



Access Reports 1: Building a Report





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Patient Reports

Instant Report

There is only one Instant Report, we'll have to use the wizard to see more Report types.



- 1. Select Patients table
- 2. From the **Create** Tab, in the **Reports** group, click the **Report** button.
 - Adjust widths so the fields fit within the margin guides. If anything goes awry, Undo.
- 3. Save as **Patients**

Patients						
Patients		Ν	1onday, May 29, 2017 9:09:04 PM			
Pt Med Rec	Last Name	First Name	Address		City	ST
015-695	Jacobsen	Jeffery	1398 NE 8t	h Ave, #1245	Gainesville	FL
068-821	Perez	Penelope	2034 Banan	a Drive	Gainesville	FL
073-809	Glass	Gloria	2343 Kale L	ane	Gainesville	FL
082-340	Knight	Katrina	9204 Avoca	ido Ave	Gainesville	FL
082-366	Smith	Sarah	456 East Ma	ain Street	Gainesville	fl
105-469	Kent	Kevin	2903 New F	Potato Drive	Gainesville	FL
107-284	Xue	Xena	2890 Poseid	don Place	Gainesville	FL
117-723	Toole	Todd	9240 Carrot	t Way	Gainesville	FL
124-988	Clark	Carl	9213 Kiwi R	oad	Gainesville	fl
127-496	King	Kala	RR 2 box 32	13	Waldo	FL
137-997	Rogers	Robert	534 Lovers	Lane	Gainesville	FI
146-935	Jones	llit	209 Cantalo	oupe Way	Gainesville	FL
154-788	Owns	Orville	723 SW 35t	h Blvd	Gainesville	FL
155-130	Finch	Frank	409 SW 92n	nd Avenue	Micanopy	FL
155-612	Mack	Mervin	2934 Turnip	Place	Gainesville	FL
159-884	Ellis	Emily	PO Box 554	4	Gainesville	FL
165-936	Gentle	Gary	9420 Horse	radish Ave	Gainesville	FL
174-457	Jimenez	Jose	12 South Bo	oxer Ave	Gainesville	FL
186-280	Zinn	Zelda	745 Nectari	ine Ave	Gainesville	FL
207-451	Fuller	Francis	123 South M	Aain Street	Gainesville	FL

Report Wizard

- 1. Select Patients table
- 2. From the **Create** tab choose Report Wizard.
 - Choose all the fields (next)
 - No Grouping (next)
 - No Sorting (next)
 - Layout: Columnar, Portrait, Adjusting field widths
 - Title: Patients Columnar
- 3. Repeat steps 1 and 2 for Layout: Tabular
- 4. Repeat steps 1 and 2 for Layout: Justified.
 - Justified looks bad because of the field sizes.

125 South Main Street	Gamesvine
Report Wizard	
	Which fields do you want on your report? You can choose from more than one table or query.
Tables/Queries	
Table: Patients	•
<u>Available Fields:</u>	Selected Fields:
	 Pt Med Rec Pt Last Name Pt First Name Pt Address Pt City Pt State Ft Zip
Report Wizard	
How would you like to lay out your rep	ort?
Ca	ncel < gack Next > Einish

Report Layout Columnar

Patients Col	umnar	
Pt Med Rec	015-695	
Last Name	Jacobsen	
First Name	Jeffery	
Address	1398 NE 8th Ave, #1245	
City	Gainesville	
ST	FL	
Zip	32567	
Pt Med Rec	068-821	
Last Name	Perez	
First Name	Penelope	
Address	2034 Banana Drive	
City	Gainesville	
ST	FL	
Zip	32567	

