

Database Software

Terry Marris September 2009

5 Reports

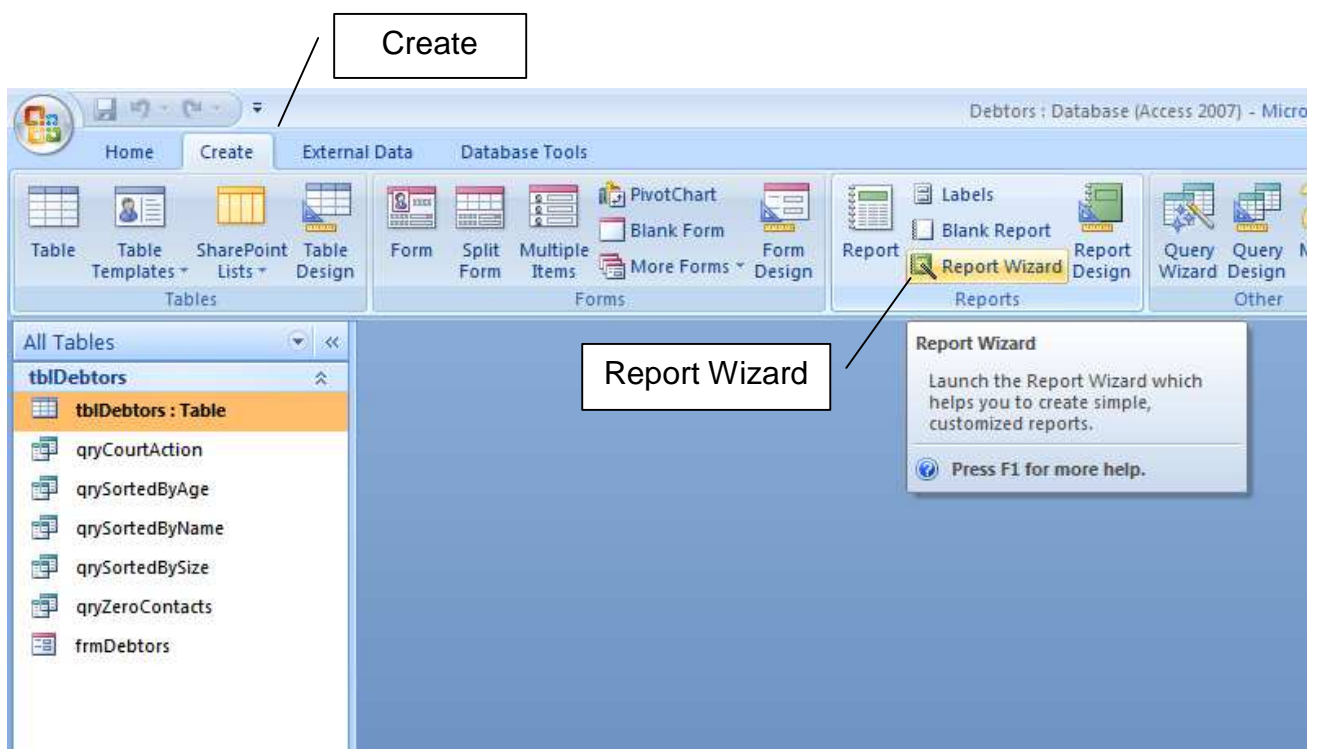
Previously, we used queries to extract information from a database. Now we see how to create reports to present information.

5.1 Report

We construct a report showing the money owed by debtors.

