

LESSON SKILL MATRIX

Skill	Exam Objective	Objective Number
Creating Reports	Create new reports.	5.1.1
	Delete reports.	5.1.3
	Create reports in Design view.	5.1.2
Applying a Theme	Apply themes.	5.3.10
Working with Reports	Sort data.	5.2.2
	Change sort order.	5.3.6

WILEY



KEY TERMS

- record source
- report



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Alpine Ski House is a small mountain lodge that features cross-country skiing in the winter and hiking in the summer. As an administrative assistant for Alpine Ski House, you take care of many of the administrative duties for the innkeepers, including reservations, billing, and record keeping. You have recently started using Access to keep track of customers and reservations at the lodge. In this lesson, you learn three different ways to create reports for the lodge, how to apply auto formats to reports, and how to sort and filter report data.

SOFTWARE ORIENTATION

Reports Group

The Reports group is located on the CREATE tab in the Ribbon, as shown in Figure 6-1.

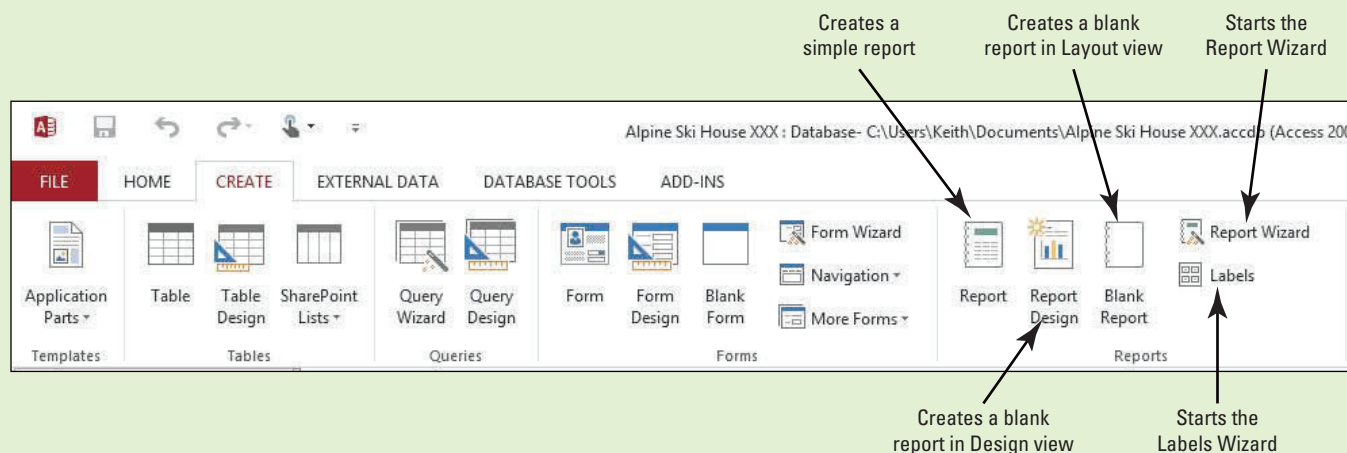


Figure 6-1
Reports group

Use the Reports group of commands to create reports.

CREATING REPORTS

The Bottom Line

A **report** is a database object that is used to organize and display data pulled from tables and queries. You can create a report using the Report button, the Report Wizard button, Report Design button, and Blank Report button, depending on the amount of customization desired. You can also create labels using the Labels button. After creating a report, you can instantly apply a Theme to create a professional look. You can also sort and filter data in a report to display the records to suit your needs.

Creating a Simple Report and Deleting a Report

You can use Access 2013 to create simple or complex reports. When creating a complex report, you might spend quite a bit of time choosing which fields you want to include from various tables or queries. That is fine when you need such a report, but when you need a simple display of all the fields in a table or query, you can use the Report button to create a simple report. You can also delete a report to remove it permanently from the database. In this exercise, you use the Report button to create a simple report and delete a report by using the Delete command.

Reports are commonly used as formatted hard copies of table or query data. You can modify a report's design, but you cannot add or edit data in a report. The purpose of a report is to allow users to view data, not edit it. For example, a supervisor might ask you to create a sales report that is filtered to show only one region's sales. The supervisor does not need to edit the data, just view it.

A report's **record source** is the table or query that provides the data used to generate a report. Before you can create a report, you need to define the record source by clicking in the Navigation Pane on the table or query on which you want to base the report. Then, click the Report button and a report is automatically generated based on the table or query you selected.

You can modify a report's design, print, or save and close a report. You should save a report's design if you are likely to use it again. To save a report, click the Save button on the FILE tab or in the Quick Access Toolbar. If you click the Close button without saving, Access will display a dialog box asking if you want to save it. Once it is saved, the report is listed in the Navigation Pane. You can open it and modify it in the future or create a new report based on the original. The next time you run the report, the design will be the same, but the data will be different if the data in the table or query has been updated.

You can also permanently delete a report from the database by using the Delete command in the Records group on the HOME tab. You can delete a report if you erroneously created it or simply want to unclutter the database by removing pre-existing reports you no longer use.

STEP BY STEP

Create and Delete a Report



GET READY. Before you begin these steps, be sure to turn on and/or log on to your computer and start Access.

1. **OPEN** *AlpineSkiHouse* from the data files for this lesson.
2. **SAVE** the database as *AlpineSkiHouseXXX* (where XXX is your initials).
3. In the Navigation Pane, click the **Rooms** table to select it. This is your record source.
4. On the **CREATE** tab, in the Reports group, click the **Report** button. The report appears in Layout view (see Figure 6-2). Notice the Report Layout tools that appear in the Ribbon.

Figure 6-2

Simple report

Room ID	Room Name	Bed Size	Rate	Location	Description
1	Ash	Queen	\$130-180	2nd floor	Balcony
2	Maple	King	\$140-190	2nd floor	Large room
3	Cottonwood	King	\$140-190	1st floor	Private
4	Blue Spruce	Queen	\$130-180	1st floor	Porch
5	Alpine Suite	King, Queen	\$180-230	1st floor	Porch, c
6	Black Walnut	2 Twin	\$130-180	2nd floor	Next to creek st
7	Uinden	2 Twin	\$130-180	1st floor	Next to
8	Red Oak	King	\$140-190	2nd floor	Balcony

- Click the **Room ID** header to select it. Position the pointer over the right border until you see a double-sided arrow. Click and drag to the left, resizing the column to remove excess white space.
- Resize the other columns until your screen looks similar to Figure 6-3.

Figure 6-3

Report with resized columns

Room ID	Room Name	Bed Size	Rate	Location	Description	Number of Guests
1	Ash	Queen	\$130-180	2nd floor	Balcony, nice view	2
2	Maple	King	\$140-190	2nd floor	Large room, nice view of creek	2
3	Cottonwood	King	\$140-190	1st floor	Private porch	2
4	Blue Spruce	Queen	\$130-180	1st floor	Porch	2
5	Alpine Suite	King, Queen	\$180-230	1st floor	Porch, creek side	4
6	Black Walnut	2 Twin	\$130-180	2nd floor	Next door to Maple, nice view creek side	2
7	Linden	2 Twin	\$130-180	1st floor	Next door to Cottonwood	2
8	Red Oak	King	\$140-190	2nd floor	Balcony, nice view	2



Another Way

You can also delete a report or any other object by right-clicking it in the Navigation Pane and choosing Delete from the shortcut menu that appears, or clicking the object and just simply pressing the Delete key on the keyboard.

- Click the **Save** button on the Quick Access Toolbar. The Save As dialog box appears with Rooms in the Report Name box. Click **OK**. Notice that the Rooms report is listed in the Navigation Pane.
- Click the **Close** button to close the Rooms report.
- In the Navigation Pane, click the **Reservations** report to select it.
- On the HOME tab, in the Records group, click the **Delete** button arrow and then click the **Delete** command on the menu that appears.
- Click **Yes** on the dialog box asking you if you want to permanently delete the Reservations report. The report is now permanently deleted from the database.

PAUSE. LEAVE the database open to use in the next exercise.

CERTIFICATION READY? 5.1.1

How do you create new reports?