Report Layout Tabular

Patients T	abular					
Pt Med Rec	Last Name	First Name	Address	City	ST	Zip
015-695	Jacobsen	Jeffery	1398 NE 8th Ave,	Gainesville	FL	32567
068-821	Perez	Penelope	2034 Banana Dri	Gainesville	FL	32567
073-809	Glass	Gloria	2343 Kale Lane	Gainesville	FL	32597
082-340	Knight	Katrina	9204 Avocado Av	Gainesville	FL	32667
082-366	Smith	Sarah	456 East Main Str	Gainesville	fl	32608
105-469	Kent	Kevin	2903 New Potato	Gainesville	FL	32608
107-284	Xue	Xena	2890 Poseidon Pl	Gainesville	FL	32597
117-723	Toole	Todd	9240 Carrot Way	Gainesville	FL	32667
124-988	Clark	Carl	9213 Kiwi Road	Gainesville	fl	32667
127-496	King	Kala	RR 2 box 323	Waldo	FL	34567
137-997	Rogers	Robert	534 Lovers Lane	Gainesville	FI	32653
146-935	Jones	Jill	209 Cantaloupe	Gainesville	FL	32597
154-788	Owns	Orville	723 SW 35th Blv	Gainesville	FL	32655
155-130	Finch	Frank	409 SW 92nd Av	Micanopy	FL	32608

Report Layout Justified

Patients Jus	tified			
Pt Med Rec				
015-695				
015-055				
Last Name				
Jacobsen				
First Name				
Jeffery				
Address				
1398 NE 8th Ave, #1	245			
City				
Gainesville				
Guillesville				
ST				
FL				

Field Sizes Matter

Remember when you go through the instant Form/Report tools or wizards Access looks at the **Field Size** property to determine how big the text boxes need to be. We can continually readjust the text boxes every time we use these tools, or we can make sure our field sizes are more appropriate.

- 1. Close all database objects (tables, Forms, Reports...).
- 2. Open the Patients table in Design view.
- 3. Change the field sizes:
 - Pt Med Rec 10
 - Pt Last Name 50
 - Pt First Name 50
 - Pt Address 255
 - Pt City 50
 - Pt State 2
 - Pt Zip 15
- 4. Close and Save the table, confirm it is OK if data is lost.
- 5. Repeat the Report Wizard using the Justified layout.
- 6. Save as **Patients Justified 2.**

Pt Med RecLast NameFirst Name015-695JacobsenJefferyAddressJage State S	
Address 1398 NE 8th Ave, #1245 City ST Zip Gainesville FL 32567 Pt Med Rec Last Name First Name 068-821 Perez Penelope Address 2034 Banana Drive City ST Zip	2
1398 NE 8th Ave, #1245 City ST Zip Gainesville FL 32567 Pt Med Rec Last Name FIL S267 Pt Med Rec Last Name Perez Perez Penelope Address 2034 Banana Drive City ST Zip	
City ST Zip Gainesville FL 32567 Pt Med Rec Last Name First Name 068-821 Perez Penelope Address 2034 Banana Drive	
Gainesville FL 32567 Pt Med Rec Last Name First Name 068-821 Perez Penelope Address 2034 Banana Drive City	
Pt Med Rec Last Name First Name 068-821 Perez Penelope Address 2034 Banana Drive City ST Zip	
068-821 Perez Penelope Address 2034 Banana Drive City ST Zip	
Address 2034 Banana Drive City ST Zip	3
2034 Banana Drive City ST Zip	
City ST Zip	
Gainesville FL 32567	
Pt Med Rec Last Name First Name	
073-809 Glass Gloria	à

	Patients					×
2	Field N	ame	Da	ata Type	Description (Optional)	
₽Þ	Pt Med Rec		Short Text			
	Pt Last Name		Short Text			
	Pt First Name		Short Text			
	Pt Address		Short Text			
	Pt City		Short Text			
	Pt State		Short Text			
	Pt 7in		Short Text	operties		•
J	ield Size	10 @				
Ir	iput Mask					
	aption					
	efault Value					
- 11÷	alidation Rule				ge that appears when you enter a	
L Dê	alidation Text				by the validation rule. Press F1 for	r
	equired	Yes		nei	lp on validation text.	
	llow Zero Length	Yes				
L I E	idexed	Yes (No Duplicat	es)			
	nicode Compression	No				
L I P	/IE Mode	No Control				
	VE Sentence Mode	None				
T	ext Align	General				
					Num Lock 🔲 😫	0

Report Sections



1. Select Patients table

- 2. From the **Create** tab choose Report Wizard.
 - Choose all the fields (next)
 - No Grouping (next)
 - No Sorting (next)
 - Layout: Tabular, Landscape, Adjusting field widths
 - Title: Patients
 - Confirm replacing the report
- 3. Set Zoom to four pages