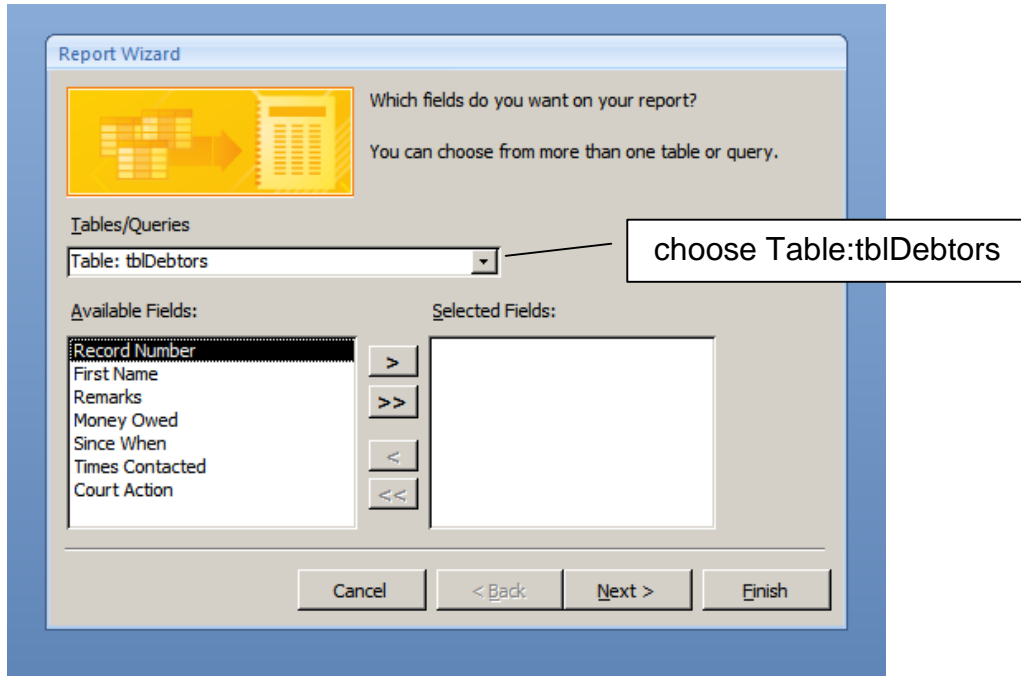
Start Up

1. start with all tables, forms, queries, ... closed, but with the database Debtors open and Security Options enabled
2. choose Create
3. choose Report Wizard



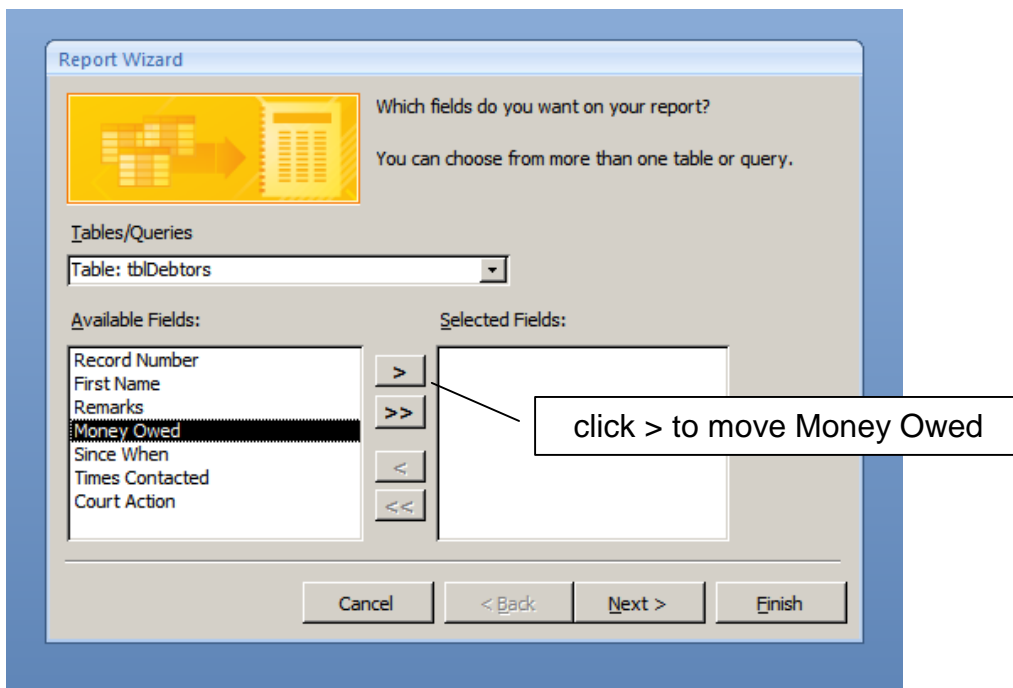
Choose the source of the report

1. there is just one table to be used as the basis of the report, so *Table:tblDebtors* is fine

