



University Information
Technology Services

Microsoft Office Access 2013

Reports and Queries

University Information Technology Services

Training, Outreach, Learning Technologies and Video Production

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University Information Technology Services

Access 2013 Reports and Queries

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Introduction

Microsoft Office Access 2013 allows people to effectively and efficiently organize data. This document has been developed to help you learn more about several useful features in Access including printing, applying queries, and importing Excel files. The various sections presented in this document will help you to build a solid knowledge foundation of the software.

Objectives

The following objectives are covered in this document:

- Creating reports and labels.
- Placing calculations on reports.
- Using the query feature.
- Importing an Excel file.

Creating a Report

When you use a database, you typically use reports to view, format, and summarize data. The following explains how to create a report in Access.

1. From the *Create* tab, click **Report Design** (see Figure 1).

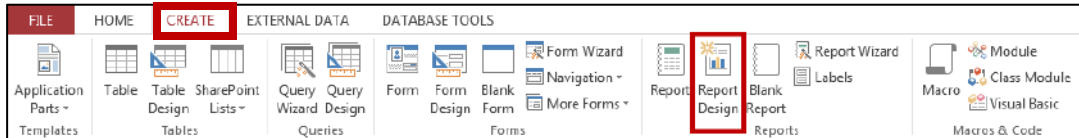


Figure 1 - Report Design

2. Right-click over the *Page Header* bar (see Figure 2).

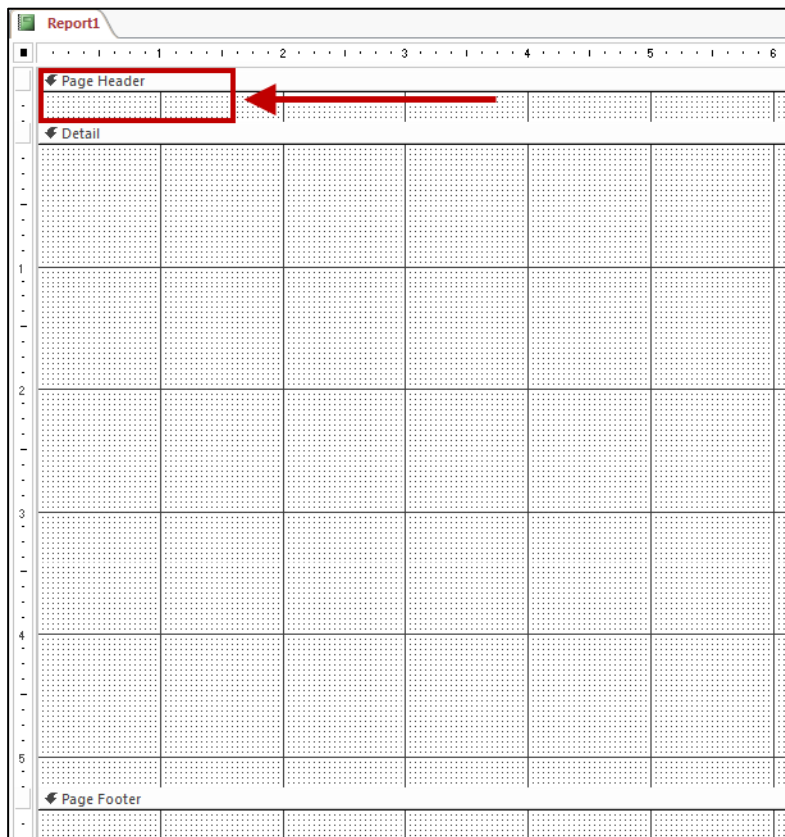


Figure 2 - Page Header

3. Select **Report Header/Footer** (see Figure 3).

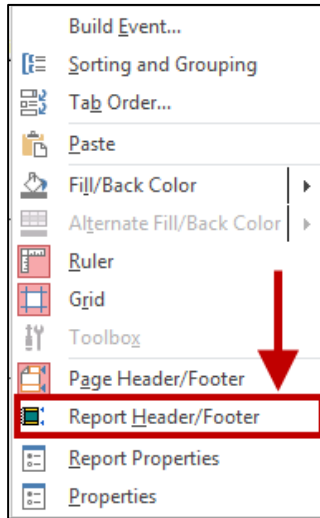


Figure 3 - Report Header/Footer

4. The following explains the different areas available in the *Report Design* (see Figure 4).

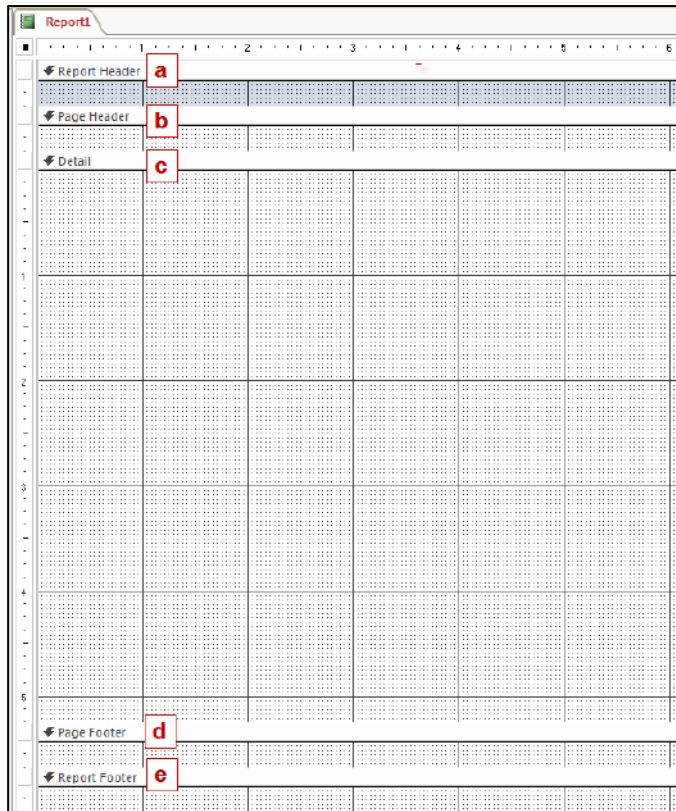


Figure 4 - Report Design

- a. **Report Header** – Text placed here will appear on the top of the first page of the report. For example, if there are ten pages in the report, the text would only appear at the top of the first page.
 - b. **Page Header** – Text placed here will appear at the top of every page. Use this for column headings and page numbers.
 - c. **Detail** – Text placed here will appear on every page.
 - d. **Page Footer** – Text placed here will appear at the bottom of every page. Use this for footers and page numbers.
 - e. **Report Footer** – Text placed here will appear at the bottom of the last page of the report. This is a perfect place to put a Job Complete or End of Report statement.
5. You can resize different areas of the report sections. To do this, hover your mouse over the top of a section bar. As you do this, a double-arrow will appear. When you see the double-arrow, hold down the mouse button and move your mouse to make the section larger or smaller (see Figure 5).

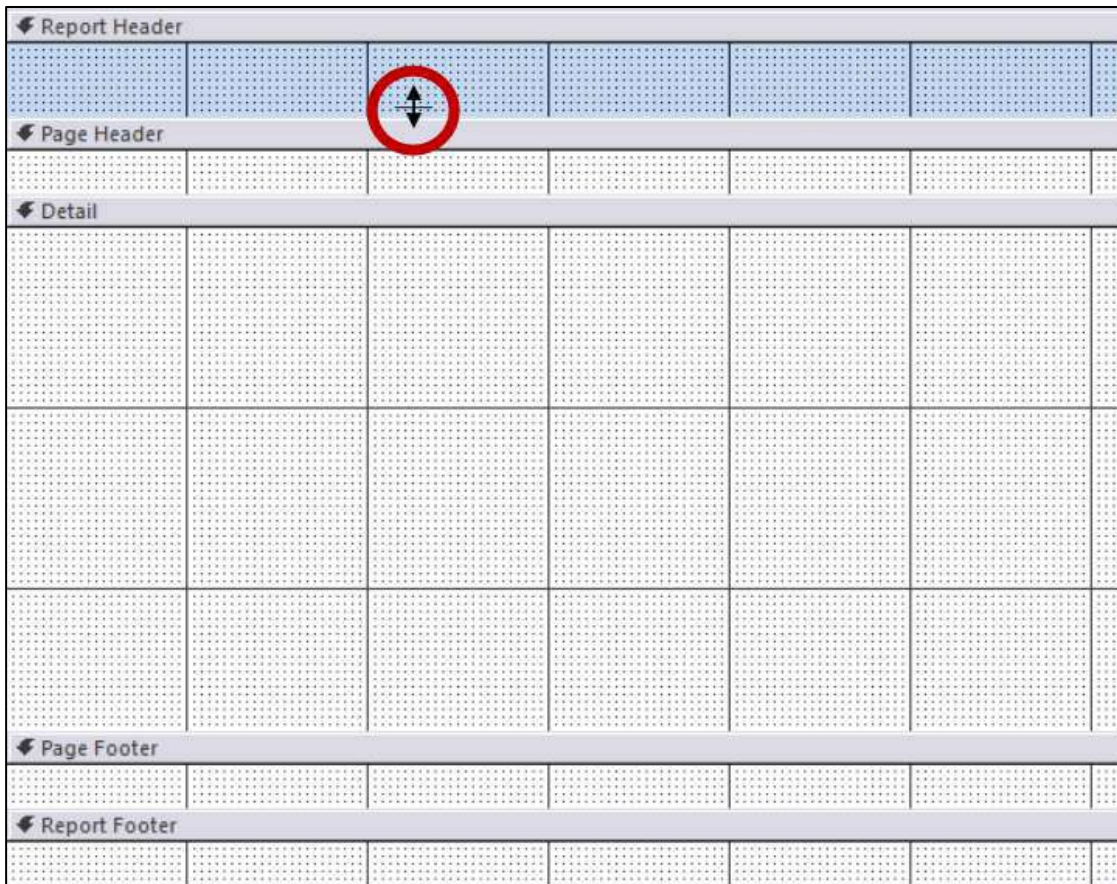


Figure 5 - Adjusting the Size of Report Sections

6. You can also adjust the width of the report. To do this, hover your mouse over the right edge of the report. As you do this, a double-arrow will appear. When you see the double-arrow, hold down the mouse button and move your mouse to make the report larger or smaller (see Figure 6).

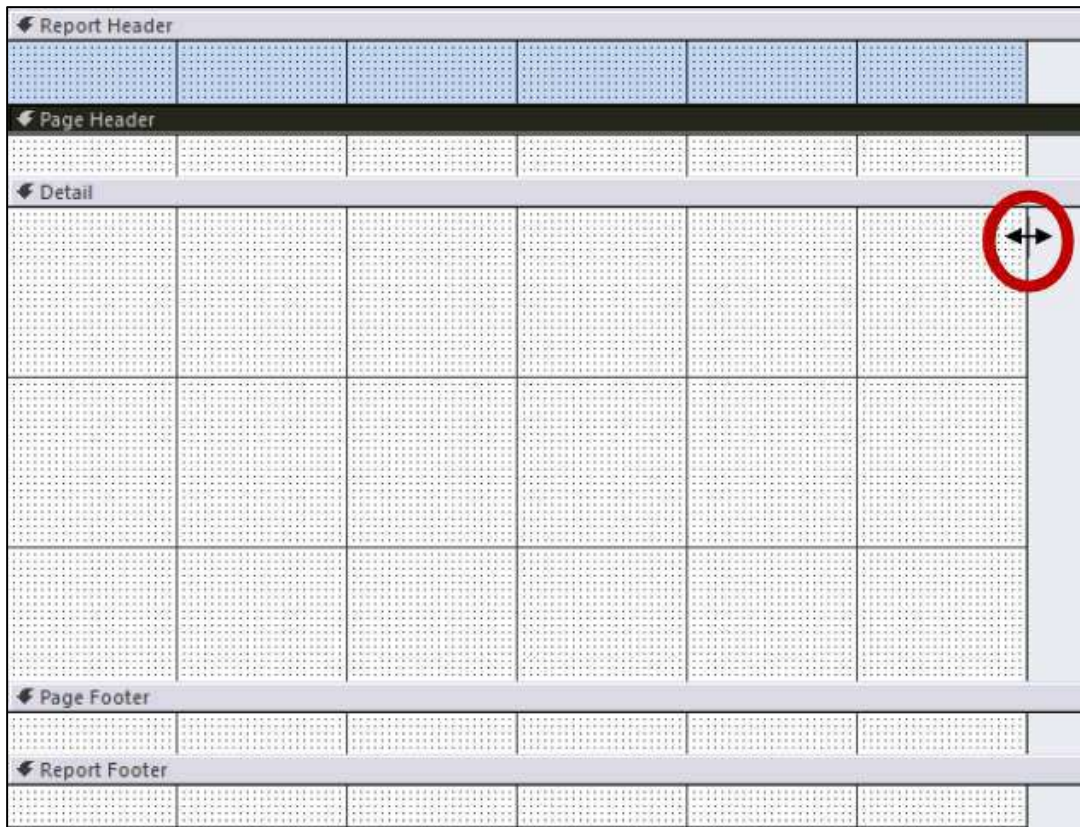


Figure 6 - Adjusting the Width of the Report

7. Labels can be used to place text in the different areas of the report. The following explains how to include a label on the report.