CERTIFICATION READY? 5.1.3

How do you delete reports?

Using the Report Wizard

You are probably already familiar with the way a “wizard” works. The Report Wizard displays a series of questions about the report you want and then it creates the report for you based on your answers. The Report Wizard knows what makes a good report, so the questions are designed to help you create a professional report with little effort. The Report Wizard is usually the easiest way to create a report when you want to choose which fields to include. It guides you through a series of questions and then generates a report based on your answers. If you want to skip steps such as Sorting or Grouping in the Report Wizard, click the Next button to go to the next screen. You can click the Finish button anytime it is available to create the report with the choices you have specified. In this exercise, you use the Report Wizard to create a report based on the Rooms table.

The Report Wizard allows you to include fields from more than one table or query. You can click the double right arrow button (>>) to include all the fields in the report or click the single right arrow button (>) to move them one at a time. Likewise, you can click the double left arrow button (<<) to move all the fields out of the report or the single left arrow button (<) to move them one at a time.

You can specify group levels, such as grouping all of the first-floor rooms together and all of the second-floor rooms together if creating a room report. You can also choose up to four fields on which to sort data in ascending or descending order. On the layout screen, you can choose from various layouts such as stepped, block, or outline, all of which indent fields and records in different ways to make the report clearer to read. You can also choose to display the report in portrait or landscape orientation. Access provides a wide variety of design styles from which to choose. On the last screen of the Report Wizard, you can key a name for the report and choose to preview or modify the report.



**Cross
Ref**

You learn more about grouping in Lesson 11.

STEP BY STEP

Use the Report Wizard



USE the database you used in the previous exercise.

1. On the CREATE tab, in the Reports group, click the **Report Wizard** button. The first screen of the Report Wizard appears.
2. Select the Rooms table in the Tables/Queries menu.
3. Click the >> button to move all the fields into the Selected Fields list.
4. Click the **Room ID** field to select it and click the < button to move it back to the Available Fields list (see Figure 6-4). Click the **Next >** button.

Figure 6-4

The Report Wizard
Fields screen

5. Click the **Location** field to select it and click the > button to add it as a grouping level (see Figure 6-5).

Figure 6-5

The Report Wizard
Grouping screen

6. Click the **Next >** button.
7. Select **Room Name** from the fields menu to sort in ascending order (see Figure 6-6), and click the **Next >** button.

Figure 6-6

The Report Wizard Sort screen

8. In the Layout section, click the **Outline** button. In the Orientation section, click the **Landscape** button (see Figure 6-7). Click **Next >**.

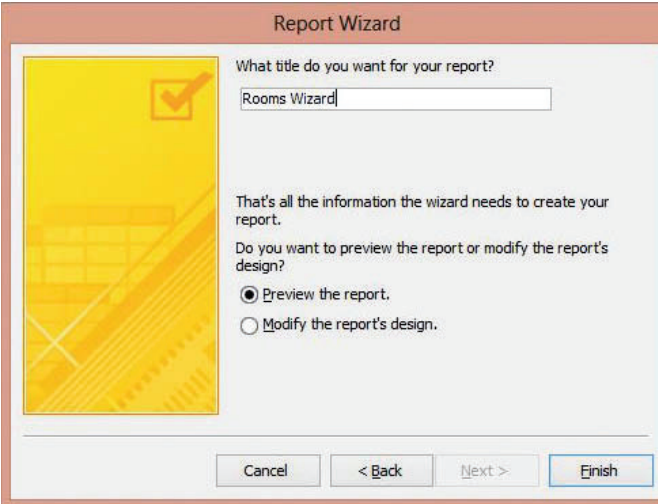
Figure 6-7

The Report Wizard
Layout screen

9. Key **Rooms Wizard** as the title of the report (see Figure 6-8).

Figure 6-8

The Report Wizard Title screen



Report Wizard

What title do you want for your report?

Rooms Wizard

That's all the information the wizard needs to create your report.

Do you want to preview the report or modify the report's design?

☒ Preview the report.

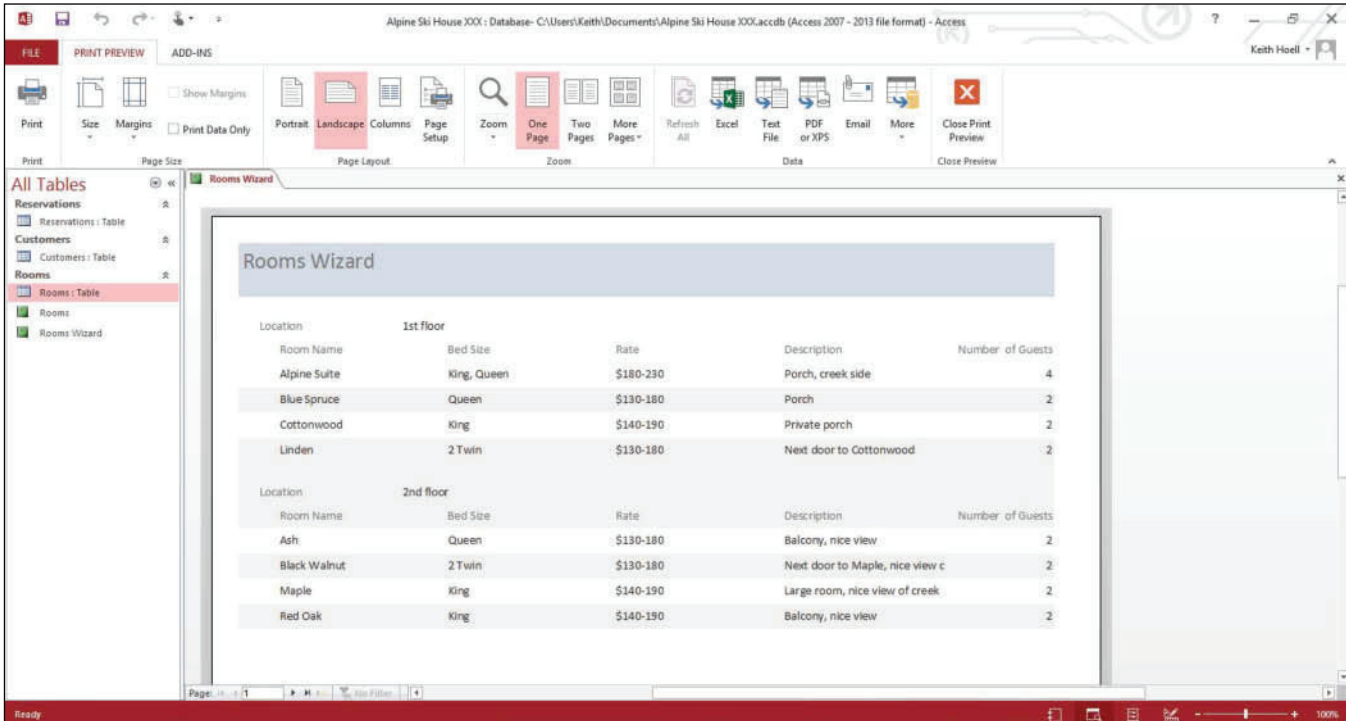
☐ Modify the report's design.

Cancel < Back Next > Finish

10. Click **Finish**. The Rooms Wizard report appears on the screen (see Figure 6-9).

Figure 6-9

The Report Wizard report



Alpine Ski House XXX: Database- C:\Users\Keith\Documents\Alpine Ski House XXX.accdb (Access 2007 - 2013 file format) - Access

Keith Hoell

Rooms Wizard

1st floor				
Room Name	Bed Size	Rate	Description	Number of Guests
Alpine Suite	King, Queen	\$180-230	Porch, creek side	4
Blue Spruce	Queen	\$130-180	Porch	2
Cottonwood	King	\$140-190	Private porch	2
Linden	2 Twin	\$130-180	Next door to Cottonwood	2
2nd floor				
Room Name	Bed Size	Rate	Description	Number of Guests
Ash	Queen	\$130-180	Balcony, nice view	2
Black Walnut	2 Twin	\$130-180	Next door to Maple, nice view c	2
Maple	King	\$140-190	Large room, nice view of creek	2
Red Oak	King	\$140-190	Balcony, nice view	2

11. **CLOSE** the report. Notice that the new report is listed in the Navigation Pane.

