

Access 2016 Module 8

Analyzing Data with Reports





Module Objectives

- Use Report Design View
- Create parameter reports
- Apply conditional formatting
- Add lines
- Use the Format Painter and themes
- Add subreports
- Modify section properties
- Create summary reports



Use Report Design View (Slide 1 of 3)

- **Reports** give you more control over how data is printed and greater flexibility in presenting summary information.
- **Report Design View** allows you to work with a complete range of report, section, and control properties.



Use Report Design View (Slide 2 of 3)

Creating a report in Report Design View

The screenshot displays the Microsoft Access Report Design View for a report named 'Report1'. The ribbon at the top includes 'External Data', 'Database Tools', 'Design', 'Arrange', 'Format', and 'Page Setup'. The 'Design' ribbon is active, showing various controls and options. The report layout is divided into sections: 'Page Header', 'Category Header', 'Detail', and 'Page Footer'. The 'Detail' section is currently selected. A 'Property Sheet' is open on the right, showing settings for the report. The 'Format' tab is selected in the Property Sheet, and the 'Record Source' is set to 'Trips'. The 'Filter' is set to 'Filter On Load' with a value of 'No'. The 'Order By' is set to 'Order By On Load' with a value of 'Yes'. The 'Allow Filters' property is set to 'Yes'.

Report1

Page Header

Category Header

Detail

Page Footer

Group, Sort, and Total

Group on Category

Sort by Price from largest to smallest More

Add a group Add a sort

Property Sheet

Selection type: Report

Report

Format Data Event Other All

Record Source Trips

Filter

Filter On Load No

Order By

Order By On Load Yes

Allow Filters Yes



Use Report Design View (Slide 3 of 3)

Review of report sections

section	where does this section print?	what is this section most commonly used for?
Report Header	At the top of the first page of the report	To print a title or logo
Page Header	At the top of every page (but below the Report Header on page 1)	To print titles, dates, or page numbers
Group Header	Before every group of records	To display the grouping field value
Detail	Once for every record	To display data for every record
Group Footer	After every group of records	To calculate summary statistics on groups of records
Page Footer	At the bottom of every page	To print dates or page numbers



Create Parameter Reports (Slide 1 of 2)

- **Parameter report** prompts for criteria to determine the records to use for report
- To create a parameter report, base it on a parameter query
- Report's **Record Source** property determines what table or query provides the fields and records for the report



Create Parameter Reports (Slide 2 of 2)

Entering parameter criteria in a query

Query1

Customers

- CustNo
- FName
- LName
- Photo
- Photo.FileData

Sales

- SalesNo
- SaleDate
- CustNo
- TripNo

Trips

- TripNo
- TripName
- TripStartDate
- Duration
- City
- StateAbbrev
- Category
- Price

Field:	FName	LName	SaleDate	Price	TripName
Table:	Customers	Customers	Sales	Trips	Trips
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:			Between [Enter start date] And [Enter end date]		
or:					



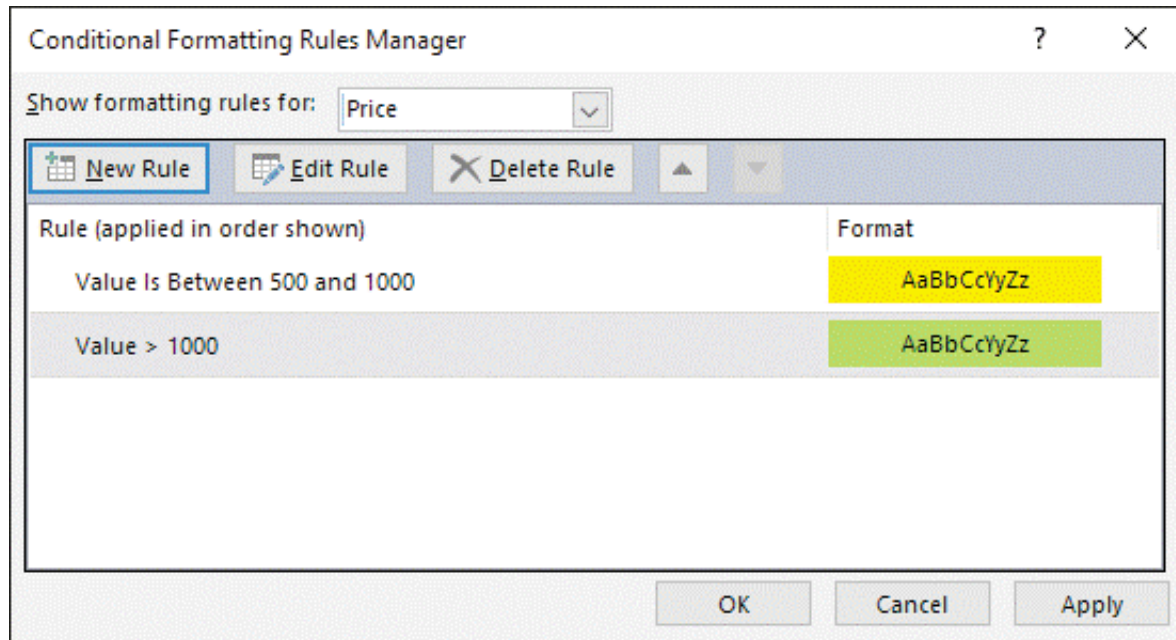
Apply Conditional Formatting (Slide 1 of 2)

- **Conditional formatting**
 - change the appearance of a control on a form or report based on specified criteria
- Conditional formatting highlights important or exceptional data on a form or report



Apply Conditional Formatting (Slide 2 of 2)

