Introduction

Access offers several **advanced options** for creating and modifying reports. The **Report Wizard** is a tool that guides you through the process of creating complex reports. Once you've created a report—whether through the Report Wizard or the Report command—you can then **format** it to make it look exactly how you want.

In this lesson, you'll learn how to use the **Report Wizard** to create complex reports. You'll also learn how to use Access's **formatting options** to **format text**, **change report colors** and **fonts**, and **add a logo**.

Throughout this tutorial, we will be using a sample database. If you would like to follow along, you'll need to download our "Advanced Report Options.accdb" You will need to have Access 2013 installed on your computer in order to open the example.

The Report Wizard

While using the **Report** command is a quick way to create reports from the current object, it's not as helpful if you want to create a report with data from multiple objects. The **Report Wizard** makes it easy to create reports using fields from multiple tables and queries. It even lets you choose how your data will be organized.

To create a report with the Report Wizard:

1. Select the **Create** tab and locate the **Reports** group. Click the **Report Wizard** command.
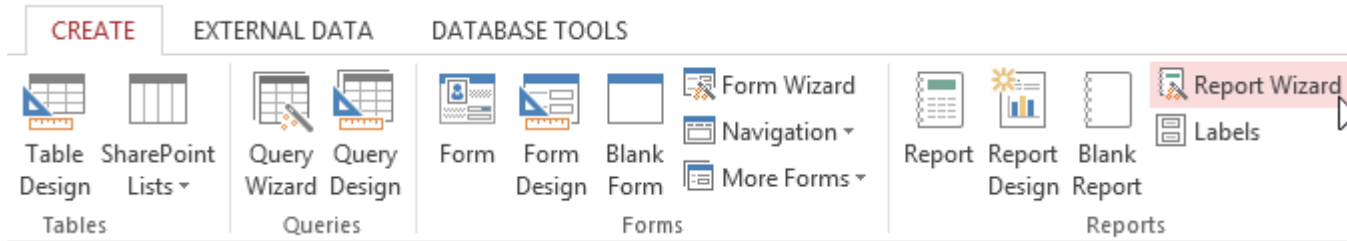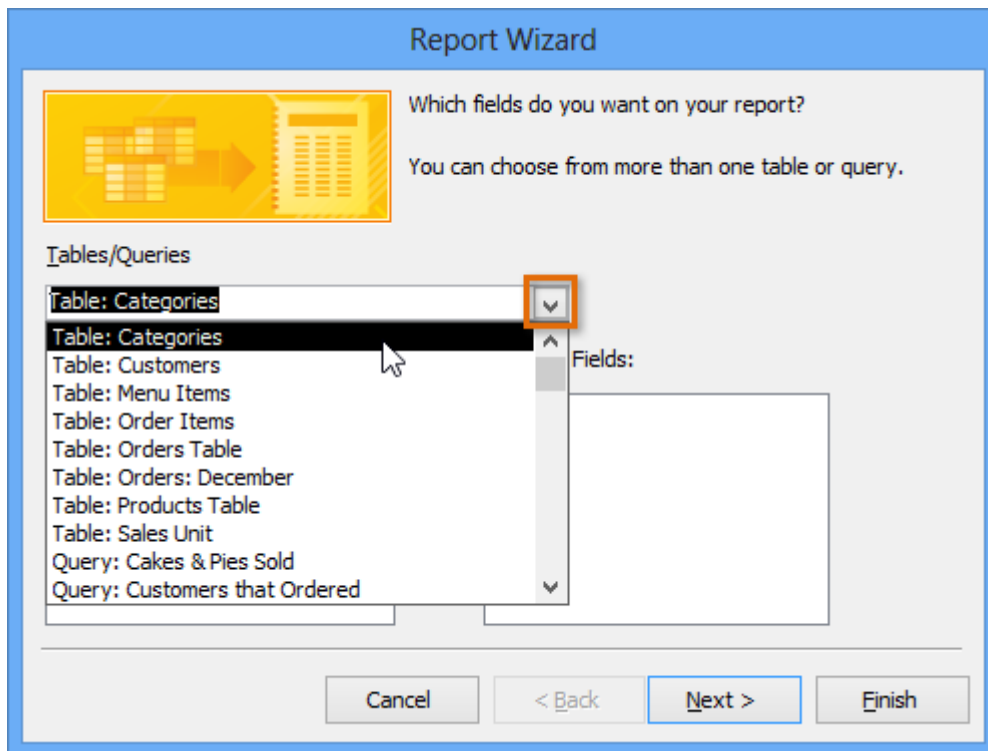
2. The **Report Wizard** will appear. In the procedures below, we'll discuss the different pages in the Report Wizard.
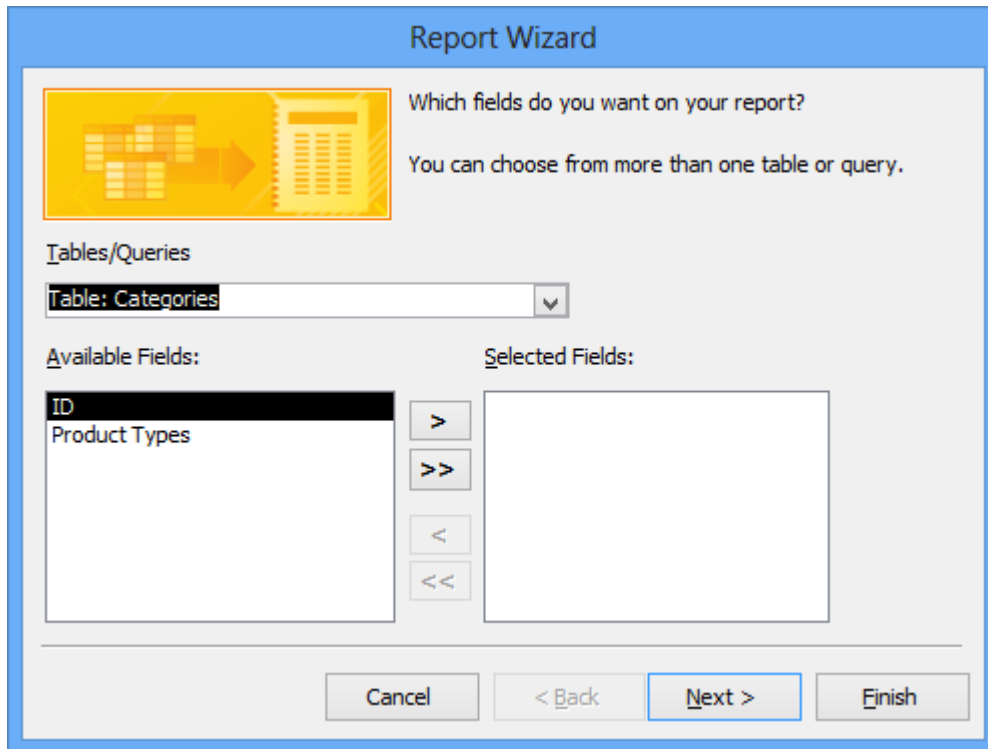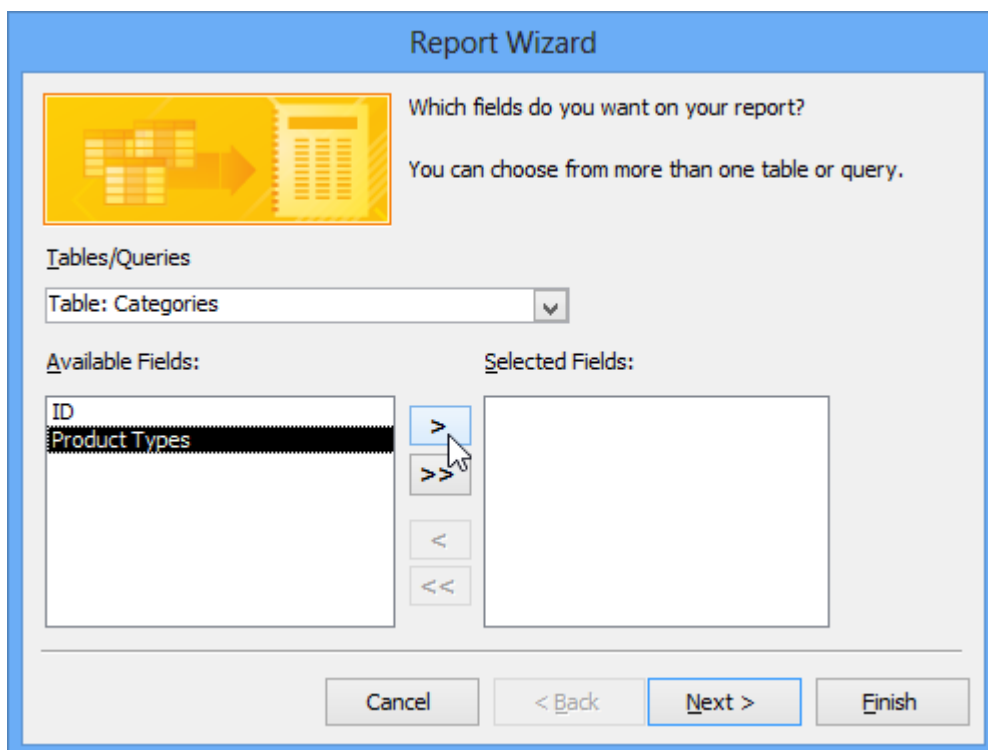