PAUSE. LEAVE the database open to use in the next exercise.

Creating a Report in Design View

When you want a customized report, you can create it in Design view, which offers you many options for creating the report exactly the way you want it. Design view gives you the most options for creating a report, because it shows you the underlying structure of the report. It also provides you with more design tools and capabilities. In this exercise, you create a report in Design view by adding and moving fields.

In Design view, a report is displayed on a design grid with sections. Table 6-1 lists the sections.

Table 6-1
Design view sections

Section Name	Description
Report header	This section is printed once at the beginning of every report. This is a good place to include a logo, a date, or information that might normally appear on a cover page.
Page header	This section is printed at the top of every page of a report, so it would be a good place to include the report title.
<Group> header	This section is printed at the beginning of a group. (The name of the grouping field replaces <Group>.) It is a good place to include the group name.
Detail	This section includes the body of the report. It is printed once for every row in a record source.
<Group> footer	This section is only printed at the end of a group that contains summary information for the group. (The name of the grouping field replaces <Group>.)
Page footer	This section is printed at the bottom of every page of a report, so it would be a good place to include information such as a page number.
Report footer	This section is printed once at the end of every report. It is a good place for report totals.

To add fields to the report design, you can display the Field List pane (if it is not already displayed) by clicking the Add Existing Fields button. Double-click a field in the Field List to add it to the design grid, or you can drag the field to a location on the grid. If you need to move a field on the grid, click the field to select it and then position the pointer on the border until you see a four-sided arrow, then drag to the new location. To change the size of a field, position the pointer on the border until it turns into a two-sided arrow, then drag to resize the field.

The field name and field data are in two separate boxes. Most of the time you will move both boxes together; however, to move one box separately from the other, position the pointer on the box border's selection handle, then drag the box to the new location.

To see what your report will look like, click the bottom half of the View button in the Views group and select Report View from the menu.

STEP BY STEP

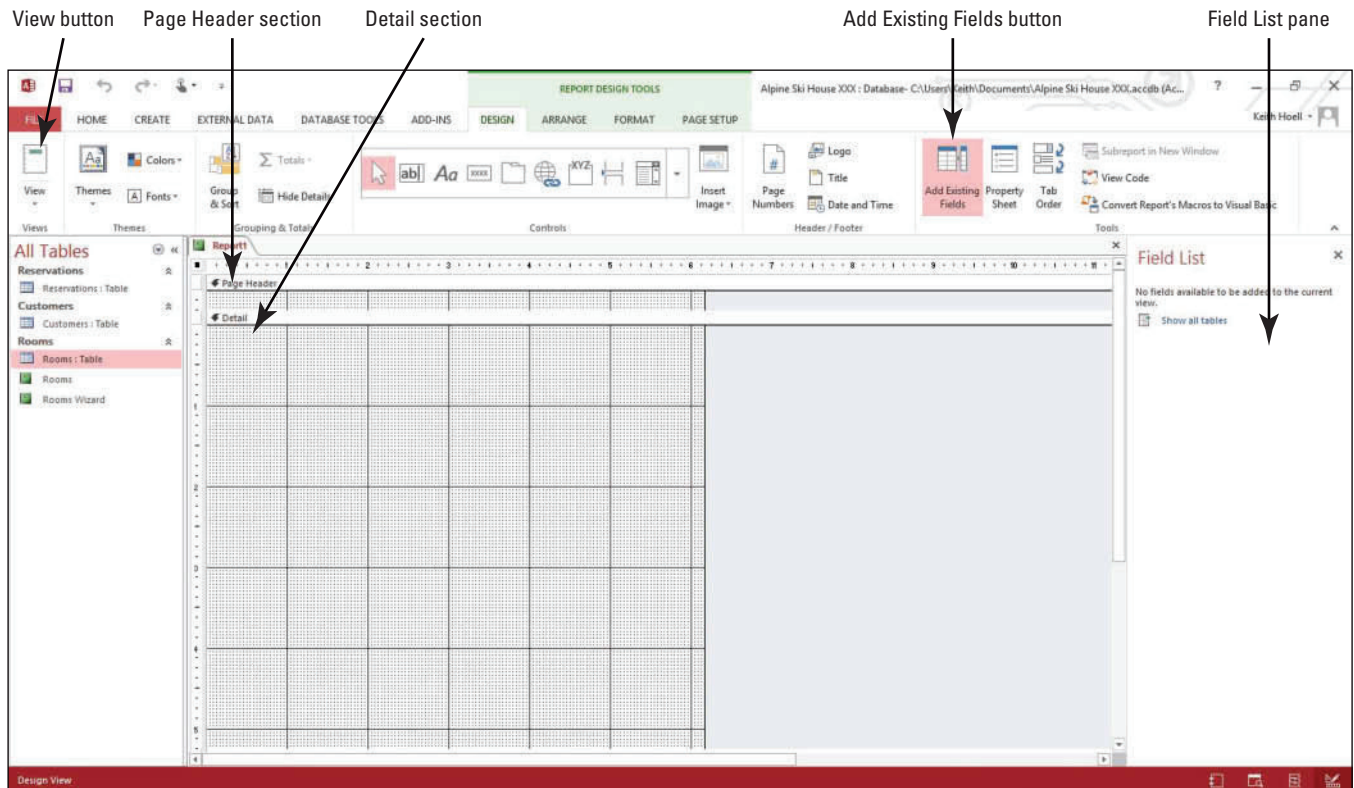
Create a Report in Design View

USE the database you used in the previous exercise.

1. If necessary, click the **Rooms** table in the Navigation Pane to select it.
2. On the CREATE tab, in the Reports group, click the **Report Design** button. A new blank report is displayed in Design view (see Figure 6-10).

Figure 6-10

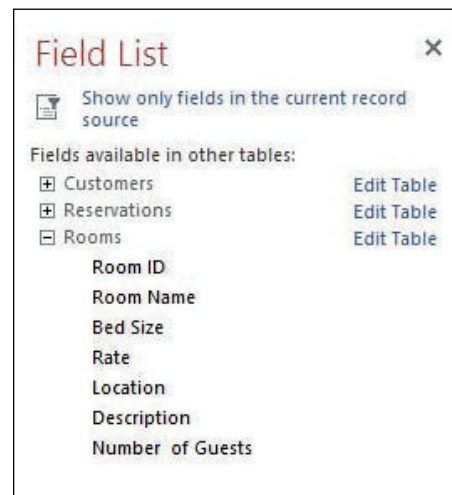
New blank report in
Design view



3. If the Field List pane is not already displayed, on the DESIGN tab, in the Tools group, click the **Add Existing Fields** button. The Show All Tables link appears.
4. Click the **Show all tables** link then the **plus (+)** box beside Rooms to display the fields in the table (see Figure 6-11).

