MICROSOFT OFFICE 2007 PDF PICTURE TUTORIAL SERIES DATABASES

TABLES, FORMS, QUERIES, LOOKUP WIZARD, RELATIONSHIPS © AUGUST 2010 BY FLOYD JAY WINTERS AND JULIE MANCHESTER winterf@scf.edu

SEE GRADING CRITERIA

Database | Tables | Lookup Wizard | Relationships | Forms | Queries | Reports

In this project, you will create an Invoice database with the following features:

- Four **tables**: Invoice, Invoice Details, Employees, Products.
- **Primary keys**, such as such as EmployeeID that link corresponding records in the tables.
- Default Values and Field Size Limits and Formats
- Data validation
- You will use the Form Wizard to create an invoice form
- You will use the **Query Wizard** to create a query that calculates price times quantity
- You then use the result of the query in a report you create using the Report Wizard

Background Terms:

- A **Database** is a collection of related objects that store, manage, manipulate, and retrieve information. A database can also be referred to as a collection of related tables that are linked by key fields, such as EmployeeID or InvoiceNumber.
- **Database objects** are tables, queries, forms, reports, and macros.
- **Relationships** are basically links that join tables based on key fields such as EmployeeID or InvoiceNumber.
- **Tables** store the data in records (rows) and fields (columns).
- **Queries** perform an action with the data in the tables, such as finding certain specific data based on criteria. The results of a query can then serve as a source of data for a report.
- Forms are used for easily entering, displaying, and editing data.
- **Reports** are a printed form of data formatted and organized to your specifications.
- Macros are actions that you can use to automate tasks.

The first form is shown below (a good form has one record on one screen in **Columnar** layout):

Emp ID	EMS	
Last Name	Stanton	
First Name	Edwin	
Address	25 Grant Ave	
City	Richmond	
State	VA	
Zip	23173-	
Phone	(800) 555-1866	
Comments		

The finished report is shown below (a good report shows multiple records in **Tabular** layout):

YourCompany Name Product Sales by Employee

EmpID	Invoice Date	InvoiceID	Product Name	Sum Of Quantity	Total Price
GEP					
	1/1/2009	101	wcs General Ledger	2	\$600.00
	1/1/2009	101	wcs Accounts Receivable	1	\$425.00
Sum					\$1,025.00
JFH					
	1/2/2009	102	wcs Tax Forms	1	\$300.00
	1/2/2009	102	wcs Backorder Tracker	1	\$275.00
Sum					\$575.00
Grand Total					\$1,600.00
Sunday, June	28, 2009				Page 1 of 1
Step 1: Create	e the Invoices	Database	e (<u>Go to Top</u>)		
Start A	ccess				
• Select l	Blank Database	e			
• Name t	he database In	voices.acc	cdb		

New Diank Data	base		*			
Blank Database						
Featured Online	e Templates					
	Contract					
Assets	Contacts	Issues				
What's new in A	Access 2007? The new Access 2007 co powerful tools to help y report, and share inform manageable environmen about the new features content while working ice system ass 2007 User Interface rour objects using the no-	ntains more you quickly track, nation in a nt. Learn more and improvement in the 2007 ew, easy access	5.	Blank Dat Create a Micros not contain any File Name: Invoices.accdb C:\Data\Access	tabase oft Office Access dat existing data or obje	abase that doe: ects.
Navigation Pa						
Navigation Pa	nline:					

Next, select where the file will be saved.

 Click the folder icon
 i to the right of the File <u>N</u>ame The File New Database dialog box opens.

Possible Problem: Unlike Microsoft Word and Excel, you can NOT resave or rename an Access database file while in Access. So pay special attention to what you name your file and specifically what folder or what drive you save it in. If you need to modify the file name or location, you can copy it, move it, or rename it in the Windows Explorer, but not in Access.