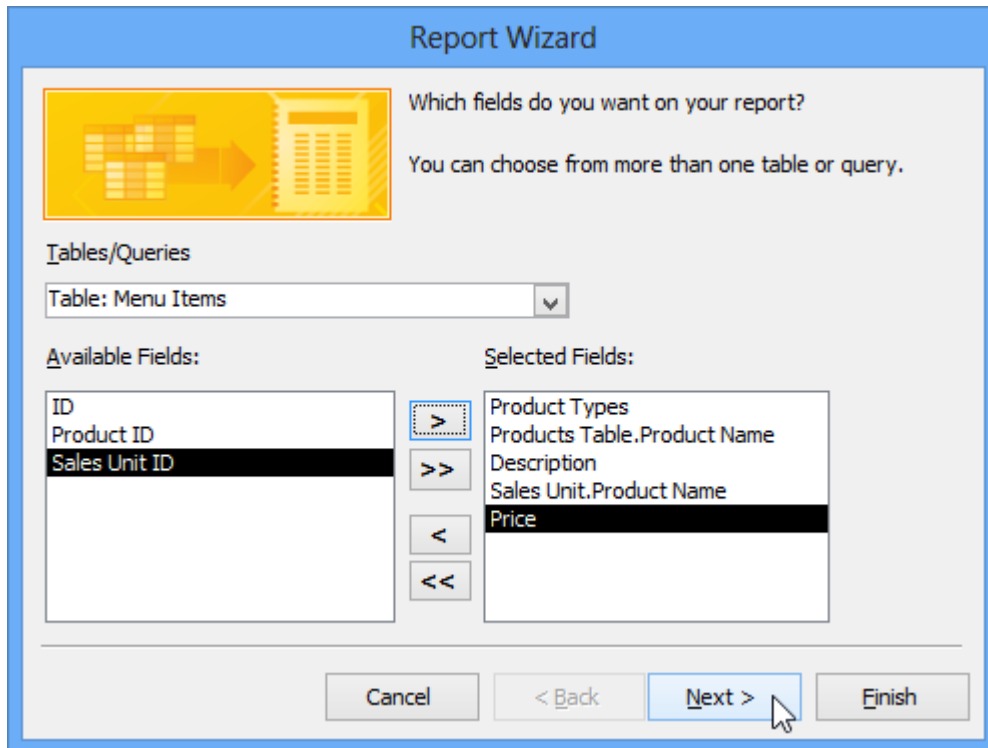# Step 1: Select the fields to include in your report

1. Click the **drop-down arrow** to select the table or query that contains the desired field(s).

2. Select a field from the list on the left, and click the **right arrow** to add it to the report.

3. You can add fields from more than one table or query by repeating the above steps. Once you've added the desired fields, click **Next**.


Step 2: Organize the report

The Report Wizard will provide you with options that let you choose how to view and organize your data. These options **group** similar data within your fields and **organize**these fields into multiple levels, like in an outline or bulleted list.

If you are building a report from only one table or query, you can skip to **Step 3** below.