7.1. From the *Design* tab, click the **Label** button (see Figure 7).

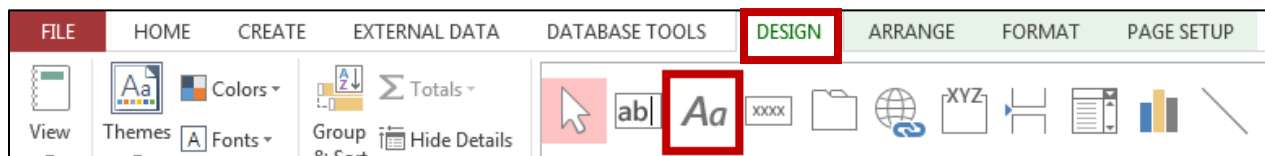


Figure 7 - Label Button

7.2. Draw a **text box** on the report and enter your text (see Figure 8).

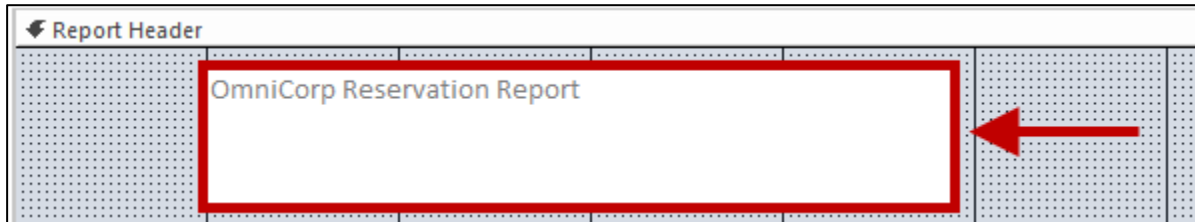


Figure 8 - The Text Box

7.3. Click anywhere on the report to de-select the text box.

7.4. Select the **text**.

7.5. From the *Home* tab, use the *Text Formatting* tools to format the text (see Figure 9).

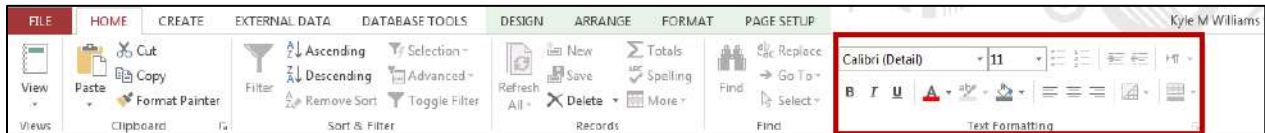


Figure 9 - Text Formatting Tools

7.6. Resize and move the **text box** so that it appears neatly on the report (see Figure 10).

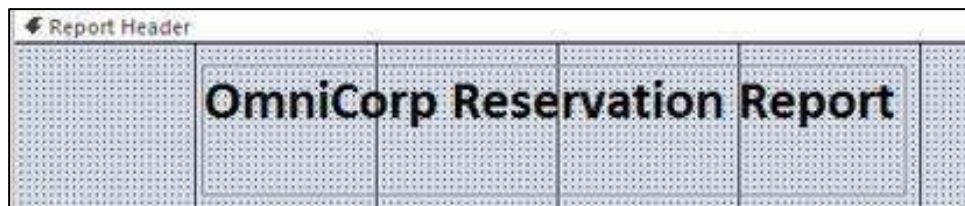


Figure 10 - Resizing the Text Box

8. To add fields, click the **Add Existing Fields** button on the *Design* tab (see Figure 11).

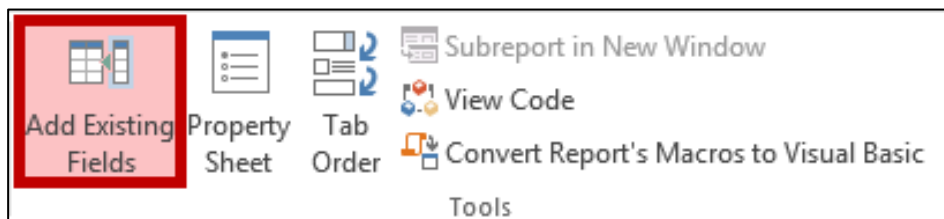


Figure 11 - Add Existing Fields

9. Click on **Show all tables** if no fields are available in the current view (see Figure 12).

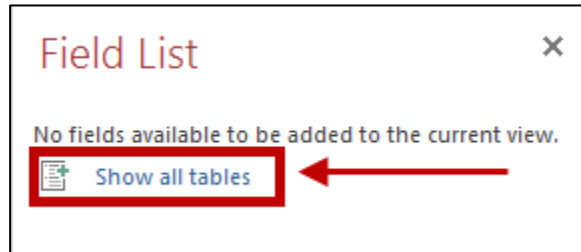


Figure 12 - Show all tables

10. In the *Field List* window, click the “+” next to your table name (see Figure 13).



Figure 13 - Table Name

11. Drag your fields from the *Field List* into the *Detail* section of the *Report*.

12. You may now create column headings. Click the **label** on the first field (see Figure 14).

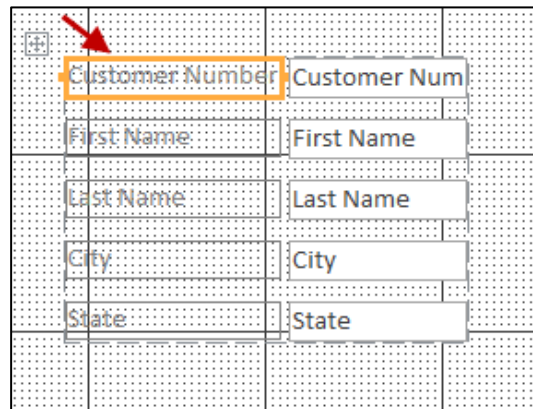


Figure 14 - Selecting a label

13. Right-click on the **label** and select **Cut** from the menu that appears (see Figure 15).

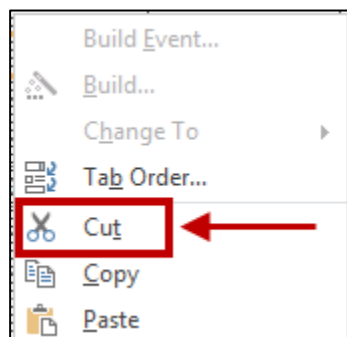


Figure 15 - Cut

14. Next, right-click in the *Page Header* area and select **Paste** from that menu (see Figure 16).

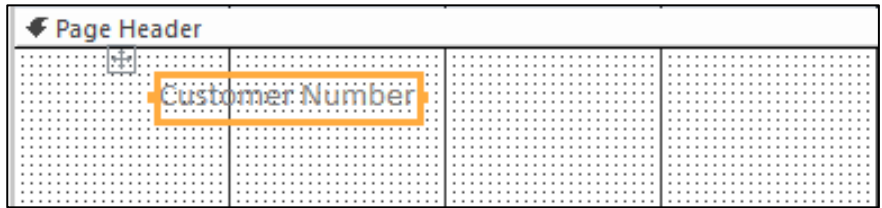


Figure 16 - Moving to the Page Header

15. Repeat steps 12-14 above until all of the labels have been moved to the *Page Header* section of the report (see Figure 17).

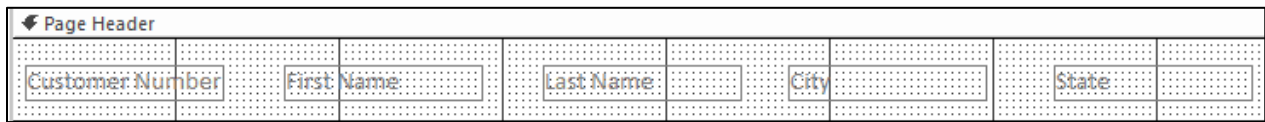


Figure 17 - Page Header

16. Once all of the labels have been moved, neatly arrange the labels in the *Page Header* section with the text boxes in the *Detail Section* (see Figure 18).

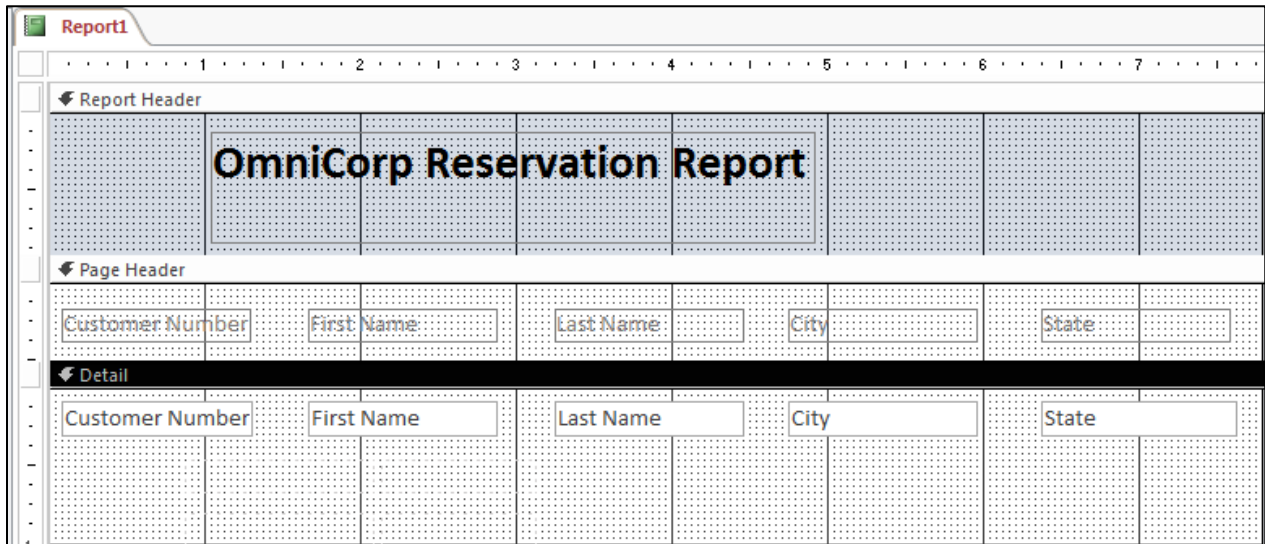


Figure 18 - Arranging Page Headers and Text Boxes.

17. Decrease the vertical space in the *Detail* section. A larger vertical area in the *Detail* section results in the records being further apart on the report (see Figure 19).