🕼 File New Database					
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📲 Organize 👻 🏢	Views 🔻 📑 New Folder			0	
Favorite Links	Name	Date modified	Size	Туре	
Documents		This folder is em	pty.		
More »					
Folders	~				
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E-Machine	(C·)				
Jata	,				
Access					
Jocumen	ts 🔻				
File <u>n</u> ame:	Invoices.accdb				
Save as <u>t</u> ype:	Microsoft Office Access 200)7 Databases (*.accdb)			
Hide Folders		Too <u>l</u> s 🔻 📘	ОК	Cancel	
Provise to the desired	folder and aliak Ok	<i>r</i>			
• Blowse to the desired	e dialog box closes	x			
Creating Tables (Go to]	<u>Гор</u>)				
Tables store the actual	data in a database.	Typically, each s	set of rel	ated data is st	ored in a
separate table. For inst	ance you would ha	ve an Employees	table for	r all of your e	mployees
and a Products table fo	or all of your produc	cts.			
• Click <u>C</u> reated data	abase opens in Tab	le Datasheet Viev	v		
 Click View in the View 	ws group of the Dat	asheet tab	· .		
 Select Design View 	s group of the Du				
<u>~~~~~</u> ~~~8~~~~~					
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Home Create Externa	I Data Database Tools	Datasheet			۲
	Insert Data Type:	- 🗌 Un	ique	e⁄8 I	
View New Add Existing Lookup	Delete Format: Fo	ormatting 🔹 🗌 Is F	Required	Pelationships Of	20 hiert
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	Table1	Now Field			×
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The Save As dialog	box opens				
• Type in the Table N	ama Employees				
• Type in the Table <u>IN</u>	and Employees	G			
	Save As	L			
	Table Name:				
	Employees				
	Employees				
		ОК Са	ancel		
• Click OK					
The Employees table	e within the Invoices	s database ope	ns in Desig	n view:	
	United March	Table Tools Invo	ices : Database (A	Access 2007) - M	x
Home Create Extern	nal Data Database Tools	Design			۲
	Delete Rows				
View Primary Builder Test Validati	on Prop	erty Indexes			
Views Tools		eet bow/Hide			
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Employees A	Field Name	D AutoNu	ata Type	Description	
Employees : Table		Autonu	mper		
					-
					-
		Field I	Properties		
	General Lookup				
	Field Size	ong Integer	1		
	New Values In	crement			
	Format		-		
	Caption Indexed Ve	es (No Duplicates)			
	Smart Tags	in the explored cost	A field name	can be up to 64 characters long,	
	Text Align G	eneral	including sp	aces. Press F1 for help on field	
				names.	

By default, Access sets the first field as the Primary Key, names it *ID* and uses the AutoNumber data type.

A **Primary** key is unique identifying field by which a table can be searched, sorted, or linked to another table. Example: an EmployeeID or ProductID.

A **Foreign** key is a corresponding key field in another table that identifies records that are linked through the primary key. Example: a foreign EmployeeID key field in an Invoices table that links to employee information in the Employee table which has the Primary EmployeeID key field.

- Change the name of the Primary Key field from ID to *EmpID*
- Click in the Data Type column, click the list arrow, and select Text

Employees					×
Field	Name	Data Type		Description	-
EmpID		AutoNumber			=
		Text			
		Memo	1		
		Number			
		Date/Time			
		Currency			-
		AutoNumber	5		_
General Lookup		Yes/No			٦
Field Size	Long Integer	OLE Object	1		
New Values	Increment	Hyperlink		The data type determines the kind of values	
Format		Attachment		that users can store in the field. Press F1 for	
Caption		Lookup Wizard		help on data types.	
Indexed	Yes (No Dupli	LOOKup wizard			
Smart Tags					
Text Align	General				

- Type in the Description 3 Characters Employees Initials
- In the EmpID Field Properties, enter 3 for the Field size and > for the Format

Employees							×
Field Nar	ne		Data Typ	e		Description	
🜮 EmpID		Text				3 Characters - Employees Initials	
LastName		Text					-
			Field Pro	opertie	es		
							_
General Lookup							
Field Size	3						
Format	>						
Input Mask							
Caption	Emp ID						
Default Value							
Validation Rule					A	field name can be up to 64 characters long,	
Validation Text					i	ncluding spaces. Press F1 for help on field	
Required	No					names.	
Allow Zero Length	Yes						
Indexed	Yes (No D	uplicates)	This indi	cates	it i	s a Primary key with a unique value	e
Unicode Compression	Yes						
IME Mode	No Contr	ol					
IME Sentence Mode	None						
Smart Tags				Ŧ			

