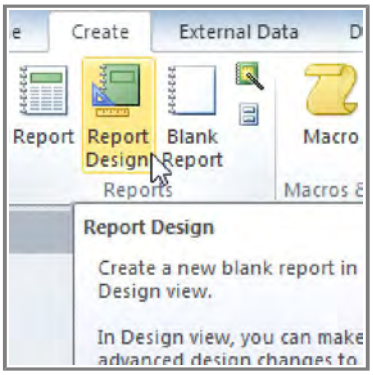
Introduction



If you need to share information from your database with someone, but don't want them actually working with your database, you should consider creating a **Report.** Reports allow you to organize and present your data in a reader-friendly, visually appealing format. Access 2010 makes it easy to create and customize a report using data from any query or table in your database.

In this lesson, you will learn how to **create**, **modify**, and **print** reports.

We will be showing you how to create reports from tables and queries in sample bakery database. If you would like to follow along, download our example and use it to follow the procedures demonstrated in this lesson.

Creating Reports

Reports give you the ability to present components of your database in an easy-to-read, printable format. Access 2010 lets you create reports from both **tables** and **queries**.

Video: Creating Reports in Access 2010

Watch the video (2:26). Need help?

To Create a Report:

1. Open the table or query you would like to use in your report. We want to print out a list of last month's orders, so we'll open up our **Orders Query**.

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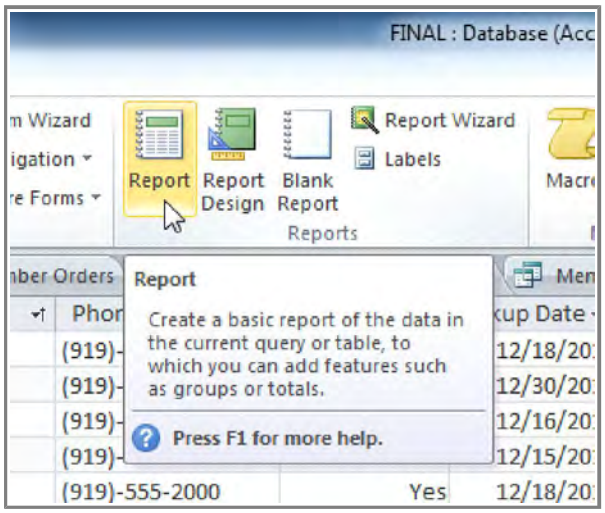
Orders Query

First Name	Last Name	Phone Number	Paid	Pickup Date	Zip Code
Xiaoxi	Zheng	(919)-555-2786	Yes	12/10/2010	27603
Andrzej	Wujek	(919)-555-0450	Yes	12/4/2010	27606
Carson	Woolf	(919)-555-0440	Yes	12/18/2010	27615
Kiara	Williams	919-555-8975	Yes	12/23/2010	27714
Janie	Widby	(919)-555-1025	Yes	12/23/2010	27615
Dick	Whitman	(919)-555-5042	Yes	12/24/2010	27607
Dick	Whitman	(919)-555-5042	Yes	12/4/2010	27607
Lashaunda	White	(919)-555-7895	Yes	12/19/2010	27607
George	Wein	(919)-555-3302	Yes	12/23/2010	27615
Lebron	Wade	(919)-555-1520	Yes	12/23/2010	27605
Xiaolin	Tu	(919)-555-2005	Yes	12/31/2010	27609

The query we'll use in our report

2. Select the **Create** tab on the Ribbon and locate the **Reports** group. Click the **Report** command.



The Report command

3. Access will create a new report based on your object.
4. It's likely that some of your data will be located on the other side of the **page break.** To fix this, **resize** your fields. Simply select a field, then **click** and **drag** its edge until the field is the desired size. **Repeat** with additional fields until all of your fields fit.

