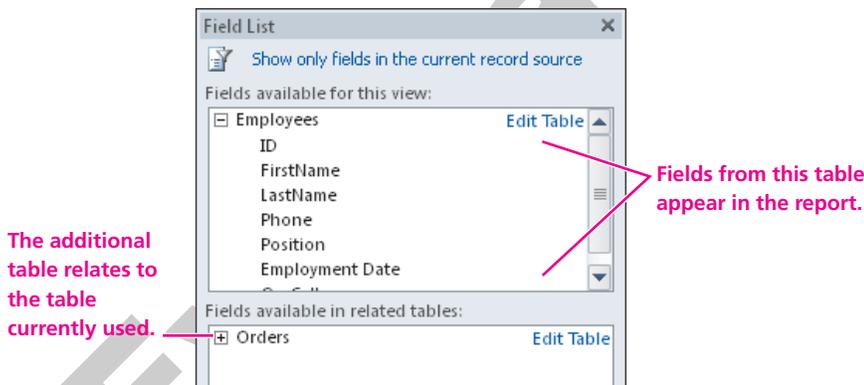
- **Bound controls**—Controls that tie, or bind, data displayed on a report to a field in a database table so that the field value (data) appears on the report. Bound controls normally appear in the Detail section of a report.
- **Unbound controls**—Lines and other drawn objects, text for titles, graphics, and so forth—independent items you can add to a report to enhance the appearance of the report.

- Calculated controls**—Controls that are tied to an expression, aggregate function, or calculated field constructed in a query or built directly on the report. Calculated controls normally appear in the Detail or report Footer section of the report.



Adding Controls from Field Lists

The Field List contains a list of all tables that appear in the database. You can expand a table to display all fields contained in the table. In addition, when you add a field from one table to the list, a section of the Field List panel shows tables that are related to the selected table. As a result, you can expand related tables and use fields from related tables in the report.



Dragging Controls from the Field List

Adding bound controls from the available field list to a section of a report is as simple as dragging the control and dropping it into the appropriate report section. When you add a field from the field list to the report page, Access places both the control label and control text box for a bound control on the report.

Because most reports display the control label in the Page Header section, you can cut it from the Detail section and paste it into the Page Header section or delete it from the Detail section and add a new label control to the Page Header section. If you try to drag the field to the Page Header section and then move the control text box to the Detail section, Access moves both parts of the control to the Detail section.

FROM THE KEYBOARD

Ctrl+X to cut an object
Ctrl+V to paste an object

Adding Controls from the Ribbon

When you display a report in Design View, Access displays control tools on the Ribbon used to add unbound controls to reports. Tools used to change font and add color to reports are also available in Layout View. As a result, working in Design View as you design and set controls on reports is essential.

QUICK REFERENCE	ADDING CONTROLS TO A REPORT
Task Drag controls Add controls from a Ribbon	Procedure <ul style="list-style-type: none"> ■ Display the report in Layout or Design View. ■ Choose Design→Tools→Add Existing Fields  to open the Field List. ■ Expand the table containing the field you want to add. ■ Drag the field onto the report and position it where you want it. <ul style="list-style-type: none"> ■ Display the report in Design View. ■ Choose Design→Controls and click the control type button you want to add to the report. ■ Click or drag a control in the position and size you want on the report.



A limited number of controls is available in Layout View. As a result, most people use Design View to add controls to reports because more controls are available when Design View is displayed.

DEVELOP YOUR SKILLS 8.2.1

Create a Report in Design View

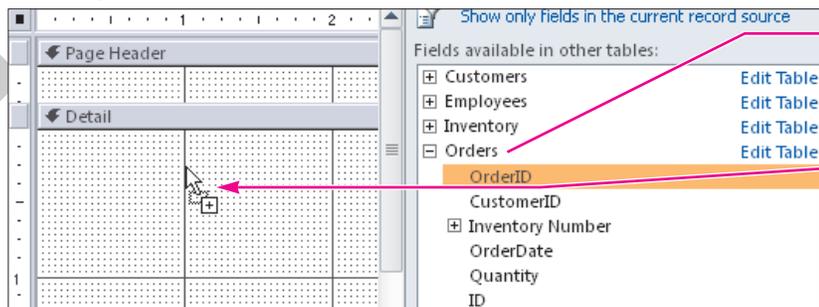
In this exercise, you will create a report in Design View, add bound controls to the report, and position control labels in the Page Header.

1. Choose **Create**→**Reports**→**Report Design**  on the Ribbon.
 Access creates a new blank report and displays it in Design view. The Field List should also be displayed.



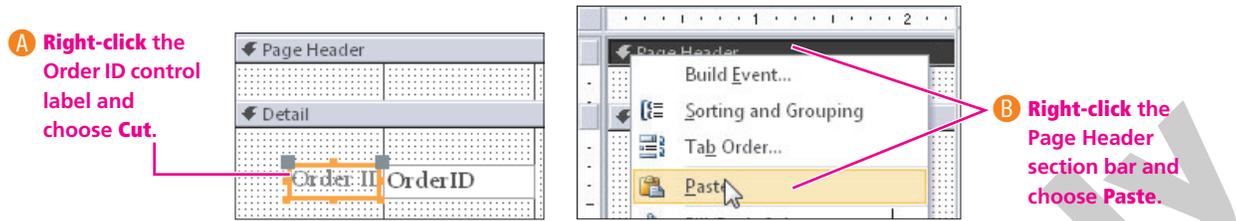
If the Field List is closed, choose Design→Tools→Add Existing Fields  on the Ribbon to open it.

2. Follow these steps to add a field to the report:



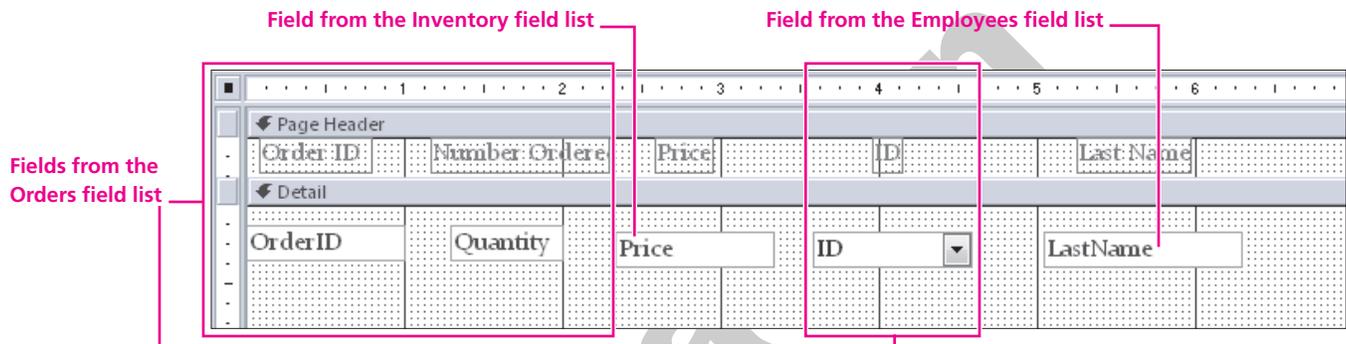
- A** Expand the **Orders** table to display the fields contained in the table.
- B** Drag the **Order ID** field to about the 1" position on the horizontal ruler in the report Detail section.

- Follow these steps to move the Order ID control label to the Page Header section:



Access places the label at the left edge of the Page Header section.

- Drag the **Order ID** control text box to the left and position it below the Order ID label.
- Repeat the procedures outlined in **steps 2–4** to add fields, position labels, and move text boxes to the positions shown in the following figure.



- Save** the report using the Report name **Sales Report** and leave it **open**.
After saving the report, Access places the name of the table from which each control text box came before the field name and separates the table name from the field name using a period (.). For example, you will notice Orders. OrderID in the first control text box in the Detail section of the report after saving it.

8.3 Modifying a Report in Design View

Video Lesson labyrinthelab.com/videos

As you work in Report Design View, you can use many of the techniques and features used to customize forms to format and enhance data controls on the report and set background colors, etc. One important difference between customizing forms and reports is the general layout of the object. Reports normally display control labels in the Report Header section so that they serve as column headings. Control text boxes appear in the Detail section. In addition, when you group summary data in a report, Access displays Group sections that hold group titles, group field control labels, and group summary data.