- Enter LastName, FirstName, Address, City, State, Zip, and Degree
- Assign each the Text data type Text comes up as the default data type for each subsequent field.
- For the *State* field, enter the Description: 2 character abbreviation
- In the *State* Field Properties, enter 2 for the Field size, > for the Format, and "VA" for the Default Value
- After *Degree*, the next field is *MOSCertified* and has the Yes/No data type and the

description: Microsoft Office Specialist Certified

- Enter *HireDate* with the Date/Time data type
- Enter *BaseSalary* with the Number data type
- Enter *Phone* with the Text data type and the description: *Home Phone*
- Enter *Comments* with the Memo data type

Using the steps above create a *Products* table that includes the following fields: ProductID, ProductName, ProductDescription, and Price.

Using the steps above create an *Invoice* table that includes the following fields: InvoiceID, InvoiceDate, and EmployeeID.

Using the steps above create an *InvoiceDetails* table that includes the following fields: InvoiceID, ProductID, and Quantity.

Using the Lookup Wizard (<u>Go to Top</u>)

When you create your tables, use the **Lookup Wizard** for foreign key fields like EmployeeID and ProductID so that dropdowns will allow for quick data entry. In the end you will have a **One-to-Many Relationship**. There is one unique Primary EmployeeID key field in the Employee table that is related to many foreign EmployeeIDs key fields in the Invoices table. In other words, one employee can have many sales.

In table Design View, choose the Lookup Wizard for the Data Type:

	📙 🤊 🗸	(~ -) =					Table Too	Is Invoices : Database ((Access 2007) - Microsoft Access
9	Home	Create	Extern	al Da	ata Database To	pols	Design		
View	Primary Key	Builder Test	Validatio Rules Tools	on 🔛	⊨ Insert Rows ≯ Delete Rows ⊉ Lookup Column	Prope	erty Indexe et	15	
All Ac	cess Objec	cts	. ≪		Products 🛄 In	voices			
Table	s		*		Field N	ame		Data Type	
	Employees			8	InvoiceID			Number	
	Invoice Deta	ails			InvoiceDate			Date/Time	_
	Invoices				EmployeeID			Text	<u> </u>
								Text	
	Products							Memo	
								Number	
								Date/Time	
								Currency	
								Autonumber	
								Yes/NO	
								ULE OBJECT	
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								Attachment	Field Properties
				G	eneral Lookup			Lookup wizard	
1			1						

Lookup Wizard This wizard creates a lookup column, which displays a list of values you can choose from. How do you want your lookup column to get its values? I want the lookup column to look up the values in a table or iguery. I will type in the values that I want. Cancel < Back Next > Enish Cookup Wizard Which table or query should provide the values for your lookup Column? Which table or query should provide the values for your lookup Wizard View I to value certails Table: Products View Cancel < Back Next > Enish Cancel < Back Next > Enish	r		
This wizard creates a lookup column, which displays a list of values you can choose from. How do you want your lookup column to get its values? I want the lookup column to look up the values in a table or guery. I will type in the values that I want. Cancel < Back	Lookup Wizard		
I want the lookup column to look up the values in a table or query. I will type in the values that I want. Cancel < Back		This wizard creates a lookup column, which displays a list of values you can choose from. How do you want your lookup column to get its values?	
I will type in the values that I want. Cancel < Back		 I want the lookup column to look up the values in a table or ouery 	
Cancel < Back		I will type in the values that I want	
Cancel < Back		1 wiii type in the values that I want.	
Cancel < Back			
Lookup Wizard Which table or query should provide the values for your lookup column? Table: Employees Table: Invoice Details Table: Products Table: Products View Iables Queries Bgth Cancel < Back		Cancel < Back Next > Einish	
Lookup Wizard Which table or query should provide the values for your lookup column? Table: Employees Table: Invoice Details Table: Products Table: Products View Image: Tables Oueries View Image: Tables Oueries Cancel < Back			
United with table or query should provide the values for your lookup column? Table: Employees Table: Invoice Details Table: Products View Image:			
Which table or query should provide the values for your lookup column? Table: Employees Table: Invoice Details Table: Products View Image: Tables Image: Queries <	Lookup Wizard		
Table: Employees Table: Invoice Details Table: Products View Image:		Which table or query should provide the values for your lookup column?	
Table: Invoice Details Table: Products View Image: Im		Tobler Employees	
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Cancel < <u>B</u> ack <u>N</u> ext > Einish			
		Cancel < <u>B</u> ack <u>N</u> ext > Einish	