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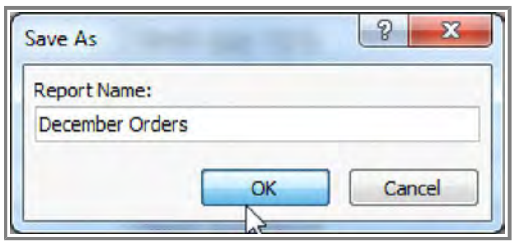
Resizing fields in the report

5. To **save** your report, click the **Save** command on the **Quick Access Toolbar.** When prompted, type a **name** for your report and then click **OK**.



Saving and naming the report

Just like tables and queries, reports can be **sorted** and **filtered.** Simply **right-click** the field you wish to sort or filter. Then, select the desired sorting or filtering option.

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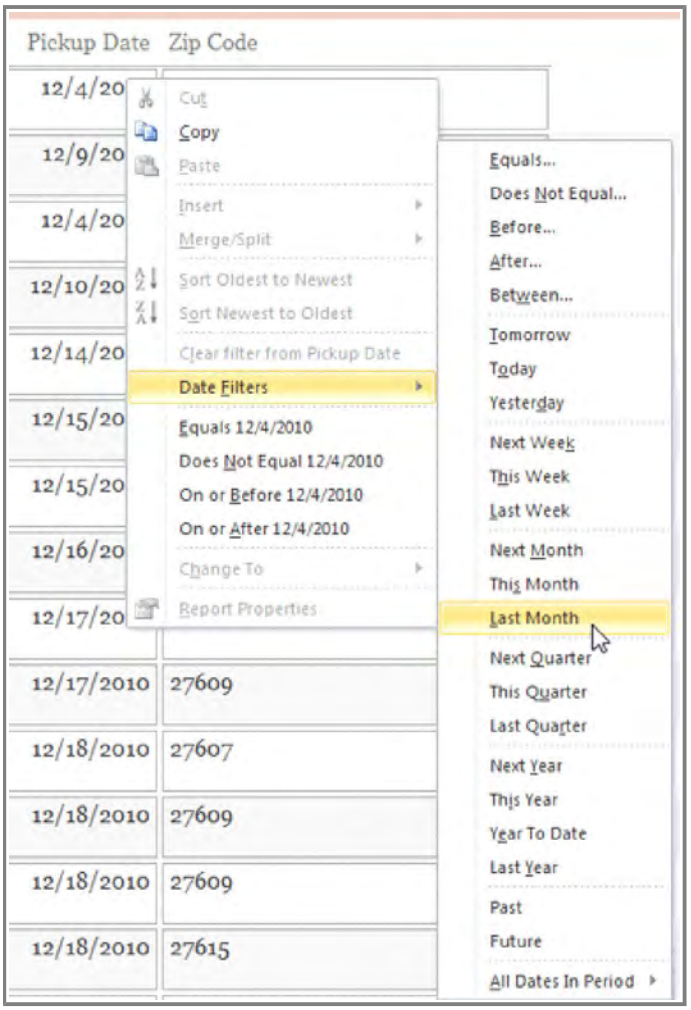

Filtering a report

Deleting Fields

You might find that your report contains some fields you don't really need to view. For instance, our report contains the **Zip Code** field, which isn't really necessary in a list of orders. Fortunately, you can **delete** fields in reports without affecting the table or query you got your data from.

To Delete a Field in a Report:

1. Click any cell in the field you would like to delete.
2. Press the **delete** key.

When you delete a field, be sure to delete its header as well. Simply select the header and press the **delete** key.

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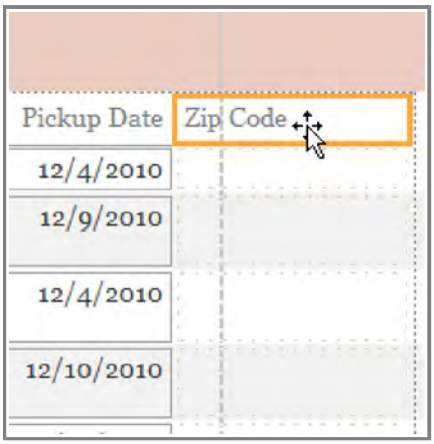

Deleting a field header after deleting the related field

Printing and Saving Reports in Print Preview

While you can print reports using commands in the **Backstage** view, you can also use **Print Preview.** Print Preview shows you how your report will appear on the printed page**.** It also allows you to **modify** the way your report is displayed, **print** it, and even **save** it as a different file type**.**

Video: Printing Reports in Access 2010

Watch the video (2:27). Need help?