Report W	/izard ×
	The report 'Patients' already exists. Do you want to replace it?
	<u>Yes</u> <u>N</u> o

- 4. Report Sections
 - Report Header, "Patients" first page only
 - Page Header/Footer, "Med Rec, Last Name, First Name..." on every page
 - Detail, each line of data every record

Unit with with with with with with with wi	Patients							PT Med Re		FirstName	Addintas	city	ST	Хiр
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Name Name <th< td=""><td>Pt Med Re</td><td>Last Name</td><td>FirstName</td><td>Address</td><td>City</td><td>ST</td><td>Zip</td><td></td><td></td><td></td><td></td><td></td><td></td><td>32 66 8</td></th<>	Pt Med Re	Last Name	FirstName	Address	City	ST	Zip							32 66 8
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Norm Norm <th< td=""><td>105-469</td><td>Kont</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<>	105-469	Kont												
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man man <td>124-985</td> <td>Clark</td> <td>Carl</td> <td>9215 Kiwi Road</td> <td>Caincaville</td> <td>1</td> <td>32667</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	124-985	Clark	Carl	9215 Kiwi Road	Caincaville	1	32667							
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Aless Aless <td< td=""><td>157-997</td><td>Nagan</td><td>Robert</td><td>554 Lovers Lanc</td><td>Caincaville</td><td>- 1</td><td>52 65 3</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>	157-997	Nagan	Robert	554 Lovers Lanc	Caincaville	- 1	52 65 3							
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Marke Only Marketskarket Markets N Markets <td>159-554</td> <td>tilia</td> <td>Emily</td> <td>PD 5ex 5544</td> <td>Caincovillo</td> <td>- N.</td> <td>32 65 9</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>34 56 7</td>	159-554	tilia	Emily	PD 5ex 5544	Caincovillo	- N.	32 65 9							34 56 7
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284-16 Veracti PC 50:22 Gale 2012 And 2014 PC 50:22 Gale 2012 And 2014 Gale 2014 And 2014	517-052	Pope	Perry	243 SW 4th Place	Gaine aville	1 5	52 59 7	942-339	Thomas	Tom	NT 3 Box 334	Waldo	N .	34 567
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2833 Cafor Cafy 34 NVN Main Stord Garaz Nig F, 5137 2034 Linggin Long 10 Stefen/Lingging No	564-675	Van Glogh	Vincent	PD 5ex 230	Gaincovillo	15	32 65 4	950-965	Adama	Amis	65.31 N W 4th Ave	Gaine sville	1 5	32 65
Lington Long d 155 Heff Lingesty Acc Wefg FL 1556 Key Werky 3023 Hem Termec Wefg FL 1566 55.56 Win Mak 641 H155 Minit Garca /k FL 1568 <	602-935	Adington	Amdd	254 55 45th Kosd	Caincaville	- R.	32 59 7	952-717	Paulson	Paul	726 South 45 Skd	Gaine sville	R .	32 65
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- 2. Right-click inside the Report Footer section and choose a fill color.
- 3. Preview the Report to see where the Report footer will appear.
 - Last page, after the last Record Detail, before the Page Footer.
- 4. From the Controls on the Design tab, choose the Label. Click to turn the tool on and click where you would like the box to appear.



- 5. Type "Created by [your name]"
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Create a Report in Design view

- 1. From the **Create** Tab, in the **Reports** group, click the **Report Design**.
 - 2. Open the property sheet.
 - 3. Click in the Grid of the Detail Section to see the *Section* properties.
 - Change the *Height* property to 2"
 - 4. Click outside the grid to see the *Report* properties.
 - Change the *Record Source* property to **Patients**
 - 5. Open the field list with the **Add Existing Fields** button on the Design tab.
 - 6. Double-click on **Pt Med Rec** in the Field List.
 - 7. Go to the Print Preview to see the result.
 - 0.25" margin + 0.25" Page header
 - + 2.00" for each record (Detail)
 - This would work for a columnar Report.