	Which fi column? column.	elds contain the value The fields you select	es you want included become columns in y	l in your lookup your lookup	
Available Fields:		Selected F	ields:		
Address City State Zip Degree MOUSCertified HireDate BaseSalary		EmpID LastName Solution			
	C	Cancel < Ba	ick <u>N</u> ext >	Einish	
a aluun Minau					1
How wide would To adjust the wi right edge of the	you like the columr dth of a column, dr e column heading to	ns in your lookup colu ag its right edge to the get the best fit.	mn? ne width you want, o <mark>kbox: Resize co</mark>	or double-click the	
Hide key col	umn (recommendec	-			
Hide key colu	umn (recommendec	First Name			
Hide key colu	umn (recommendec Last Name Stanton	First Name Edwin			
Hide key colu Emp ID EMS GEP	umn (recommended Last Name Stanton Pickett	First Name Edwin George			
Hide key colu Emp ID EMS GEP JFH	umn (recommended Last Name Stanton Pickett Hooker	First Name Edwin George Joe			
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Hide key colu Emp ID	umn (recommendeo Last Name Stanton Pickett	First Name Edwin George			

Lookup Wizard	
	When you select a row in the lookup column, you can store a value from that row in your database, or you can use the value later to perform an action. Choose a field that uniquely identifies the row. Which column in your lookup column contains the value you want to store or use in your database?
	Available Fields:
	Emplo LastName FirstName
	Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> inish

Setting Relationships (<u>Go to Top</u>)

After you define your tables and set up your Lookup Wizard, you must finish setting up your relationships. **Relationships** refer to how related tables in a database are linked or joined together by key fields (such as EmployeeID) to avoid data redundancy, to provide for easier data entry, to ensure data consistency, and to avoid potential errors.

Choose **Database Tools** tab > **Relationships**. Right-click on the line connecting related tables through their key fields to enforce **Referential Integrity** to make sure there are no Invoice Detail records without matching Invoices (you cannot have children without parents).



Possible problem: If there is not line connecting the EmployeeIDs from the Employees table and the Invoices table: drag the EmpID **Primary key** from the Employees table to the EmployeesID **Foreign key** in the Invoices table.



When done your relationships should look like this, with each many table having a **1-to-Many** (1 to ∞) **Relationship** with the other tables (1 employee can have many sales):



If your Lookup Wizard and **1-to-Many** Relationships are set correctly, data entry with your tables becomes much easier and more powerful with dropdowns:

		InvoiceID 👻	InvoiceDate 👻	Employee	ID	*	Add New I	Field	
	+	101	1/1/2009	GEP					
	+	102	1/2/2009	JFH					
	+	103	1/3/2009	JFH		•			
*				EMS	St	tan	ton	Edw	in
				GEP	Pi	ick	ett	Geor	ge
				JFH	Н	00	ker	Joe	
				REL	Le	ee		Robe	ert
				TSJ	Ja	ick	son	Tom	

Using the steps above use the Lookup Wizard to link the InvoiceDetails table to the Products table through ProductID.

Once you have set up your Relationships properly and used the Lookup Wizard to link to related tables it is much easier to create good forms and subforms for data entry.

Creating Forms (Go to Top)

A **Form** is used to enter, edit and delete information stored in a table. Forms are more attractive and easier to use than tables. We will build two forms. The first is a basic Employees form. The second is an Invoice form with a **Subform** (an itemized detail form within a main form).