Figure 6-11

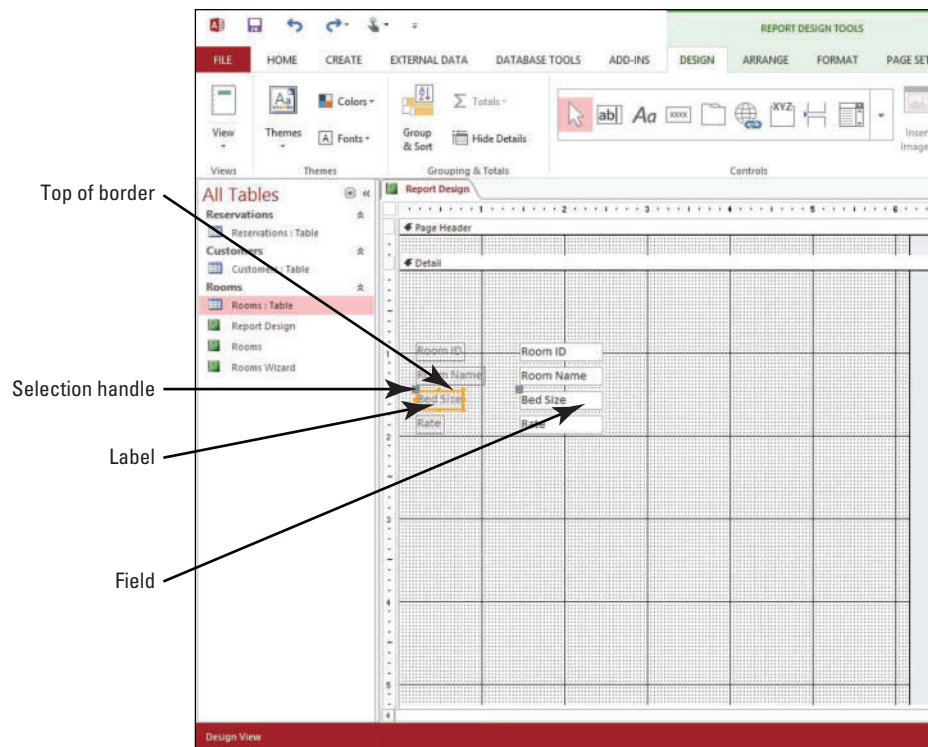
Field List pane



5. Double-click **Room ID**. The field is inserted onto the design grid.
6. Double-click **Room Name**, **Bed Size**, and **Rate**.
7. Click the **Close** button on the Field List pane.
8. Click the **Bed Size** label. The border around the label changes to orange, indicating that it is selected. Position the insertion point over the top of the border (see Figure 6-12) until the pointer changes to a four-sided arrow.

Figure 6-12

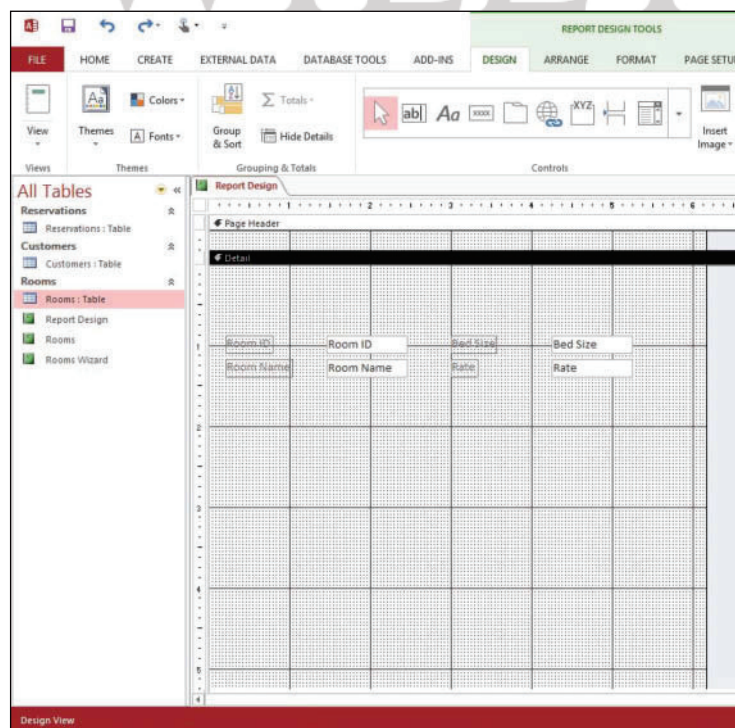
Bed Size label selected



9. Click and drag the label to position it about one-half inch to the right of the Room ID field and release the mouse button. The field is moved along with the label.
10. In the same manner, move the **Rate** label and field to position it below the Bed Size field (see Figure 6-13).

Figure 6-13

Moved fields



11. Click the **Room ID** field to select it. Position the mouse pointer on the square handle in the middle of the right-side border. Click and drag the field to the left to decrease the size by about one-quarter inch.

**CERTIFICATION
READY? 5.1.2**

How do you create a report
in Design view?

12. On the Ribbon, in the Views group, click the bottom half of the **View** button and select **Report View** from the menu. The report is shown in Report view. Scroll down to see all the records.
13. Click the **Save** button on the Quick Access Toolbar.
14. Key **Report Design** in the Report Name box, and click **OK**.
15. **CLOSE** the report.

PAUSE. LEAVE the database open to use in the next exercise.

Take Note

You can add more than one field to a report design at once only after at least one other field has been added. Hold down the Ctrl key and click the fields you want, and then drag the selected fields onto the report.

**Cross
Ref**

In Lesson 8, you learn how to add more functionality to a report by adding controls in Design view.

APPLYING A THEME**The Bottom Line**

A theme applies a set of predefined fonts, colors, and design to a report. You can apply a theme to any report in Layout view or Design view. The Themes gallery displays a variety of designs. After you click the design you want, it is applied to the report. This instant formatting can quickly give your report the professional look you want.

Applying a Theme

To apply a theme, on the REPORT LAYOUT TOOLS Design contextual tab, in the Themes group, click the Themes button to display the Themes gallery. You can select a design from the list displayed or browse for saved themes. You can also customize and then save a theme based on the current report. You can click the Colors button and choose a color scheme from the menu to update the currently applied theme's colors, and even create new theme colors. You can also click the Fonts button and choose a font scheme to update the currently applied theme's fonts and create new theme fonts. In this exercise, you apply a theme to the Rooms report and modify the fonts.

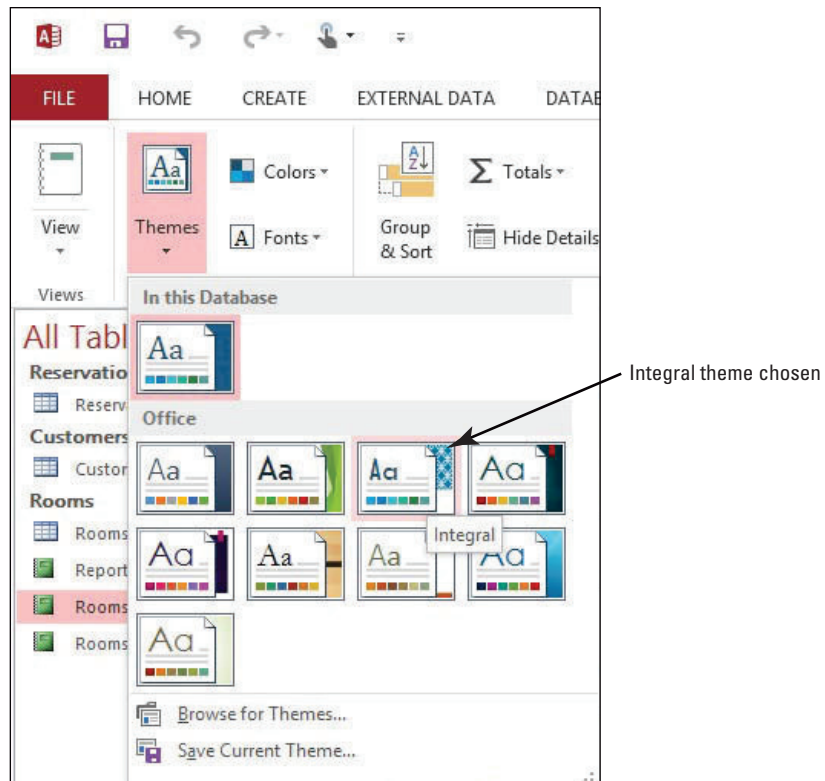
STEP BY STEP**Apply a Theme**

USE the database open from the previous exercise.

1. **OPEN** the **Rooms** report.
2. On the Ribbon, in the Views group, click the bottom half of the **View** button. Select **Layout View** from the menu.
3. On the REPORT LAYOUT TOOLS Design contextual tab, in the Themes group, click the **Themes** button. The Themes gallery of predefined report themes appears.
4. In the Office section and the first row, third column, click the **Integral** design (see Figure 6-14). The format is applied to the report.