Click the buttons in the interactive below to learn about **Print Preview.**

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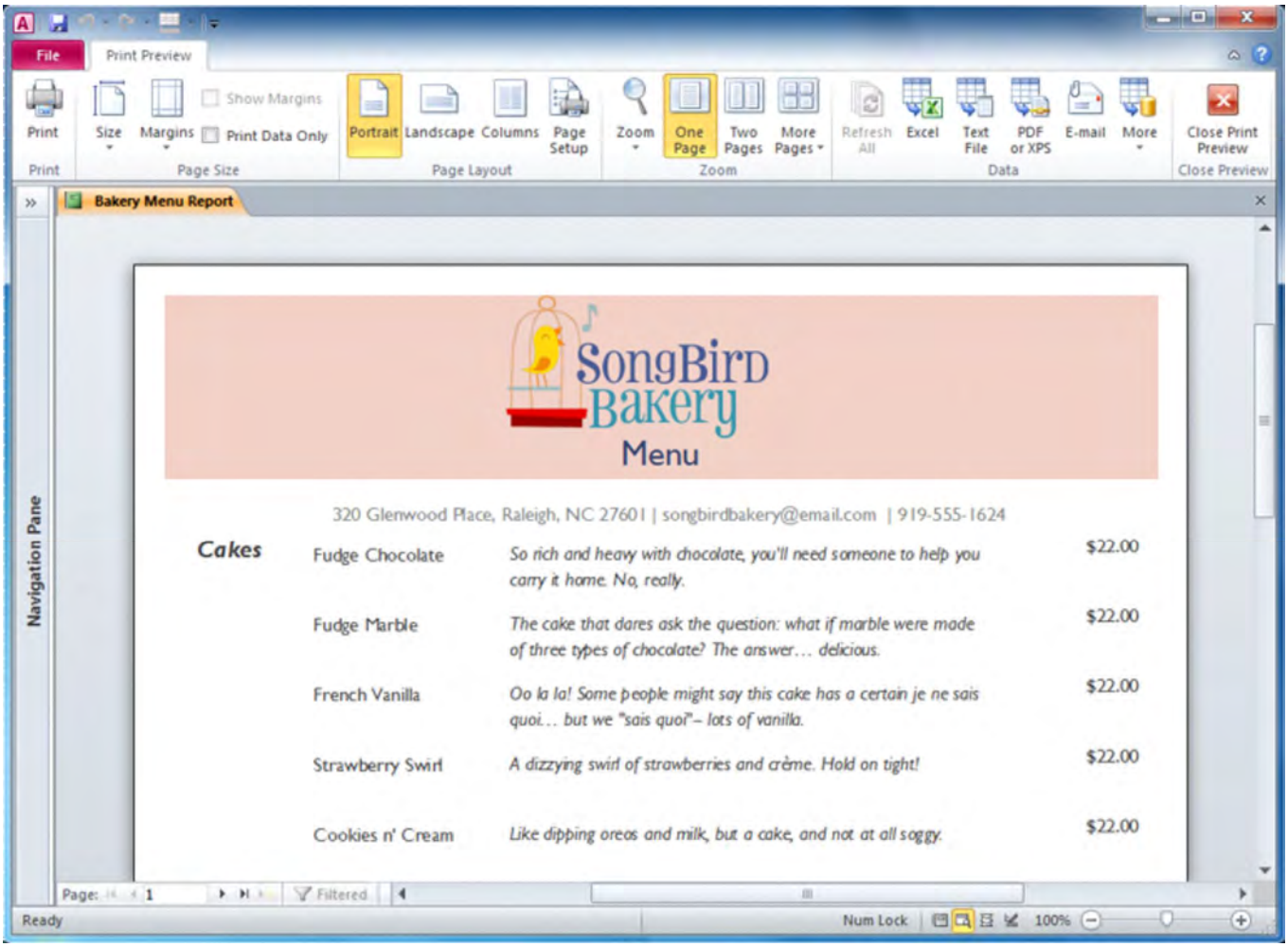

To Print a Report:

1. On the **Home** tab of the **Ribbon**, click the **View** command and select **Print Preview** from the drop-down list. Your report will be shown as it will appear on the printed page.

