

CREATING CUSTOM REPORTS IN DESIGN VIEW

To create this report, you will be using the **Jobs** database that is supplied by clicking on the link in the explanation section for the Access page.

When a report is created in Design view, three sections of the report appear-Page Header, Detail, and Page Footer. Once the report is created, it needs to have controls added to display the data from the table or query on which it is based. Bound controls may be added from the field list or other types of controls may be added from the Toolbox.

Reviewing and Creating Queries for a Custom Report

Before we create the reports, we need to look at the queries the report is going to be based on. Also, we need to create a new query that will be used to create this report.

Reviewing the Queries

- ❖ Open the database **Jobs** from the folder where it was stored when it was downloaded from the **Access** Web page.
- ❖ Click **Queries** in the **Objects Bar**.
- ❖ Click the **NAICS and Employers** query.
- ❖ Scroll right to view the fields in the query and then switch to **Design View**.
- ❖ The tables for this query are the **NAICS** and **Employer** tables.
- ❖ Close this query.
- ❖ Open the **Potential Placement Fees** query in **Design View**.
- ❖ Right-click the **PlacementFee** field text box.
- ❖ Click **Zoom** on the **Shortcut Menu**.
- ❖ Place the insertion point at the end of the text in this box.
- ❖ This field determines an employer's placement fee for a position by multiplying the weekly wages by two, and then multiplying by the number of openings for the position.
- ❖ Click the **OK** button and then run the query.
- ❖ Close the query. Click **No** if you are asked to save design changes to the query.

Creating the Potential Income by Employer Query

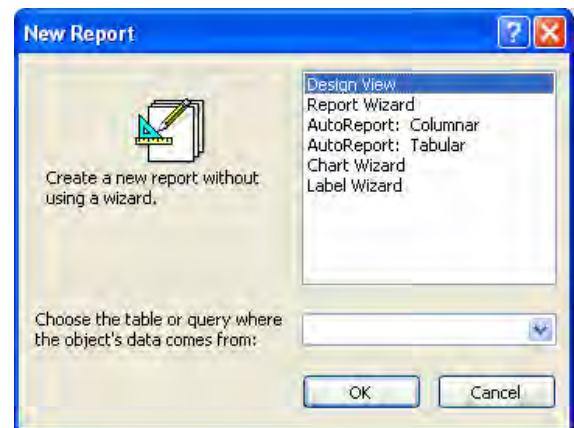
- ❖ Double-click **Create query in Design View**.
- ❖ Double-click the **Position** table in the **Show Table** dialog box.
- ❖ Click the **Close** button.
- ❖ Add the **EmployerID** and **Openings** fields to the **Design** grid.
- ❖ Click the **Totals** button on the toolbar (see illustration at right).
- ❖ Change the **Group by** in the **Totals** row for **Openings** to **Sum**.
- ❖ Click to the **left** of the word **Openings** in the **Field Text Box**.
- ❖ Input **TotalOpenings:** before the word **Openings**. DO NOT put a space between Total and Openings.
- ❖ When the query is run, **TotalOpenings** will appear at the top of the column instead of **Openings**. This will become the Field Name for this query.
- ❖ Right-click the **Field** text box in the **third** column.
- ❖ Click the **Zoom** option on the shortcut menu.
- ❖ To create the **Calculated Field**, input **PlacementFee:2*Openings*[Hours/Week]*Wage**.
 - **PlacementFee** becomes the name of the field for the query.
 - The Hours/Week field was enclosed in brackets because field names containing spaces or special characters must be enclosed in brackets.



- If brackets are omitted from other field names, Access adds them automatically when the Zoom dialog box is closed.
- ❖ Click the **OK** button to exit the **Zoom** dialog box.
- ❖ In the **Total** row for the **Placement Fee** column, leave the default of **Group by**.
- ❖ Make sure the Show check box is selected.
- ❖ Right-click the **Field** text box in the **fourth** column and then click **Zoom**.
- ❖ To create the **Calculated Field**, input **PotentialIncome:**
IIf([TotalOpenings]>=3,[PlacementFee]+200,[PlacementFee]+500).
 - **Potential Income** becomes the name of the field for this query.
 - This formula will check to see if the **Total Openings** is **Greater Than** or **Equal** to **3**.
 - If the **Total Openings** meets the specification, then **200** will be added to the **Placement Fee**.
 - If the **Total Openings** doesn't meet that specification, then **500** will be added to the **Placement Fee**.
- ❖ Click **OK** to exit the **Zoom** dialog box.
- ❖ In the **Total** box for this field, choose **Expression**.
- ❖ Save the query as **Potential Income by Employer**.
- ❖ Run the query to see if it works properly.

Creating a Report

- ❖ In the Database window, click **Reports** on the **Objects Bar**.
- ❖ Click the **New** button on the toolbar.
- ❖ The **New Report** dialog box will open.
- ❖ Click **Design View**.
- ❖ Click the drop-down arrow next to **Choose the table or query where the object's data comes from**.
- ❖ Choose the query **NAICS and Employers** from the list.
- ❖ Click **OK** to open the **Design View** dialog box.
- ❖ The report will appear with the **Page Header**, **Page Footer**, and **Detail** section displayed.
- ❖ The **Toolbox**, **Properties Box**, and **Field List** should be displayed in the window.
 - The **Field List** contains the fields from the table that was chosen earlier.
 - The **Toolbox** is used to insert controls into the report. A list and description of the **Toolbox** buttons can be found under the **Toolbox Control Buttons** link on the **Access** Web page.
 - The **Properties** box is used to make changes to the different controls.
- ❖ Click the **Maximize** button on the **Report** window.
- ❖ Change the width of the report to **5.5-inches**, if necessary.
- ❖ To change the width of the report:
 - Move the mouse pointer to the edge of the gray area in the **Design** window.
 - The mouse pointer will change to the shape illustrated at the right.
 - Click and drag the mouse pointer until the gray area reaches the 5.5-inch mark on the ruler.



Sorting and Grouping Data in a Report

Access allows you to organize records in a report by sorting them using one or more sort keys. Each sort key can also be a grouping field. If you specify a sort key as a grouping field, a Group Header section and a Group Footer section will be added to the report. A report can have up to 10 sort fields and any of its sort fields can be a grouping field.

- ❖ Do one of the following to open the Sorting and Grouping dialog box:
 - Click the **Sorting and Grouping** button on the **Report Design** toolbar (see illustration).
 - Click **View** on the **Menu Bar** and then select **Sorting and Grouping**.



- ❖ The **Sorting and Grouping** dialog box will display (see illustration).
- ❖ Click the list arrow in the first **Field/Expression** text box to display the list of available fields.
- ❖ Click **NAICSDesc**.
- ❖ Leave the **Sort Order** as **Ascending**.
- ❖ Click the drop-down arrow for the **Group Header** option and click **Yes**.
- ❖ The **NAICSDesc Group Header** will be added to the report.
- ❖ To specify the secondary sort key, click the drop-down arrow for the second **Field/Expression** text box.
- ❖ Click **EmployerName** from the list of field names.
- ❖ Accept the defaults for all the other options.
- ❖ Close the **Sorting and Grouping** dialog box.
- ❖ Once the report is completed, click the **Close** button.
- ❖ When the prompt appears to name the report, insert **Potential Income**, and then click **Yes**.
- ❖ Click the **OK** button to save the report.
- ❖ The name of the report will appear in the database under **Reports**.