- Click More Forms in the Forms group on the Create tab
- Select Form <u>Wizard</u>

	🗟 19 🗸	(≥ ,					Invoices : Database (Ac
9	Home	Create	External	l Data	Datab	ase Tools	i
Table	Table Templates	SharePoin Lists *	t Table Design	Form	Split Form	Multiple Items	PivotChart Blank Form More Forms Design
All Acc	ess Object	S	• «			T.	Form Wizard
Tables			*				Datasheat
E	mployees						

- If necessary, click the dropdown arrow next to the <u>Tables/Queries</u> box and select the *Employees* table.
- Click the [>] button to move EmpID, LastName, FirstName, Address, City, State, Zip, Phone, and Comments to the <u>S</u>elected Fields list

	Which fields do you want on your form?
	You can choose from more than one table or query.
Tables/Queries	
Table: Employees	
<u>A</u> vailable Fields:	Selected Fields:
Degree MOSCertified HireDate BaseSalary	 LastName FirstName Address City State Zip Phone Comments
Ca	ncel < Back Next > Finish
lick <u>N</u> ext Form Wizard	
lick <u>N</u> ext Form Wizard What layout would you like for	your form?
lick Next Form Wizard What layout would you like for	your form? © Columnar © Tabular © Datasheet © Justified
lick Next	your form? © Columnar © Tabular © Datasheet © Justified Lick Next
lick Next Form Wizard What layout would you like for What layout would you like for Columnar selected and cl ote: a good form has one record hoose a style and click Next	your form? © Columnar © Tabular © Datasheet © Justified Lick Next d on one screen in Columnar layout

Emp ID	EMS	
Last Name	Stanton	
First Name	Edwin	-
Address	25 Grant Ave	
City	Richmond	
State	VA	
Zip	23173-	
Phone	(800) 555-1866	
Comments		

Building Queries (<u>Go to Top</u>)

A **Query** can be used to find and arrange specific information and do on the fly calculations. We will create two queries. First we will create a simple Employees Query to list only Employee names and addresses.

• Click Query Wizard in the Other group on the Create tab

_	Home	Create	External Data	Database Tools	Commences and the second	_
	8			Rank Form	Elabels	
able	Table Templates -	SharePoint Lists *	Table For Design	m Split Multiple More Form Form Form Rems More Forms • Design	Report Report Wizard Design	Query Query Macro Wizard Design *
	Tal	bles		Forms	Reports	Other

This wizard creates a select query from the fields you pick.	Simple Query Wizard Crosstab Query Wizard Find Duplicates Query Wizard Find Unmatched Query Wizard
--	---

• With Simple Query Wizard highlighted, click OK The Simple Query Wizard dialog box opens.

	Which fields do you want in your query?
	You can choose from more than one table or query.
Tables/Queries	
Table: Employees	
<u>A</u> vailable Fields:	Selected Fields:
EmpID LastName FirstName	
Address City	
State Zip	
Degree	

- If necessary, choose *Table: Employees* from the drop-down <u>Tables</u>/Queries list
- Click [>] with EmpID highlighted to move it to the <u>S</u>elected Fields list
- Repeat for LastName, FirstName, Address, City, State, and Zip
- Click <u>F</u>inish

The new *Employees* query opens in Datasheet view:

Employees Qu	ery						_		
🔟 Emp ID 👻	Last Name 🝷	First Name 🝷		Address	*	City -	State	- Zij	• C
EMS	Stanton	Edwin	25 Gra	int Ave		Richmond	VA	23173	}_
GEP	Pickett	George	3600 \	/alley Street		Norfolk	VA	34404	-1000
JFH	Hooker	Joe	1213 L	_ookout Mtn	Way	Bradenton	FL	34209)_
REL	Lee	Robert	1900	Arlington Blv	d	Sarasota	FL	34288	}_
TSJ	Jackson	Tom	1012 E	Bull Run Roa	d	Sarasota	FL	34229)_
USG	Grant	Simpson	1776	Appomattox	Drive	Bradenton	FL	34210)-1
WTS	Sherman	Will	1532 I	Marching Dri	ve	Ellenton	FL	34221	-
*							VA		
Click V	view in the Re	sults group of	on the l	Home tab					
The Em	<i>iployees</i> querv	y opens in D	esign v	iew:					
Employe	ees Query	1	U						
Er	mplovees								
	*								
	LastName								
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	State								
	Zip Degree								
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Fie	ld: [EmpID] 🔽 [LastName] [Firs	tName]	[Address]	[City]	[State]	[Zip]		
l ab	ole: Employees E	mployees Emp	loyees	Employees	Employe	es Employee	s Emp	loyees	
Sho	w:			V	V			V	
Criter	ria:								
	4							•	
• In the (riteria row fo	r State ente	r "FL"						
• In the c								_	
	Field	[City]		[State]		[7in]			
	Table:		_	Estates				_	
	Table:	Employee	S	Employee	es	Employe	ees	_	
	Sort:								
	Show:	V		V			1		
	Criteria:			"FL"					
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L									
Click D	un in the grou	in on the Do	cian to	h					
	cun in the give		Design	U					
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	- <u>-</u> , -, -, -/		Pass-Throu	ıgh	Delete Roy	vs 📈 Delete Colum	ins		le Names
View Run Sele	ct Make Append Upda Table	ate Crosstab Delete	💪 Data Defir	ition Table	Builder	🗐 Return: All	- T	otals	ameters
Results	_	Query Type	_		Qu	ery Setup		Show/H	ide
Only re	cords having	a State value	e of FL	are include	ed in t	he results:			

	Employees Q	uery					
	Emp ID 👻	Last Name 🝷	First Name 🝷	Address -	City -	State -	Zip 🛃
	JFH	Hooker	Joe	1213 Lookout Mtn Way	Bradenton	FL	34209-
	REL	Lee	Robert	1900 Arlington Blvd	Sarasota	FL	34288-
	TSJ	Jackson	Tom	1012 Bull Run Road	Sarasota	FL	34229-
	USG	Grant	Simpson	1776 Appomattox Drive	Bradenton	FL	34210-1
	WTS	Sherman	Will	1532 Marching Drive	Ellenton	FL	34221-
*						VA	

Now let's create a Query that computes Price times Quantity that we can then use in a Product Sales by Employee Report.

- Click Query Wizard in the Other group on the Create tab
- Select Simple Query Wizard
- Choose *Table: Invoices* from the drop-down <u>Tables/Queries</u> list

	Which fields do you want in your query? You can choose from more than one table or query.
Tables/Queries Table: Employees Table: Employees Table: Invoice Details Table: Invoices Table: Products Casuvanne FirstName Address City State Zip Degree	Fields:
,	Cancel < Back Next > Finish

• With *InvoiceID* highlighted in the <u>A</u>vailable Fields list, click the single arrow \triangleright to move it to the <u>S</u>elected Fields list

Simple Query Wizard	
	Which fields do you want in your query? You can choose from more than one table or query.
<u>T</u> ables/Queries Table: Invoices	
<u>A</u> vailable Fields:	Selected Fields:
InvoiceDate EmployeeID	InvoiceID

- Select the *Products* table from the <u>Tables/Queries</u> list
- Add *ProductName* and *Price* to the <u>Selected</u> Fields list
- From the *InvoiceDetails* table and add *Quantity* to the <u>Selected Fields list</u>

Simple Query Wizard	
	Which fields do you want in your query? You can choose from more than one table or query.
<u>T</u> ables/Queries Table: Invoice Details	
<u>A</u> vailable Fields:	Selected Fields:
InvoiceID ProductID	InvoiceID ProductName Price Quantity

• Click <u>N</u>ext

The dialog box offers the choice between including every field from every record or a summary with simple calculations.