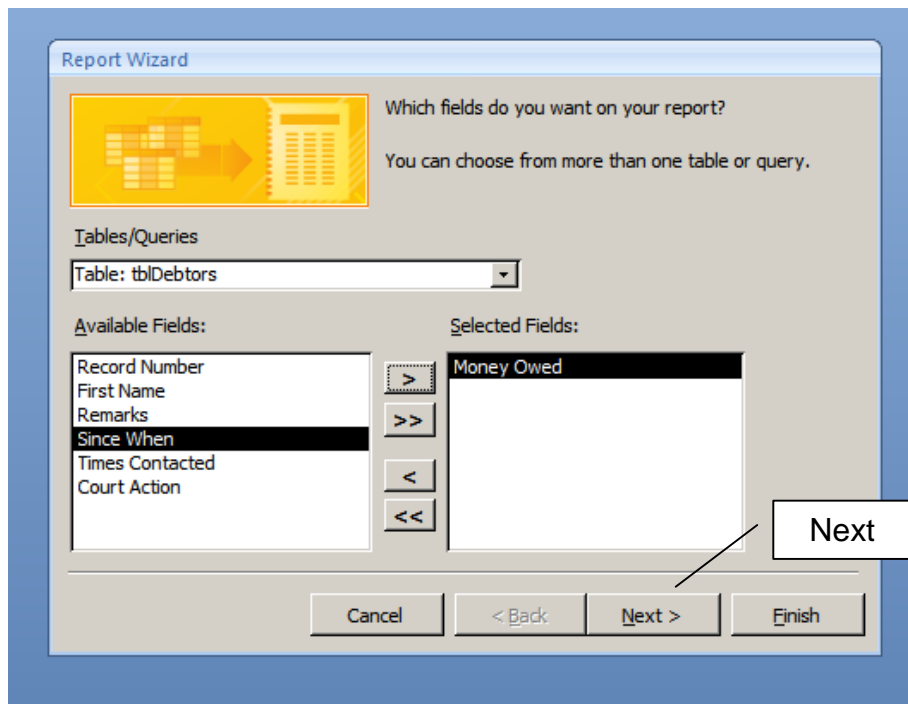


Choose the content of the report

1. select *Money Owed*, the first item to be in the report

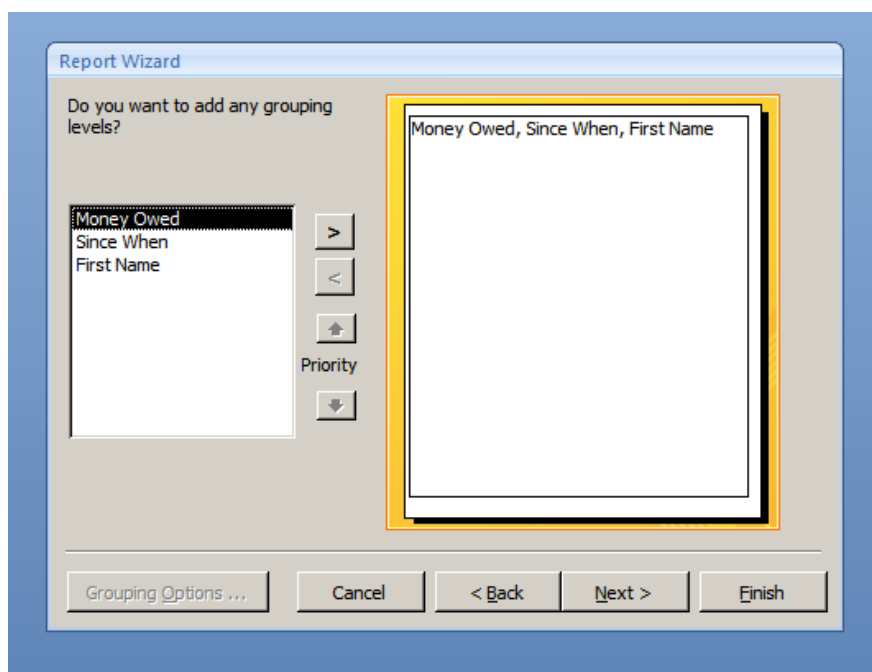


- then click > to move Money Owed from Available Fields to Selected Fields