Adding Report Sorting and Grouping Levels

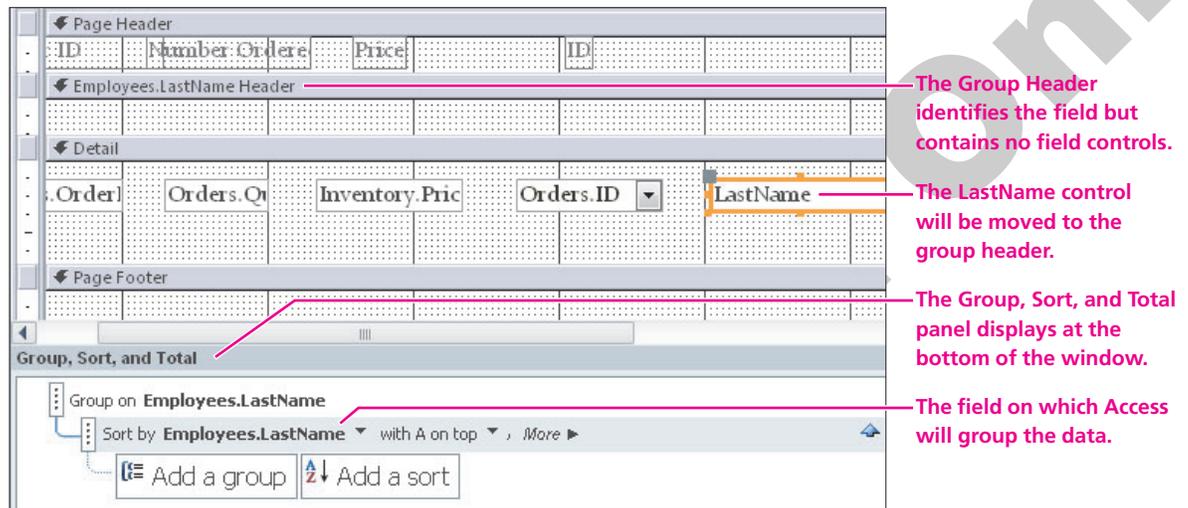
The report you have created is relatively sparse—it currently contains only five fields and column headings. If you printed the report now, it would resemble a table datasheet. However, by grouping the data using the *Employee* field, you create a report that provides information that is easier to locate. A *group* is a collection of records that has at least one data element in common. For example, if you want to display all vendors with offices in the same state, you could group on the State field. A group consists of a Group Header, records, and a Group Footer. Grouping records enables you to separate records visually on a report and display introductory and summary data for each group.

Order ID	Number Ordered	Price	Item Total	Sales Totals
Navarro				
GC-30	2	\$65.82	\$131.65	
GC-30	2	\$74.57	\$149.14	
GC-20	50	\$6.50	\$325.05	
GC-7	7	\$83.55	\$584.82	
GC-4	6	\$55.90	\$335.41	
	67	57.2682		\$1,526.06
Riso-Neff				
GC-12	5	\$48.47	\$242.33	
	5	48.466		\$242.33

Data records are grouped for each employee.

Using the Group, Sort, and Total Panel

To view the grouping and sorting settings, you display the Group, Sort, and Total panel at the bottom of the Access window. You can then use the panel to add groups and sorting settings or review them after you set them. You can also set up groups using commands on the shortcut menus and then study the effect in the Group, Sort, and Total panel. You can set properties in the Group, Sort, and Total panel to display or hide group headers and footers. Additional properties enable you to tell Access how to group data, set a grouping interval, and set group properties for keeping items in a group together on a page.



Working with Group Sections

Setting a group and sort order does not automatically place the column heading or field control text box on the report. It simply sets the grouping and sorting order and creates a section on the report to hold the controls. After you set up the groups, it is important to either move the group field from the Detail section to the Group section or add it to the Group section. By placing the field text box control in the Group Header section, Access groups all entries by the field you choose and each item in the Group Header section prints only one time—at the start of a new group value.

Creating Multi-Level Groupings

Access provides multi-level grouping for records on a report. If, for example, you want to print invoices that group items ordered by type or category for each customer, you would use two-level grouping. You can set multiple groups using the Sort, Group, and Total panel or by choosing the command from the shortcut menu.

QUICK REFERENCE	ADDING SORT AND GROUP LEVELS
Task	Procedure
Display the panel using the Ribbon in Layout or Design View	<ul style="list-style-type: none"> ■ Display the report is Design View. ■ Choose Design→Grouping & Totals→Group & Sort  on the Ribbon.
Add group level	<ul style="list-style-type: none"> ■ Right-click the field on which you want to group data records. ■ Choose Group On <i>Field Name</i>.
Add sort order	<ul style="list-style-type: none"> ■ Right-click the field on which you want to sort data or groups. ■ Choose Sort A to Z or Smallest to Largest  or ■ Choose Sort Z to A or Largest to Smallest .



The command you see when you right-click a field name to group or sort depends on the data type of the field.

DEVELOP YOUR SKILLS 8.3.1

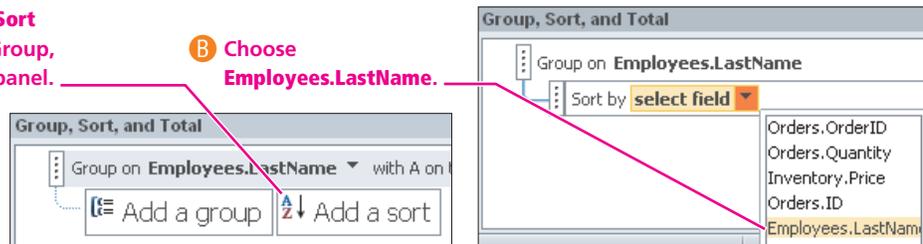
Add a Group and Sort Level to a Report

In this exercise, you will add a group and sort level to the Sales Report in your Green Clean Reports database that groups records by sales person.

1. Display the Sales Report in **Design View**.
2. **Right-click** the Employees.LastName text box control in the Detail section of the report and choose **Group On**.
Access displays a group header for the new group.
3. Choose **Design→Grouping & Totals→Group & Sort** on the Ribbon to open the Group, Sort, and Total panel.
4. **Right-click** the LastName text box control in the Detail section again and choose **Cut**.
5. **Right-click** the Employee.LastName Header section bar and choose **Paste** to place the text box control in the group header section.
6. Follow these steps to set a sort order using the Group, Sort, and Total panel:

A Click the **Add a Sort** button on the Group, Sort, and Total panel.

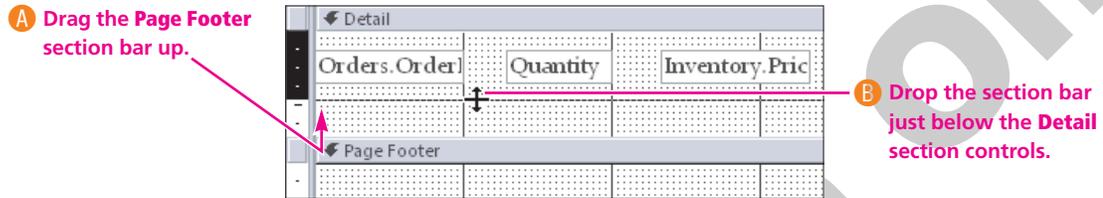
B Choose **Employees.LastName**.



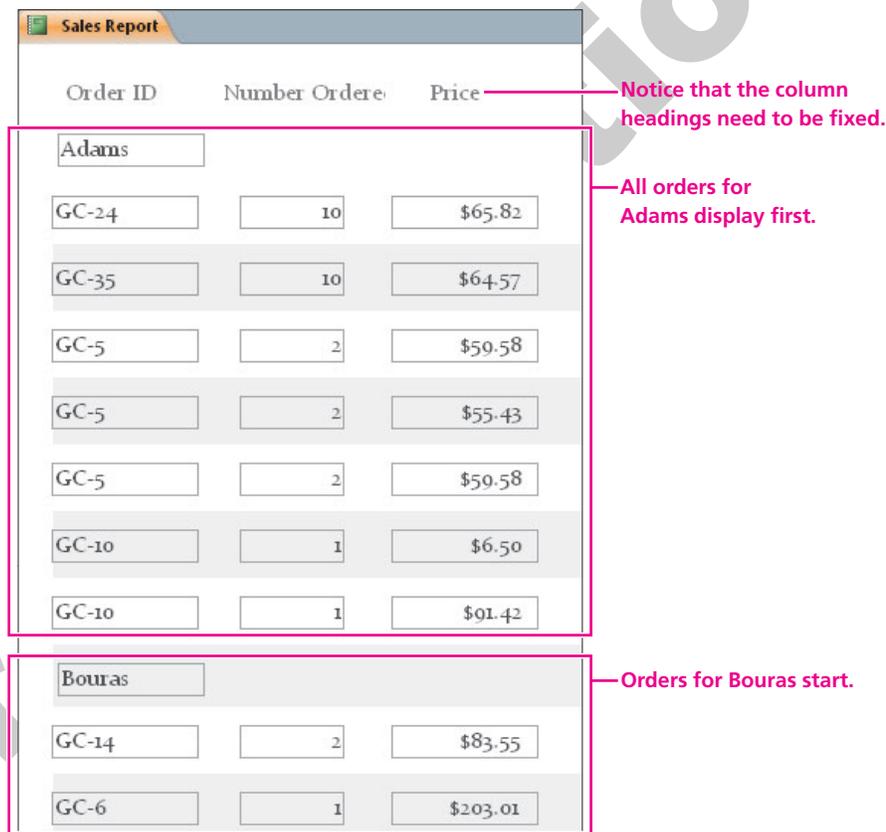
7. **Right-click** each of the following controls in the sections identified and choose **Delete** to remove them:

Section	Control
Page Header	ID label and Last Name label
Detail	Orders.ID ID

8. Scroll **down** to the bottom of the report palette and follow these steps to size the Detail section:



9. Switch to **Report View** and compare your report to the one shown here:

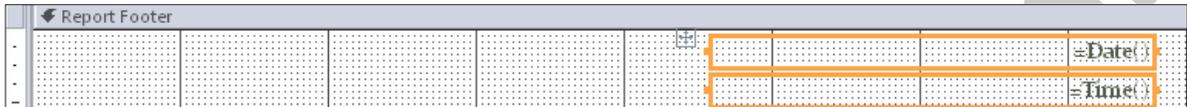


10. **Save**  changes to the report, and then **close**  it.