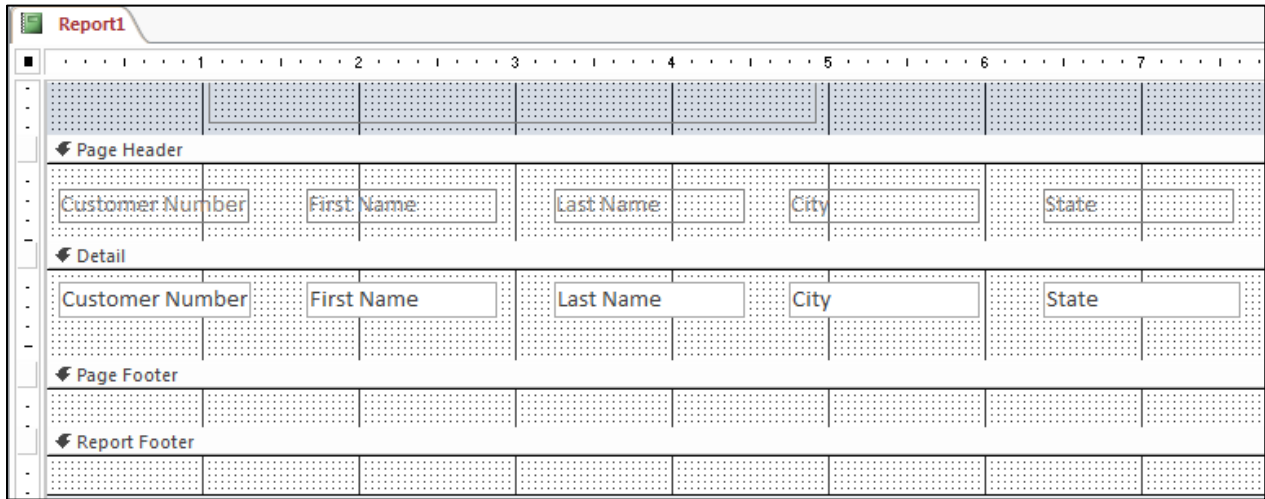


Figure 19 - Vertical Section

18. Click the **Page Numbers** button on the *Design* tab (see Figure 20).

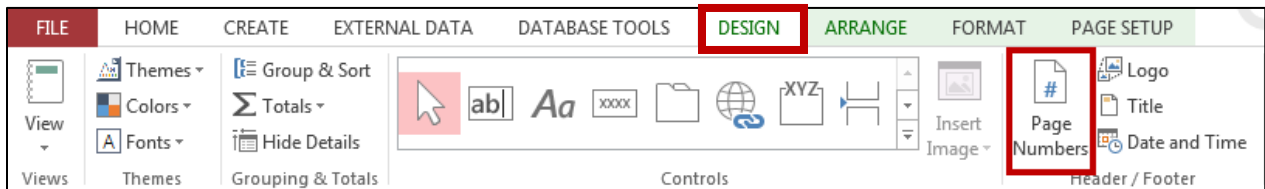


Figure 20 - Page Number

19. Select your preferred number style and click **Ok** (see Figure 21).

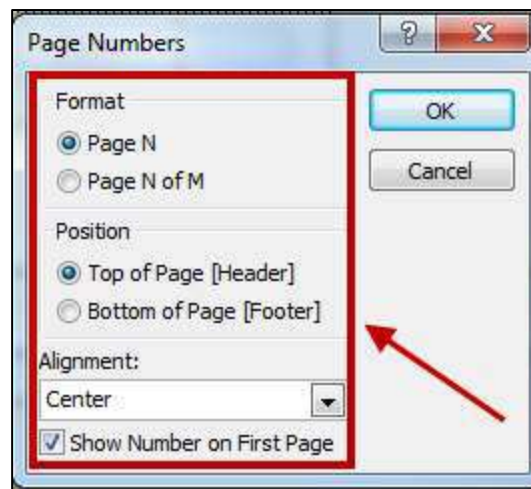


Figure 21 – Page Number Style

20. Place your *Report Page Number* under the *Page Footer* section of the Report (see Figure 22).

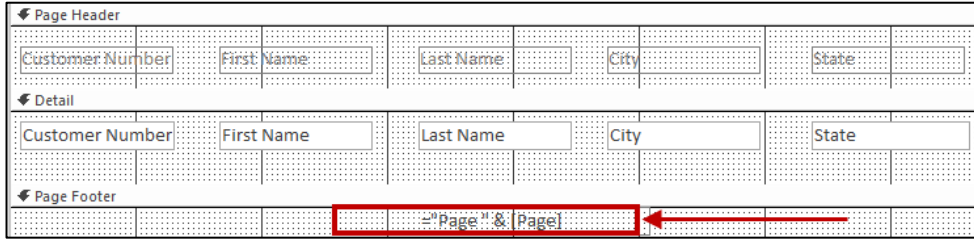


Figure 22 - Page Number

21. To view the report, click the **View** button on the *Design* tab.

22. Select **Report View** (see Figure 23).

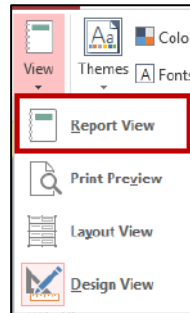


Figure 23 - Report View

23. The report will appear on your screen (see Figure 24).

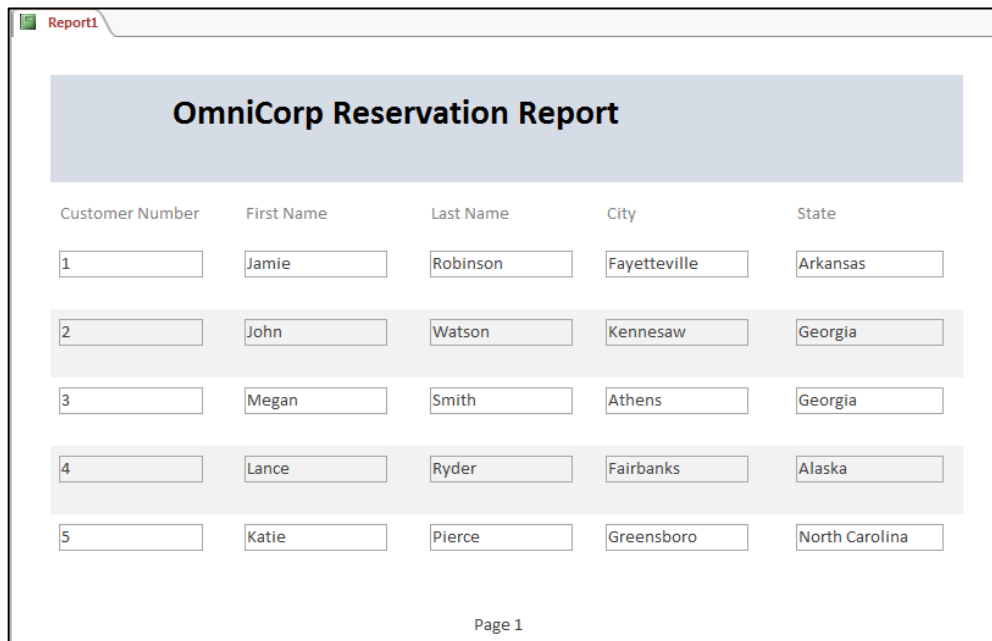


Figure 24 - Report View

- 24. To print the report, click the **File** tab.
- 25. Select **Print**.
- 26. Click on the **Print** button (see Figure 25).

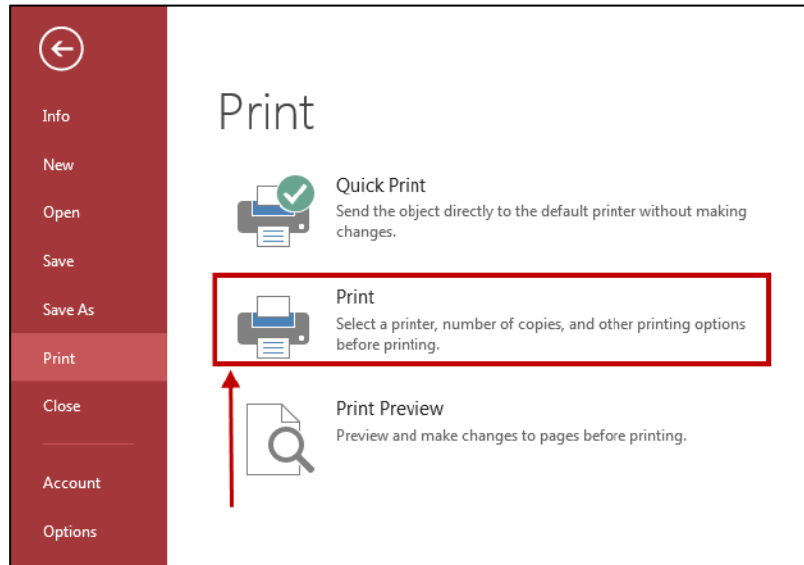


Figure 25 - Print

- 27. The report can be saved and opened again later when needed. After saving, if data is added to the database, the new data will be added to the saved report (see Figure 26).

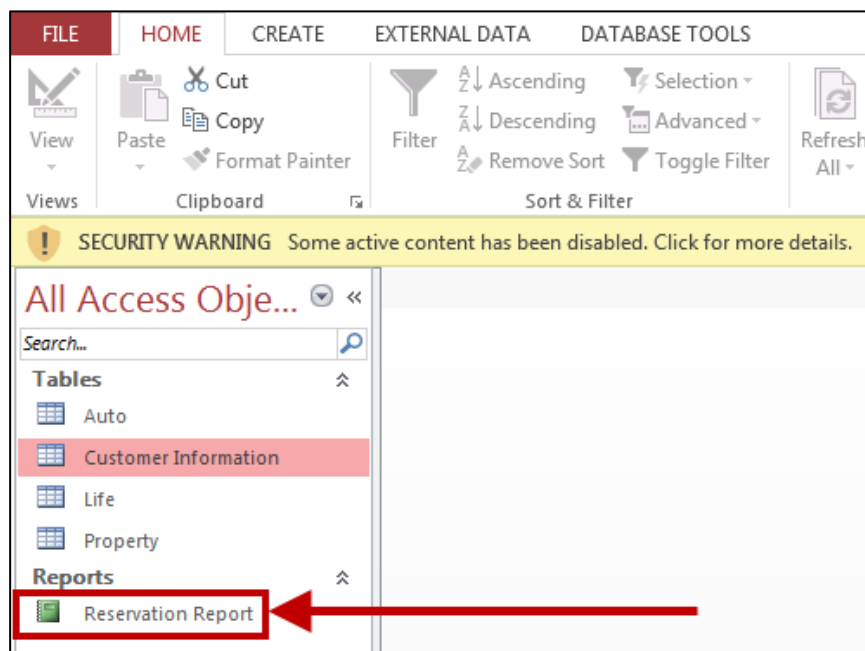


Figure 26 - Reopening the Table

Creating Labels

The following explains how to create labels in Access.

1. Click to select the **table** containing the data that you want to place on labels (see Figure 27).

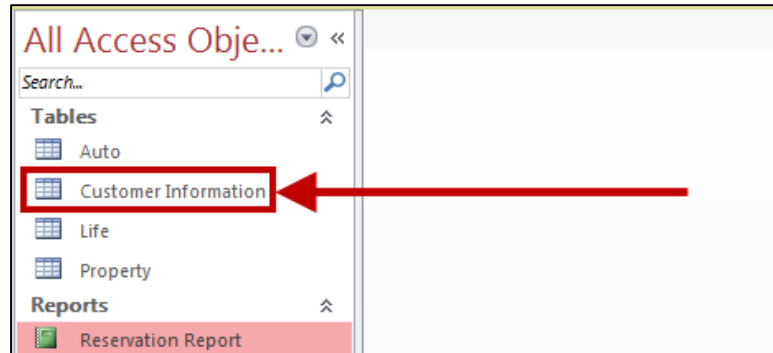


Figure 27 - Select the Table

2. In the *Create* tab of the ribbon, click on the **Labels** button (see Figure 28).

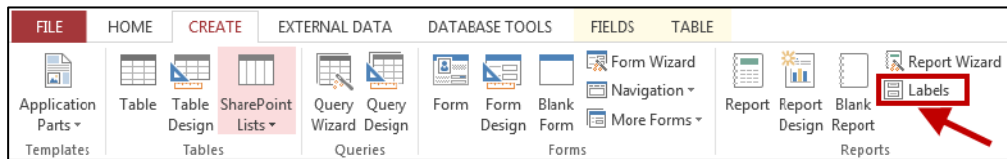


Figure 28 - Labels

3. In the *Label Wizard* window that appears, select the **product number** and **manufacturer** and click **Next** (see Figure 29).