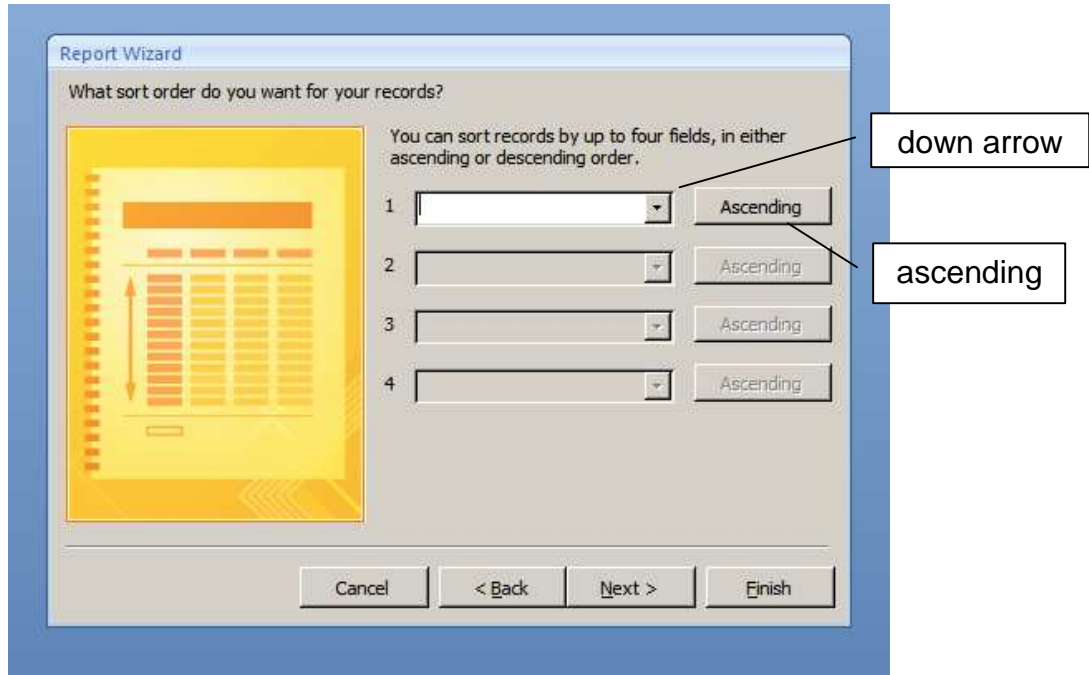
- in the same way, copy over *Since When* and *First Name*
- Next

Format the Report



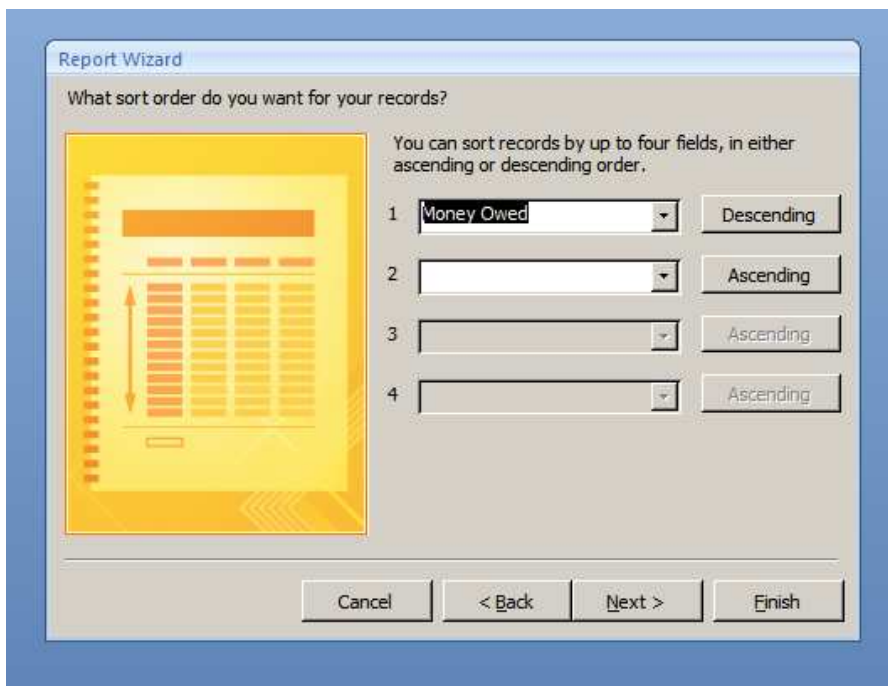
- we do not want any grouping, so we click Next