1. Access will offer a list of several organization options. Select an option from the list to preview it.
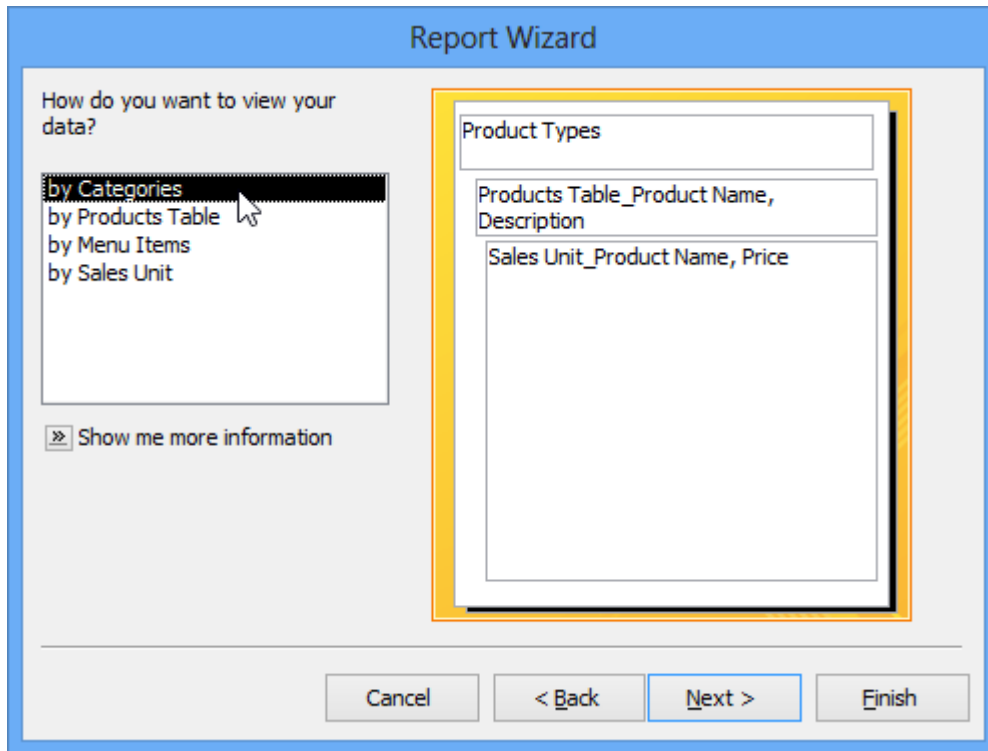
2. Click **Next** when you are satisfied with the basic organization of your data.

3. If you're not satisfied with the way your data is organized, you can now modify the grouping levels. Select a field from the list, and click the **right arrow** to add it as a new level.

4. If necessary, modify the order of your grouped fields by selecting a field and clicking the **up** or **down Priority** arrow to move it up or down a level.

5. Once you are satisfied with the organization of your report, click **Next**.

Step 3: Sort your report data

1. Click the top drop-down arrow, and select the name of the first field you want to sort.

2. Click the button on the right to change the sort to **ascending** or **descending**.


3. Add any additional sorts. You can sort up to **four fields**. The sort will be applied from top to bottom, meaning the sort at the top of the list will be the main sort.

4. When you are satisfied with the way your data is sorted, click **Next**.

Depending on the grouping you have chosen for your data, your sorting options may be limited.

Step 4: Select a layout and title

1. Click the various layout options to see how they look, then **select** one to use in your report.

2. Select either a **portrait** (tall) or **landscape** (wide) orientation for your report.
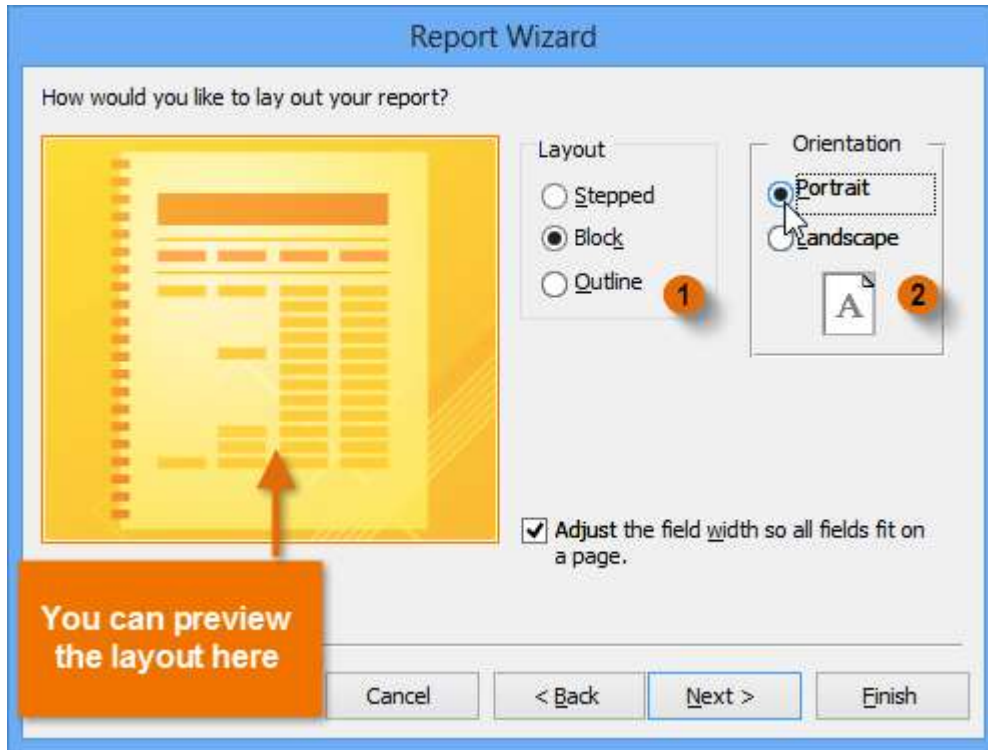
3. Once you are satisfied with your report layout, click **Next**.