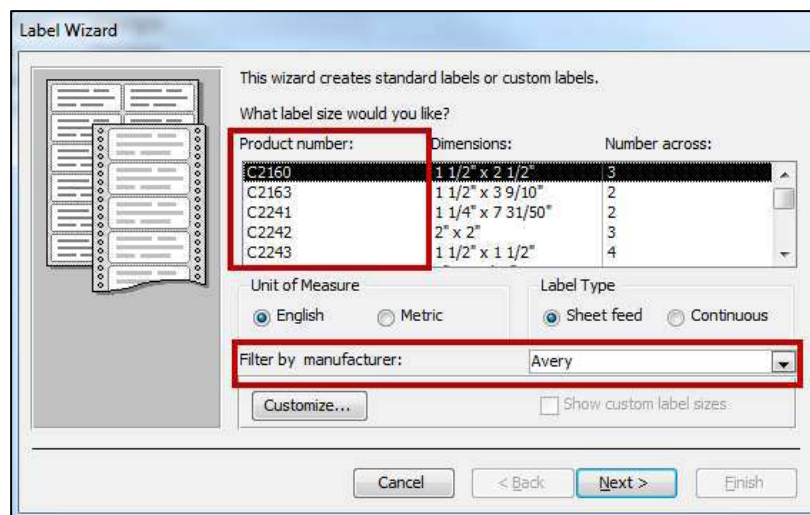


Figure 29 - The Label Wizard

- Next, make the adjustments for the text formatting (see Figure 30).

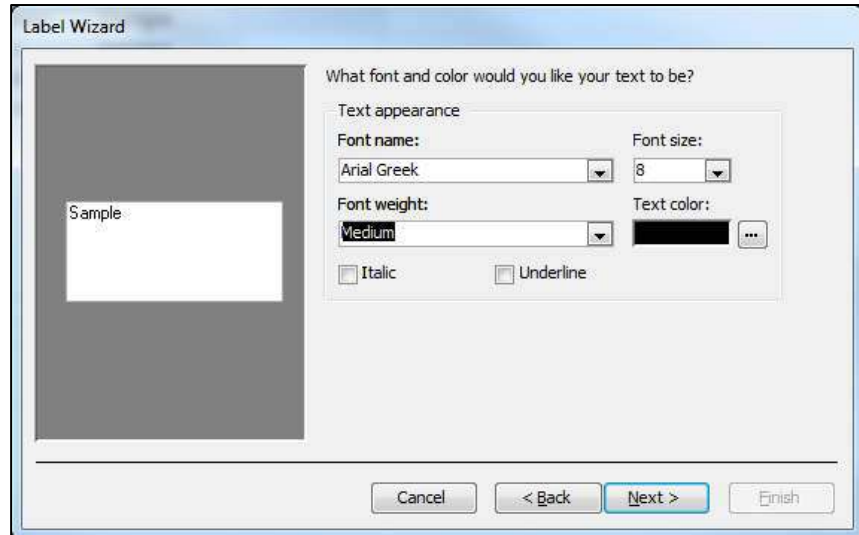


Figure 30 - Text Adjustments

- Click **Next**.
- Click the **arrow** button to move fields *from Available fields to Prototype label* (see Figure 31).

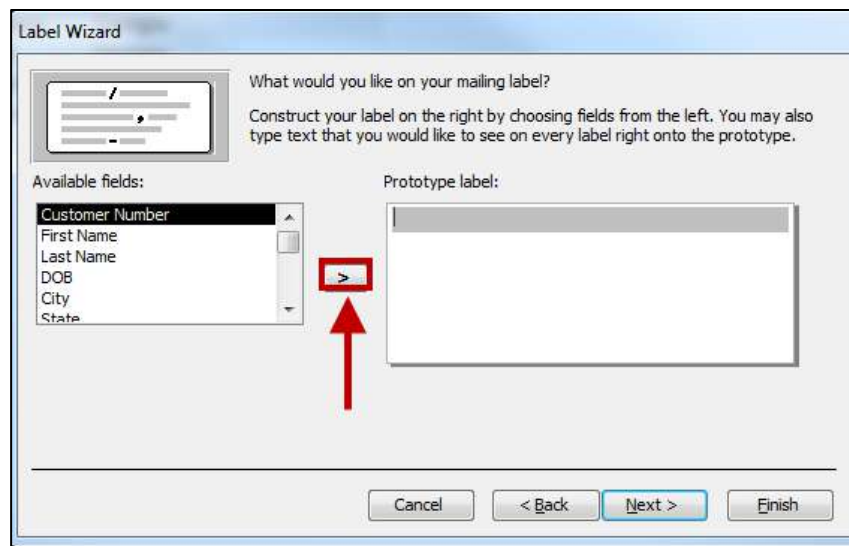


Figure 31- Prototype Label

- In the next window, if you would like to sort the data, select the field you would like to sort by (example: *Last Name*), click the **arrow** button to move the selected field from the *Available fields* category to the *Sort by* category (see Figure 32).

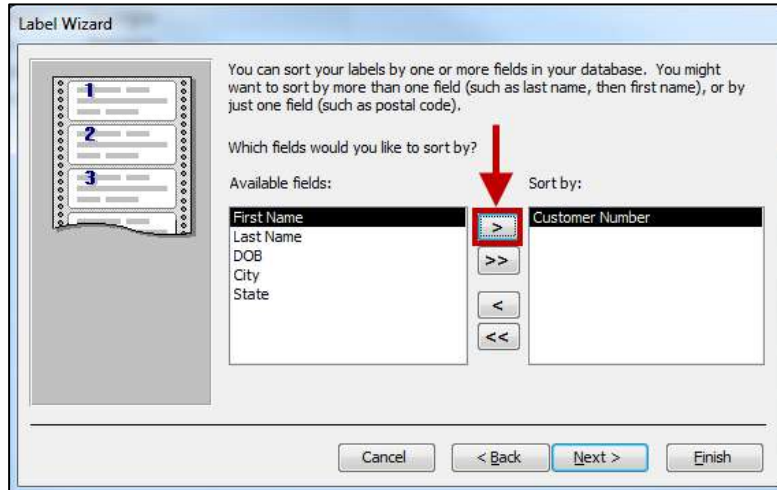


Figure 32 - Sort By

- In the next window, enter the name for the report and click the **Finish** button (see Figure 33).

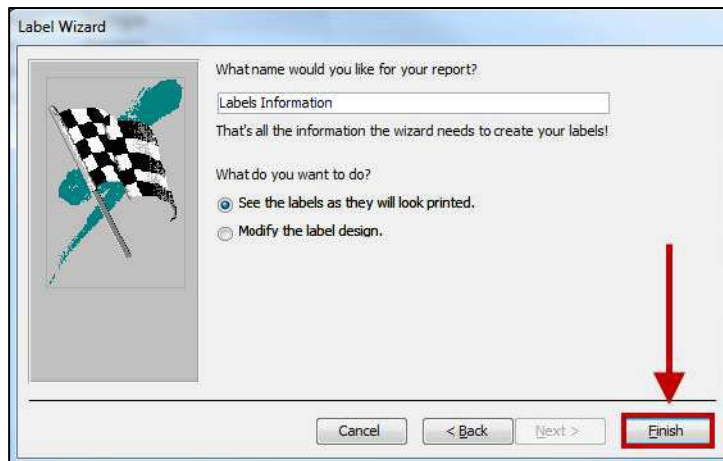


Figure 33 - Finish Button

- Next, click the **Print** button to send the labels to the printer or the **Close** button to return to the main view of the database (see Figure 34).

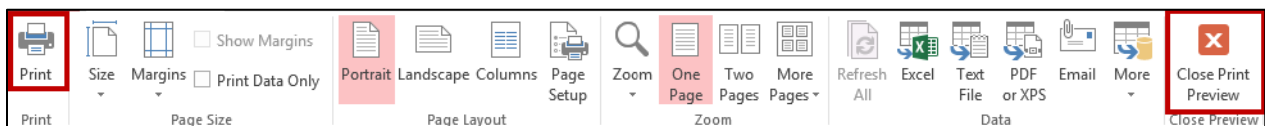


Figure 34 - Printing and Closing Print Preview

Placing Calculations on a Report

The following explains how to place a calculation on a report. The following will show how to calculate the total sales made by each store during a two-day sale (see Figure 35).

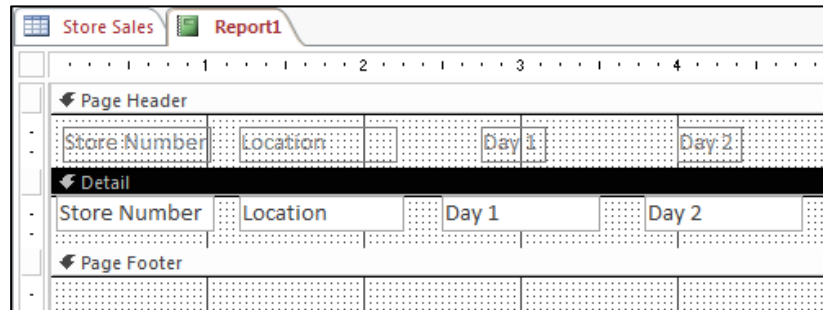


Figure 35 - Two Day Sales

1. To place a text box on the report, click the **Text Box** button on the *Design* tab (see Figure 36).

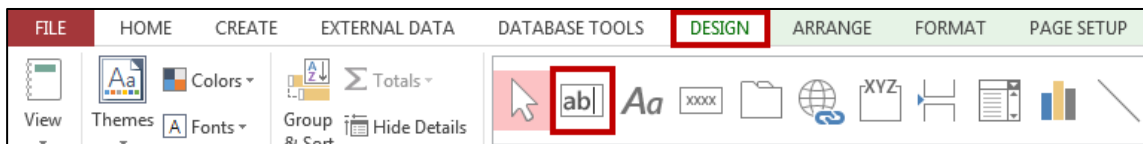


Figure 36 - Text Box

2. Draw a **text box** in the *Detail* section of the report (see Figure 37).

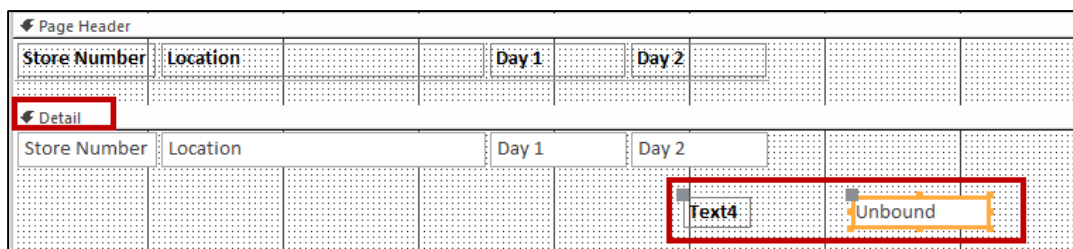


Figure 37 - Text Box

3. Move the **label** from the *Detail* section to the *Page Header* section. The following explains how to accomplish this.

- 3.1. Click on the **label** (see Figure 38).