	Would you like a detail or summary query?	
1 aa	 Detail (shows every field of every record)	
2 aa	 Summary	
1 bb 2 dd 3 dd	Summary Options	

• Click Summary Options

Simple Query Wizard
Would you like a detail or summary query? Detail (shows every field of every record) Detail (shows every field of every record) Summary Summary Options
The Summary Options dialog box opens.Check the Sum box for the <i>Quantity</i> field; then click OK
Summary Options
What summary values would you like calculated?
Field Sum Avg Min Max Cancel
Price
Click Next after the Summary Options dialog box closes
Change the title of the query to <i>PriceXQtyQuery</i>
Select <u>M</u> oalfy the query design.
What title do you want for your query?
PricexQtyQuery
That's all the information the wizard needs to create your query.
Do you want to open the query or modify the query's design?
Open the query to view information
Modify the query design.
Cancei < Back Next > Finish



Ð	PriceXQtyQuery				+
	InvoiceID 🔻	Product Name 🝷	Price -	Sum Of Quantity -	TotalPrice -
	101	wcs Accounts Receivable	\$425.00	1	\$425.00
	101	wcs General Ledger	\$300.00	2	\$600.00
	102	wcs Backorder Tracker	\$275.00	1	\$275.00
	102	wcs Tax Forms	\$300.00	1	\$300.00

• Save and close the query

Creating Reports (Go to Top)

Reports are used to display the information from a table or the results form a query in the desired field order, showing only the desired fields. Let's create a report based on our PriceXQtyQuery.

• Select Report Wizard in the Reports group on the Create tab

Table Te	Table SharePoint Table Tables SharePoint Table Tables Form Split Multiple More Forms * Design Tables Forms
The	Report Wizard dialog box opens
In the	he <i>Employees</i> table, add <i>EmpID</i> to the <u>Selected Fields list</u>
	Report Wizard
	Which fields do you want on your report? You can choose from more than one table or query.
	Tables/Queries
	Table: Employees
	<u>A</u> vailable Fields: <u>S</u> elected Fields:
	LastName FirstName Address City State Zip Degree MOUSCertified
	Cancel < Back Next > Einish

Report Wizard	
Which fields do you want on your report? You can choose from more than one table or query.	
Tables/Queries	
Query: PriceXQtyQuery	
Available Fields: Selected Fields:	
Price	
Image: Contract of the second seco	
Cancel < Back Next > Finish	
Group level by <i>EmpID</i> Report Wizard	
Do you want to add any grouping levels? EmpID InvoiceID InvoiceDate	
ProductName Sum Of Quantity TotalPrice	
Sort by <i>InvoiceDate</i>	

Report Wizard	
What sort order and summary information of asc 1 2 3	do you want for detail records? u can sort records by up to four fields, in either cending or descending order. (InvoiceDate Ascending Ascending Ascending
Cancel	<pre>✓ Ascending </pre> Summary Options < Back Next > Finish
 Click the Summary Options button Check the Sum box for <i>TotalPrice</i> and Summary Options What summary values would you like calce Field Sum Avg Sum Of Quantity TotalPrice 	A click OK
Choose <u>S</u> tepped layout and Landscape	e orientation

Report Wizard	
How would you like to lay out your report?	Layout Stepped Orientation Block Portrait Outline A
	Adjust the field width so all fields fit on a page.

• Select a Style (Note: **Microsoft Office 2007 has a bug** that may push the Grand Total or **Sum(TotalPrice)** summary off to the far right of the page so that it may not be viewable. If one style does not work try another. It is because of this bug that we must print this report in Landscape instead of Portrait. We can resize the report with and height later.)

	 Access 2007 Apex Aspect	^	
	Civic Concourse		
Title	Flow Foundry Median		
Label above Detail	Metro Module		
Control from Detail	Northwind Office	-	

The report opens in Design view:

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4												
Ľ	Report Header											
	Produc	t Sale	es by	Emplo	ovee							
ľ			,									
	Page Header											
ľ	EmpID In	voiceDate	Invoi	iceID Product Na	ime		Sum Of Qu	antity TotalPrice				
	EmpID Header											
ľ	EmplD											
	Detail											
Γ	Invol	ceDate	InvoiceID	ProductNa	me .	Sum Of Qu	antity	TotalPrice				
h	EmpID Footer											
r	+"Summary #	er T & TTEmp	p10" + " & "	1 & (EmpID) &	("&:Count(*) & "	表 If[Count[*]+1]	detail record","d	etaill riecords") & "	C			
	Sum									+Sum[[Tot		
	Page Footer											
115	Now()										-'Paga '& Paga &	of a Pag

The Report Wizard generates a basic report that you can customize for your specific company. (Note the **Microsoft Office 2007 bug** pushed **=Sum(TotalPrice)** off to the far right of the page so that it would not be viewable in Portrait view.) In the following steps, you add your company name to the Report Header, rename the *Sum of Quantity* label, line up the totals, and move the page number.