4. Select the text box, and type the **title** you would like for your report.

5. Select whether you want to **preview** the report or **modify** its design, then click **Finish**.
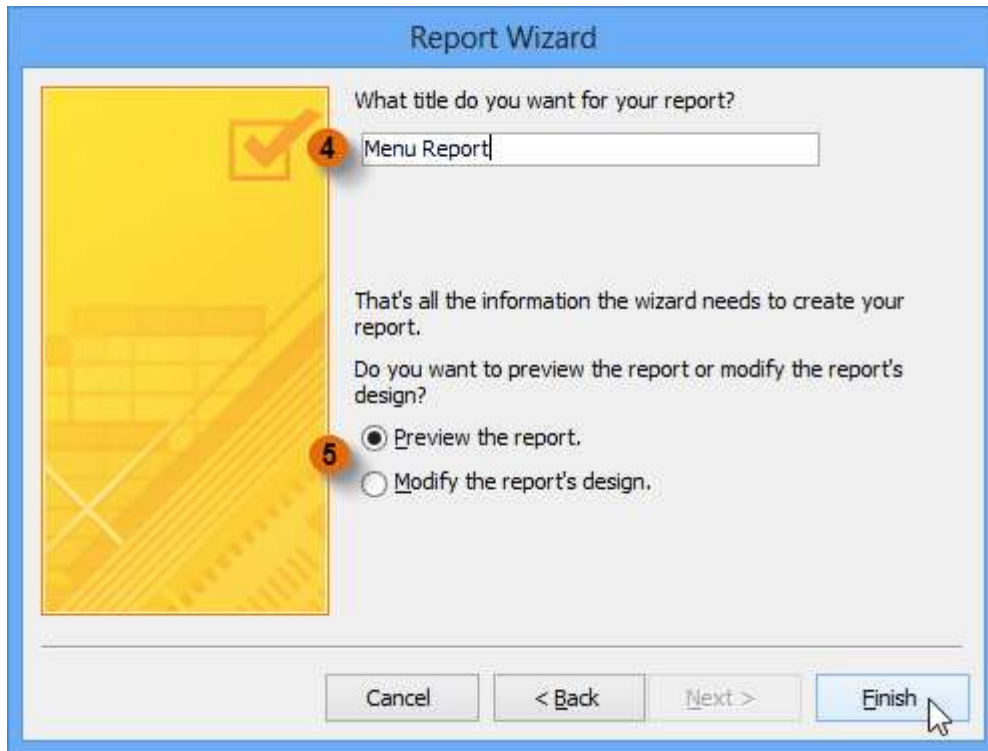
6. Your report will be created and saved.

You may have to adjust your field and row **size** and **location** to make sure your data looks the way you want it to. To do this, you'll need to switch to **Design view**. When you're done, switch back to **Report view** to see your changes.

Formatting reports

One of the strengths of reports is that you can modify their appearance to make them look how you want. You can add **headers** and **footers**, apply new **colors**, and even add a **logo**. All of these things can help you create visually appealing reports.

Modifying report text

The bulk of the information in your report comes straight from the query or table you built it from, which means you can't edit it within the report. However, you can change, add, or delete label text, headers, and footers to make your

report clearer and easier to read. For example, in our report we decided we didn't need the field headings to understand our data, so we simply **deleted** them.

Just like other Office programs, Access allows you to modify the text color and font, add shapes, and more. If you're not sure how to perform basic text and shape formatting, visit the **Formatting Text** and **Shapes** lessons from our **Word 2013** tutorial.

Cakes	Strawberry Swirl	A dizzying swirl of strawberries and crème. Hold on tight!	$22.00
Cakes	Cookies n' Cream	Like dipping oreos and milk, but a cake, and not at all soggy.	$22.00
Cakes	Lemon	A simple classic-- sweet and sour.	$22.00
Cakes	German Chocolate	"Chocolate" in German is "schokolade." You don't have to be able to say that to enjoy this cake.	$22.00