Adding Date and Time Data to a Report

Video Lesson labyrinthelab.com/videos

When reports change frequently and are printed regularly, keeping track of the most current report can be a challenge. You can add a date and/or time to the footer section of a report to help you track the reports. When you add the date and time controls, Access places the controls in the Report Header section by default. You can move them to the section in which you want them to appear or leave them in the Report Header section.



The Date and Time controls in the Report Footer section.

QUICK REFERENCE	ADDING DATE AND TIME FIELDS TO A REPORT
Task	Procedure
Add a date field to a report	<ul style="list-style-type: none"> ■ Choose Design→Header/Footer→Date & Time  on the Ribbon. ■ Check the Include Date checkbox, select the format option, and click OK.
Add a time field to a report	<ul style="list-style-type: none"> ■ Choose Design→Header/Footer→Date & Time  on the Ribbon. ■ Check the Include Time checkbox, select the format option and click OK.

DEVELOP YOUR SKILLS 8.3.2

Add Date and Time to the Page Footer Section

In this exercise, you will add the date and time to the Page Footer section of your report.

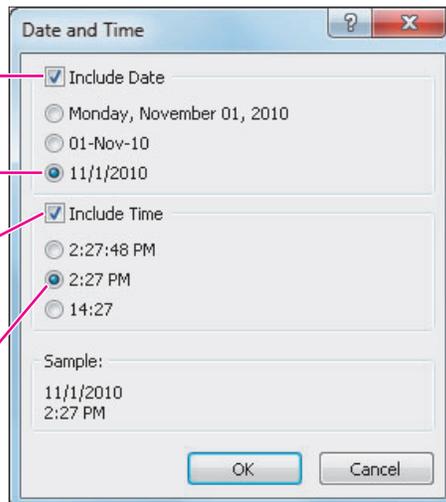
1. Display the Sales Report in **Design View**.
2. Choose **Design**→**Header/Footer**→**Date & Time**  on the Ribbon to open the Date and Time dialog box.
3. Follow these steps to add date and time controls to the section:

A Check the **Include Date** checkbox.

B Choose the **mm/dd/yyyy** format option.

C Check the **Include Time** checkbox.

D Choose the **hh:mm** time option and then press **[Enter]**.



4. Click the **=Date()** control and **press**  and click **=Time()** control to select both controls in the Report Header section.
5. **Right-click** one selected control and choose **Cut**; then **right-click** the Page Footer section and choose **Paste**.
6. Drag the controls to the right side of the **Page Footer** section.
7. **Save**  changes to the report and then **close**  it.

Adding Graphics to Reports

Video Lesson labyrinthelab.com/videos

Adding a graphic to a report that identifies the business can be an effective way to associate a corporate logo with a company. Graphics also dress up a report to make it more interesting to those who use the report. Access contains two basic tools for adding a graphic to a report or form:

- The Image or Insert Image control: Enables you to position a graphic on any report or form section
- The Logo control: Places a logo in the Report Header section of a report and the Form Header section of a form

QUICK REFERENCE	ADDING A GRAPHIC TO A REPORT OR FORM
Task	Procedure
Add a logo to a report or form	<ul style="list-style-type: none"> ■ Display the form or report in Design View. ■ Choose Design→Header/Footer→Logo  on the Ribbon.
Add a picture to a report or form:	<ul style="list-style-type: none"> ■ Display the report or form in Design View. ■ Choose Design→Controls→Insert Image <li style="text-align: center;"><i>or</i> ■ Choose Design→Controls→Image.

Applying Themes

When you build the report in Design View, you add design elements to the report manually. Formatting a report using the Themes feature enables you to create a report using color schemes available in Access. Themes contain design elements such as background color, font and font size, and so forth that quickly dress up a report without the tedious formatting of controls and background manually and individually. Applying a Theme improves the readability of the report and can make it look more professional. However, caution should be used when applying a Theme to a report because applying Access Themes reformats all objects in the active database with the color scheme defined in the Theme. Because reports are designed for printing, the formatting Themes apply is much more subtle for reports than it is for forms. As a result, you may wish to apply additional formatting controls after you apply the Theme.

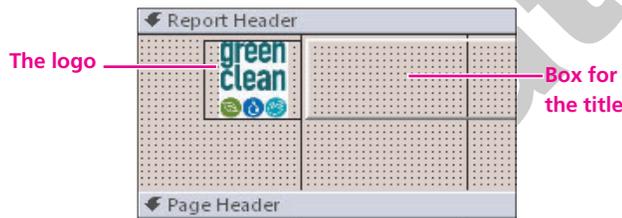
QUICK REFERENCE**APPLYING THEMES TO FORMS AND REPORTS**

Task	Procedure
Apply a Theme	<ul style="list-style-type: none"> ■ Prepare the report or form to which you want to apply the Theme. ■ Display the report or form in Design View or Layout View. ■ Choose Design→Themes→Themes  on the Ribbon. ■ Select the Theme to apply.

DEVELOP YOUR SKILLS 8.3.3**Add a Logo and Apply Themes to a Report**

In this exercise, you will add a logo to the Report Header section and apply a Theme to the report.

1. Display the Sales Report in **Design View**.
2. Choose **Design**→**Header/Footer**→**Logo**  on the Ribbon to open the Insert Picture dialog box.
3. **Open** the Lesson 08 folder and **double-click** the GC Logo.jpg filename.
Access places the logo in the upper left corner of the Report Header section, as shown. Notice, too, that there is a long narrow box immediately to the right and attached to the logo. This box is used to type a title on the report. You can delete the title box or use it to add a title to the report.



4. Choose **Design**→**Themes**→**Themes**  on the Ribbon and choose the **Trek Theme** from the palette.
Although you have selected a different format, you may see no difference in the report until you display the report in Layout or Report View.
5. **Save**  changes to the report and then **close**  it.

Formatting Controls**Video Lesson**

labyrinthlab.com/videos

Now that you have the elements you want to include on the report set, you can format the controls to make them visually effective. Aligning controls to ensure that the column headings appear where you want them, adding a title, and formatting the text and sizes of each control are just a few of the edits you can make. The procedures you use to format, align, size, and position the controls are the same procedures you used to format controls on forms.

Selecting Controls

Each control, as you are aware, contains two parts: the control label and the control text box. When you add a field control to a report, Access places both parts of the control on the report

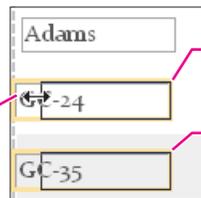
and you can reposition the label as you did earlier in this lesson. To select multiple controls at the same time, you have several options: Clicking each control individually, selecting all controls along a horizontal or vertical line, or outlining an area of the report to select all controls within the area.

Sizing Controls

An important part of any report is reporting and summarizing accurate data. Another part of reporting data is ensuring that the data is fully displayed in the report. To accomplish that, you need to size controls on the report so that they are large enough to display the longest data value for each field. Sizing controls is often more efficient in Layout View because the report is running and data displays as you size the control. As a result, you can be certain that data for all records has adequate space.

As you work in Layout View, you will find that active controls display a heavier border than inactive controls. Use the borders to size the control just as you used handles on active controls while working in Design View—drag the border. As you drag the border for the active record, the controls for that field on all records also resize, just as they would if you resized the control in Design View. The main difference is that in Design View, you only see one control—not multiple controls that represent multiple records.

As you drag a border, notice that the mouse pointer appears as a two-headed arrow.



The active control displays a broader border.

The borders of additional records also resize.

Identifying Mouse Shapes

The mouse pointer shape is important as you work with Design as well as Layout View. You've already seen how the mouse pointer appears when you are sizing a control. In addition to the sizing mouse shape, you will see the white pointer arrow accompanied by a four-headed black arrow that you use to move a control.

DEVELOP YOUR SKILLS 8.3.4

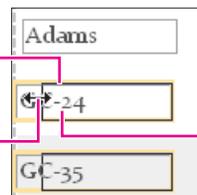
Set, Size, and Align Report Controls

In this exercise, you will use Layout View to reposition controls on the Sales Report, align the controls, and size the controls to fit the data.

1. Display the Sales Report in **Layout View** and follow these steps to size the control:

A Click the **GC-24** control to make it active.

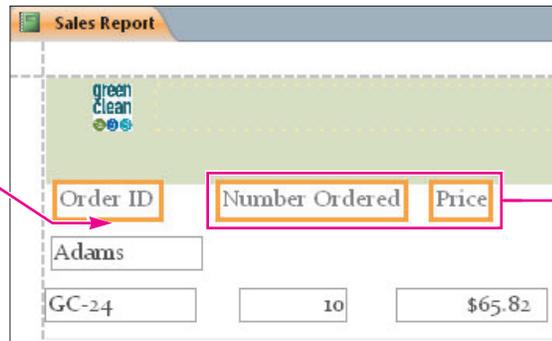
B Point to the **left border** of the control until the mouse shape appears as shown here.