Set up a Tabular Report

- 1. In the Design view, move the Pt Med Rec label and text box as high as you can in the detail section
 - Or set property Top to 0"
 - 2. Reduce the height of the Detail section as far as it will go
 - Or set property height to 0". It cannot be zero because there are objects in the way, but it will make it as small as possible.
 - 3. Go to the Print Preview to see the result.
 - 4. Adjust the spacing in the detail section so the data is not so tight.
 - You can eyeball this, but I would select the field, press the down arrow key on my keyboard four times, press the up arrow 2 times. This stretches out the detail section and re-centers my field within the given space.
 - 5. Move the label to the Page Header.
 - The label is attached to the text box, to sever their connection use Cut. Cut the label from the detail section, paste in the Page Header section.
 - Use the align and size tools to make the Report organized.
 - 6. Make a matching Last Name column.
 - 7. Go to the Print Preview to see the result.
 - 8. Close and Save as **Patients Draft 1**.



Pt	Med	Rec	015-695	
Pt	Med	Rec	068-821	
Pt	Med	Rec	073-809	
Pt	Med	Rec	082-340	
Pt	Med	Rec	082-366	
Pt	Med	Rec	105-469	
Pt	Med	Rec	107-284	
Pt	Med	Rec	117-723	
Pt	Med	Rec	124-988	
Pt	Med	Rec	127-496	
Pt	Med	Rec	137-997	
Pt	Med	Rec	146-935	
Pt	Med	Rec	154-788	
Pt	Med	Rec	155-130	
	Med		155-612	
Pt	Med	Rec	159-884	
	Med		165-936	
	Med		174-457	
	Med		186-280	
	Med		207-451	
	Med		210-844	_
	Med		227-324	
	Med		263-730	_
Pt	Med	Rec	269-583	
Pt	Med	Rec	269-852	_
Pt	Med	Rec	269-852	
Pt	Med	Rec		
Pt	Med	Rec	Pt Med Rec	
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Pt	Med	Rec	Pt Med Rec 015-695 068-821	
Pt	Med	Rec	Pt Med Rec 015-695 068-821 073-809	
Pt	Med	Rec	Pt Med Rec 015-695 068-821 073-809 082-340	
Pt	Med	Rec	Pt Med Rec 015-695 068-821 073-809 082-340 082-366	
Pt	Med	Rec	Pt Med Rec 015-695 068-821 073-809 082-340 082-366 105-469	
Pt	Med	Rec	Pt Med Rec 015-695 068-821 073-809 082-340 082-366 105-469 107-284	
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Working with Table Structures

- 1. From the **Create** Tab, in the **Reports** group, click the **Report Design**.
- 2. Open the Property Sheet (button on the Design tab).
- 3. Click outside the grid to see the Form properties
 - Change the *Record Source* property to **Patients**
- 4. Open the field list with the Add Existing Fields (button on the Design tab).
- 5. Click on Pt Med Rec and Shift-Click on Pt Zip
- 6. Drag the Selection onto the Form

When you drag the fields onto the Form/Report, each textbox is a single unit, you can resize and move it independent of the other objects. Sometimes that's good so you can customize your Form/Report, sometimes it's bad because resizing one thing requires you to resize EVERYTHING.

File	Home	Create	External Data	Database Tools	Design	Arrange	Format	Page Setup	Ŷ	Tell me	what you w	ant to do
2	Stacked Tab	Dular Remov Layou	re Insert Inser Above Belov	t Insert Insert W Left Right	Select Layo Select Colu Select Row	mn Merge	e Split	Split Horizontally	Move Up	Move Down	A Control Margins *	Control Padding •
	Table			Rows & Columns			Merge /	Split	M	ove	Pos	ition

Access provides table structures within the Form. They are a little cranky, but usually worth the effort.