Modifying the page header and footer

To view and modify the **header** and **footer** that appear on each page of your report, select the **View** command on the Ribbon and switch to **Design view**. The header and footer are located in the white space beneath the **Page Header** and **Page Footer** bars.
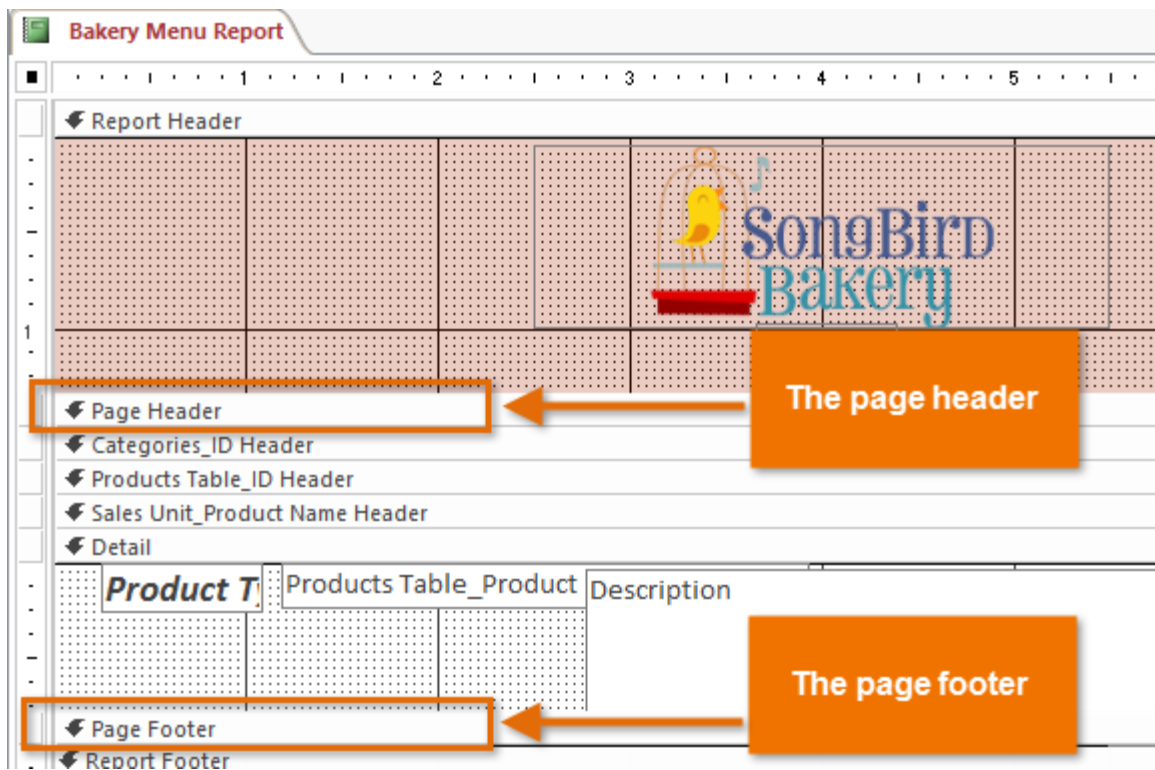
Depending on your report's design, sometimes you may find that there is no white space in the page header and footer, as in the image above. If this is the case, you must **resize** the header and footer before you can add anything to them. Simply click and drag the bottom border of the header or footer to make it larger.
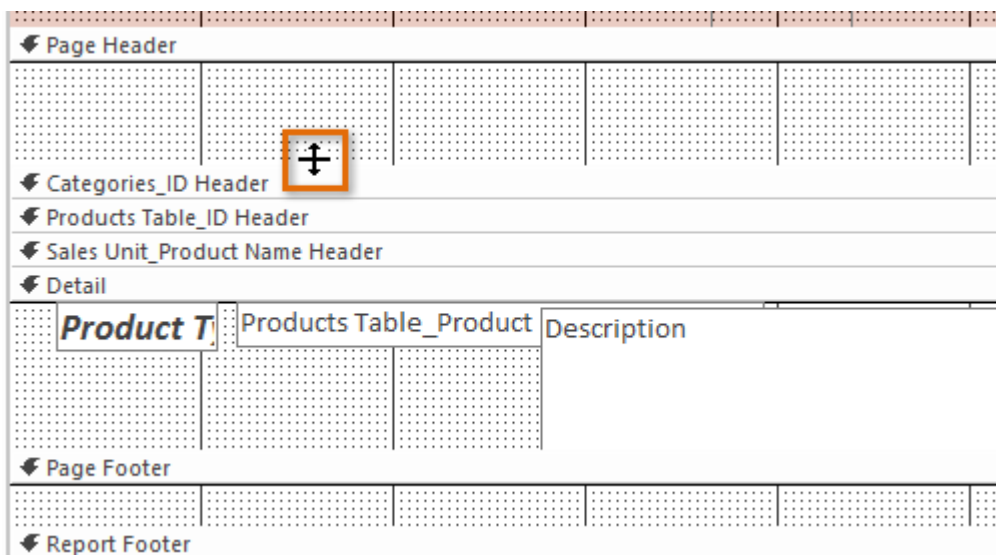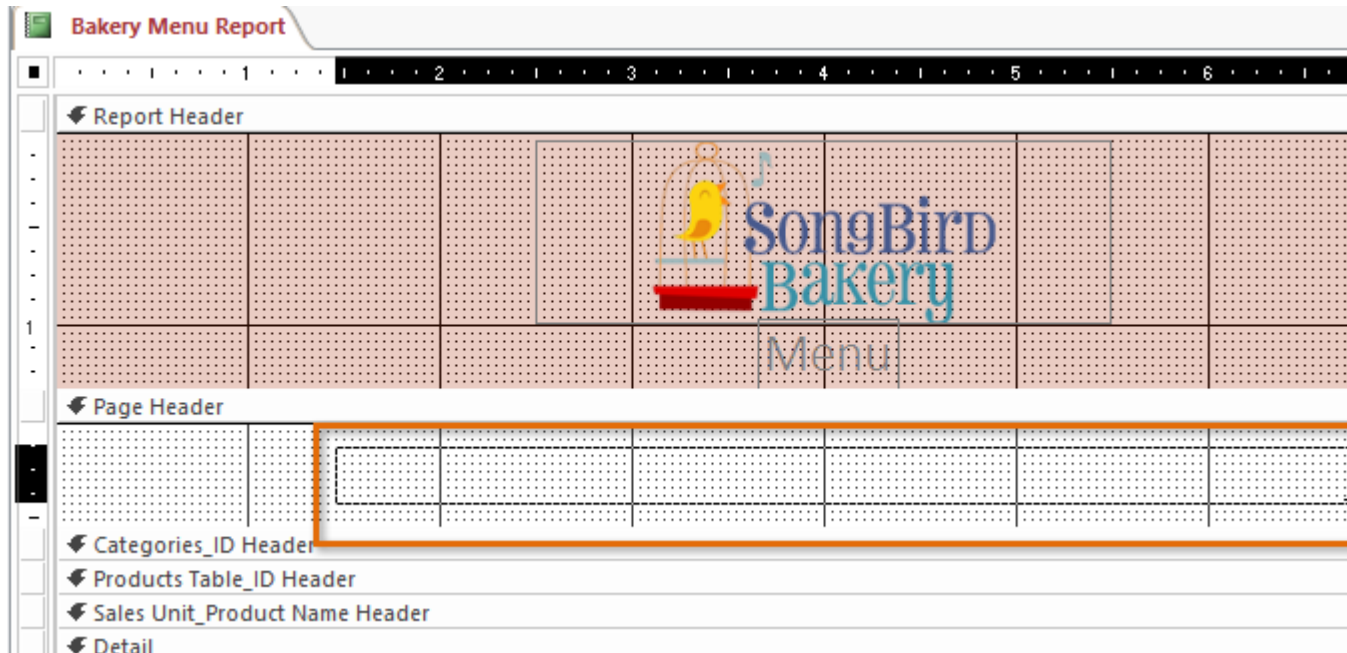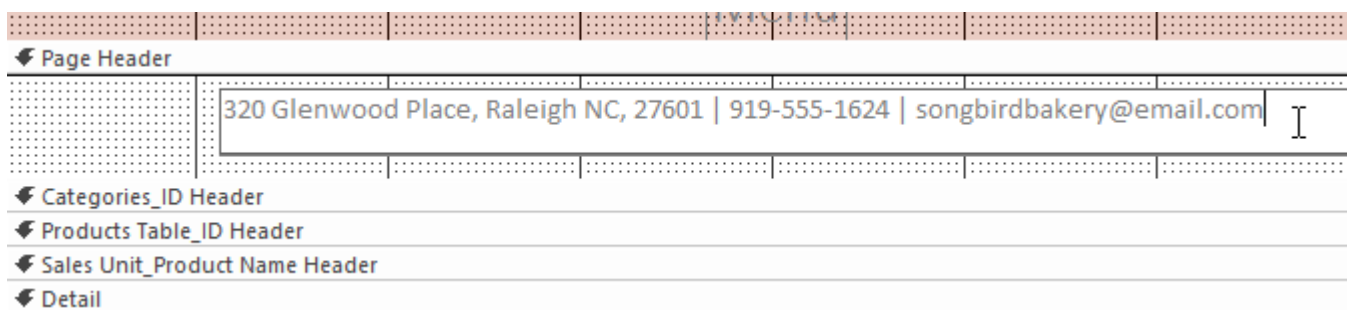
To add text to a header or footer:

1. Select the **Design** tab, locate the **Controls** group, and click the **Label** command.
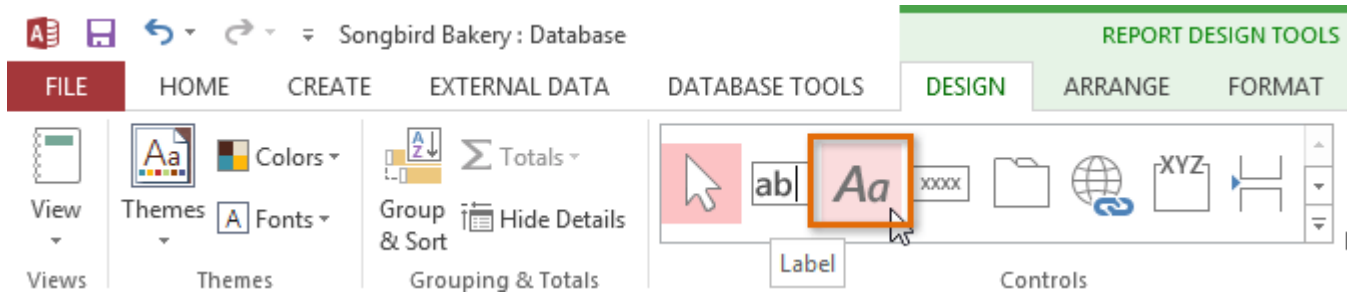
2. Click and drag the mouse inside the white area to create your label. Release the mouse when it is the desired size.
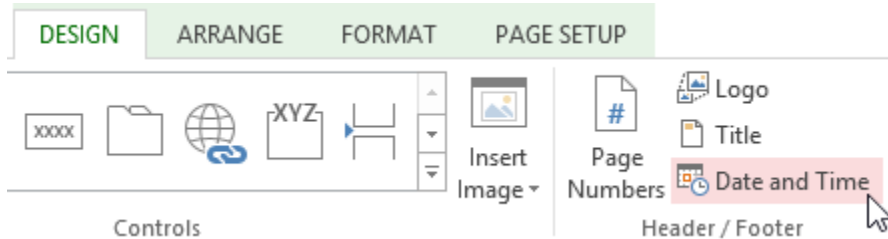

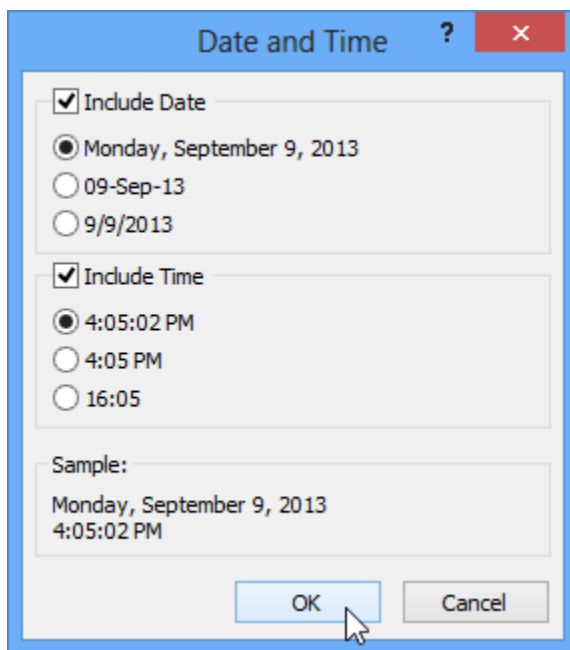3. Click the text box, and type the desired text.

To add the date and time to a header or footer:

1. Select the **Design** tab, locate the **Header/Footer** group, and click the **Date and Time** command.

2. A dialog box will appear. Select the desired formatting options. A preview of the text that will be included in your report will appear.

3. When you are satisfied with the appearance of the date and time, click **OK**.
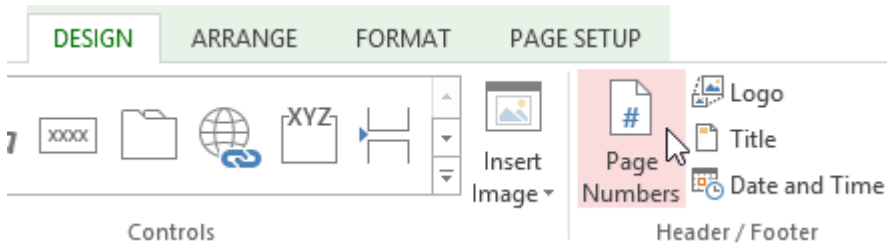
By default, the date and time appear in the **header**. If you would like to move them to the **footer** instead, simply click the date and time boxes and drag them to the desired location.

To add page numbers to a header or footer:

1. Select the **Design** tab, then locate the **Header/Footer** group.

2. Click the **Page Numbers** command.

3. The **Page Numbers** dialog box will appear. Select the **format** of the page numbers.

   o Select **Page N** to display the number of only the current page.

   o Select **Page N of M** to display the number of the current page and the number of total pages.