- Hover the pointer over the vertical ruler near the bottom of the Report Header and drag the bottom edge of the Report Header to make it big enough for the company name
- Click and drag the report title down to make room for the company name

•	
-	
•	
	Product Sales by Employee
1	
	✓ Page Header

Possible problem: When you try to click and drag the label, after you click it you cannot drag it, you can only edit the text.

Solution: Do not release the mouse button after clicking the label. Click and drag in one step.

• Click the Label tool in the Controls group on the Design tab



• • • • • • • • • • • • • • • • • • •
Report Header
Product Sales by Employee
• Type in your company name and then click in an empty area of the report
Click the label to select it
• Use the tools in the Font group to format the company name
Calibri V A V B I U 26 V Onditional E E T V Font
Product Sales by Employee
····· · · · · · · · · · · · · · · · ·
✓ Report Header
YourCompany Name
Product Sales by Employee
✓ Page Header
 In the EmpID Footer, select the "Summary for" text box and delete it Click TotalPrice in the Detail section Press and hold the [Shift] key and click =Sum(TotalPrice) in the EmpID footer and Report footer
The three total fields are highlighted
InvoiceDate InvoiceID ProductName Sum Of Quantity TotalPrice
EmpID Footer +"Summary for " & "EmpID" + X = " & EmpID] & [(" & Count(*) & " * & Bf(Count(*)+1, [detail record", "detail records") & " * Sum[]Tot
•Now()
Grand Total

• Click the Align Right tool in the Control Alignment group on the Arrange tab

Report Design Tools
Home Create External Data Database Tools Design Arrange Page Setup
AutoFormat Tabular Stacked Remove Control Control Margins * Padding * Image: Stacked Remove Remove Control Control Remove Image: Stacked Remove Remove Image: Stac
AutoFormat Control Layout Control Alignment
The three total fields are now aligned on their right edge.
antity TotalPrice
TotalPrice
totti records: j sc. i::::::::::::::::::::::::::::::::::::
• Open the Property Sheet, if necessary, by clicking Property Sheet in the Tools group on the Design tab
Add Existing Fields Tools
• With the three total fields still highlighted, set the Format to Currency
Property Sheet Selection type: Multiple selection
Format Data Event Other All
Control Source
Decimal Places Long Date Visible Medium Date

Short Date

Long Time

Short Time

Currency

Standard

Euro

Fixed

Medium Time

General Number

Text Format

Width

Height

Back Style

Back Color

Тор

Left

Datasheet Caption

- In the Properties Sheet, adjust the Page Number field in the Page Footer and change its Width and Left properties to the best settings.
- Open the report in Report View (Home tab > View > Report View) Note 1: A good report shows multiple records on one page in **Tabular** layout. Note 2: Notice that it displays both Subtotals for each employee and a Grand Total for everyone.

Note 3: Notice the spaces in the headers, as in Invoice Date and Product Name (instead of InvoiceDate and ProductName). These spaces are added in Design View. Also in Design View the column widths were adjusted to give the best presentation.

×

YourCompany Name Product Sales by Employee

Product Sales by Employee

		_			
EmpID	Invoice Date	InvoiceID	Product Name	Sum Of Quantity	Total Price
GEP					
	1/1/2009	101	wcs General Ledger	2	\$600.00
	1/1/2009	101	wcs Accounts Receivable	1	\$425.00
Sum					\$1,025.00
JFH					
	1/2/2009	102	wcs Tax Forms	1	\$300.00
	1/2/2009	102	wcs Backorder Tracker	1	\$275.00
Sum					\$575.00
Grand Total					\$1,600.00
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