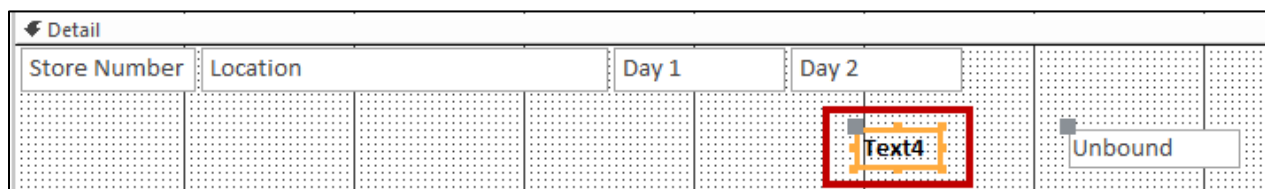


Figure 38 - Select the label

3.2. Right-click the **label** and select **Cut** (see Figure 39).

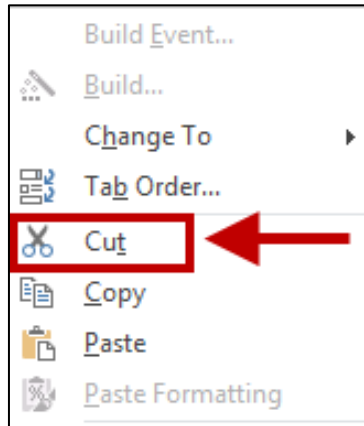


Figure 39 - Cut

3.3. Right-click inside the *Page Header* section and select **Paste** (see Figure 40).

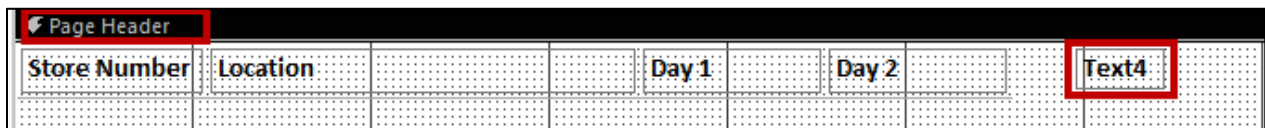


Figure 40 - Right Click on the Page Header Section

4. Once the label is in the *Page Header* section, align the **text box** and the label (see Figure 41).

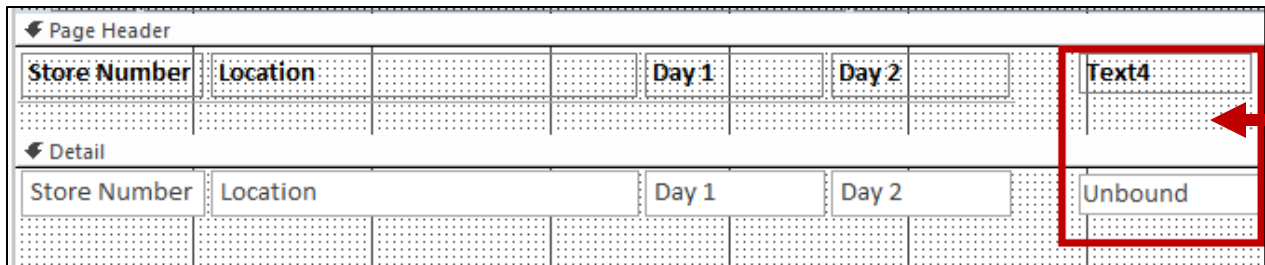


Figure 41 - Aligning the Text Box

5. Enter a descriptive name for the label (see Figure 42).

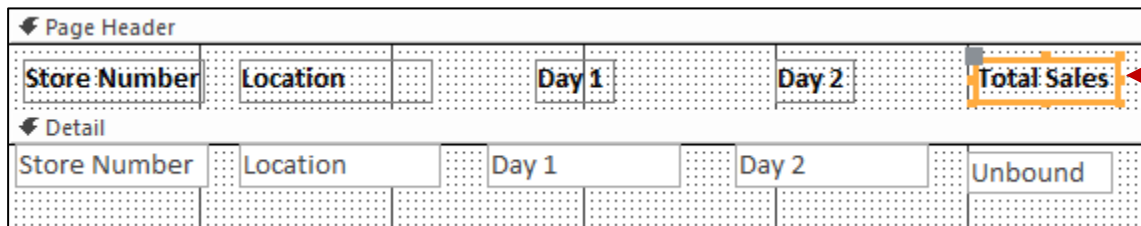


Figure 42 - Entering a Name

6. Select the **text box** (see Figure 43).

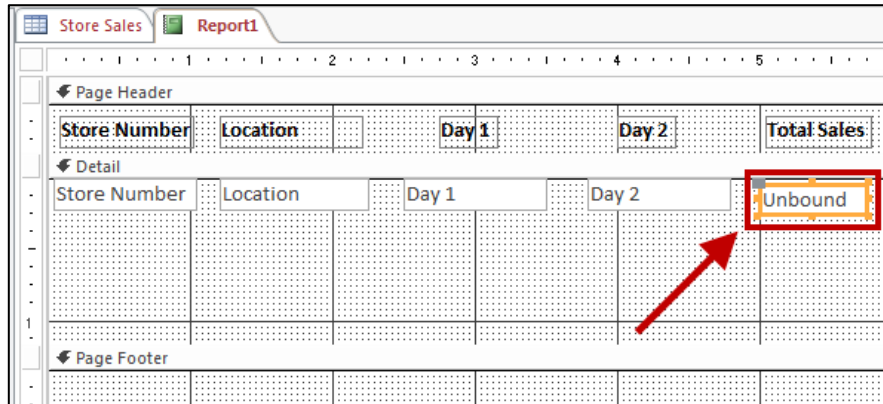


Figure 43 - Selecting the Text Box

7. From the *Design* tab, click **Property Sheet** (see Figure 44).

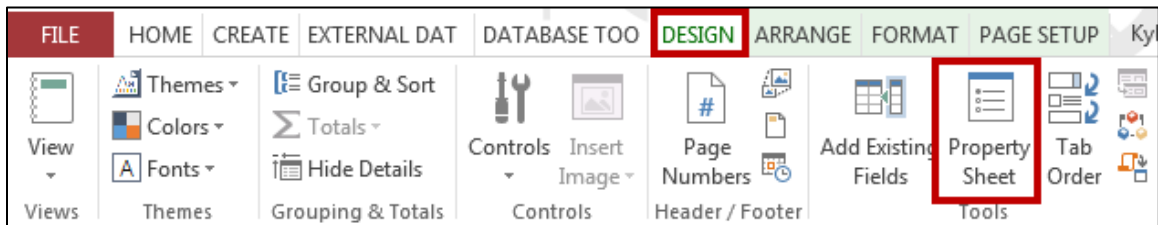


Figure 44 - Property Sheet

8. In the *Property Sheet*, from the *Other* tab, enter a descriptive name for the **text box category** (see Figure 45).

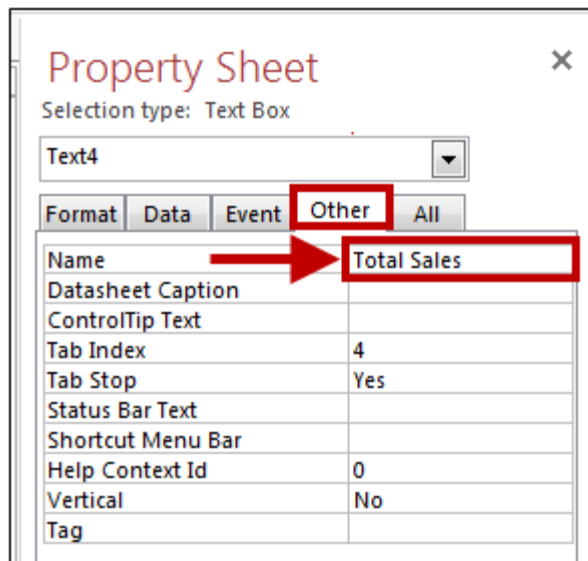



Figure 45 - Entering a Name

9. In the *Property Sheet*, from the *Data* tab, click the **ellipsis**  button in the *Control Source* category (see Figure 46).

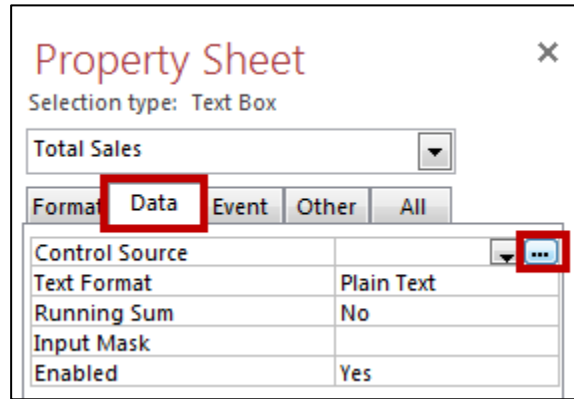


Figure 46 - Control Source

10. The following explains how to build the formula in the *Expression Builder*.
10.1. Type the '=' symbol to begin a formula (see Figure 47).

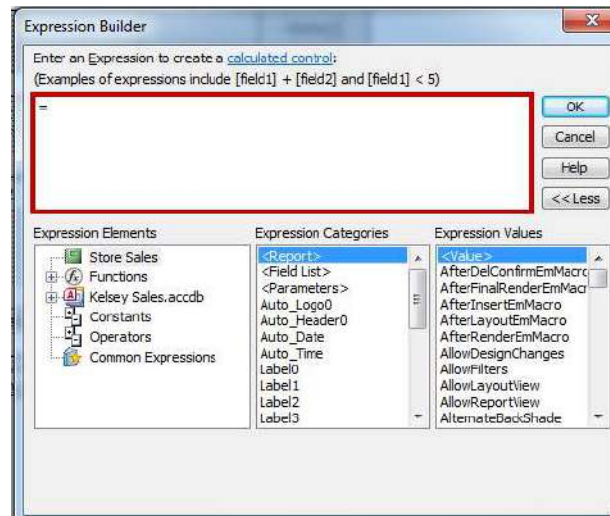


Figure 47 - Expression Builder Formula

- 10.2. Enter the formula so that it says = [Day 1] + Day 2] (see Figure 48).

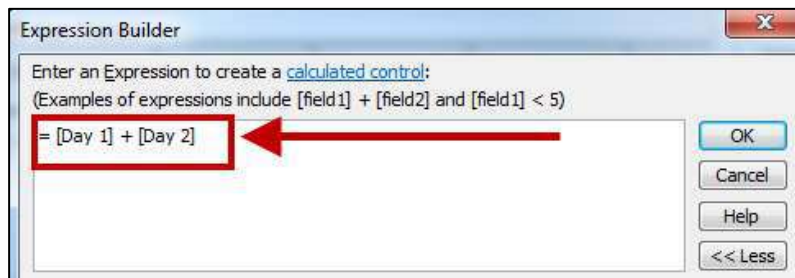


Figure 48 - Type the Formula

10.3. Click the **OK** button when finished to close the *Expression Builder* (see Figure 49).

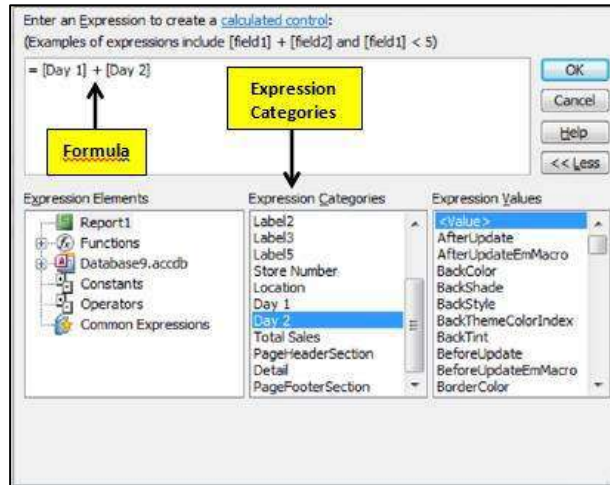


Figure 49 - Expression Builder

11. From the *Format* tab, select the format for the text box (see Figure 50).

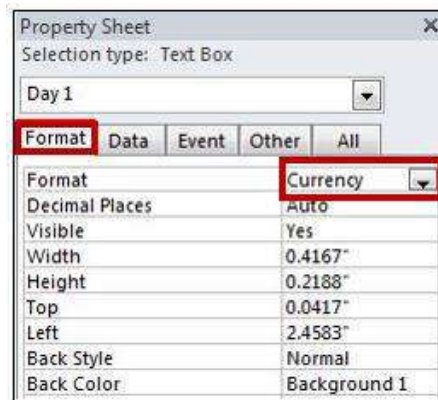


Figure 50 - Format Tab

12. Figure 51 shows how the report will appear.

Store Number	Location	Day 1	Day 2	Total Sales
2	Sandy Spring	\$20,000.00	\$15,000.00	\$35,000.00
3	Athens	\$12,000.00	\$18,000.00	\$30,000.00
4	Kennesaw	\$16,000.00	\$17,000.00	\$33,000.00
5	Atlanta-Midtown	\$30,000.00	\$25,000.00	\$55,000.00
6	Atlanta-Candler Park	\$24,000.00	\$17,000.00	\$41,000.00

Figure 51 - Report View

Queries

Queries help you to search through a database for specific information. Examples of items that can be searched for include the following:

- *Stores with sales above or below an indicated amount*
- *Students earning an “A” in a specific course*
- *People who live in a specific zip code*
- *Companies located in a specific state*
- *Employees who have completed a First Aid course*

The following explains how to create a query to search for stores in the database that had sales above \$700 on the first day of a special sale that was held by the company.