C Drag the border to a position close to the **2** in the value.

2. Follow these steps to position and align the column headings:

A Click the **Order ID** control label and drag it to the right so that it appears centered above the column.



B Center the **Number Ordered** and **Price** labels above their columns.

3. Save  changes to the report and then close  it.

Adding a Title to the Report Header

Video Lesson labyrinthelab.com/videos

Titles identify the purpose of forms and reports and often contain only the name of the company. You can use Design View to add a Label control containing the title to the report or use the Title tool that is designed to specifically add and format a title. Both tools are available in both Design and Layout Views. When you use the Title tool to create a title for a form or report, Access places the report name as the title, positions it in the appropriate section of the form or report, and formats the text using the default settings. You can then change the text format if desired, using tools on the Ribbon and the Property Sheet. Because you have already applied a *Theme* to the report in this lesson, Access will format the title using settings that are active in the Theme.

Using the Property Sheet

The Property Sheet contains property settings that control the way many elements of database objects function and look. You have already used the Property Sheet to set data format in tables and form properties. Many of the same properties are available for controlling data display in reports.

DEVELOP YOUR SKILLS 8.3.5

Add a Report Title and Format Text

In this exercise, you will use Layout View to add a report title and format text using the Property Sheet and Ribbon.

1. Display the Sales Report in **Layout View**.
2. Choose **Design**→**Header/Footer**→**Title**  on the Ribbon.
Access places a title with the text Sales Report beside the logo at the top of the report.
3. Click the **Sales Report** title and choose **Design**→**Tools**→**Property Sheet**  on the Ribbon.

4. Change the following property settings to format the title control:

Property	Setting
Special Effect	Raised
Font Size	36
Width	3.5"
Text Align	Center
Font Weight	Semi-bold

5. Drag the **lower-right corner** of the logo and size it to the height of the title.
6. **Save**  changes and display the report in **Design View**.

Format Label Controls

7. Click the **vertical ruler** on the left in the Page Header section to select all column headings and choose **Format**→**Font**→**Bold** and set the size to **14**.
8. Size each **column heading** so that all text displays and then adjust the positions of the column headings appropriately.
9. Select the **Employees.LastName** text box in the Group Header section and set the following properties in the Property Sheet:

Property	Value
Back Color	Brown, Accent 2
Special Effect	Sunken
Fore Color	White
Font Size	16
Text Align	Center

10. Adjust the size of the **Employees.LastName** control and the height of each report section.
11. **Save**  changes to the report, view the report in **Layout View** and make additional adjustments, and then **close** it.

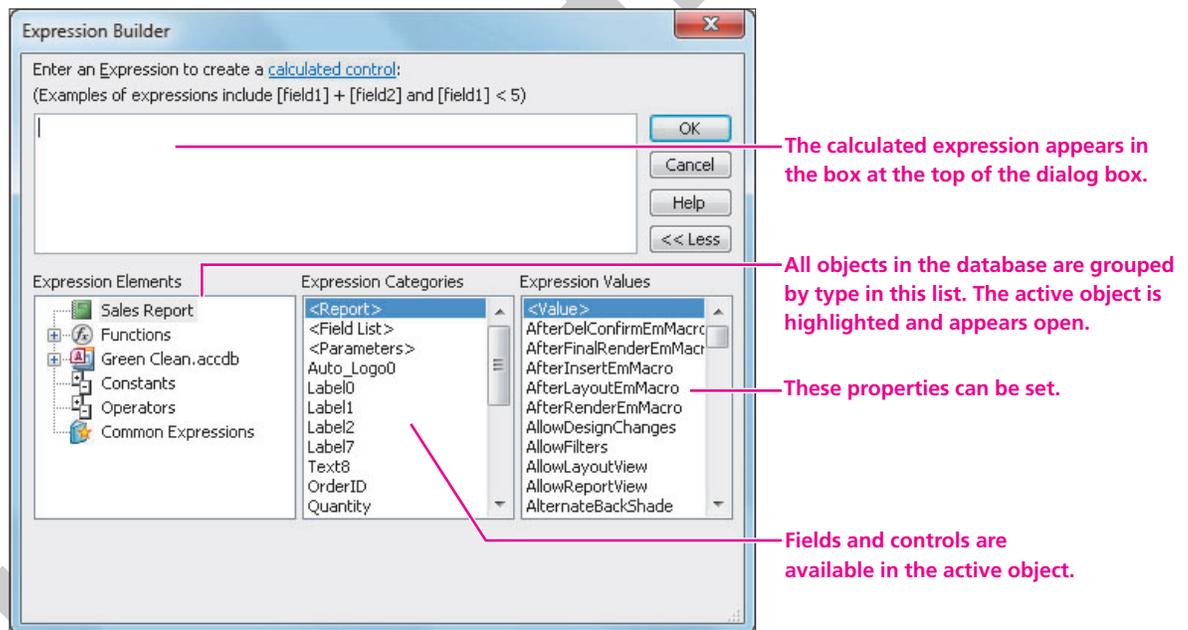
8.4 Performing Report Calculations

Video Lesson labyrinthelab.com/videos

By now, you have most likely learned how to create a calculated field in a query grid. You can also create *calculated controls* in reports that calculate values for each record based on data contained in table or query fields. When you position the calculated control in the Detail section, Access calculates the value for each record in the report each time you open and print the report. As a result, each time you update a value used in a calculated control, Access updates the report the next time you open and print it. The Text Box control is one tool you can use to create a control on the report to hold the calculated expression.

Using the Expression Builder

You can create a calculated control by typing control field names and operators (multiply, divide, add, subtract, etc.), symbols such as square brackets, and so forth, directly in the Control Source property in the Properties dialog box. However, many people find it easier to use the Expression Builder dialog box to build the expression. The Expression Builder dialog box contains features that enable you to paste field names and operators required for the expression right into the dialog box so that you can review the expression. You can use the Expression Builder to create expressions in queries, on forms, or on reports.



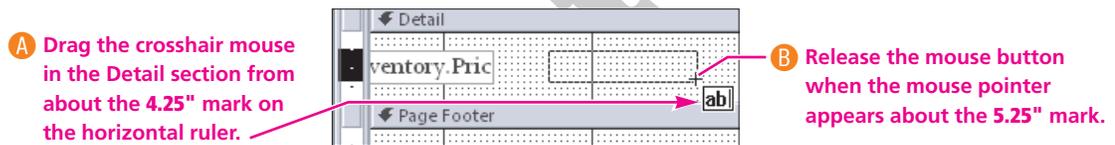
QUICK REFERENCE	USING THE EXPRESSION BUILDER
Task	Procedure
Create a calculated control using the Expression Builder	<ul style="list-style-type: none"> ■ Display the form or report in Design View. ■ Choose Design→Controls→Text Box  on the Ribbon. ■ Click or draw the control on the form or report palette where you want it to appear. ■ Press [F4] to display the Property Sheet and click the Data tab. ■ Click the Control Source property and then click the Build  button. ■ Add fields, operators, and other elements to the expression and then click OK.

DEVELOP YOUR SKILLS 8.4.1

Add a Calculated Control Using the Expression Builder

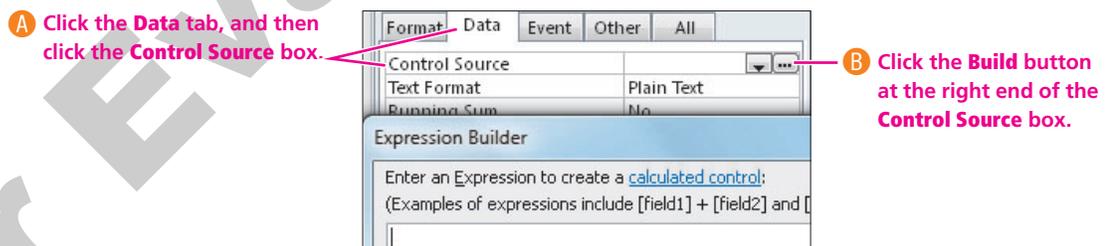
In this exercise, you will add a bound calculated control to the report that calculates the total sales for each record. You will use the Expression Builder and Design View.

1. Display the Sales Report in **Design View** and display the right side of the **Detail** section.
2. Choose **Design→Controls→Text Box ** on the Ribbon and follow these steps to create the control to hold the calculation:



Access places a unbound control text box on the report along with a control label.

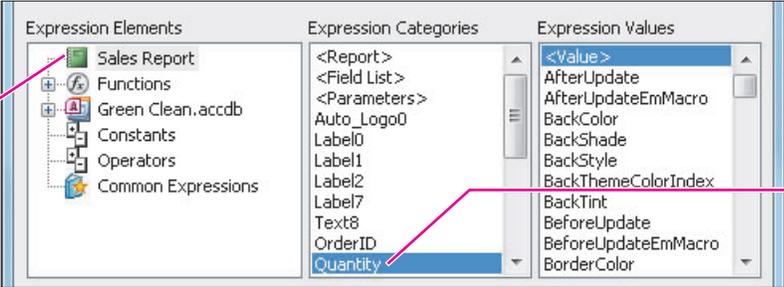
3. Press **[F4]** to display the Property Sheet and follow these steps to open the Expression Builder:



Access opens the Expression Builder dialog box.