Figure 6-14

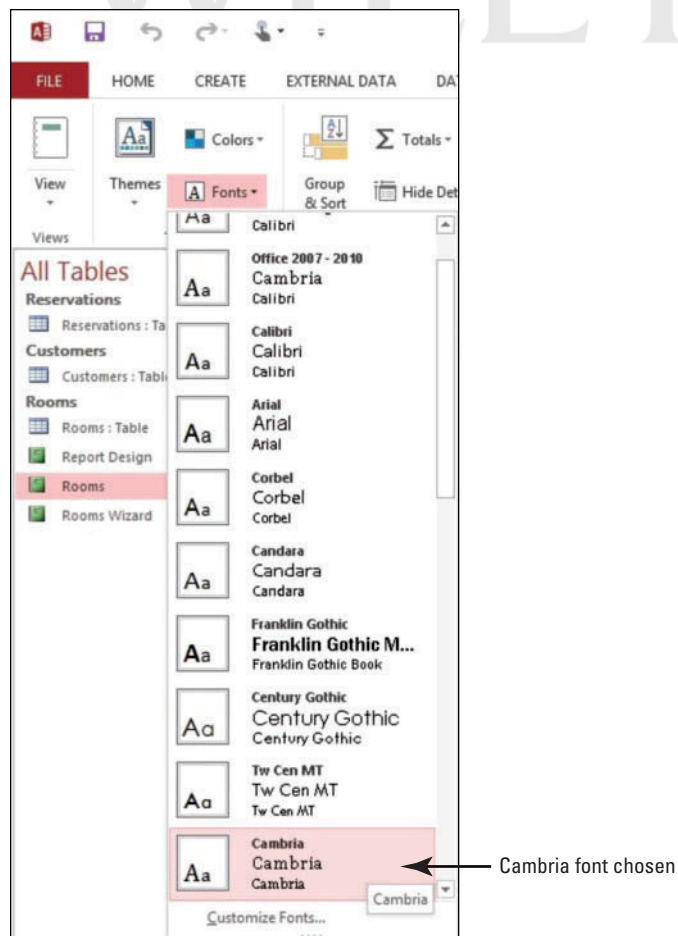
The Themes gallery with
Integral theme chosen



5. In the Themes group, click the **Fonts** button. Select **Cambria** from the menu (see Figure 6-15). The new Font theme is applied.

Figure 6-15

The Fonts menu with Cambria
font chosen



**CERTIFICATION
READY? 5.3.10**

How do you apply themes to a report?

The Bottom Line**6. SAVE** the report.**PAUSE. LEAVE** the report open to use in the next exercise.**WORKING WITH REPORTS**

Reports help group and summarize data in different ways. However, after a report is created, you can use Layout view as well as Report view to help locate data. For example, you can use Layout view to easily sort field data one at a time, or perform more complex sorts using the Group, Sort, and Total pane. You can also use Layout view to filter data and view only those records based on the criteria you specify, and use Report view or Layout view to find data based on any term you specify.

Sorting Data within a Report

Sorting organizes data into a particular sequence, such as alphabetic order or from smallest to largest numbers. For example, you can sort a customer list in alphabetic order by last name or by customer ID number. You can sort data by clicking the buttons on the Ribbon, right-clicking and choosing commands from the shortcut menu, or by using the Group, Sort, and Total pane. In this exercise, you sort data within a report by using the Ribbon, the shortcut menu, and the Group, Sort, and Total pane.

Sorting data in a report is similar to sorting in a table. In Layout view, select the field you want to sort and click the Ascending or Descending button on the HOME tab, in the Sort & Filter group. Click the Remove Sort button to remove the sort order. You can sort as many fields as you like one at a time.

**Cross
Ref**

Lesson 3 has more information about sorting in a table.

You can also easily sort data by right-clicking in a field and choosing the type of sort you want from the shortcut menu. The sort commands in the shortcut menu vary depending on the type of data in the field. For text, you will choose Sort A to Z or Sort Z to A; for numbers, you will choose Sort Smallest to Largest or Sort Largest to Smallest; and for dates, you will choose Sort Oldest to Newest or Sort Newest to Oldest.

**Cross
Ref**

Lesson 5 has more information about sorting in a form.

The Group, Sort, and Total pane gives you more sorting options. You can use the pane to specify the sort order or to view the results of sorting using the shortcut menu. To specify a sort, click the Add a Sort button and select a field from the pop-up menu. Click the drop-down menu to specify the type of sort you want. Click the More Options button to display additional commands for creating detailed sorts. Click the Less Options button to return to the basic sorting options.

To delete a sort in the Group, Sort, and Total pane, click the Delete button at the end of the sort line.

**Cross
Ref**

Lesson 7 has more information about sorting in a query.

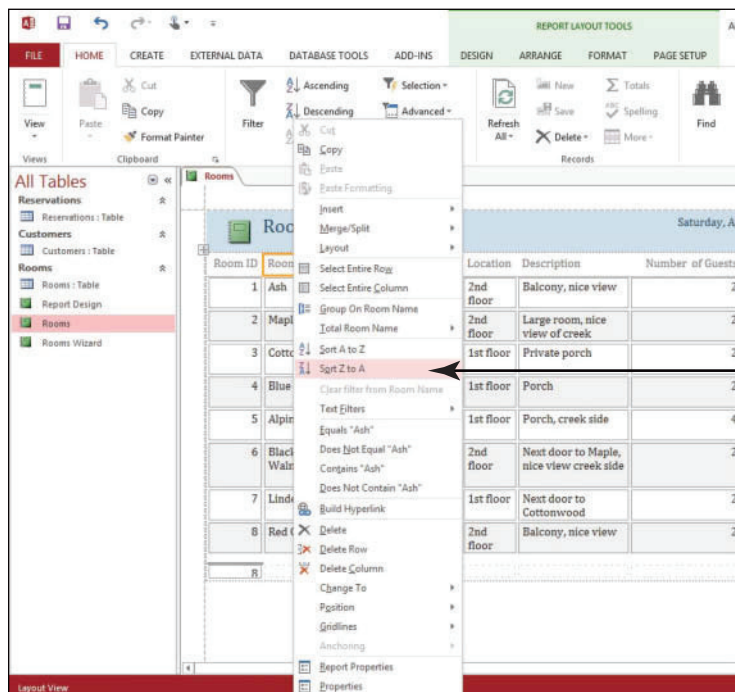
STEP BY STEP**Sort Data within a Report****USE** the report open from the previous exercise.

1. On the HOME tab in the Views group, click the bottom half of the **View** button. Select **Layout View** from the menu.
2. Click the **Room Name** header.
3. On the HOME tab, in the Sort & Filter group, click the **Ascending** button. The column is sorted in ascending alphabetic order.
4. On the HOME tab, in the Sort & Filter group, click the **Remove Sort** button. The Sort is removed.

5. Right-click the **Room Name** header. The shortcut menu appears.
6. Select **Sort Z to A** (see Figure 6-16). The column is sorted.