1. From the *Create* tab, click the **Query Design** button (see Figure 52).

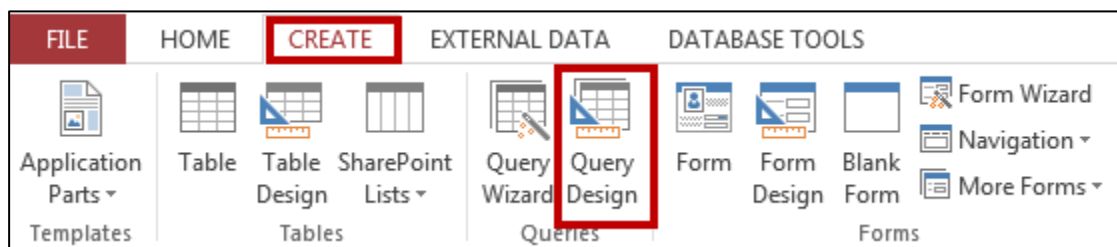


Figure 52 - Query Design

2. The *Show Table* dialogue box will appear. Select the table that you want to add and click **Add** (see Figure 53).

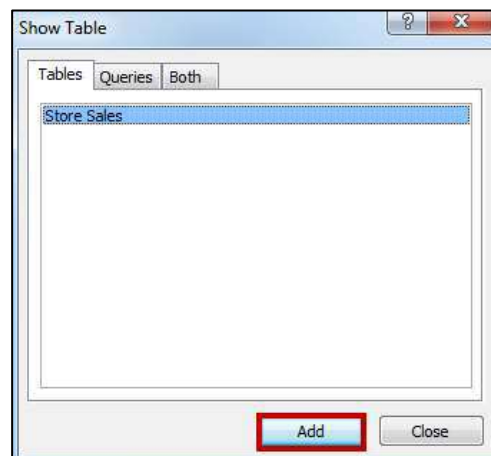


Figure 53 - Click Add

3. Click the **Close** button after you have added the table to close the *Show Table* dialogue box.

- Using the table at the bottom of your screen, place your cursor in the first column of the *Field* dropdown (see Figure 54).

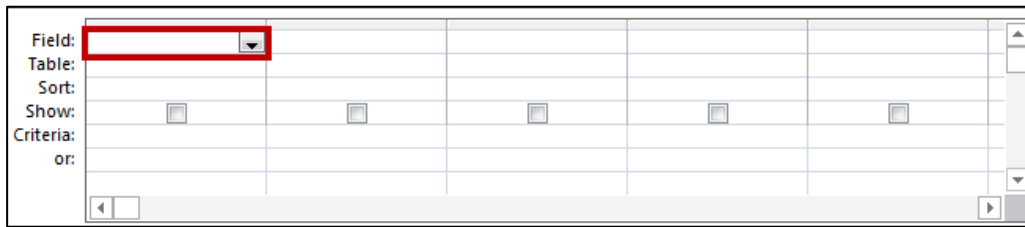


Figure 54 - The Field Dropdown

- Click the arrow in the first column of the *Field* row. Then, select the field that you want included in this query (see Figure 55).

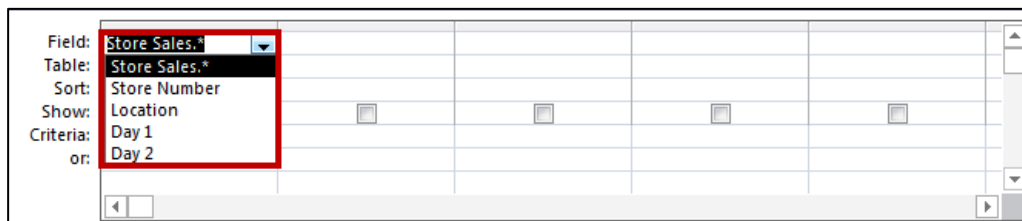


Figure 55 - Dropdown Menu

- Repeat steps 3-4 above for the other columns until you have all of the fields listed that you want included in this query (see Figure 56).

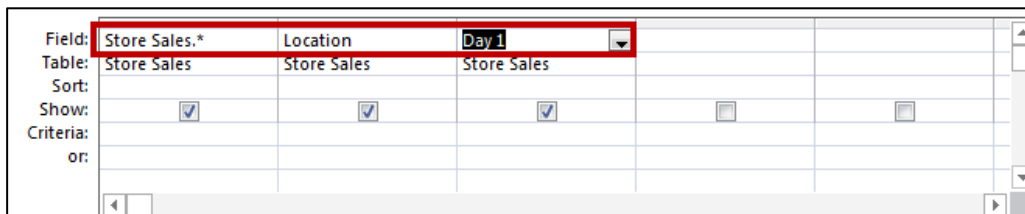


Figure 56 - Adding additional fields

- In the Criteria row, enter what you are searching for in the database under the field where you want to perform the search. For example, if you wanted to search for stores that had sales \$700 and higher on day 1, you would enter the following in the sort row: **>=700** (see Figure 57).

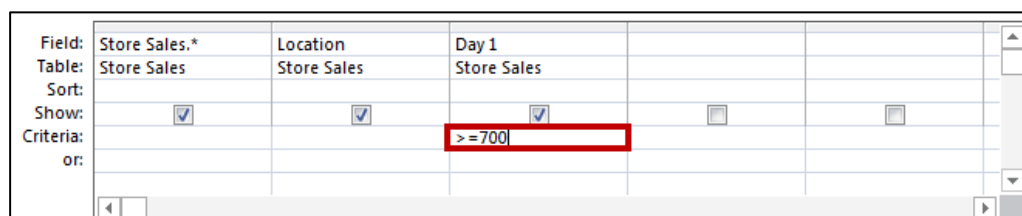


Figure 57 – Criteria

8. Click the **Run** button, located under the *Design* tab on the Ribbon (see Figure 58).

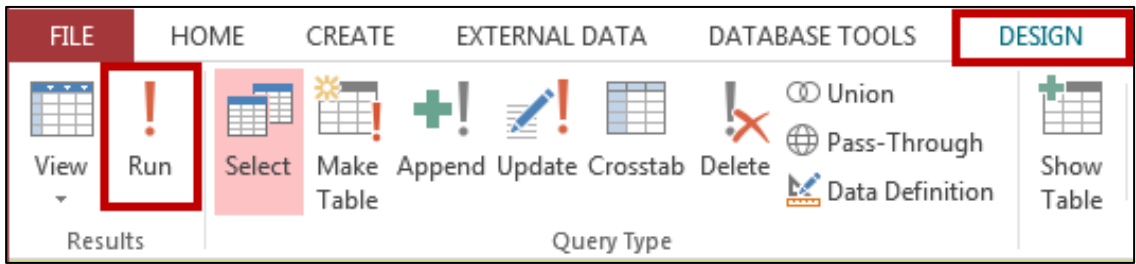


Figure 58 - Click Run

9. Your data will appear on the screen (see Figure 59).

Store Num	Store Sales.1	Store Sales.1	Day 2	Field0	Field1
2	Sandy Spring	\$20,000.00	\$15,000.00	Sandy Spring	\$20,000.00
3	Athens	\$12,000.00	\$18,000.00	Athens	\$12,000.00
4	Kennesaw	\$16,000.00	\$17,000.00	Kennesaw	\$16,000.00
5	Atlanta-Midtown	\$30,000.00	\$25,000.00	Atlanta-Midtown	\$30,000.00
6	Atlanta-Candle	\$24,000.00	\$17,000.00	Atlanta-Candle	\$24,000.00
*	(New)	\$0.00	\$0.00		\$0.00

Figure 59 - Query Data

10. To save the query, click the *Save* button at the top-left area of the window. Please note that any data that is entered into the table after the query is saved will be included in the query if it meets the criteria specified (see Figure 60).

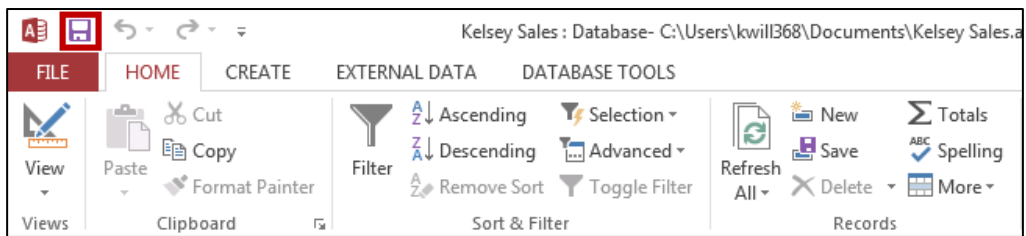


Figure 60 - Click Save

Including a Query in a Report

The following explains how to include the results of a query in a report.

1. From the *Create* tab, click **Report Design** (see Figure 61).

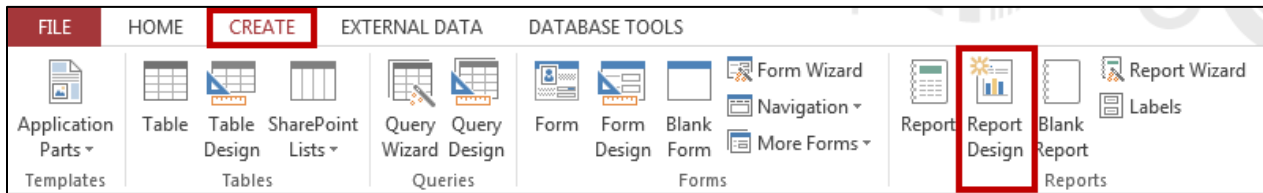


Figure 61 - Report Design

2. From the *Design* tab, click **Property Sheet** (see Figure 62).

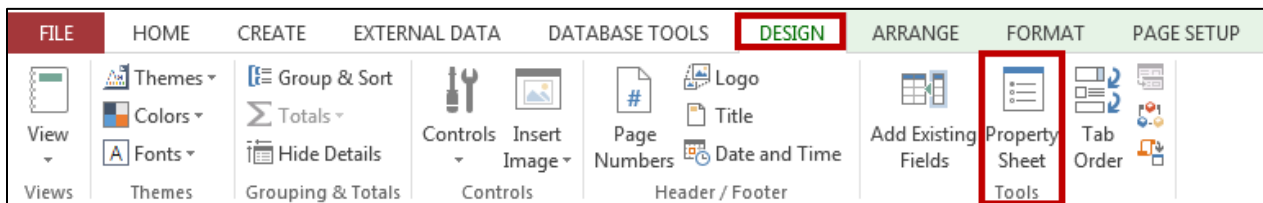


Figure 62 - Property Sheet Button

3. On the *Data* tab of the *Property Sheet*, click the arrow for **Record Source** and select your query from the list that appears (see Figure 63).

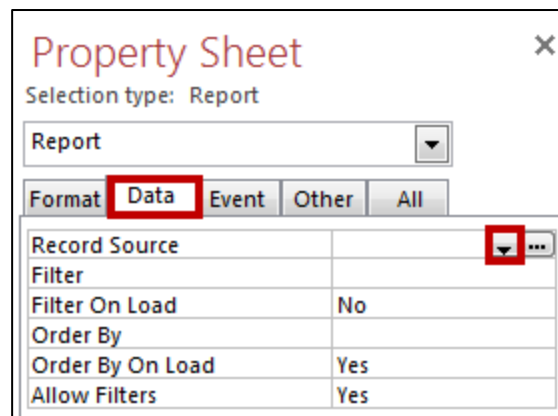


Figure 63 - Record Source

4. Proceed as normal designing the report. The data that appears on the report will come from the query that you selected.

How to Quickly Create a Form

Access provides users with a quick way to develop a form. The following explains how to create a form using the available development tools.

1. Select the **table** that needs a form created. In the example below, the *Store Sales* table is selected (see Figure 64).

