

ACCESS <<<<<<<

By Patricia Cox

The Master Budget Project: Creating a Report

>>> Last month we created a query to select the data needed for the Materials List Report. This month we will design the actual report. We will also discuss various useful report views and properties that allow you to customize a report.

With reports, there is a place for everything, and everything needs to be in the right place. Keeping that in mind makes it easier to create useful reports. To create the Materials List Report, go to the Create tab and click Report Wizard. In the Tables/Queries dropdown, you'll see that we can choose from any of the tables already created, which might lead you to wonder why we created Materials List Data query to gather data for the report. One advantage in gathering all the data in one object is that it becomes much easier to run through the Report Wizard multiple times if you aren't satisfied with the results.

After choosing the query from the dropdown menu, select the fields to be included in the report. For our report, we want to include all the fields, so click the double arrow that moves all the Available Fields on the left into the Selected Fields box on the right. Then click Next.

The next step asks about grouping

levels. This will allow us to create a sum function and a group section in the report design so we can add labels (for clarity) and text fields (for calculations). For our report, we are going to group by Product Name. Click Next to go to sort order and summary information. Access lets you sort by up to four fields. We will sort by Part Description. This step is also where we can add calculations to the report, so click on the Summary Options button. Access asks which fields we want calculated and gives us the options to calculate Sum, Avg, Min, and/or Max. We want to track the Total Estimated Product Cost, so check the Sum box for the Extended Cost field. We want the report to show the details and summary, so make sure that radial is selected in the Show box. Click OK to return to the Report Wizard, then click Next.

Layout and orientation default to Stepped layout and Portrait orientation, which is what we want, so click Next to get to style. Here, choose whichever style looks best to you. The completed report shown in Figure 1 uses the default "Office" style.

The final step is where you enter the title. The Report Wizard also adds page

numbers and dates in the footer. You can delete these items later if you don't want them.

There are always adjustments to the reports the Wizard creates, so before you click Finish, select the option to "Modify the Report's Design."

Modifying the Design

When you click Finish, Access will then open the report in Design View rather than Print Preview. Here is where you can add or move items and delete the page numbers, dates, or any other elements you don't want. Before making any changes, however, it is wise to save the design. That way you won't have to start all over if you make a substantial mistake.

Access opened the report in Design View, but that might not be the easiest view to use for making changes to the layout and design. There are four report views:

- ◆ *Report View* shows the report layout, but it doesn't include items such as page breaks. You can't make changes in Report View.
- ◆ *Print Preview* shows you what the report will look like when printing it

on paper. Remember that this isn't the same as Report View. You can't make changes in Print Preview.

- ◆ *Layout View* allows you to move controls around while seeing how it affects the layout.
- ◆ *Design View* also allows you to select and drag controls to change the design, but you need to go to Print Preview or Layout view to see how the changes will look. Design View also has a grid, which can make it easier to align items in your report.

Choose the view that feels more comfortable for you—either Design or Layout—and make the following changes to the Materials List Report:

- ◆ Move the subtotal and grand total value fields to line up with the detail. To do this, select the field and move it by either dragging it with the mouse or using the arrow keys on the keyboard.
- ◆ Change the "Sum" labels to read "Total Estimated Product Cost" and move them closer to the values. Because they are grouped, making changes to one label (renaming and moving) will automatically change the

Figure 1. Materials List Report

Product Name	Part Description	Units Needed	Cost Per Unit	Extended Cost
Basic Bike				
	Brake Unit	1	\$6.00	\$6.00
	Chain	1	\$6.00	\$6.00
	Gear Shift	1	\$8.00	\$8.00
	Rubber Handles	2	\$2.00	\$4.00
	Seat	1	\$4.00	\$4.00
	Steel	2	\$15.00	\$30.00
	Tires	2	\$10.00	\$20.00
Total Estimated Product Cost				\$78.00
Deluxe Bike				
	Brake Unit	1	\$6.00	\$6.00
	Chain	1	\$6.00	\$6.00
	Gear Shift	1	\$8.00	\$8.00
	Rubber Handles	2	\$2.00	\$4.00
	Seat	1	\$4.00	\$4.00
	Steel	3.5	\$15.00	\$52.50
	Tires	2	\$10.00	\$20.00
Total Estimated Product Cost				\$100.50
Grand Total				\$178.50

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other. Also move the Grand Total label closer to the values as well.

- ◆ On the Property Sheet (which you can bring up at any time by pressing F4, right-clicking a report control and choosing Properties, or going to the Arrange tab of Report Layout Tools and selecting Property Sheet), select GroupFooter1. On the Format tab, set the Force New Page property to "After Section."

Figure 1 shows the final layout with these changes. Some people prefer to create reports from a blank report, but that takes a lot of patience and a thorough understanding of report sections, grouping, and controls. It's easier to

use the wizard for a close draft and then modify it.

Next month we will begin to create a navigation structure that will make it easier to access completed objects while we continue to develop the database. **SF**

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