We choose to list in descending order of debt, with the largest debt first.



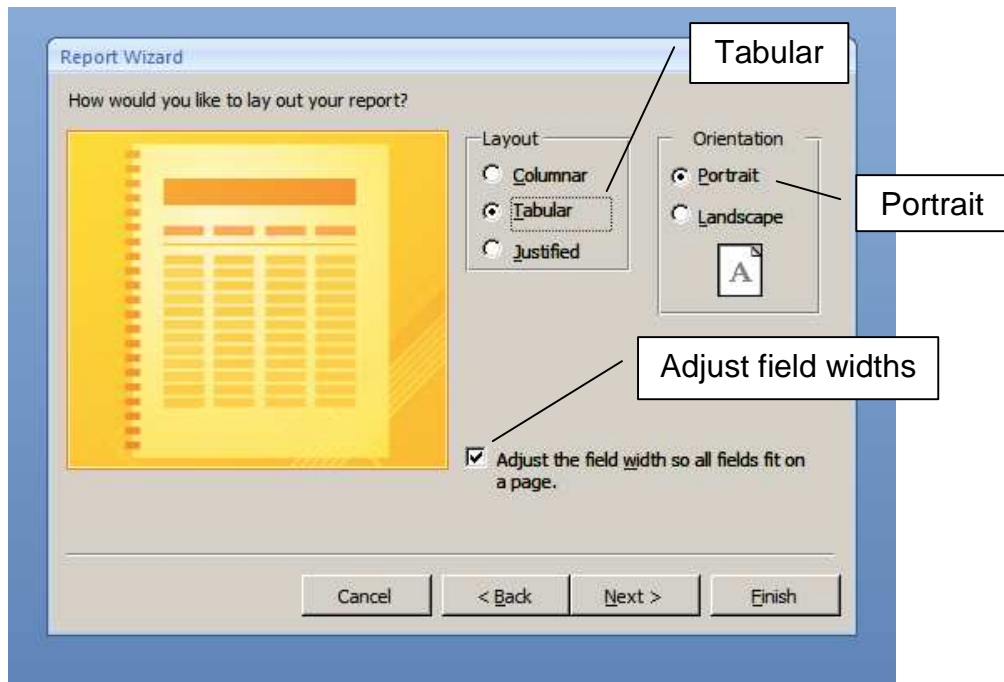
2. click on the down arrow
3. choose Money Owed
4. click on Ascending to change it to Descending