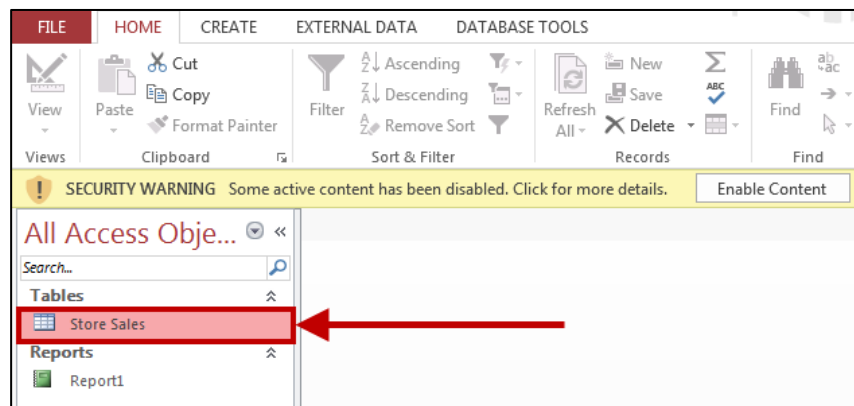


Figure 64 - Store Sales Table

2. Click the **Form** button on the *Create* tab (see Figure 65).

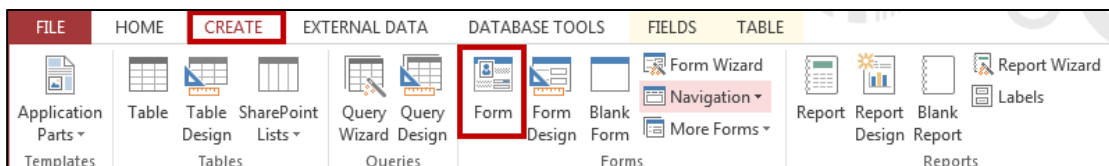


Figure 65 - Form Button

3. A form will be created (see Figure 66).

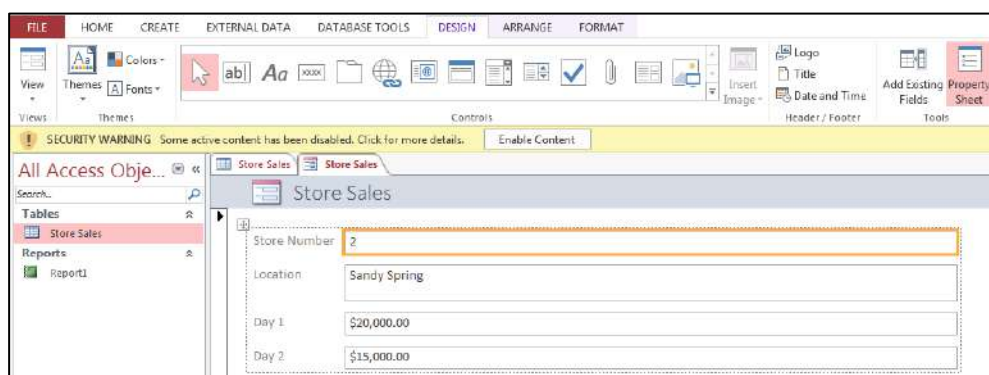


Figure 66 - Created Form

4. To make adjustments to the form:
- 4.1. From the *Design* tab, click the **View** button (see Figure 67).

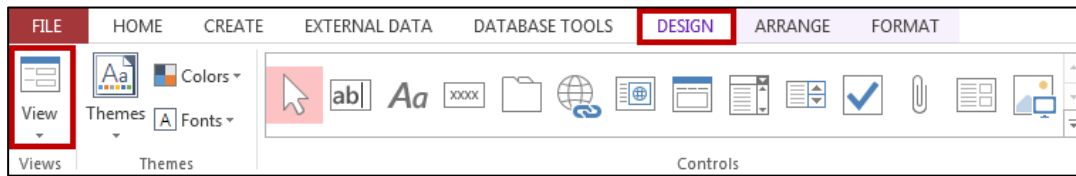


Figure 67 - The View Button

- 4.2. From the *View* options, click on **Design View** (see Figure 68).

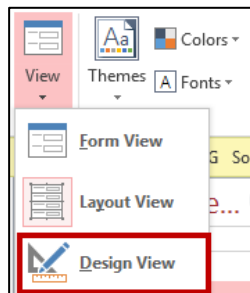


Figure 68 - Design View

- 4.3. You can now make adjustments to the form that was created. For information on editing *Form* properties, refer to the *Microsoft Office Access 2013 – Intro to Forms* booklet located on the UITS Documentation Center. (<http://uits.kennesaw.edu/cdoc>) (see Figure 69).

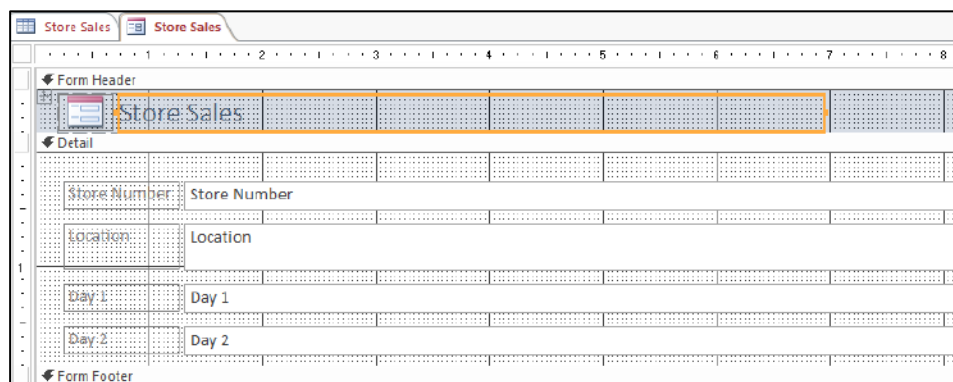


Figure 69 - Editing the Form

How to Quickly Create a Report

Access provides users with a quick way to develop a report. The following explains how to create a report using the available development tools.

1. Select the **table** that needs a report created. In *Figure 70*, the *Store Sales* table is selected.

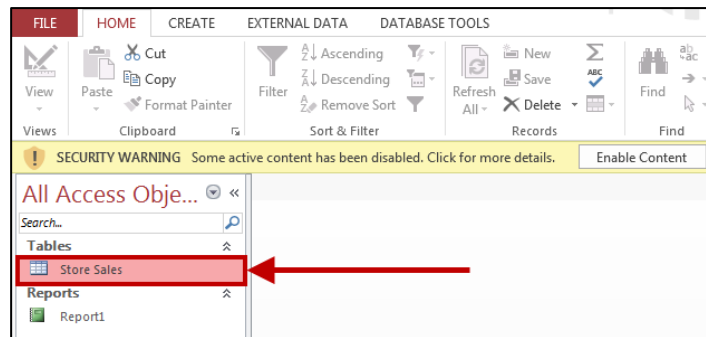


Figure 70 - Selecting the Table

2. From the *Create* tab, click the **Report** button (see *Figure 71*).

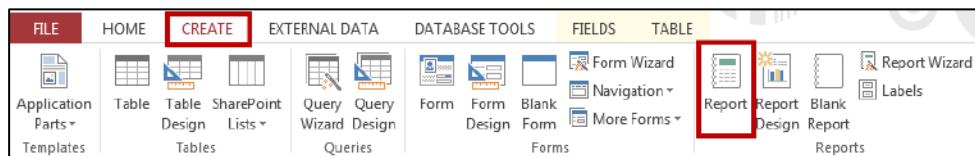
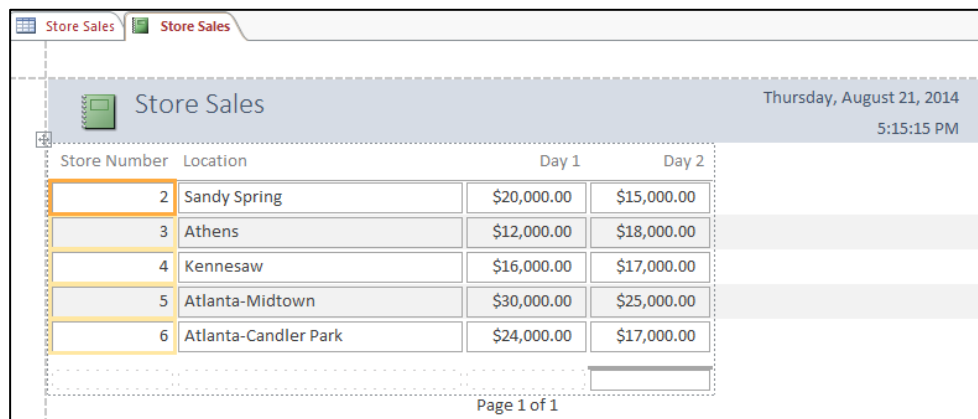


Figure 71 - Report Button

3. The report will appear on your screen (see *Figure 72*).

A screenshot of the 'Store Sales' report displayed in Microsoft Access. The report shows a table with columns for 'Store Number', 'Location', 'Day 1', and 'Day 2'. The data is as follows:

Store Number	Location	Day 1	Day 2
2	Sandy Spring	\$20,000.00	\$15,000.00
3	Athens	\$12,000.00	\$18,000.00
4	Kennesaw	\$16,000.00	\$17,000.00
5	Atlanta-Midtown	\$30,000.00	\$25,000.00
6	Atlanta-Candler Park	\$24,000.00	\$17,000.00

The report also includes a header with the title 'Store Sales' and the date 'Thursday, August 21, 2014 5:15:15 PM'. The footer shows 'Page 1 of 1'.

Figure 72 - Report Button

4. The following explains how to make modifications to the report:
 - 4.1. From the Home tab, click the **View** button (see Figure 73).

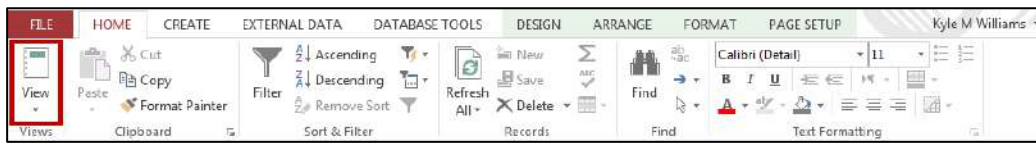


Figure 73 - View Button

- 4.2. From the menu options, click on **Design View** (see Figure 74).

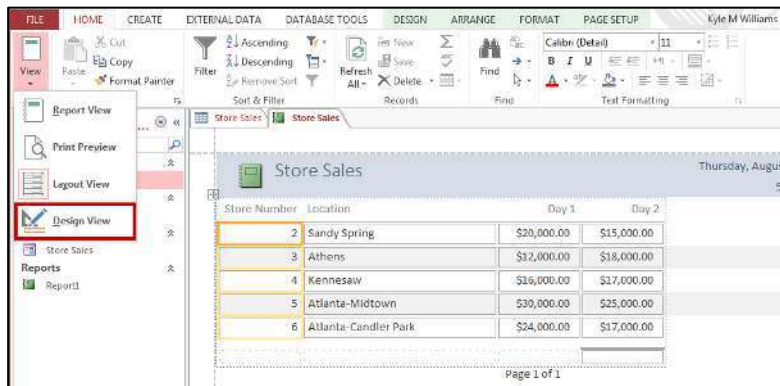


Figure 74 - Design View

- 4.3. You can now make adjustments to the report that was created (see Figure 75).

Report Header					
Store Sales				=Date()	=Time()
Page Header					
Store Number	Location	Day 1	Day 2		
Detail					
Store Number	Location	Day 1	Day 2		
Page Footer					
Page & [Page] & of & [Pages]					
Report Footer					
				=Sum([Day 2])	

Figure 75 - Editing the Form

Importing an Excel File into Access

Access gives you the ability to import an Excel file into Access. The following explains how to accomplish this task.

1. Create a new Access database file.

- From the *External Data* tab, click the **Excel** button in the *Import & Link* category (see Figure 76).

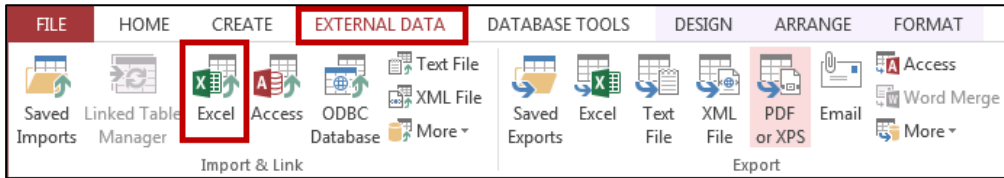


Figure 76 - Importing an Excel File

- The *Get External Data – Excel Spreadsheet* window will appear (see Figure 77).