Figure 6-16

Shortcut menu

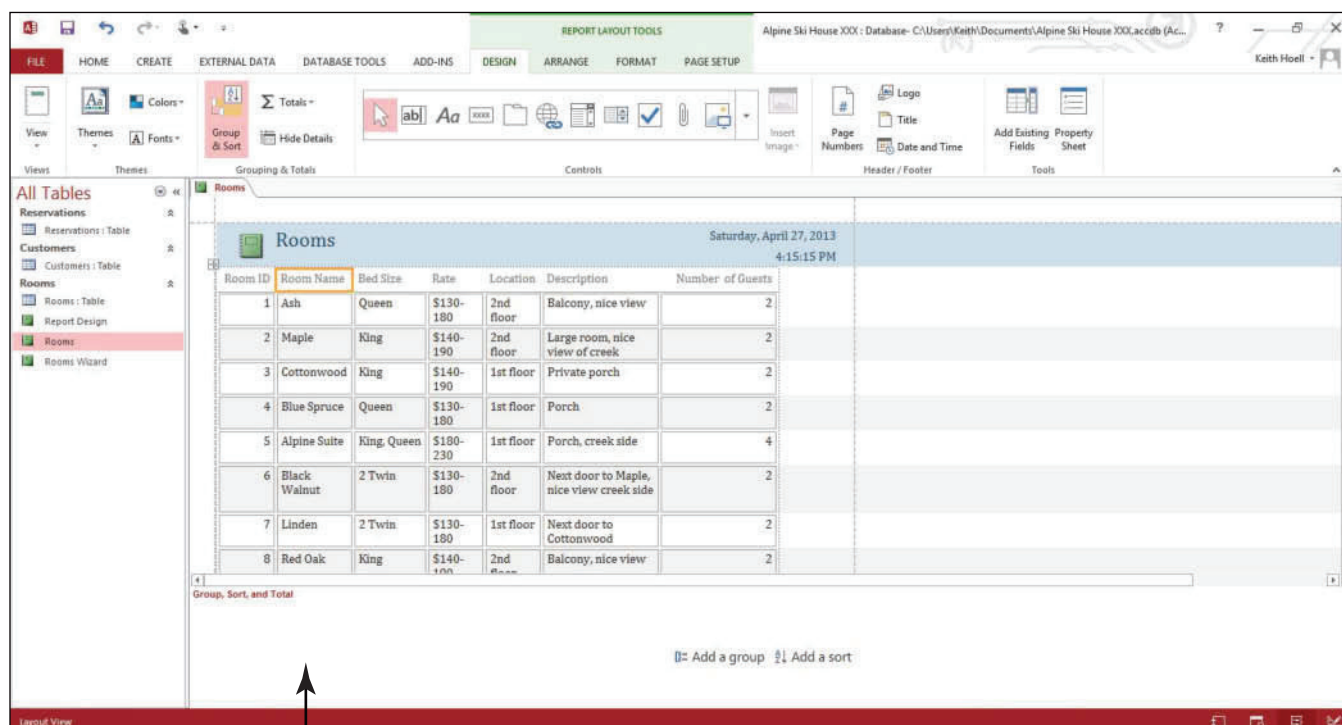


Click Sort Z to A to sort in descending order

7. On the HOME tab, in the Sort & Filter group, click the **Remove Sort** button. The Sort is cleared.
8. On the REPORT LAYOUT TOOLS Design contextual tab, in the Grouping & Totals group, click the **Group & Sort** button. The *Group, Sort, and Total* pane appears at the bottom of the screen (see Figure 6-17).

Figure 6-17

Group, Sort, and Total pane

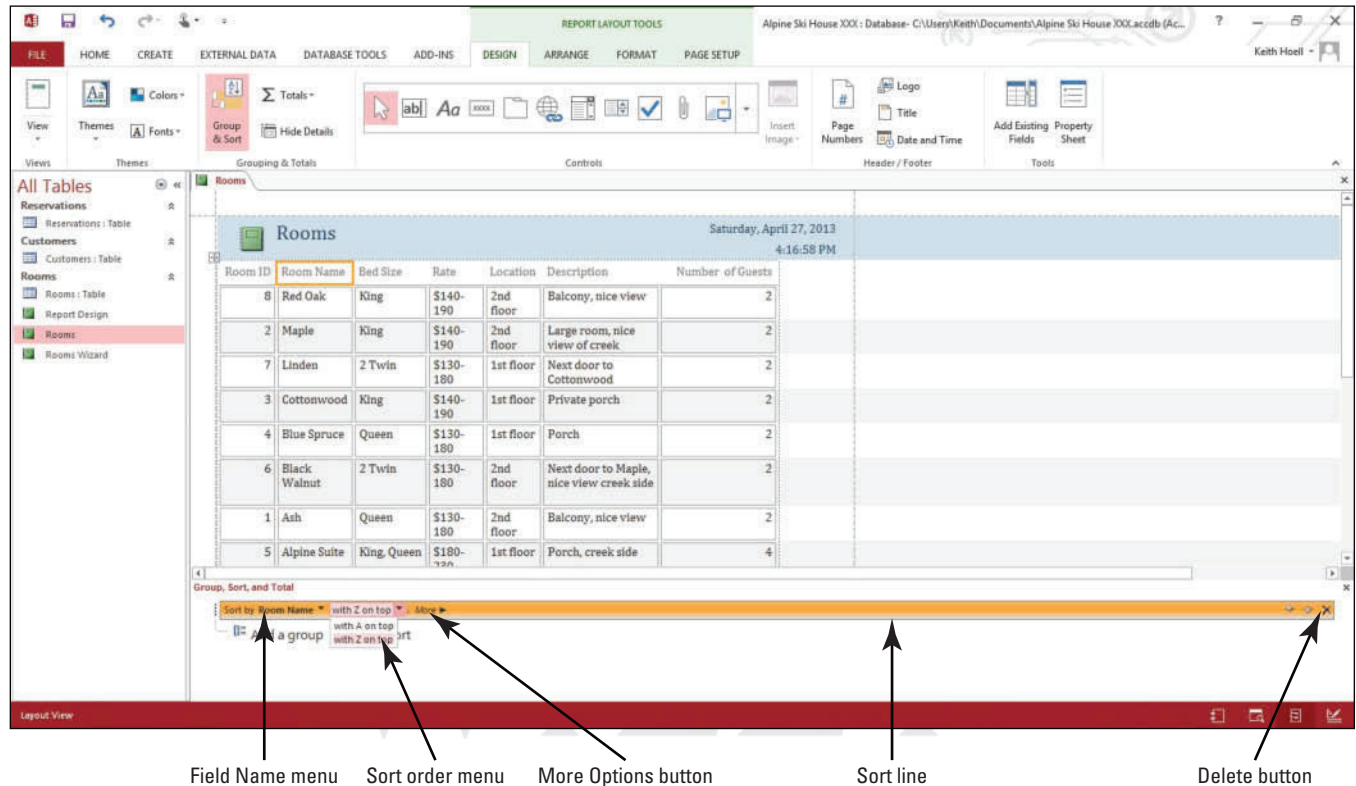


Group, Sort, and Total pane

9. Click the **Add a sort** button in the *Group, Sort, and Total* pane.
10. Click the **Room Name** field in the fields list. Notice that the field was sorted in ascending order by default and a line was added describing the sort.
11. Click the **down arrow** beside *with A on top* and select **with Z on top** from the menu (see Figure 6-18). The field is sorted in descending order.

Figure 6-18

Sort displayed in the Group, Sort, and Total pane



CERTIFICATION READY? 5.2.2

How do you sort data?

CERTIFICATION READY? 5.3.6

How do you change sort order?

12. Click the **More Options** button in the Sort line. Notice the options available for customizing a sort.
13. Click the **Delete** button. The sort is cleared.
14. In the Grouping & Totals group on the Ribbon, click the **Group & Sort** button. The *Group, Total, and Sort* pane is removed.
15. **SAVE** the report.

PAUSE. LEAVE the database open to use in the next exercise.

Filtering Data within a Report

A filter displays only data that meet the criteria you have specified and hides the rest. It does not modify the table data or the design of the report. After you remove a filter, all the records are displayed again. Filtering data in Layout view of a report is very similar to filtering data in a table. You can apply common filters using the commands in the Sort & Filter group or by right-clicking a field and choosing a filter from the shortcut menu. The filters available on the shortcut menu vary depending on the type of data in the field. Only one filter can be applied to a field at a time. However, you can specify a different filter for each field. In this exercise, you filter a report using a custom filter, and filter by selection.

You can toggle between filtered and unfiltered views using the Toggle Filter button. To remove a filter from a field, right-click in the field and select the Clear filter from field name command. To remove all filters permanently, select the Clear All Filters command on the Advanced menu in the Sort & Filter group.

Take Note If you save a report (or other object) while a filter is applied, it will be available the next time that you open the report. If you want to open the report and see the filter already applied, set the Filter On Load property setting to Yes.

You can also filter by selection in a report. If you want to view only the reservations for 12/13/14, select that date in the Check-in field and click the Selection button. That date will appear in the menu, so that you can choose Equals 12/13/14, Does Not Equal 12/13/14, and so on. You can also access these commands on the shortcut menu by right-clicking the value.

Take Note If you need to apply a filter that is not in the common filters list, you can write an advanced filter using the Advanced Filter/Sort command on the Advanced menu. You need to be familiar with writing expressions, which are similar to formulas, and be familiar with the criteria that you specify when designing a query.