X



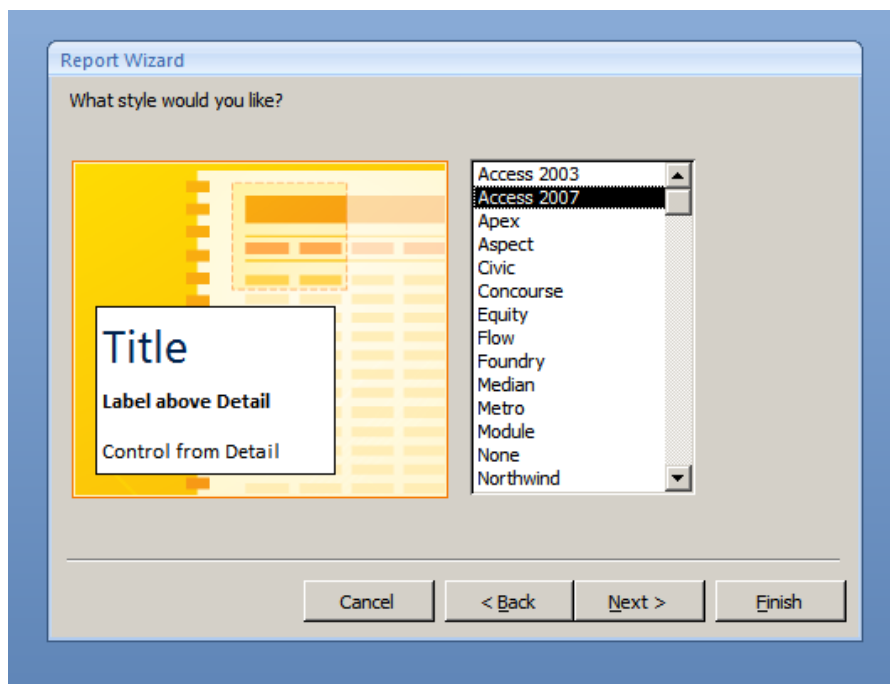
5. Next

6. We choose
 - a. Tabular Layout
 - b. Portrait Orientation
 - c. Adjust field width so all fields fit on one page

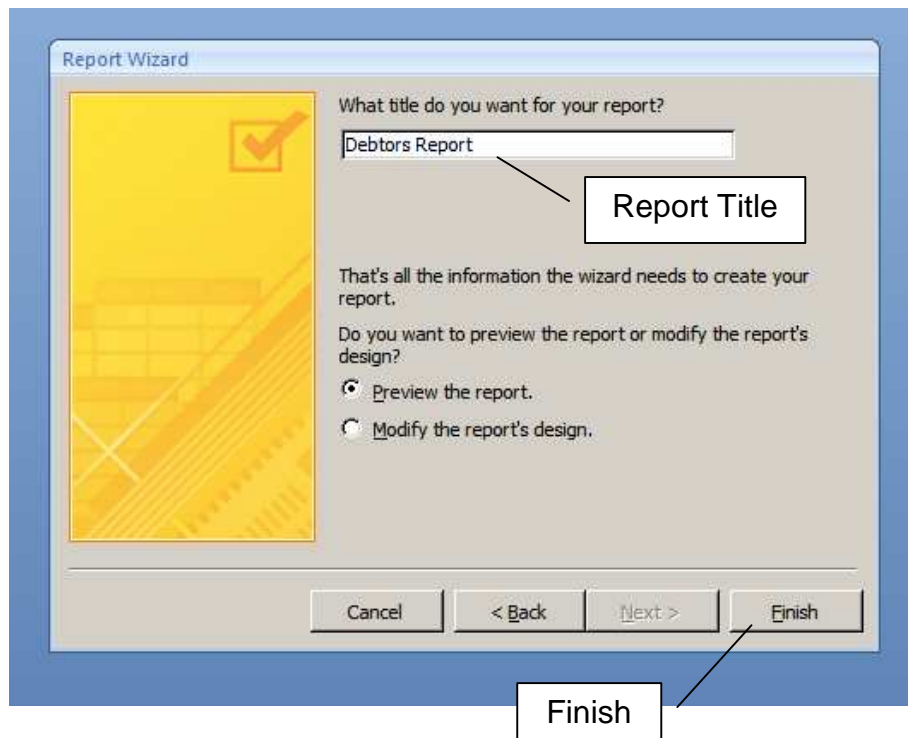


7. Next

8. choose Access 2007 style



9. Next

10. set the report title to Debtors Report**11.** Finish

Tidy Up



The screenshot shows a software interface with a 'Debtors Report' tab selected. A callout box points to the tab with the text 'Debtors Report tab'. Below the tab, the report content is displayed, including a title 'Debtors Report' and a table with three columns: 'Money Owed', 'Since When', and 'First Name'. The table lists 15 debtors with their respective amounts and dates.