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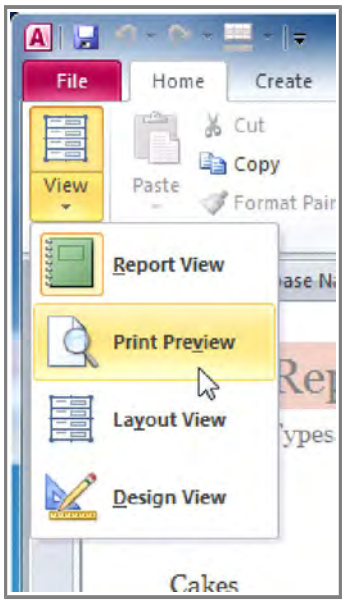
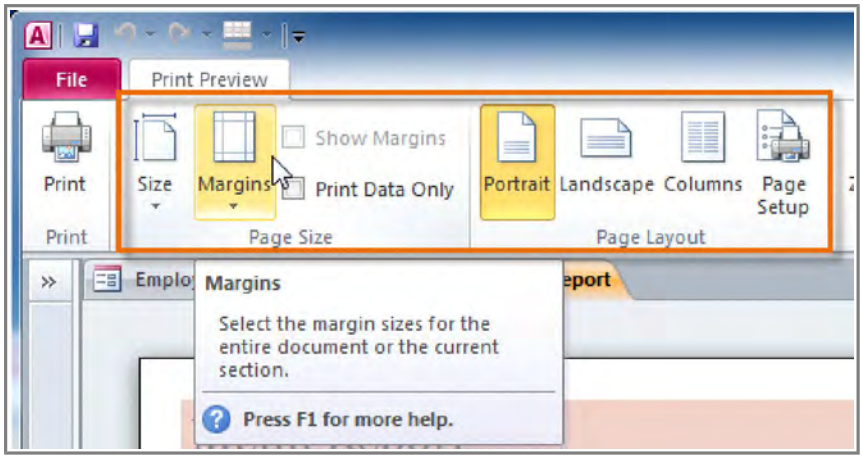


Switching to Print Preview view

2. If necessary, modify the **page size**, **margin width**, and **page orientation** using the related commands on the Ribbon.



Page setup commands in Print Preview

3. Click the **Print** command.

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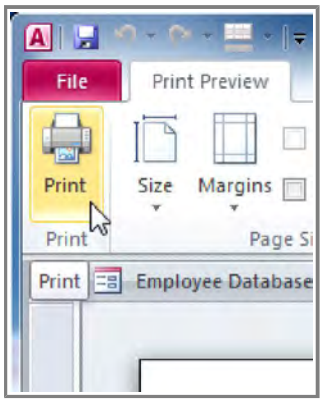


The Print command

4. The **Print** dialog box will appear. Set any desired print options, then click **OK**.

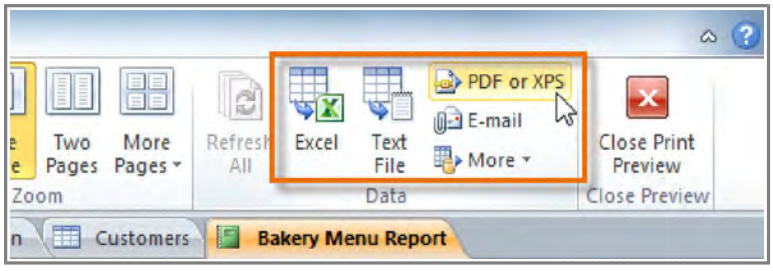
Saving Reports

You can save reports in other formats so that they'll be viewable outside of Access. This is called **exporting** a file, and it allows you to view and even modify reports in other formats and programs.

