CREATING CUSTOM REPORTS IN DESIGN VIEW

To create this report, you will be using the **Jobs** database that is available by clicking on the link in the explanation section of the **Access 2007 Training Web 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

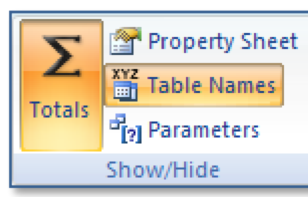
Before we create the reports, we need to look at the queries the report is going to be based on. Also, we need to create a new query that will be used to create this report.

Reviewing the Queries

- Open the database **Jobs** from the folder where it was stored when it was downloaded from the **Access 2007 Web Page**.
- Open 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** by clicking the **View** button.
- 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

- Click the **Create Tab**.
- In the **Other Group**, click the **Query Design** button.
- 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 in the **Show/Hide Group** (see illustration at right).



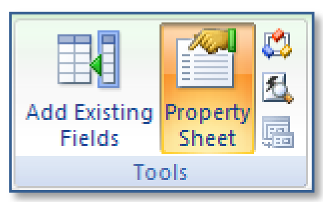
- Change the **Group by** in the **Totals** row for **Openings** to **Sum**.
- Click to the **left** of the word **Openings** in the **Field Text Box**.
- Input **TotalOpenings:** before the word **Openings**. DO NOT put a space between Total and Openings.
- When the query is run, **TotalOpenings** will 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.

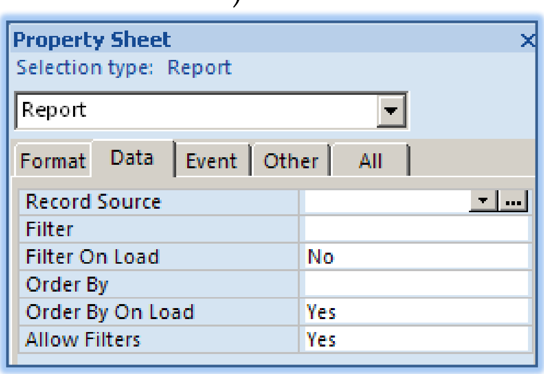
- ❖ Click the **OK** button to exit the **Zoom** dialog box.
- ❖ In the **Total** row for the **Placement Fee** column, leave the default of **Group by**.
- ❖ Make sure the **Show** check box is selected.
- ❖ Right-click the **Field** text box in the **fourth** column and then click **Zoom**.
- ❖ To 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 the **Create Tab**.
- ❖ In the **Reports Group**, click **Report Design**.
- ❖ The **Design View** window will display.
- ❖ The report will appear with the **Page Header**, **Page Footer**, and **Detail** section displayed.
- ❖ 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.
- ❖ In the **Tools Group**, click the **Property Sheet** button (see illustration at right).



- ❖ In the **Selection Type** box, make sure **Report** is selected.
- ❖ Click the **Data Tab** (see illustration below).

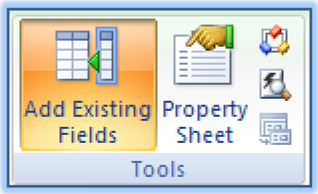


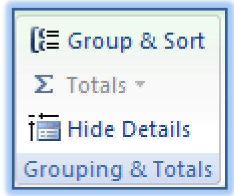
- ❖ Click the **Record Source** arrow.
- ❖ Choose the query **NAICS and Employers** from the list.

Sorting and Grouping Data in a Report

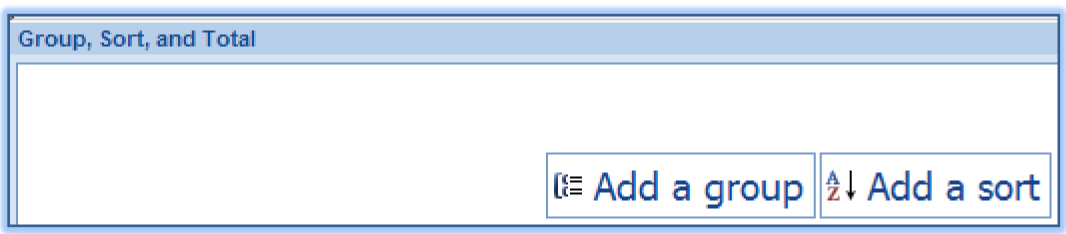
Access allows you to organize records in a report by sorting them using one or more sort keys. Each sort key can also be a grouping field. If you specify a sort key as a grouping field, a Group Header section and a Group Footer section will be added to the report. A report can have up to 10 sort fields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

- Click the **Design Tab**, if necessary.
- In the **Tools Group**, click the **Add Existing Fields** button (see illustration below left).

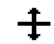




- Click the **Show all tables** link at the bottom of the **Property Sheet**, if necessary.
- Click the link for **Show only fields in the current record source**. This link appears at the bottom of the **Property Sheet**.
- In the **Grouping and Totals Group**, click the **Group and Sort** button (see illustration above right).
- The **Sort, Group, and Total** area will appear at the bottom of the window (see illustration below).



- Click **Add a Group**.
- A new group will appear with a list of the fields in the current record source.
- Click **NAICSDesc**.
- Click the **Add a sort** button.
- Select **NAICSDesc** from the list.
- To specify the secondary sort key, click the **Add a sort** button again.
- Click **EmployerName** from the list of field names.
- Close the **Group, Sort and Total** area by clicking the **Group and Sort** button again.
- In the **Fields List** click the **NAICSDesc** field and drag it to the **one-inch (1)** position on the **horizontal** grid in the **NAICSDesc** group area.
- Drag the following fields to the **Detail Section** of the Report.
  - Employer Name
  - Address
  - City
  - State/Province
  - Postal Code
  - Position
  - Phone
- Place the fields at the **one-inch (1)** position on the **horizontal** grid.
- Close the **Field List**.
- Move the **Postal Code**, **Position**, and **Phone** fields so that they appear to the right of the other fields.
- To select all the fields and the labels, hold down the **Shift** key, and select the rest of the fields and labels.
- Move the **Position** field below the **Phone** field.

- Scroll to the bottom of the report.
- Move the mouse pointer between the **Page Footer** area and the **Detail** area until the mouse pointer changes to the image illustrated at the right. 
- Drag up until the **Page Footer** displays directly below the fields in the **Detail** area.
- Click the **Title** button in the **Controls Group** to add a title for the report.
  - **Report1** will appear in the **Report Header** section.
  - Input a **Title** for the report.
  - Press **Enter** once the new Title has been inserted.
- Switch to **Layout View**.
- Click the **Auto Format** button on the **Design Tab**.
- Apply an **Auto Format** to the report.
- Switch back to **Design View**.
- Click the **Line** button in the **Controls Group**.
- Draw a line at the bottom of the **Detail** section of the report.
- Format the line using the **Property Sheet**.
- Draw and format a line at the bottom of the **Group (Category)** section.
- Make any other necessary adjustments to the design of the report, such as changing widths of the controls, that will make the report look better.
- After all the changes have been made, 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.**