4. Follow these steps to create the calculated expression:

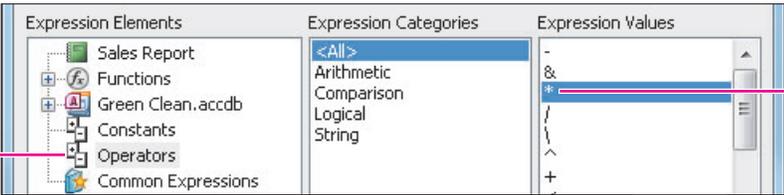
A Click **Sales Report** in the **Expression Elements** list.



B Double-click **Quantity** in the **Expression Categories** list to add it to the expression.

5. Follow these steps to add the operator to the expression:

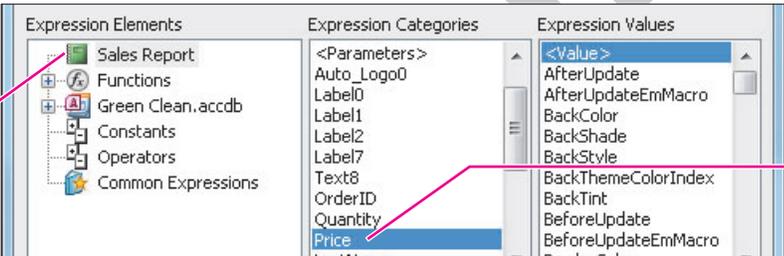
A Click **Operators** in the **Expression Elements** list.



B Double-click the asterisk (*) in the **Expression Values** list to add it to the expression.

6. Follow these steps to complete the expression:

A Click **Sales Report** in the **Expression Elements** list.



B Double-click **Price** in the **Expression Categories** list to add it to the expression.

Access adds the field to the box at the top of the Expression Builder.

7. Click **OK** to place the expression in the Control Source property box.
8. Click the **Property Sheet Format** tab and set the Format property to **Currency** and the Text Align property to **Right**.
9. **Right-click** the control label on the report and choose **Cut**; then **right-click** the Page Header section bar and choose **Paste** to place the control as a column heading.
10. Position the label above the calculated control text box and then **double-click** the label text and type **Item Total**.
11. Click the **Price** column heading (label).
12. Choose **Home**→**Clipboard**→**Format Painter**  on the Ribbon to pick up the format of the column heading.
13. Click the **Item Total** column heading to paint the format onto it and size the control to display all text.
14. Switch to **Report View** to display the report with totals and then **save**  it.

Creating Controls to Calculate Totals

Video Lesson labyrinthelab.com/videos

The calculated control you added to the report calculated a total for each item in the report. The calculated control appeared in the Detail section of the report. You can add calculated controls to other sections of the report so that the control performs a calculation on groups of records. For example, when you have a report that is grouped by sales person, such as the one you are creating, you can add the calculated control to the Group Footer section so that Access calculates a value for each group. And if you want a simple total at the end of a report, you would add the calculated control to the Report Footer section. You can even create a control that calculates sub-totals and then create a control that calculates a grand total at the end of the report.

Displaying the Group Footer Section

You may have noticed, when you set the report to group records by employee last name, that Access displayed the header but left the footer hidden. In most cases, the group footer is used only to display group summary data such as totals and calculations. As a result, before you can add a group total, you must first display the Group Footer section. You display the Group Footer section using the Group, Sort, and Total panel or by setting a function for a field in the Detail section.



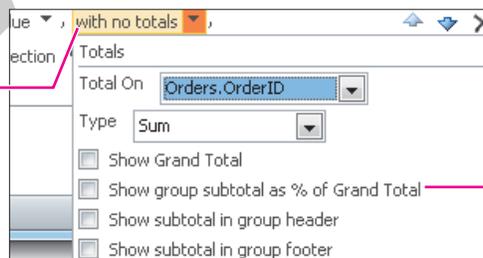
The Group bar expands to display additional options.

Feature options appear on drop-down menus.

Creating Aggregate Fields

In addition to creating calculated totals in the Group Footer section, you can total values, find averages, and set other aggregate functions directly from the Group bar in the Group, Sort, and Total panel. When you select a field control in the detail section of the report, you can also use the totals button on the Ribbon to set aggregate functions for the field.

Click the With No Totals list button to open the Totals options.



Set the field and position you want to display the totals and functions.

QUICK REFERENCE**USING GROUP, SORT, AND TOTAL FEATURES**

Task	Procedure
Display the Group Footer section	<ul style="list-style-type: none"> ■ Display the report in Design View. ■ Choose Design→Grouping & Totals→Group & Sort  on the Ribbon. ■ Click More on the Group bar for the group for which you want to display a footer. ■ Click the Without a Footer Section list button and choose With a Footer Section.
Set aggregate function totals from the Group bar	<ul style="list-style-type: none"> ■ Display the report in Design View. ■ Choose Design→Grouping & Totals→Group & Sort  on the Ribbon. ■ Click More on the Group bar for the group for which you want to display aggregate functions. ■ Click the with no totals list button and set the field, type, and position of the function you want to set.
Set aggregate function totals from the Ribbon	<ul style="list-style-type: none"> ■ Display the report in Design View and click the field control in the Detail section for which you want to set a function. ■ Choose Design→Grouping & Totals→Totals  on the Ribbon. ■ Choose the function you want to apply to the field.

DEVELOP YOUR SKILLS 8.4.2**Create Calculated Totals and Set Functions in Group Footers**

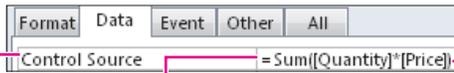
In this exercise, you will create a calculated total for each sales person and also set a function to calculate the total and average of other columns in the report.

1. Display the Sales Report in **Design View** and select the **Orders.Quantity** control in the Detail section.
2. Choose **Design→Grouping & Totals→Totals**  on the Ribbon and choose Sum. Access opens the EmployeeLastName Footer section and places the function in the footer.
3. Repeat the procedures outlined in **steps 1 and 2** to set an Average function for the Inventory.Price field in the Detail section.
4. Choose **Design→Controls→Text Box**  on the Ribbon and create a new text box at about the **5.5"** mark in the Employees.LastName Footer section.
5. Select the **calculated control** in the Detail section and copy and paste it into the Employees.LastName Footer section, positioning it at about the **5.5"** mark.
6. Open the **Property Sheet Data** tab and follow these steps to revise the expression to calculate total sales for each salesperson:

A Click the **Control Source** property.

B Type **Sum** (immediately after the = sign—be sure to include the open parentheses—and type the rest of the formula as shown).

C Type **)** at the end of the expression to close the parentheses.



7. Add a label using the **Label tool**  to the Page Header section above the control text box, add the text Sales Totals to the label, and format the label using the **Format Painter** to appear as the other column headings.
8. Switch to **Layout View** and review the report, adjusting the width of any field that displays #####. Pound symbols in a field indicate that the field is not wide enough to display the value.
9. **Save**  changes to the report and **close** it.

8.5 Creating Labels Using the Label Wizard

Video Lesson labyrinthelab.com/videos

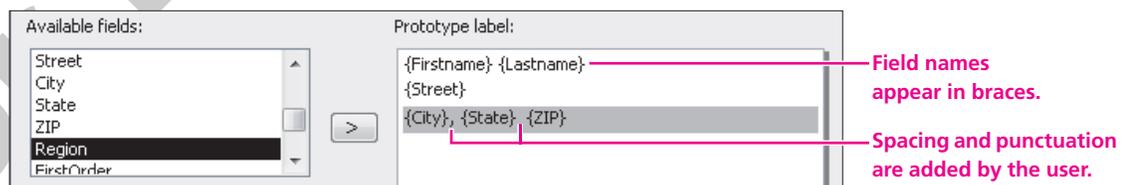
One common request people have of databases is the capability to print address labels using data contained in a database table. As a result, Access 2007 introduced a new wizard designed specifically for creating labels—it's called the Label Wizard. The Label Wizard steps you through screens from which you can make choices to set up labels using the data from specific tables or queries.

Setting Up the Labels

The procedures for using the Label Wizard are similar to those you have used to create other objects using wizards. The Label Wizard provides options for setting standard labels as well as for creating custom labels. The database object that is active when you start the wizard is the object Access assumes you want to use to create the labels. As a result, it is important to select or open the object before you start.

Adding Fields to the Labels

Adding fields to the labels is similar to adding fields to a Word document when you plan to use the document as a mail merge main document. As a result, it is necessary to add required spacing and punctuation to the label as you insert the fields. In addition, Access places curly braces { } around field names on the labels just as Word does.