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan

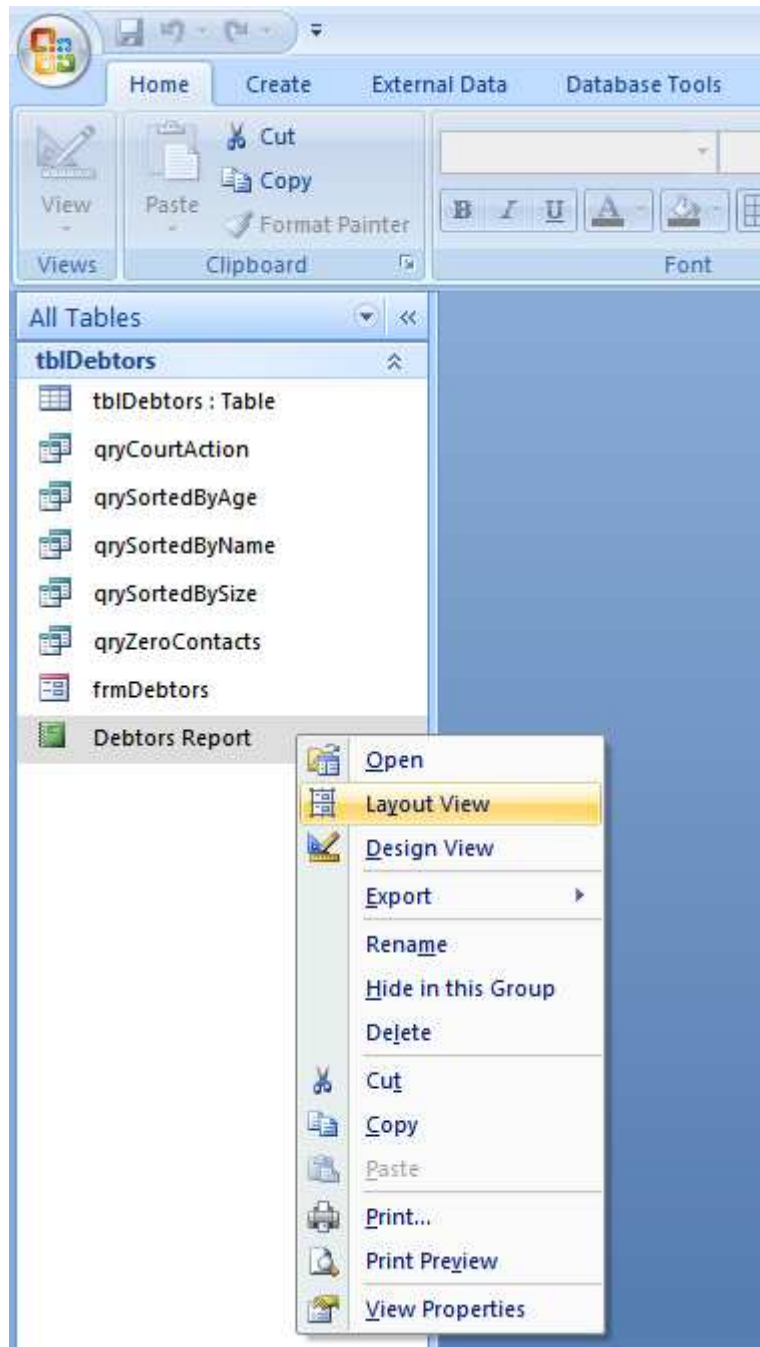
1. right click Debtors Report tab, Save
2. right click Debtors Report tab, Close

Improve the Report

We could do with having a total for all the money owed.

Add a Total

1. right click Debtors report
2. choose Layout View



3. click on any number in the Money Owed column

4. click Σ Totals down arrow

The screenshot shows the Microsoft Access interface with the 'Debtors Report' open in Report Layout Tools. The ribbon is set to 'Page Setup', and the 'Grouping & Totals' group is active. A callout box points to the 'Totals' button (represented by a sigma symbol and a down arrow) in this group. The report itself is a table with three columns: 'Money Owed', 'Since When', and 'First Name'. The 'Money Owed' column is highlighted with a dashed orange border. The report footer displays the date '31 August 2009'.