Access offers options to save your report as an **Excel file,** a **Text** file, a **PDF**, an **XPS** file, an **email attachment**, a **Rich Text** file, or an **HTML document.** Experiment with the different export options to find the one that best suits your needs.

To Export a Report:

1. On the **Home** tab of the **Ribbon**, click the **View** command and select **Print Preview** from the drop-down list.
2. Locate the **Data** group on the Ribbon.
3. Select one of the file type options on the Ribbon, or click **More** to see options to save your report as a **Word** or **HTML** file.



Report export options

4. Save your file.
    - If you're saving the report as a **PDF or XPS** file:
        1. Select the location where you wish to save the report.
        2. Place your cursor in the **file name** text box and type a name for your report if you wish to name it something other than the report title.

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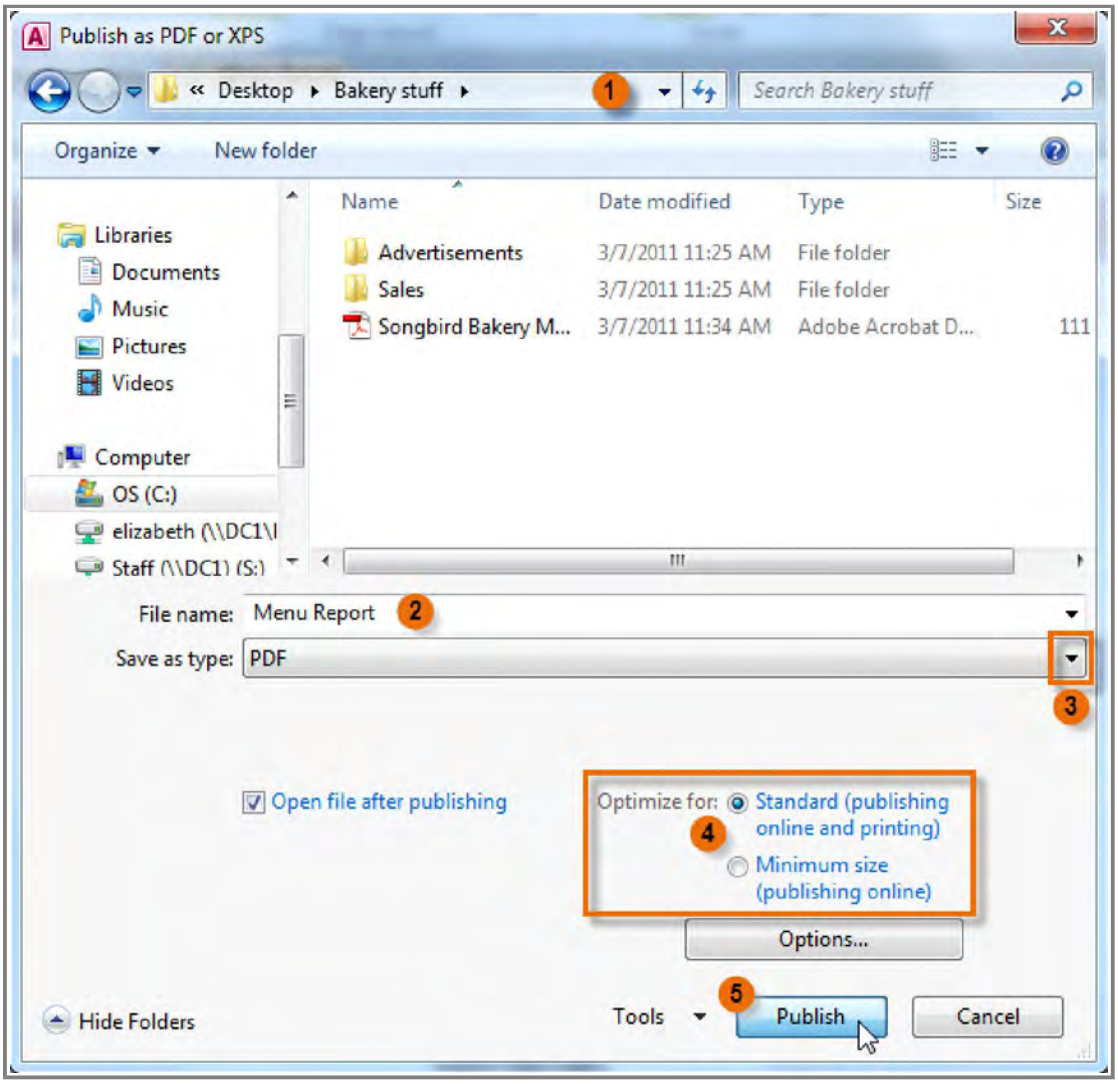
3. In the **Save as Type** drop-down menu, select either **PDF** or **XPS**.
4. Select the file **quality** by clicking either **Standard** for reports you plan on printing or **Optimized** for reports you plan to share primarily online.
5. Once you are satisfied with your settings, click **Publish** to save your report.