4. Under **Position**, choose **Top of Page** or **Bottom of Page** to control where the page numbers appear.

5. Click the drop-down arrow to select the **alignment** of the page numbers.

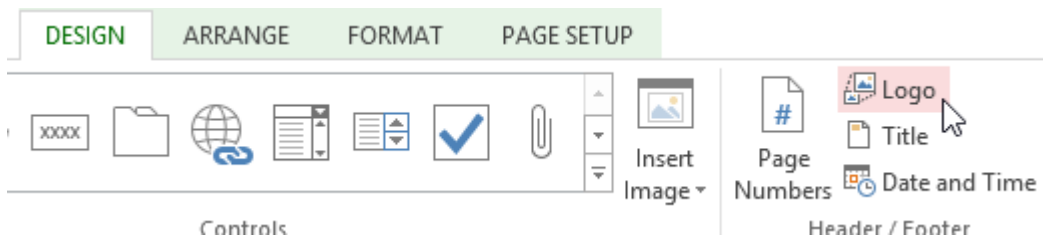6. When you are satisfied with the settings, click **OK**.
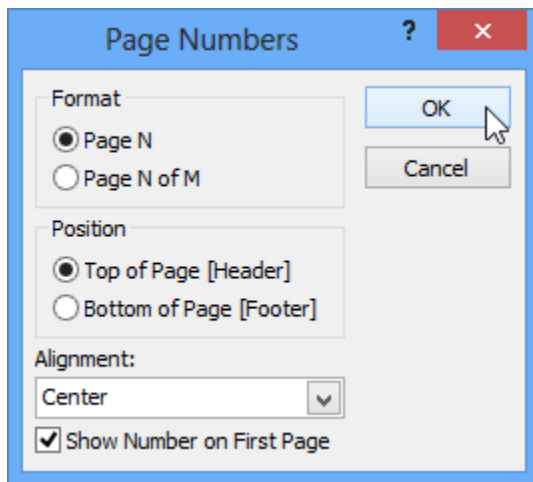
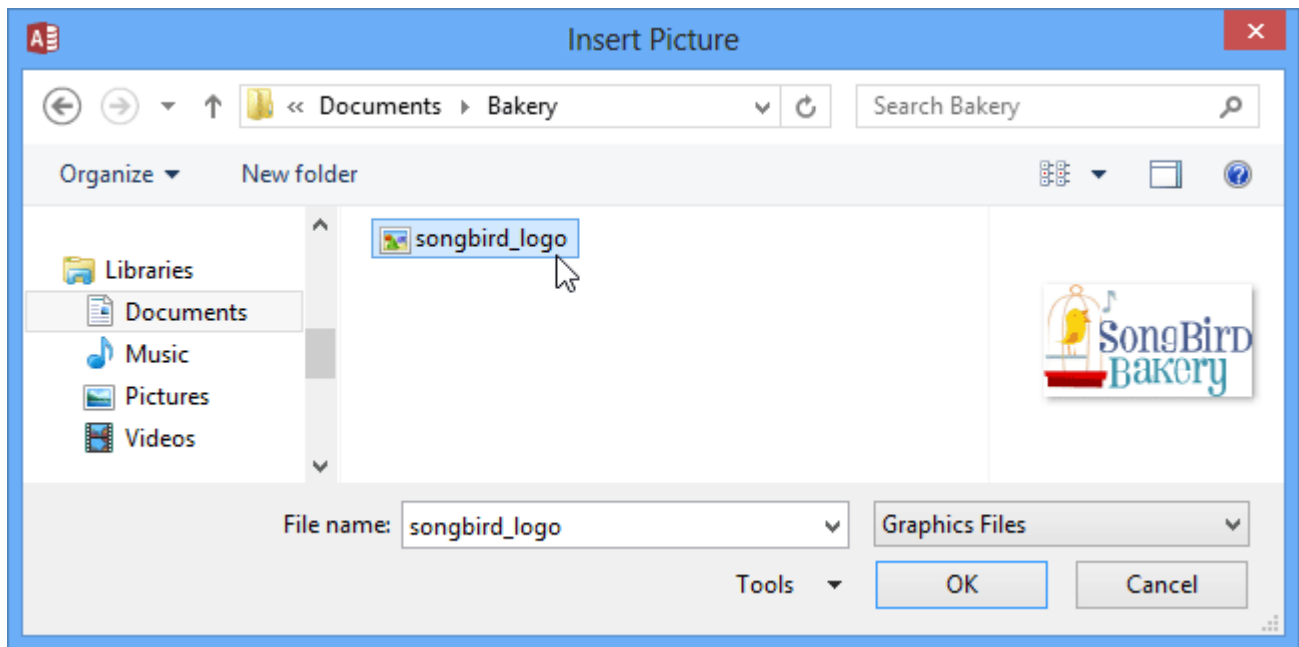# Modifying your report's appearance

To add a logo:

1. From the **Design** tab, click the **View** command, then select **Layout View** from the drop-down list.
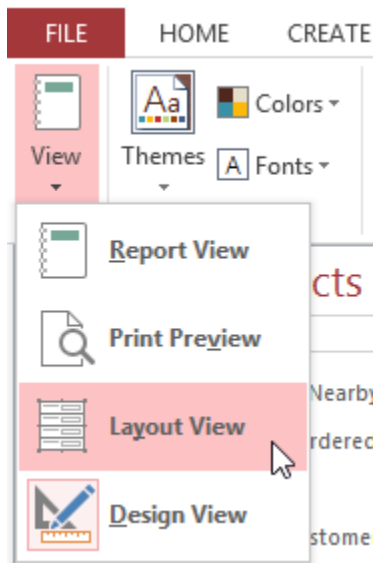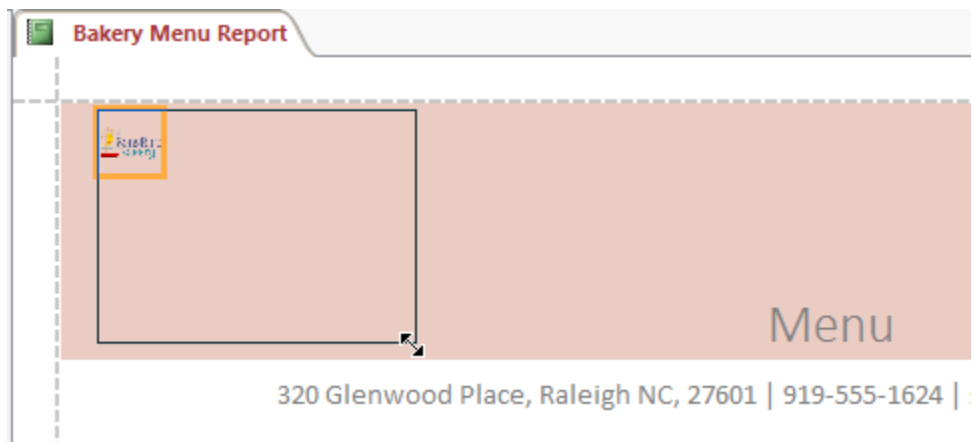

2. Locate the **Header/Footer** group, then click the **Logo** command.

3. A dialog box will appear. Locate and select the desired file, then click **OK** to add it to your report.

4. A small version of the image will appear in the header. Click and drag the image border to resize it.

5. If necessary, move your logo to the desired location by clicking and dragging it.

Themes and fonts

A **theme** is a set of **colors** and **fonts** that applies to the **entire database** to give it a consistent, professional look. By default, databases use the Office theme. When you change the theme, all of the theme fonts and colors in your database change to match the new theme. Designing and modifying reports using theme elements can help you keep the appearance of your reports consistent.