Cross Ref

Lessons 3, 5, and 7 have more information about filtering records in a table, form, and query, respectively.

STEP BY STEP

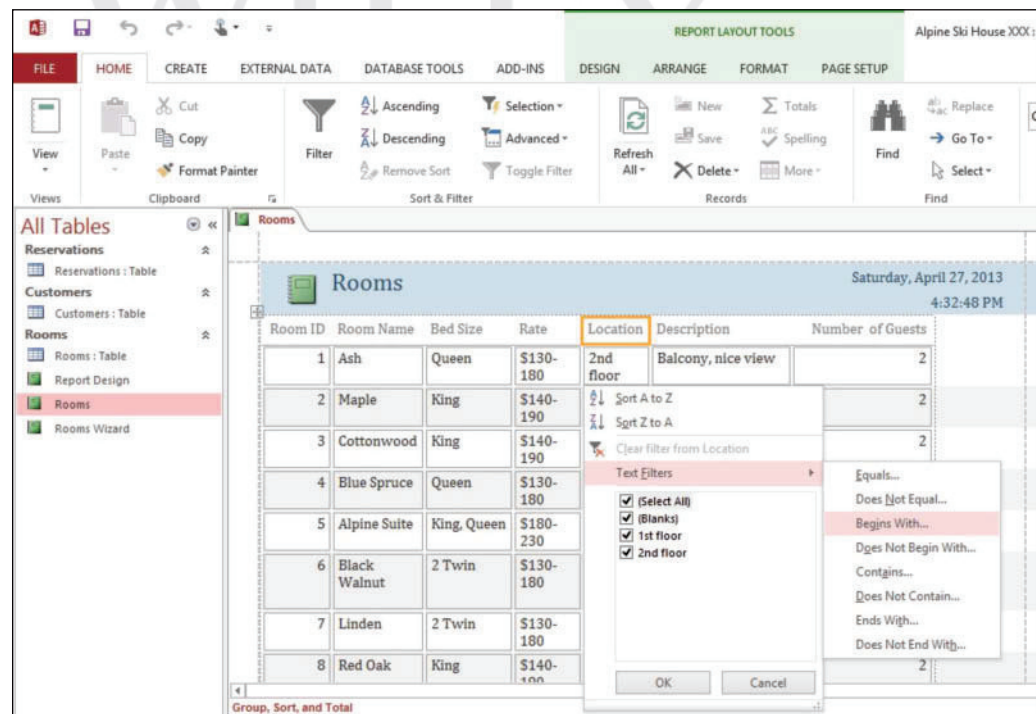
Filter Data within a Report

USE the database you used in the previous exercise.

1. Click the **Location** header to select it.
2. On the HOME tab, in the Sort & Filter group, click the **Filter** button. A menu appears.
3. Point to **Text Filters**. A second menu appears. Select **Begins With...** (see Figure 6-19). The Custom Filter dialog box appears.

Figure 6-19

Shortcut menu

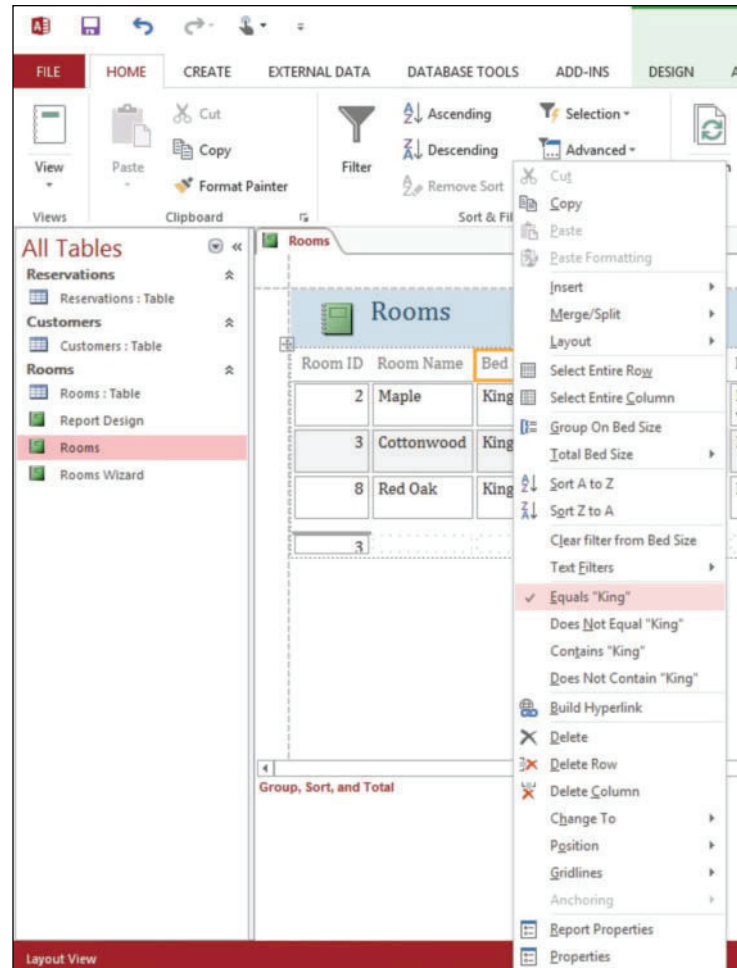


4. Key **1** into the Custom Filter dialog box and click **OK**. The data is filtered to show only the rooms on the first floor.
5. Click the **Toggle Filter** button on the Ribbon. The report returns to its unfiltered state.
6. In the Bed Size field, click **King** in the second row.
7. On the HOME tab, in the Sort & Filter group, click the **Selection** button. Select **Equals "King"** from the menu. The data is filtered to show only the rooms with King-sized beds.

8. Right-click the **Bed Size** header. A shortcut menu appears. Notice that the Equals “King” filter and the other filters from the Selection menu are also available in the shortcut menu (see Figure 6-20).

Figure 6-20

Shortcut menu



9. Select **Clear filter from Bed Size** from the menu. The filter is cleared.

10. **CLOSE** the report.

PAUSE. LEAVE the database open to use in the next exercise.

Finding Data within a Report

When you want to quickly locate records in a report, you can use the Find command, which searches all the records of the report for any term you specify. Sometimes, you may need to quickly find records within a report while in Report view or Report Layout view. To accomplish this, you can use the Find command in the Find group on the HOME tab. In this exercise, you locate data in Report view by using the Find command.



Lesson 3 has more information about the Find command.

The Find command was overviewed for tables in Lesson 3. Like the Find command in table data-sheet view, once clicked, the Find dialog box appears where you can enter search criteria, set options for where you would like Access to look for the data, and set data matching and other search options. You can quickly locate records that match your search term and view multiple occurrences; however, remember that you cannot modify record data from within a report, so you cannot replace the record data that is found.

Take Note You cannot use the Find command when you are in Report Design view.

Take Note You can also use the Find command in tables, forms, and queries.



Another Way You can also access the Find command by pressing Ctrl+F on the keyboard.

STEP BY STEP

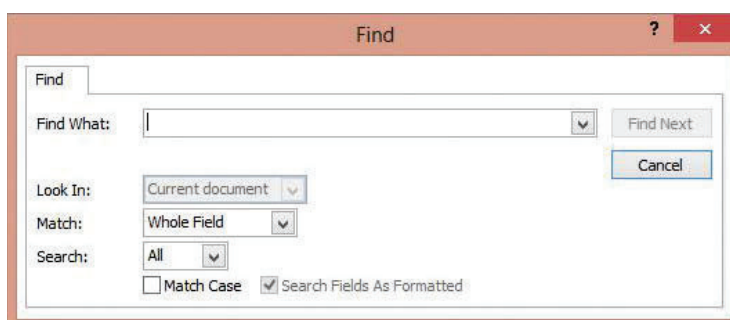
Find Data within a Report

USE the database open from the previous exercise.

1. **OPEN** the **Rooms** report.
2. On the HOME tab, in the Find group, click the **Find** button. The Find dialog box appears (see Figure 6-21).