Saving the report as a PDF or XPS file

- If you're saving the report as any other type of file:
  1. Click **Browse** to specify your file location and name, then click **Save**.
  2. In the **Export** dialog box, click the checkboxes to select desired saving options where applicable,
  3. Click **OK** to export your report.

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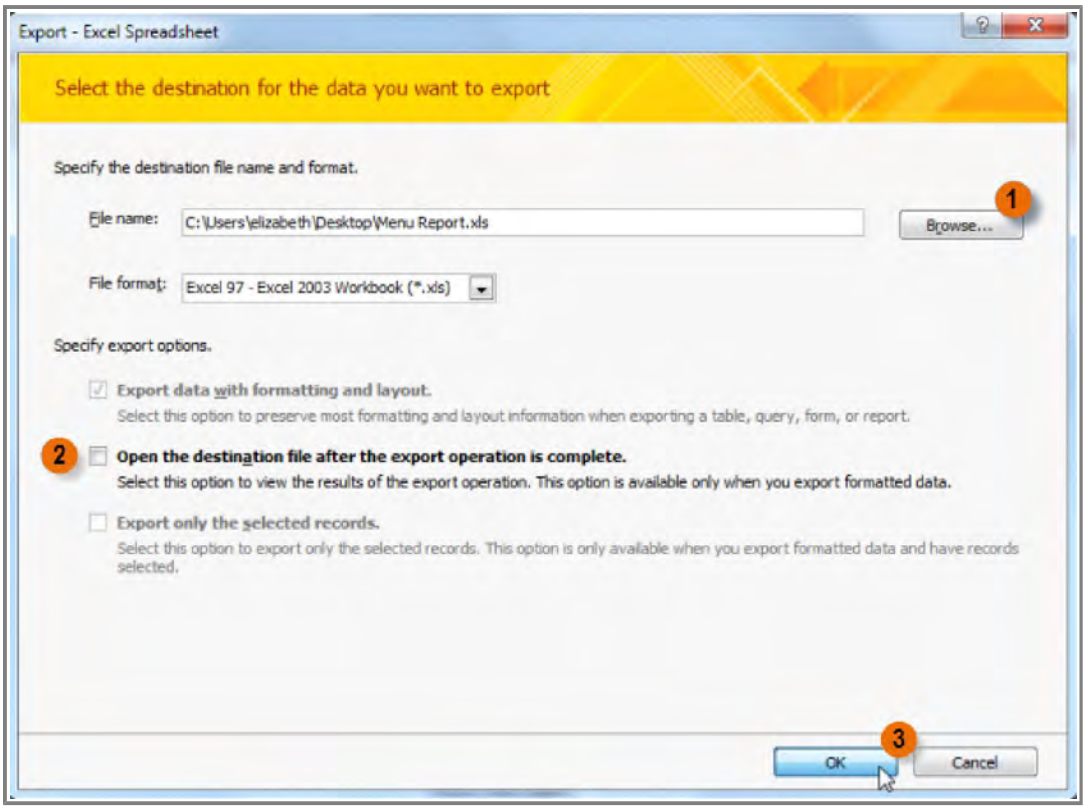

Saving the report as an Excel, Word, text, or HTML file

5. A dialog box will appear to notify you that your file has been successfully saved. Click **Close** to return to your report.