Conditional Formatting Rules Manager dialog box





Add Lines (Slide 1 of 2)

- **Lines** often added to a report to highlight or enhance the clarity of information
- Can use short lines to indicate subtotals and grand totals



Add Lines (Slide 2 of 2)

Previewing the last page of the CategoryRevenue report

CategoryRevenue		
Sale Date	Trip Name	Price
5/4/2017	Golden Hands Venture	\$900.00
5/4/2017	Golden Hands Venture	\$900.00
5/4/2017	Golden Hands Venture	\$900.00
7/18/2017	Rocky Mountain Mission	\$1,700.00
7/18/2017	Rocky Mountain Mission	\$1,700.00
7/19/2017	Rocky Mountain Mission	\$1,700.00
7/19/2017	Rocky Mountain Mission	\$1,700.00
7/19/2017	Rocky Mountain Mission	\$1,700.00
7/19/2017	Rocky Mountain Mission	\$1,700.00
7/20/2017	Rocky Mountain Mission	\$1,700.00
7/20/2017	Rocky Mountain Mission	\$1,700.00
Subtotal:		\$18,200.00
Service		
7/13/2017	Boy Scout Project	\$1,000.00
7/13/2017	Boy Scout Project	\$1,000.00
Subtotal:		\$2,000.00
Grand Total:		\$131,200.00

Page: 14 4 No Filter



Use the Format Painter and Themes (Slide 1 of 2)

- **Format Painter**

- Tool you use to copy multiple formatting properties from one control to another in Design or Layout View for forms and reports

- **Themes**

- Predefined formats that you apply to the database to set all of the formatting enhancements such as font, color, and alignment on all forms and reports



Applying a theme to a report

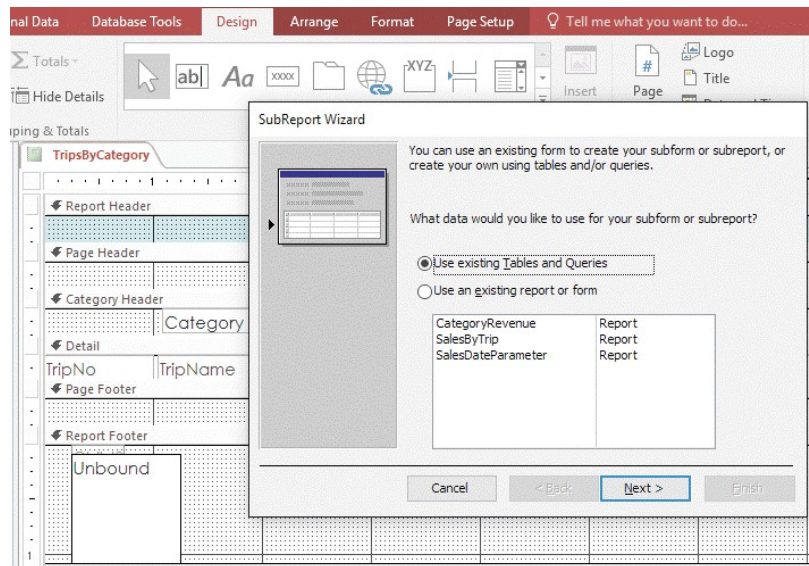




Add Subreports (Slide 1 of 2)

- **Subreport** control displays a report within another report
- Report that contains the subreport control is called the **main report**
- Can use a subreport control when you want to connect two reports together

SubReport Wizard
dialog box





Add Subreports (Slide 2 of 2)

Subreport in Report Design View

TripsByCategory

1 2 3 4 5 6 7 8

Report Header

Page Header

Category Header

Category

Detail

TripNo TripName TripStartDate Duration City StateAbbrev Price

Page Footer

Report Footer

1 2 3 4 5

Report Header

Category Revenue Report



Modify Section Properties

- Report **section properties**
 - Characteristics that define each section
 - Can be modified to improve report printouts

External Data Database Tools Design Arrange Format Page Setup Tell me what you want to do...

Grouping & Totals Totals - Group & Sort Hide Details

Controls

Header / Footer

Tools

Property Sheet

Selection type: Section

GroupFooter0

Format Data Event Other All

Property	Value
Name	GroupFooter0
Visible	Yes
Height	0.25"
Back Color	Background 1
Alternate Back Color	Background 1, Darker
Special Effect	Flat
Auto Height	Yes
Can Grow	Yes
Can Shrink	Yes
Display When	Always
Keep Together	Yes
Force New Page	After Section
New Row Or Col	None
On Click	
On Format	
On Dbl Click	
On Mouse Down	
On Mouse Up	
On Mouse Move	

Group, Sort, and Total

Group on TripName with A on top, by entire value, with CustNo totaled, with title Trip Name, with a header section, with a footer section, do not keep group together on one page, Less

Add a group Add a sort



Create Summary Reports (Slide 1 of 2)

- **Summary reports**
 - Reports that show statistics on groups of records rather than details for each record
- Create summary reports by using functions such as Sum, Count, or Avg
- Do not contain controls in Detail section

Design View of
CategorySummary
report

CategorySummary					
1 2 3 4 5 6					
Report Header					
Category Revenue Report					
Category Header					
Category					
Detail					
Category Footer					
Subtotal:					=Sum([Price])
Report Footer					
Grand Total:					=Sum([Price])



Create Summary Reports (Slide 2 of 2)

Preview of the CategorySummary report

Category Revenue Report	
Adventure	\$13,300.00
Cultural	\$12,600.00
Eco	\$48,300.00
Educational	\$36,800.00
Family	\$18,200.00
Service	\$2,000.00
Grand Total:	\$131,200.00