CREATE 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 2013 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.

Review and Create 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.

Review the Queries
✦ Open the database Jobs from the folder where it was stored when it was downloaded from the Access 2013 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.

Create the Potential Income by Employer Query
✦ Click the Create Tab.
✦ In the Queries Group, click the Query Design button (see illustration at right).
✦ The Show Table dialog box will display (see illustration below).
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 below).

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.
★ Make sure the colon (:) appears after the first Openings word.
★ 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: If((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.

Create a Report
In the Database window, click the Create Tab.
In the Reports Group, click Report Design.
The **Design View** window will display (see illustration below).

The report will appear with the **Page Header**, **Page Footer**, and **Detail** section displayed.

Click the **Maximize** button on the **Report** window, if necessary.

Change the width of the report to **5.5-inches**, if necessary.

To change the width of the report:

-Star (*)* Move the mouse pointer to the edge of the gray area in the **Design** window.
-Star (*)* The mouse pointer will change to the shape illustrated at the right.
-Star (*)* Click and drag the mouse pointer until the gray area reaches the 5.5-inch mark on the horizontal ruler.

Click the **Report Design Tools: Design Tab**, if necessary.

In the **Tools Group**, click the **Property Sheet** button (see illustration below left).

In the **Selection Type** box, make sure **Report** is selected.

Click the **Data Tab** (see illustration below right).

Click the **Record Source** arrow.

Choose the query **NAICS and Employers** from the list.

**Sort and Group 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).
- In the Grouping and Totals Group, click the Group and Sort button (see illustration below 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.
- Move the mouse pointer over the line between the NAICSDesc Group Header and the Detail header.
- Click and drag down about 0.5-inches on the vertical ruler.
- 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.

Move the Position field and Phone field up below the Postal Code 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 Header/Footer 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.

Click the View Button arrow.

Click Layout View.

Click the Report Layout Tools: Design Tab, if necessary.

Click the Themes button in the Themes Group (see illustration at right).

Move the mouse pointer over each of the Themes to see a Live Preview of the Theme.

Select a Theme for the Report.

To change the Colors for the Theme, click the Colors button.

To change the Fonts scheme for the Theme, click the Fonts button.

Select the fields in the second column of the report.

Move them to the right about two-inches.

Select the Field Controls in the left column; the ones that contain the data from the table.

DO NOT select the Label controls; the ones with the Field Names.

Move the mouse pointer over to the right edge of one of the controls.

Resize the Controls so that all the data appears in each of the records.

You will have to scroll down to make sure all the data displays.

Switch back to Design View.

Click the Report Design Tools: Design tab.

Click the Line button in the Controls Group (see illustration on next page).

Draw a line at the bottom of the Detail section of the report.

Holding down the Shift key while drawing can be used to draw a straight line.

Double click the Line to open the Property Sheet.

Click the Format tab (see illustration on next page).

Use the Border options to make formatting changes to the line.

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**.