Figure 6-21

Find dialog box



3. Key **King** in the Find What drop-down box.
4. Click the **Find Next** button. Access highlights the first occurrence of 'King' in the report. Continue clicking the Find Next button until Access reports that it has finished searching the records 6.
5. Click **Cancel** to close the Find dialog box.
6. **CLOSE** the report. **CLOSE** the database.

STOP. CLOSE Access.

SKILL SUMMARY

In This Lesson You Learned How To:	Exam Objective	Objective Number
Create Reports	Create new reports. Delete reports. Create reports in Design view.	5.1.1 5.1.3 5.1.2
Apply a Theme	Apply themes.	5.3.10
Work with Reports	Sort data. Change sort order.	5.2.2 5.3.6

Knowledge Assessment

Matching

Match the term in Column 1 to its description in Column 2.

Column 1

1. report
2. record source
3. Report Wizard
4. Field List pane
5. Detail
6. theme
7. Sort
8. Filter
9. design grid
10. Find command

Column 2

- a. organizes data in a particular order
- b. displays data that meets the criteria you have specified and hides the rest
- c. a list of available fields for adding to a report
- d. a database object that is used to organize and display data from tables and queries
- e. locates data in an open object like a table, query, or report
- f. the table or query that provides the data used to generate a report
- g. the way a report is displayed in Design view
- h. guides you through a series of questions and then generates a report based on your answers
- i. the section of a report that includes the body of the report
- j. a predefined format that you can apply to any report in Layout view

True/False

Circle T if the statement is true or F if the statement is false.

- T F 1. A simple report contains all the records in a table or query.
- T F 2. You can edit the data in a report.
- T F 3. Click the Report button to define a record source.
- T F 4. In the Report Wizard, you can skip steps such as Sorting or Grouping by clicking the Next button.
- T F 5. You can drag a field from the Field List pane to the design grid to add it to the report.
- T F 6. Layout view gives you the most options for creating a report, because it shows you the underlying structure of the report.
- T F 7. In Report Design view, you can click on the top of the border of a label to move both the field and its label.
- T F 8. You can save a filter with a report.
- T F 9. You can use the Group, Sort, and Total pane to specify sort order or view the results of sorting using the shortcut menu.
- T F 10. The Toggle Filter button removes a filter permanently.

Competency Assessment

Project 6-1: Soccer Team Report

You need a copy of the soccer team's roster that you can print and take with you to work. Create a simple report and apply a theme.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** the **SoccerTeam** database.
2. **SAVE** the database as **SoccerTeamXXX** (where XXX is your initials).
3. Click the **Roster** table to select it.
4. On the **CREATE** tab, in the **Reports** group, click the **Report** button. A new report is created.
5. Resize each field so that all fields fit on one page.
6. On the **REPORT LAYOUT TOOLS Design** contextual tab, in the **Themes** group, click the **Themes** button.
7. In the **Office** category, select the format in the second row, third column, named **Retrospect**.
8. Click the **Save** button on the **Quick Access Toolbar**. The **Save As** dialog box appears with the name **Roster** in it. Click **OK** to accept that name for the report.
9. **CLOSE** the report.
10. **CLOSE** the database.

LEAVE Access open for the next project.

Project 6-2: Fourth Coffee Inventory Report

In your job at Fourth Coffee, you are responsible for maintaining the coffee inventory. Create a report to view the inventory and prepare for the next order.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** **Coffee** from the data files for this lesson.
2. **SAVE** the database as **CoffeeXXX** (where XXX is your initials).
3. Click the **Coffee Inventory Table** in the **Navigation Pane** to select it.
4. On the **CREATE** tab, in the **Reports** group, click the **Report Wizard** button. The first **Report Wizard** screen appears.
5. Click **>>** to move all the fields to the **Selected Fields** list and click **Next**.
6. On the grouping screen, click the **Scheduled Order Date** field, click the **>**, and click **Next**.
7. On the sorting screen, click the active **down arrow** on the menu, select **Pounds**, and click **Next**.
8. Keep the defaults as is on the layout screen and click **Next**.
9. Click **Finish**. The report is created.
10. **CLOSE** the report.
11. In the **Navigation Pane**, double-click the **Coffee Inventory** report you just created to open it.
12. Switch to **Layout** view and resize the label columns and field boxes so all text and data appear completely in them.
13. **SAVE** and **CLOSE** the report.
14. **CLOSE** the database.

LEAVE Access open for the next project.

Proficiency Assessment

Project 6-3: Alpine Ski House Reservations Report

Every week is different at the Alpine Ski House. Sometimes the lodge is full of guests, and sometimes only a few rooms are occupied. Create a report to show the innkeepers what to expect in the coming weeks.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** the *AlpineHouse* database.
2. **SAVE** it as *AlpineHouseXXX* (where XXX is your initials).
3. Use the Report Wizard to create a report using the Room, Check-in Date, and Check-out Date fields from the Reservations table.
4. Group the report by Room and sort it in **ascending order** by Check-in Date.
5. Use **stepped** layout and **portrait** orientation.
6. Keep the default report name as **Reservations**, and finish the wizard.
7. Switch to Layout view.
8. Apply the **Organic** theme.
9. **SAVE** and **CLOSE** the report.
10. **CLOSE** the database.

LEAVE Access open for the next project.

Project 6-4: Wingtip Toys Design View Report

The manufacturing department at Wingtip Toys needs summary information about each toy in inventory. Create a report in Design view that will display the requested information.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** *WingtipToys* and **SAVE** it as *WingtipToysXXX* (where XXX is your initials).
2. Click the **Inventory** table in the Navigation Pane to select it.
3. On the CREATE tab, in the Reports group, click the **Report Design** button.
4. On the DESIGN tab, in the Tools group, click the **Add Existing Fields** button, if necessary, to display the Field List pane.
5. Add and position the fields from the Inventory table onto the design grid (see Figure 6-22). Adjust the Description field width as shown.

Figure 6-22

Wingtip Toys report in Design view

Page Header					
Detail					
ID	ID				
Description	Description				
In Stock	In Stock				
Price	Price				

6. **SAVE** the report as **Toy Summary**.
7. **CLOSE** the report.

LEAVE the database open for the next project.

Mastery Assessment

Project 6-5: Filter, Sort, and Find Records in a Wingtip Toys Report

A large order was recently filled, and now the inventory at Wingtip Toys is quite low on some items. Create a report that displays this information.

The **WingtipToysXXX** database should be open.

GET READY. LAUNCH Access if it is not already running.

1. Define the Inventory table as the record source for a new report.
2. Create a simple report.
3. Apply the **Ion Boardroom** theme to the new report.
4. Sort the report in **ascending order** by the Description field.
5. Click the first row of the **In Stock** field, which contains the number 10.
6. Filter by selection to display the toys with 10 or fewer items in stock.
7. Click the **In Stock** field header and sort the field in **ascending order**.
8. Clear all sorts.
9. Clear all filters.
10. Find and cycle through all occurrences of the word, **Car**.
11. **SAVE** the report as **Inventory**.
12. **CLOSE** the report.
13. **CLOSE** the database.

LEAVE Access open for the next project.

Project 6-6: Angel Project Report

The school Angel Project has begun. Information for the boy angels needs to be distributed to the boys in the kindergarten classes, and the girl angels' information needs to be distributed to the girls. Create a report with filters that display the boy and girl information separately.

GET READY. LAUNCH Access if it is not already running.



1. **OPEN** the **AngelProject** database.
2. **SAVE** the database as **AngelProjectXXX** (where XXX is your initials).
3. Define the List table as the record source for a new report.
4. Use the Report Wizard to create a report with all the fields.
5. Skip the grouping and sorting screens, and choose a **tabular, portrait layout**.
6. Name the report **Angel Needs and Wants**.
7. Switch to Layout view and adjust field widths as necessary so that all data fits on the screen and on one page, and apply the **Organic** theme.
8. Display the *Group, Sort, and Total* pane.
9. Sort the report in **ascending order** by Age.
10. Create a filter to show only the information for the **males**.
11. Toggle the filter and create a new filter to show only the information for the **females**.
12. **SAVE** and **CLOSE** the report.
13. **CLOSE** the database.

CLOSE Access.