- 7. With all the fields selected, click on the **Stacked** option on the Arrange tab.
 - Click in the grid to drop the selection. Then click on one field to see that you're in a "table".
 - The plus sign in the corner is a "Table Move Handle", it will select everything in the table. You can use it to move the table structure.
 - Once you're in a table structure, most of the Arrange tab will be enabled.
- 8. Swap the first and last name.
- 9. Select the whole table and click the Tabular option on the Arrange tab.
 - This is much easier than individually moving the labels into the page header one at a time.
- 10. Swap the first and last name again.
- 11. Select the whole table and choose the Remove Layout option.
 - This removes the table structure but keeps the object placements.
- 12. Close and don't save

+		:::
Pt Med	Rec: Pt Med Rec	
		:::
Last Na	me: Pt Last Name	
First Na	me: Pt First Name	
		:::
Address	Pt Address	
		:::
City:	Pt City	
ST	Pt State	
	<u> </u>	
Zip	Pt Zip	

• Page Header	
Pt Med Rec	Eirst:Name La
• Detail	-
Pt Med Rec	Pt First Name Pt

Page Header	
Pt Med Rec	First Name Las
 Detail 	
Pt Med Rec	Pt First Name Pt

Sorting Data on a Report

The Sort options are available in the Data view of Tables, Queries, and Forms, but not in a Report. The Sort Order of a dataset can be arranged in the Design view of a Query. If you want to limit the data on a Report or have it display the data in a specific order, you may want to set up a Query. It is possible to sort a Report, but it has to be set in the structure of the Report.

<u>Quick Filter</u>

- 1. Open the Report **Patients** in Report view.
 - Notice the Sorting tools are disabled, but the filters are working.
- 2. Right-click on *Waldo* in the *City* Column. Choose **Equals Waldo**.
- 3. Click the **Toggle filter** button on the Home tab.
 - Filters are temporary. If you close the Report and reopen it, all the data will return.

Sort Order

- 1. Go to the Design view of the Report.
- 2. From the Design tab or from the right-click menu , open the Sorting and Grouping Options
 - Depending on where you find the tool it has slightly different names: Group & Sort; Sorting and Grouping; Group, Sort, and Total.
- 3. Sort by City "with Z on top".
- 4. Sort by Last Name "With A on top".
- 5. Close and Don't Save.

Quick Sort in Layout View

- 1. Open the Patients Report in Layout view.
- 2. If needed, open the Group & Sort pane.
- 3. Right-click on a city and choose Sort Z to A.
- 4. Right-click on a last name and choose Sort A to Z.
 - This replaces the City sort, only one sort level this way.

Label Wizard

Labels are usually used to create folder labels, mailing labels, and name tags. You can create these through a Mail Merge in Microsoft Word, or here in Access by using the Label Wizard. In Word, you're able to modify the final result; in Access, you cannot modify the data on a Report.

Make sure you select the correct database object in the Navigation Pane, this wizard does not give you a chance to change the record source.

Group, Sort, and Total							
Sort by CITY 🔻 with Z on top 🔻 , More 🕨							
Sort	Sort by LAST						
	[≡] Add a group ^{⊉↓} Add a						

The label product number should be listed on the box of labels.

1.

2.

Gainesville, FL 32655



Gainesville, FL 32608

Micanopy, FL 32608

Same Report, Different Data

Happens all the time. You have a beautiful Report, but it has the wrong data. You can try to recreate the Report, but that is more work than needed.

Make the Query

Again, if you only want part of the data, you should create a Query that produces the set you want.



- 1. From the Create tab, choose Query Design.
- 2. Add the Patients Table to the query.
- 3. Add all the fields at once with the * option.
 - Double-click on the * at the top of the Patients Table. The asterisk (*) represents the entire dataset.
- 4. Add Pt City.
 - Double-click on Pt City.
 - Since the * already brought a City field, uncheck the Show option.
 - Set the criteria to **Not "Gainesville".**
- 5. Save as **Patients not Gainesville**.
 - Should be 21 records.

Copy the Report

You can open the original report and use the Save As option, but copying and pasting the original report often produces better results. You may need to change the Report Property **Caption** to match the new report.

- 1. Right-click on the report Labels Patients 5160 and Copy.
- 2. Right-click anywhere in the Navigation Pane and choose Paste.
- 3. Paste as: Labels Patients 5160 Not Gainesville.
- 4. Right-click on the new report and go to the Design view.
- 5. Open the property sheet.
- 6. Change the Record source property for the Report to **Patients not Gainesville.**
- 7. Preview the Report.
 - If needed, say OK to the margin error message.
- 8. Save!!

Patients Not Gainesville						
		Patients				
		*				
	8	🖁 Pt Med Rec				
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