To change the theme:

1. Select the **Design** tab, locate the **Themes** group, and click the **Themes**command.
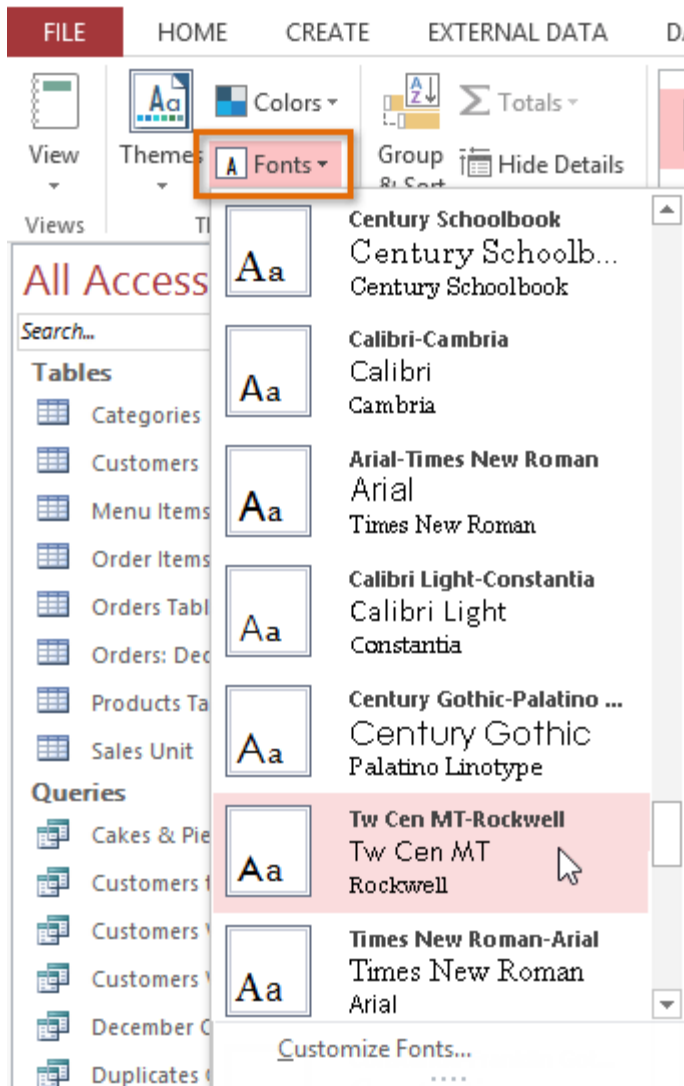
2. A drop-down menu will appear. Select the desired theme.
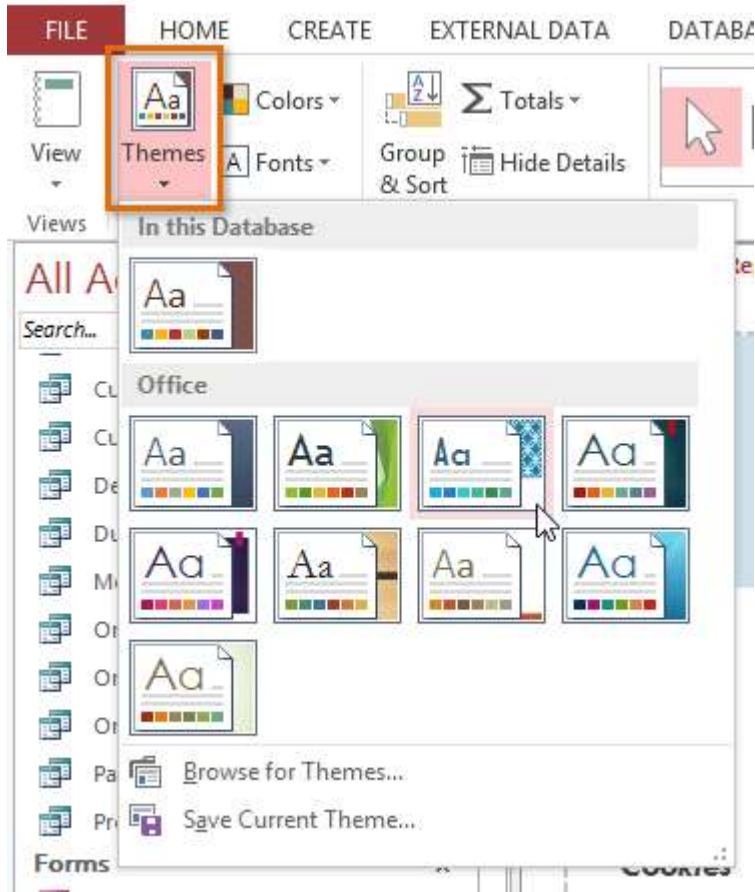
3. The theme will be applied to your entire database.

To change the theme fonts:

1. Select the **Design** tab, locate the **Themes** group, and click the **Fonts**command.

2. A drop-down menu will appear. Select a set of **theme fonts**.

3. The fonts will be applied to your entire database.

320 Glenwood Place, Raleigh NC, 27601 | 919-555-1624 | songbirdbakery@email.com

Cookies	Fudge Chocolate	So rich and heavy with chocolate, you'll need someone to help you carry it home. No, really.
Cookies	Sugar	Soft, moist and simply delightful.

Challenge!

1. Open an **existing Access database**. If you want, you can use our "Advanced Report Options.accdb"
2. Open the **Cookies Sold** report.
3. Add the **date** and **time** to the **header**.
4. Add **page numbers** to the **footer**.
5. Choose a new **theme** and **theme fonts**.
6. Add a **logo**. You can use an image from your computer or **download the Songbird Bakery logo**.