A typical label design

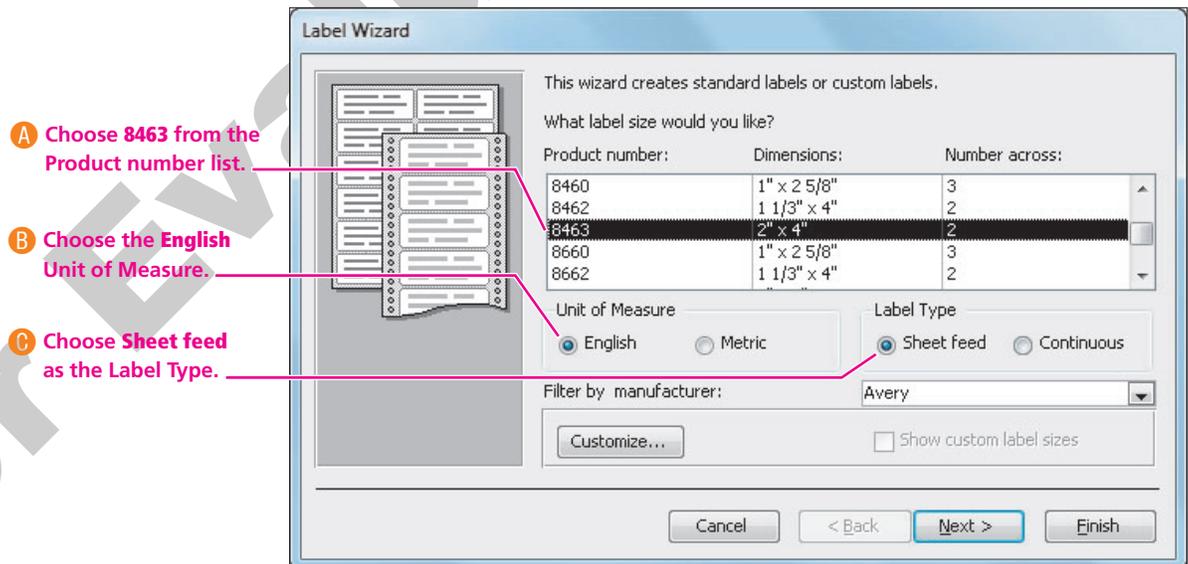
QUICK REFERENCE**CREATING LABELS**

Task	Procedure
Launch the Label wizard	<ul style="list-style-type: none"> ■ Select the table containing the data you want to use for the labels. ■ Choose Create→Reports→Labels .
Work through wizard screens	<ul style="list-style-type: none"> ■ Select the label type, format, and unit of measure you want to use for the labels and click Next. ■ Set the font, size, and color, and then click Next.
Add fields to a label	<ul style="list-style-type: none"> ■ Double-click the field names in the Available Fields list in the order you want them to appear on the label. ■ Add spacing, punctuation, and hard returns as needed to position the fields properly. ■ Click Next. ■ Select the field on which you want to sort the labels and click Next. ■ Type a label report name and click Finish.

DEVELOP YOUR SKILLS 8.5.1**Create Labels Using the Label Wizard**

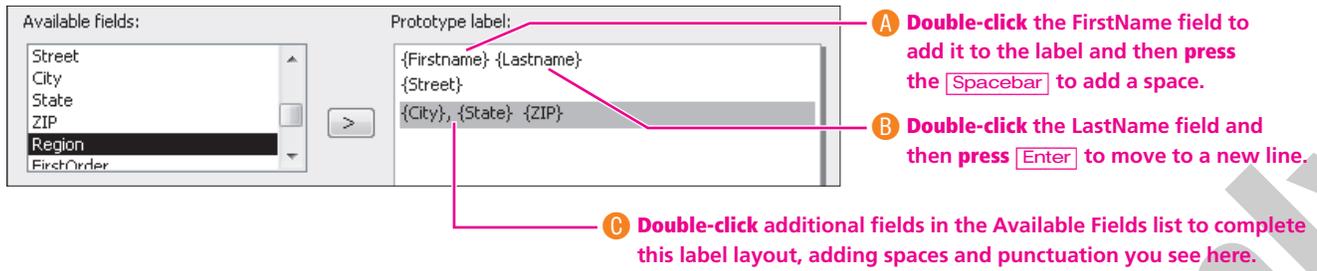
In this exercise, you will create mailing labels for addressing envelopes for a mass mailing to all customers in the Green Clean Reports database.

1. Click the **Customers** table in the Navigation Pane to make it active.
2. Choose **Create**→**Reports**→**Labels**  on the Ribbon to launch the Label Wizard.
3. Follow these steps to set the label type and size:



4. Click **Next** and set the Font Size to **10**.

5. Click **Next** and follow these steps to set up the prototype label:



6. Click **Finish** to complete the labels; click **OK** if Access displays a message about label size. Access saves the report using the default report name and displays the labels in Print Preview.

7. **Close**  the report.

8.6 Printing Reports

Video Lesson labyrinthlab.com/videos

Reports in Access provide the main output source for disseminating information from the database. As a result, creating meaningful reports is important to the success of the database. After you create and format reports, set grouping and sorting levels, and add summary controls, you are ready to test the report by printing it.

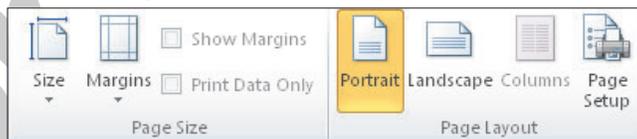
FROM THE KEYBOARD

Ctrl+P to open the Print dialog box

Procedures for printing reports are basically the same procedures you would use to print files in other programs, such as Word, Excel, and PowerPoint. As with each different program, print options in Access vary with different objects. For example, you can print individual pages, all pages, or a set range of pages.

Setting Report Print Layout

Commands on the Page Setup tab of the Ribbon enable you to set up the basic page layout for a report. Using these commands, you can change the paper size and orientation, set margins and columns, and instruct Access to print the data only—leaving the design elements off.



Page Layout tools on the Page Setup tab.

Controlling Page Breaks

If you have used Word to create long documents, you know that controlling page breaks is important to prevent an individual line of a paragraph (often called a widow or orphan) from appearing on a page by itself. The same is true for printing reports. You want to adjust settings so that a group header section stays with at least the first record in the report and also to prevent an individual record or line of a report section from appearing alone. Access contains features that you can set to contain report sections and produce a better organized report.

Setting Page Breaks

Setting a page break on a report is different from setting a hard page break in a Word document or Excel worksheet. Because your report design contains controls for defining the report layout, it can be challenging to determine how many records will appear for each group, and the number of records shown in each group usually varies for each group heading. As a result, setting a page break is an uncertain way to try to control page printouts.

Setting Group Controls

Instead of setting page breaks for printing reports, Access enables you to control how you want to keep groups together on report pages. Setting these controls prevents lone headers on report pages and enables you to keep each group on a single page. Setting these controls also reduces excessive page printouts.

QUICK REFERENCE	PRINTING REPORTS
Task	Procedure
Display Print Preview	<ul style="list-style-type: none"> ■ Display Report View. or ■ Choose File→Print→Print Preview.
Print specific pages	<ul style="list-style-type: none"> ■ Choose File→Print→Print to display the Print dialog box. ■ Select the Pages option and enter the page numbers you want to print.
Print all report pages	<ul style="list-style-type: none"> ■ Choose File→Print→Quick Print. or ■ Choose File→Print→Print to display the Print dialog box. ■ Click OK. or ■ Press Ctrl+P to display the Print dialog box. ■ Click OK.

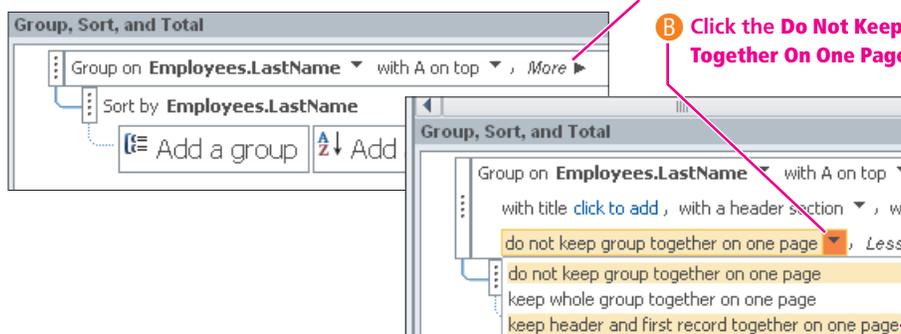
DEVELOP YOUR SKILLS 8.6.1

Set Print Options

In this exercise, you will set up the report for printing and print the report.

1. Display the Sales Report in **Design View** and display the **Group, Sort, and Total** panel.
2. Follow these steps to set page controls:

A Click **More** on the **Group** bar in the **Group, Sort, and Total** panel.



3. **Save**  the report and display it in **Print Preview**, navigating to multiple pages.
4. Choose **Print Preview**→**Print**→**Print**  on the Ribbon to print the report and then **close** it, **close** the database, and **exit** Access.

8.7 Concepts Review

Concepts Review labyrinthlab.com/acc10

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz by going to the URL listed above. If your classroom is using Labyrinth eLab, you may complete the Concepts Review quiz from within your eLab course.