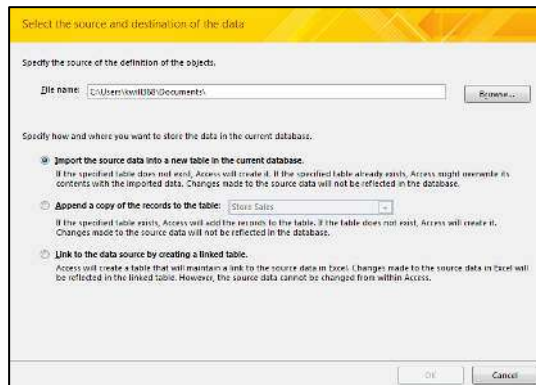


Figure 77 - Get External Data Window

- Click the **Browse** button to locate your Excel spreadsheet file (see Figure 78).



Figure 78 - Click Browse

- Navigate to and select the excel spreadsheet that you wish to import.
- Select the **Import the source data into a new table in the current database** option (see Figure 79).

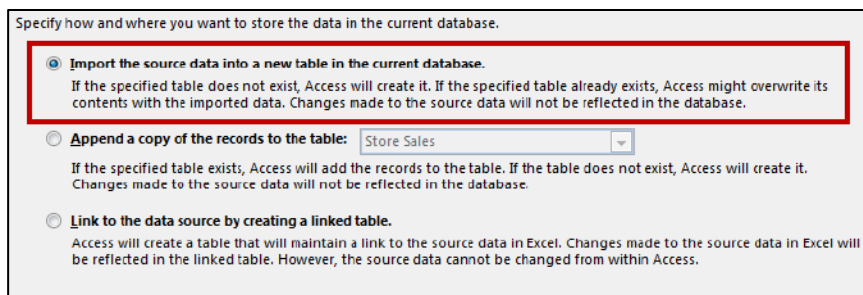


Figure 79 - Import the Source Data Option

7. Click **OK**.
8. If the first row of the spreadsheet contains your *Column Headings*, select the **First Row Contains Column Headings** option (see Figure 80).

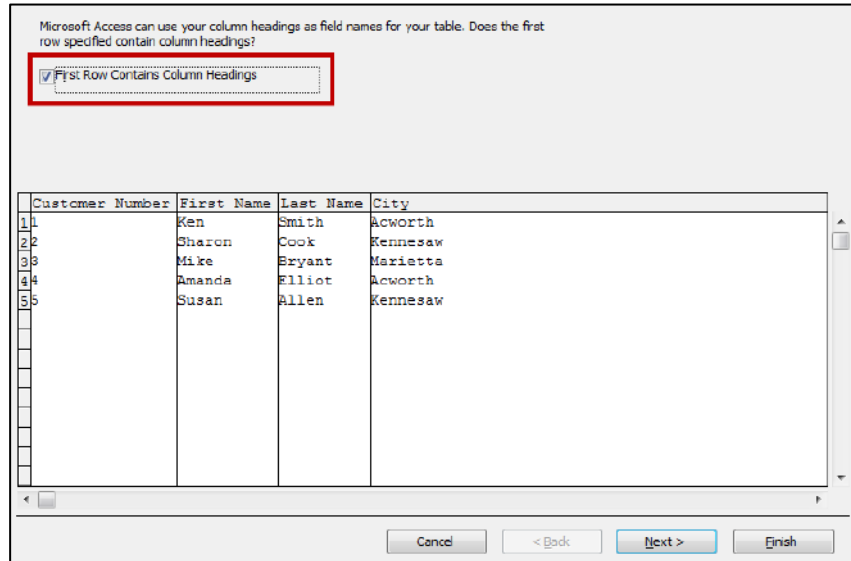


Figure 80 - First Row Contains Column Headings

9. Click **Next**.
10. For the next option, you can select the different columns and adjust the *Field Name* and *Data Type* for the database (see Figure 81).

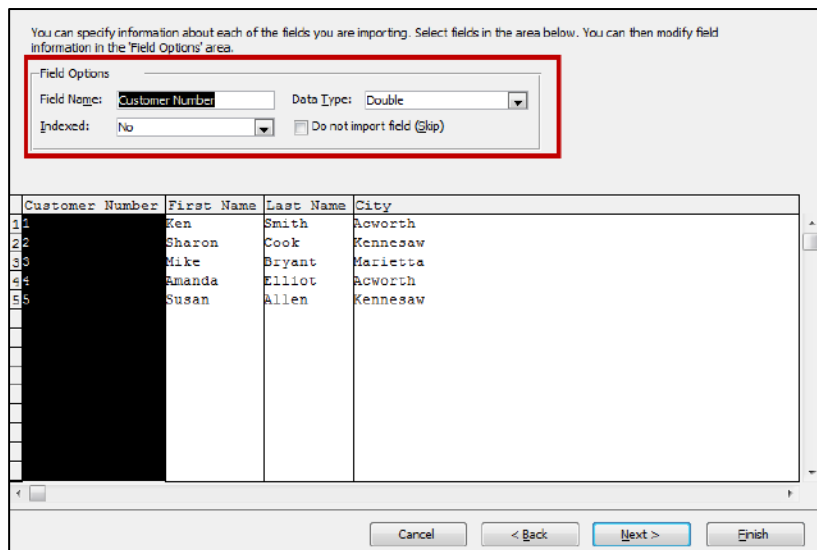


Figure 81 - Field Options

11. When you are finished, click the **Next** button.

12. Determine if you want Access to create a primary key for you, if you want to choose your own primary key from data within the spreadsheet, or if you don't want a primary key (see Figure 82).

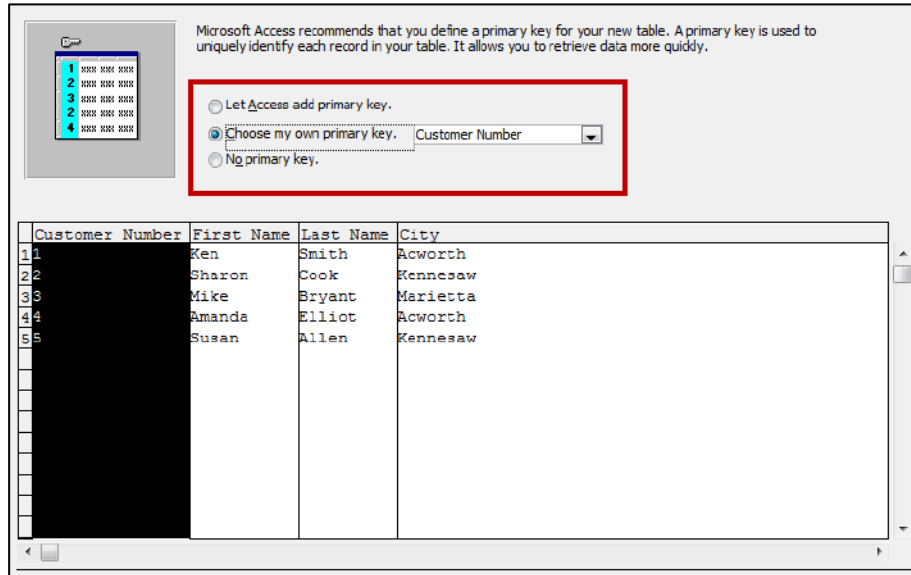


Figure 82 - Selecting the Primary Key

13. Click the **Next** button.

14. Enter a name for the table that will be created in the *Import to Table* field (see Figure 83).

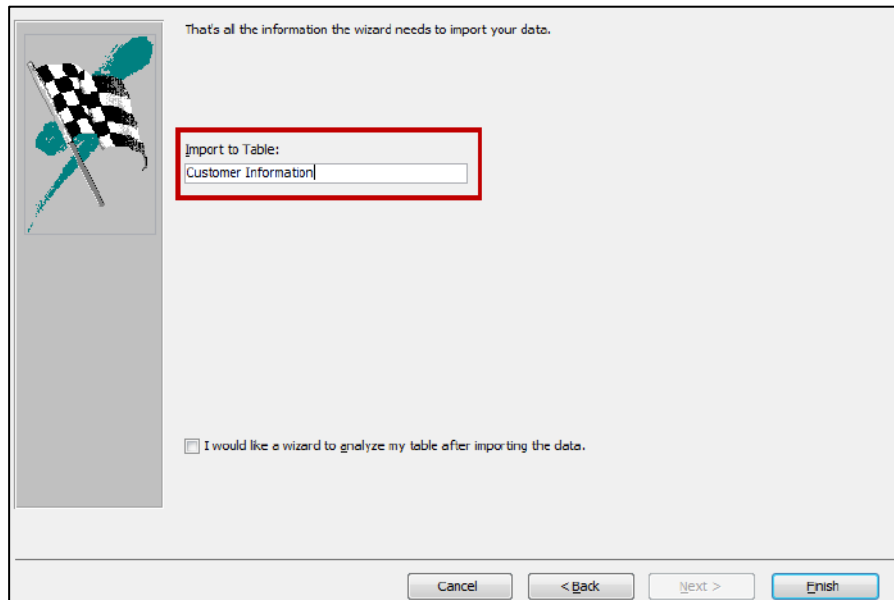


Figure 83 - Entering the Table Name

15. Click **Finish**

16. The *Save Import Steps* window will appear. Select **Save Import Steps** if you wish to save the import steps. Doing so will allow you to quickly repeat the operation (see Figure 84).

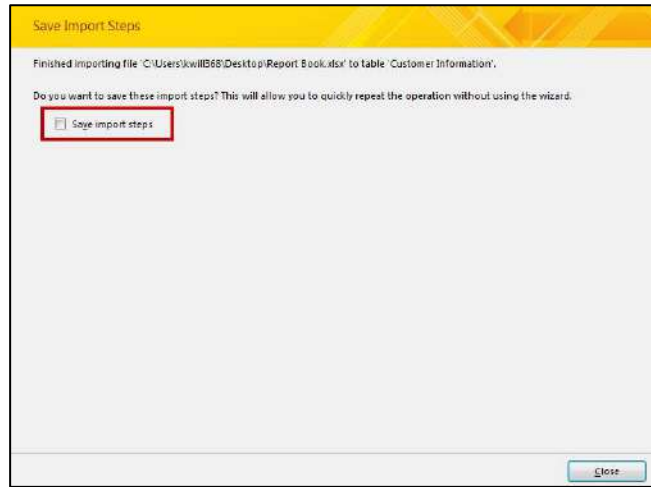
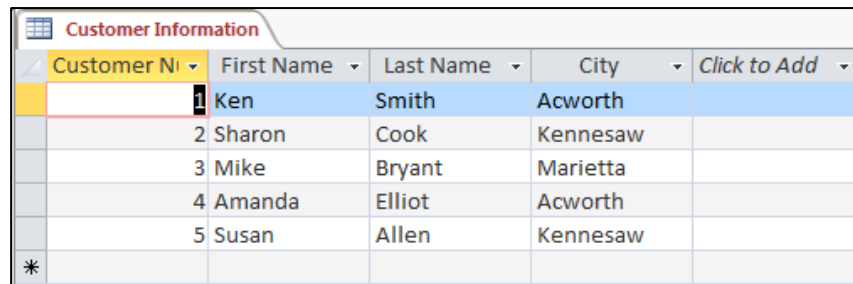


Figure 84 - Save Import Steps

17. Click **Close**

18. The information in Excel will be imported into Access. At this point, you could create forms, create reports, create queries, etc (see Figure 85).



Customer Number	First Name	Last Name	City	Click to Add
1	Ken	Smith	Acworth	
2	Sharon	Cook	Kennesaw	
3	Mike	Bryant	Marietta	
4	Amanda	Elliot	Acworth	
5	Susan	Allen	Kennesaw	

Figure 85 - The Imported Table

Additional Assistance

If you need additional assistance with Microsoft Office Access 2013, contact University Information Technology Services (UITs) at:

Faculty and Staff Service Desk

Phone: 470-578-6999

Email: service@kennesaw.edu

Students Help Desk

Phone: 470-578-3555

Email: studenthelpdesk@kennesaw.edu