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan

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5. choose Sum

The screenshot shows the Microsoft Access interface with the 'Debtors Report' open. The 'Totals' dropdown menu is open, and the 'Sum' option is highlighted. A callout box labeled 'Sum' points to this option. The report displays a table with columns for 'Money Owed', 'Since When', and 'First Name'. The data is as follows:

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan

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Format the Total

1. click on the sum itself (730)
2. click on the Format down arrow

The screenshot shows the Microsoft Access Report Layout Tools ribbon with the 'Format' tab selected. The 'Debtors Report' is displayed in the main window. The report table has columns for 'Money Owed', 'Since when', and 'First Name'. The total value of 730 is highlighted in the 'Money Owed' column. A tooltip for the 'Format' button is visible, and callouts point to the 'Format' button and the total value.

Money Owed	Since when	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan
730		

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3. choose Currency

The screenshot shows the Microsoft Access interface with the 'Debtors Report' open. The 'Format' tab is active, and a context menu is displayed over the 'Currency' field in the report. The menu lists various number and date formats, with 'Currency' selected. A callout box points to the 'Currency' option in the menu.

Money Owed	Name
£250.00	
£75.00	
£75.00	
£50.00	
£50.00	
£50.00	16/11/2008 Terry
£35.00	16/04/2009 Doug
£35.00	01/09/2009 Paige
£25.00	15/03/2009 Anna
£25.00	17/02/2009 Barb
£15.00	06/06/2008 Barry
£15.00	01/09/2008 Hazel
£15.00	25/08/2008 Mary
£10.00	03/05/2009 Justin
£5.00	25/06/2008 Stan
730	

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Report Layout Tools Debtors : Database (Access 2008)

Home Create External Data Database Tools Format Arrange Page Setup

View Calibri 10 Conditional Currency % .00 >.0 Group & Sort Hide Details Totals Width Style Color Gridlines

Font Formatting Grouping & Totals Gridlines

All Tables << Debtors Report

tblDebtors

- tblDebtors : Table
- qryCourtAction
- qrySortedByAge
- qrySortedByName
- qrySortedBySize
- qryZeroContacts
- frmDebtors
- Debtors Report

Debtors Report

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan
£730.00		

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Add a Caption

1. right click on the total, £730.00
2. choose Set Caption

The screenshot shows the Microsoft Access Report Layout Tools ribbon with the 'Format' tab selected. The 'Debtors Report' is displayed in the main area. A context menu is open over the total value of £730.00 in the 'Money Owed' column. The 'Set Caption' option is highlighted in yellow. A callout box points to this option with the text 'Set Caption'. Another callout box points to the total value with the text '£730.00'.

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00		
£50.00		
£50.00		
£35.00		
£35.00		
£25.00		
£25.00		
£15.00		
£15.00		
£15.00		
£10.00		
£5.00		
£730.00		

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The screenshot shows the Microsoft Access 2007 interface. The ribbon is set to 'Database Tools' and the 'Debtors Report' tab is selected. The ribbon includes sections for 'Views', 'Clipboard', 'Font', 'Rich Text', and 'Records'. The 'Debtors Report' tab is highlighted, and a callout box points to it with the text 'Debtors Report tab'. The main window displays a report titled 'Debtors Report' with a table of debtors.

Money Owed	Since When	First Name
£250.00	01/09/2008	Pearl
£75.00	15/08/2009	Priti
£75.00	03/03/2008	Rose
£50.00	15/05/2009	Jo
£50.00	01/03/2009	Annette
£50.00	16/11/2008	Terry
£35.00	16/04/2009	Doug
£35.00	01/09/2009	Paige
£25.00	15/03/2009	Anna
£25.00	17/02/2009	Barb
£15.00	06/06/2008	Barry
£15.00	01/09/2008	Hazel
£15.00	25/08/2008	Mary
£10.00	03/05/2009	Justin
£5.00	25/06/2008	Stan
£730.00	Money Owed Total	

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Save and Close

1. right click Debtors Report tab, Save
2. right click Debtors Report tab, Close

Exercise 5.1

1. Try out the report example shown above.

We have seen how to create a simple report.

Next we look at some of the theory behind databases.

Bibliography

www.officetutorials.com accessed August 2009

www.dealing-with-data.net accessed August 2009