Reinforce Your Skills

REINFORCE YOUR SKILLS 8.1

Create a Report in Design View

Lagniappe Cruises is preparing to publish a brochure that describes its cruises for next year. In preparation for this brochure, they would like to have a report that tallies the total cost of each room type based on occupancy. In this exercise, you will create the shell of the report and add fields to the report.

1. **Open** the rs-Lagniappe Cruises database from the Lesson 08 folder and **save** the file using the filename **rs-Lagniappe Reports**.
2. Choose **Create**→**Reports**→**Report Design**  on the Ribbon to create the report.
3. Choose **Design**→**Tools**→**Add Existing Fields**  on the Ribbon to open the Field List.
4. **Expand** (+) the Cruises table to display the field list for the table.
5. **Drag** the following fields to the report Detail section in the order listed: SailDate, Destination, Ship, InsideCabin, OutsideCabin, Verandah.
6. **Right-click** the SailDate label and choose **Cut**; then **right-click** the Page Header and choose **Paste**.
7. Repeat the procedures outlined in **step 6** to cut and paste the Destination and ShipName labels in the Page Header, dragging the labels to appropriate positions above the field text box control.
8. **Drag** additional fields into the following positions on the report:

Page Header			
SailDate	Destination	Ship Name	
Detail			
SailDate	Destination	Ship	
InsideCabin	InsideCabin		
OutsideCabin	OutsideCabin		
Verandah	Verandah		

9. **Print** a copy of the report design.
10. **Save**  the report using the report name **Cruise Costs** and leave it **open**.

REINFORCE YOUR SKILLS 8.2**Add Group Levels, Time, and Date to the Report**

Before formatting and enhancing the report you created, you need to better organize the report so that it shows data grouped by date and subgrouped by destination. In this exercise, you will add two group levels to the report and also add time and date controls.

1. Display your Cruise Costs report in **Design View**.

Set Grouping

2. **Right-click** the Destination control in the Detail section and choose **Group On**.
3. **Right-click** the Destination control in the Detail section again and choose **Cut**; then **right-click** the Destination Header section and choose **Paste**.
4. Repeat the procedures outlined in **steps 2 and 3** to create another group using the Sail-Date control in the Detail section.

Align Controls

5. Click the **vertical ruler** even with the first cabin controls and drag the mouse down to select all six cabin controls.
6. Choose **Arrange**→**Sizing & Ordering**→**Size/Space**→**To Widest**  to size the controls evenly.
7. Choose **Arrange**→**Sizing & Ordering**→**Size/Space**→**Equal Vertical**  to distribute the controls evenly.
8. Select the three cabin labels and choose **Arrange**→**Sizing & Ordering**→**Align**→**Left**. 
9. Repeat the procedures outlined in **step 8** to align the cabin text boxes on the left.

Add Date & Time Controls

10. Drag the **Page Footer** section bar up and position it just below the **Verandah** controls.
11. Choose **Design**→**Header/Footer**→**Date & Time**  and set options to add the date and time to the report using a format you prefer.
12. Adjust the positions of additional controls to appear as follows and delete the **Destination** and **SailDate** control labels in the Page Header:

Report Header				
				=Date()
				=Time()
Page Header				
	Ship Name			
Destination Header				
Destination				
SailDate Header				
	SailDate			
Detail				
	Ship			
	Inside Cabin		InsideCabin	
	Outside Cabin		OutsideCabin	
	Verandah		Verandah	

When you group on the Destination and SailDate fields, the labels for the controls no longer appear in the Page Header section of the report.

13. Switch to **Layout View**, review the report, and adjust the size of the destination control to display all text.
14. **Save**  changes to the report and **print** a copy of the report.

REINFORCE YOUR SKILLS 8.3

Format and Enhance the Report

You have now established the skeleton of the report. Adding a title and graphics as well as graphic elements to the report will enhance its appearance. In this exercise, you will add a title and logo to the report header section, format text controls, and format the report.

1. Display the Cruise Costs report in **Design View** and drag the border of the **Report Footer** section down to make the section larger.
2. Select both the **Date** and **Time** controls that appear in the Report Header section.
3. **Right-click** the selected controls and choose **Cut**; then **right-click** the Report Footer section and choose **Paste** to move the controls to the footer.

Add and Format a Logo

4. Choose **Design**→**Header/Footer**→**Logo**  and **double-click** the rs-Lagniappe Cruises Logo.gif file in the Lesson 08 folder to add the logo to the report.
5. Close the **Field List** panel and **press** **[F4]** to open the Property Sheet.
6. Click the **Border Color** property and choose **White** from the color palette.

Add and Format a Title

7. Choose **Design**→**Header/Footer**→**Title**  and then set the following properties:

Property	Setting
Font Size	72
Fore Color	Orange, Accent 6

8. Size the **title control** to display all text on one line and position the title appropriately.
9. Size the **logo control** appropriately.

Format Detail Section Controls

10. Select all label controls in the **Detail** section, apply the following properties, and drag the left border of the controls to size them appropriately:

Property	Setting
Fore Color	Orange, Accent 6
Font Size	14
Font Weight	Bold

11. Select the **Cabin** text box controls, set the following properties, and then drag the right border of the controls to size them appropriately:

Property	Setting
Fore Color	Accent 6, Darker 25%
Font Size	14
Font Weight	Extra Bold

Format Group Controls

12. Select the **Destination** and **SailDate** controls in the group headers, apply formatting to the controls appropriately, and then size the controls appropriately.
13. Delete the **Ship Name** label in the Page Header section; then select the **Ship** control in the Detail section, set formatting properties of your choice, and size the control appropriately.
14. Display the report in **Layout View** and size the **Destination** group header so that the right edge appears close to the right margin border as shown.

Australia/New Zealand	
11/24/2010	
Laissez Faire	
Inside Cabin	\$1,899.00
Outside Cabin	\$1,999.00
Verandah	

15. Make additional adjustments as necessary to the report, **save**  changes to the report, and then **print** a copy of it.

REINFORCE YOUR SKILLS 8.4

Create Calculated Controls

The report you are building is shaping up nicely. Each cabin on the all ships is designed to hold two people. Connecting cabins are designed for families who take a cruise. To report the total cost of each cabin for each cruise, you need to add some calculated controls to the report. In this exercise, you will use the Expression Builder to add the calculated controls to the report.

1. Display the Cruise Costs report in **Design View** and **press** **[F4]** to open the Property Sheet.
2. Choose **Design**→**Controls**→**Text Box**  on the Ribbon and then click the **Detail** section beside the Inside Cabin text box.
3. In the Property Sheet, click the **Data** tab, choose the **Control Source** property and click the **Build** button to launch the Expression Builder.
4. Click the **Cruise Costs** report in the Expression Elements list and **double-click** the InsideCabin field from the Expression Categories list to add it to the Expression Builder; then type ***2** to complete the expression and click **OK**.

5. In the Property Sheet, click the **Format** tab and set the Format property to **Currency**.
6. Repeat the procedures outlined in **steps 2–5** to create calculated controls for the Outside Cabin control and the Verandah control, substituting the appropriate field name in the expression and setting both to Currency format.
7. **Delete** the labels for each control you added.

Add a Label Control

8. Choose **Design**→**Controls**→**Label**  and place a label control containing the text **Total Cost** beside the Ship control in the Detail section.

Format the New Controls

9. Click the **Ship** control in the Detail section and choose **Design**→**Font**→**Format Painter** to pick up the format applied to the control and then click the Total Cost label to apply the format to the label.
10. Repeat **step 9** to pick up the format of the cabin text boxes and apply it to the calculated controls.
11. **Align** controls appropriately and then **save**  changes to the report.
Your report should appear similar to:



Laissez Faire		Total Cost
Inside Cabin	\$1,899.00	\$3,798.00

REINFORCE YOUR SKILLS 8.5

Create Count Totals

The number of cruises to each destination is a value that is also required for this report. In this exercise, you will create a total count of cruises for each destination.

1. Display the Cruise Costs report in **Design View** and click the **Destination** control in the Destination Header section.
2. Choose **Design**→**Grouping & Totals**→**Group & Sort**  and click More on the Group on Destination bar.
3. Follow these steps to show a count of each destination in the footer section:

A Click the **With No Totals list button**.

B Choose **Destination** from the **Total On list**.

C Check the **Show Subtotal In Group Footer** checkbox.

with Destination totaled ▾

Totals

Total On: Destination ▾

Type: Count Values ▾

Show Grand Total
 Show group subtotal as % of Grand Total
 Show subtotal in group header
 Show subtotal in group footer

Access creates the count function in the Destination Footer section of the report.

4. Drag the **Page Footer** section bar down to make the Destination Footer section larger; then click the **Count** control and choose **Format**→**Font**→**Align Text Right** on the Ribbon.
5. Display the report in **Report View** and compare the listings for Australia/New Zealand on your report to the one shown here:

Australia/New Zealand		
11/24/2010		
Laissez Faire	Total Cost	
Inside Cabin	\$1,899.00	\$3,798.00
Outside Cabin	\$1,999.00	\$3,998.00
Verandah		
12/08/2010		
Laissez Faire	Total Cost	
Inside Cabin	\$1,599.00	\$3,198.00
Outside Cabin	\$1,799.00	\$3,598.00
Verandah	\$6,679.00	\$13,358.00

Total cruises to the first listed destination is 2.

6. Save  the report, **print** a copy, and then **close** it.

REINFORCE YOUR SKILLS 8.6**Create Labels**

Mailing labels is only one type of label you can create using the Label Wizard. You can also create file folder labels and many other types. In this exercise, you will create a simple file folder label to use for creating labels for Lagniappe Cruise destinations.

1. Select the **Cruises** table and choose **Create→Reports→Labels**  to launch the Label Wizard.
2. Take the following actions on the Wizard screen indicated, clicking **Next** to advance to the next screen:

Screen	Action
1	Choose Label #8257
2	Choose Font Size 10
3	Move Destination to the Prototype Label
4	No changes
5	Type Destination File Labels as the report title.

3. **Print** a copy of the report and then **close** the report, **close** the database, and **exit** Access.

Apply Your Skills



APPLY YOUR SKILLS 8.1

Create a Report in Design View

Raritan Clinic East continues to work on their database. They have finalized forms and have moved on to creating reports. In this exercise, you will create a report using data from the Resources table.

1. **Open** the as-Raritan Clinic database in your Lesson 08 folder and **save** the database as a new file named **as-Raritan Clinic Reports**.
2. Create a new report in **Design View** that is based on the Resources table.
3. **Drag** controls for the following fields to the Detail section and place them side by side in the order shown: ResourceTypeID, ResourceFirstName, ResourceLastName.
4. **Delete** the label control for the **ResourceTypeID** field and move the labels for the name controls to the **Page Header** section.
5. **Save**  the report using the report name **Resources** and **print** a copy of the report. Leave the report **open**.

APPLY YOUR SKILLS 8.2

Group Data in the Report

Grouping the resources by type helps locate resources when substitutes are needed. In this exercise, you will create a grouping level for the report you started in Apply Your Skills 8.1 and add a date control to the Report Footer section.

1. Display the Resources report in **Design View**.
2. Choose the **ResourceTypeID** control in the Detail section and set it as the **Group On** field.
3. Move the **ResourceTypeID** control to the **ResourceTypeID Header** section of the report.
4. Add the **Date** control without the Time control to the report and move it to the **Page Footer** section.
5. Adjust the size of the **Detail** Section.
6. **Save**  changes to the report and leave it **open**.

APPLY YOUR SKILLS 8.3

Format the Report

The plain report you have created so far is a nice basic structure of a report. Formatting the report so that text appears more vivid and sections are more appropriately sized to report the data will improve the appearance of the report. In this exercise, you will apply a Theme to the report, format report controls, and size the report sections.

1. Display the Resources report in **Design View** and size the **Detail** section so that it is just tall enough to accommodate the controls.
2. Format the report by applying the **Opulent Theme** to the report.
3. Set **control properties** for the controls to improve their appearance.
4. **Align** the controls in the Detail section at the top.
5. Size the **Detail** and **ResourceTypeID Header** sections so that they are large enough for the controls they contain.
6. Switch to **Layout View** and adjust the sizes of the controls to display data appropriately on the report.
7. **Save**  changes to the report, **print** a copy, and then **close** the report.

APPLY YOUR SKILLS 8.4

Add a Logo and Title to the Report

The Raritan Clinic East report now contains the data and format you want to display. In this exercise, you will add a title and logo to the report.

1. Display the Resources report in **Design View** and make the **Report Header** section active.
2. Add the as-Raritan Clinic Logo.jpg graphic to the **Report Header** section of the report and position it on the right side of the section.
3. Add a **title** to the report and position it on the left side of the **Report Header** section.
4. Type **Resources by Type** in the new title box and format the title by setting the font size to **40**.
5. **Size** and **position** the logo and title appropriately.
6. **Save**  changes to the report and leave it **open** for the next exercise.

APPLY YOUR SKILLS 8.5

Add a Control and Edit the Control Source

The group header identifies the coded resource type ID. Unless those who view the report know what each type of resource represents, they will have no idea how many nurses, staff, etc., are listed. In this exercise, you will add a new control to the report and edit the control source property to select the appropriate table.

1. Display the Resources report in **Design View** and display the **Field List** panel.
2. Expand the field list for the **Resource Types** table and drag the **ResourceType** field to the **ResourceTypeID Header** section, positioning it beside the existing control in the section.
3. Copy the format from the **ResourcesID** control to the **ResourceTypeID** control in the group header section, align the controls appropriately, and delete unnecessary control labels.
4. Display the report in **Layout View** and size the controls in the group header section appropriately to display all data.
5. **Save**  the report and leave it **open** for the next exercise.

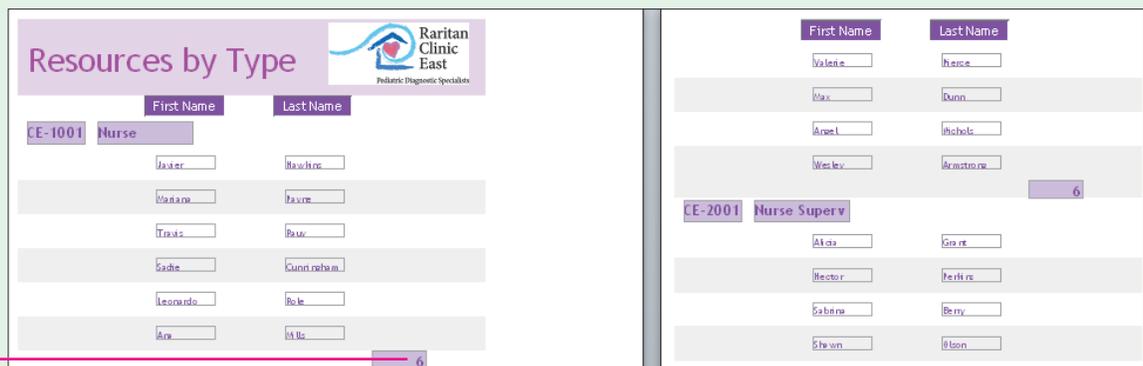
APPLY YOUR SKILLS 8.6

Add Totals to Count the Entries in Report Groups

The report for the clinic database is almost complete. In this exercise, you will add totals that count the number of records for each group.

1. Display the Resources report in **Design View** and display the **Group, Sort, and Total** panel.
2. Create a total that counts the **resource records** for each resource type and displays the **total** in the group footer section.
3. Display the report in **Report View** and compare your report to the one shown here:

Each group total appears before the next group heading.



Group ID	Resource Type	First Name	Last Name
CE-1001	Nurse	Isabel	Blanchinc
		Madara	Payne
		Tomas	Bauer
		Sadie	Cunningham
		Leonardo	Bole
		Ann	Walt
6			
CE-2001	Nurse Superv	Alice	Garret
		Hector	Herlires
		Sabrina	Berry
		Steven	Bison
		Valene	Ruise
		Max	Quinn
6			

4. **Save**  the report, **print** a copy, and then **close** the report, **close** the database, and **exit** Access.

Critical Thinking & Work-Readiness Skills



In the course of working through the following Microsoft Office-based Critical Thinking exercises, you will also be utilizing various work-readiness skills, some of which are listed next to each exercise. Go to labyrinthelab.com/workreadiness to learn more about the work-readiness skills.

8.1 Create a Report that Prints Labels

Green Clean is preparing to set up files for all customers in the database. They would like you to prepare a report for the database that they can use to create file folder labels. Follow these guidelines to prepare the report:

- Use the ct-Green Clean Reports (Lesson 08 folder).
- Format the labels so they print file folder label format from the Green Clean Customers table.
- Sort the labels on the Last Name field.
- Print a copy of the labels on plain paper.

WORK-READINESS SKILLS APPLIED

- Applying technology to a task
- Improving or designing systems
- Thinking creatively

8.2 Create, Format, and Total a Custom Report

Green Clean's corporate offices have just contracted with First Perk, an onsite coffee shop, to provide beverage service. First Perk has its own database for which they want to add custom reports. The manager explains that they would like a report that groups orders by sales person, totals each order, and totals all orders for each sales person.

Create a report that meets the manager's criteria using a query as a record source. Format the report using appropriate design elements, and save the report with the title **Sales Summary**. The logo for First Perk can be found in the Lesson 08 folder. Print the report.

WORK-READINESS SKILLS APPLIED

- Thinking creatively
- Making decisions
- Organizing and maintaining information

8.3 Use Teamwork to Design a Custom Report Layout

Green Clean's management team, none of them database experts, challenges your team of consultants to produce reports from their database that provide "higher value" information, though they are not specific in their requests. Collaborate with your team to identify the types of reports you believe Green Clean could effectively add to the database. Then, design a report layout that can be applied to the reports and create at least two new reports for Green Clean. Add the reports to the Green Clean Reports database you have used throughout this lesson. Customize the reports using your collaborative creative imaginations.

WORK-READINESS SKILLS APPLIED

- Seeing things in the mind's eye
- Thinking creatively
- Solving problems