Challenge!

1. If you haven't already, download our sample database and **open** it.
2. Open the **Customers Who Live Nearby** query and use it to **create** a report.
3. **Resize** the fields and rows so that all of the information is visible.
4. **Move** any fields located on the right side of a **page break** onto the same page as the other fields.
5. **Export** the report as a **PDF** file.

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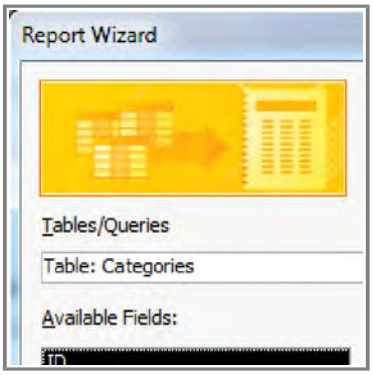
Introduction



Access 2010 offers several **advanced options** for creating and modifying reports. The **Report Wizard** is a tool that guides you through the process of creating complex reports. Once you've created a report, whether through the Report Wizard or the Report command, you can then **format** it to make it look exactly how you want.

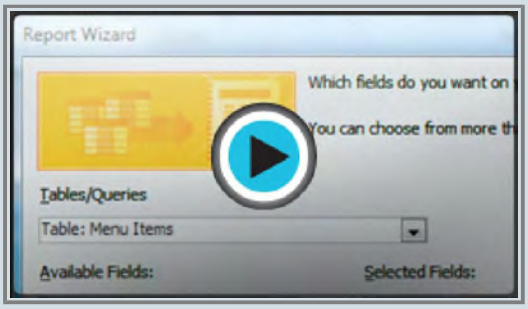
In this lesson, you'll learn how to use the **Report Wizard** to create complex reports. You'll also learn how to use Access's **formatting options** to **format text**, **change report colors and fonts**, and **add a logo**.

We will be showing you how to create and modify reports with examples from our sample database. If you would like to follow along, download our example and use it to follow the procedures demonstrated in this lesson.

The Report Wizard

While using the **Report** command is a quick way to create reports from the current object, it's not as helpful if you want to create a report with data from multiple objects. The **Report Wizard** makes it easy to create reports using fields from multiple tables or queries. It even lets you choose how your data will be **organized**.

Video: Using the Report Wizard in Access 2010



Watch the video (3:09). Need help?

To Create a Report using the Report Wizard:

1. Select the **Create** tab and locate the **Reports** group. Click the **Report Wizard** command.

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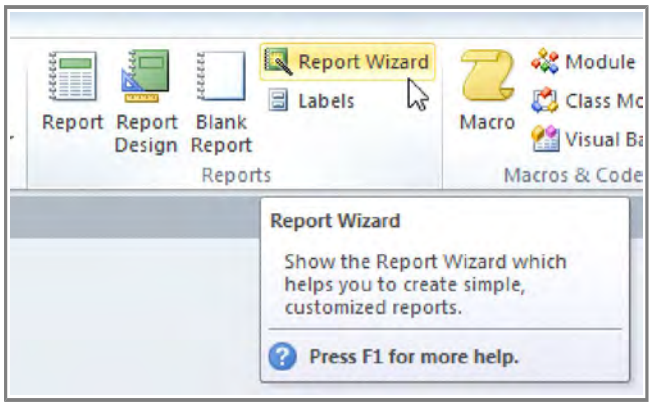
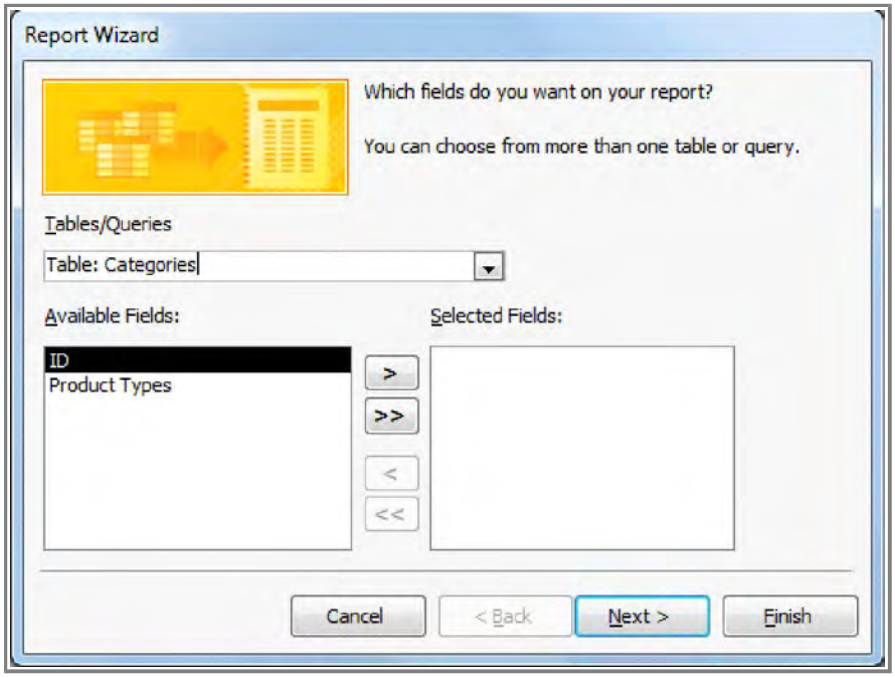


The Report Wizard command

2. The **Report Wizard** dialog box will appear.



The Report Wizard dialog box

Step 1: Select the Fields to Include in your Report

1. Click the drop-down arrow to select the table or query that contains the desired field or fields.

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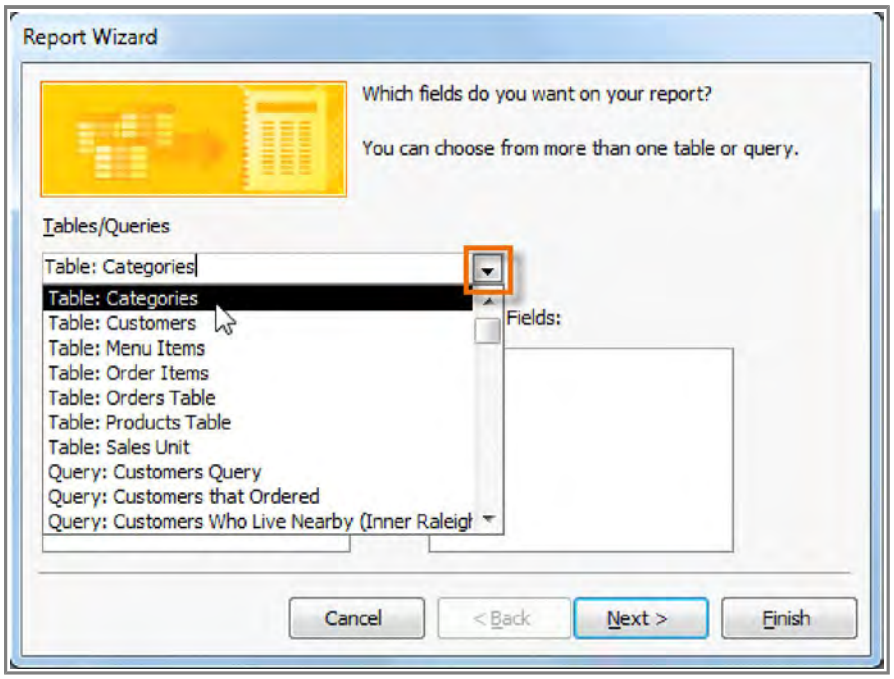
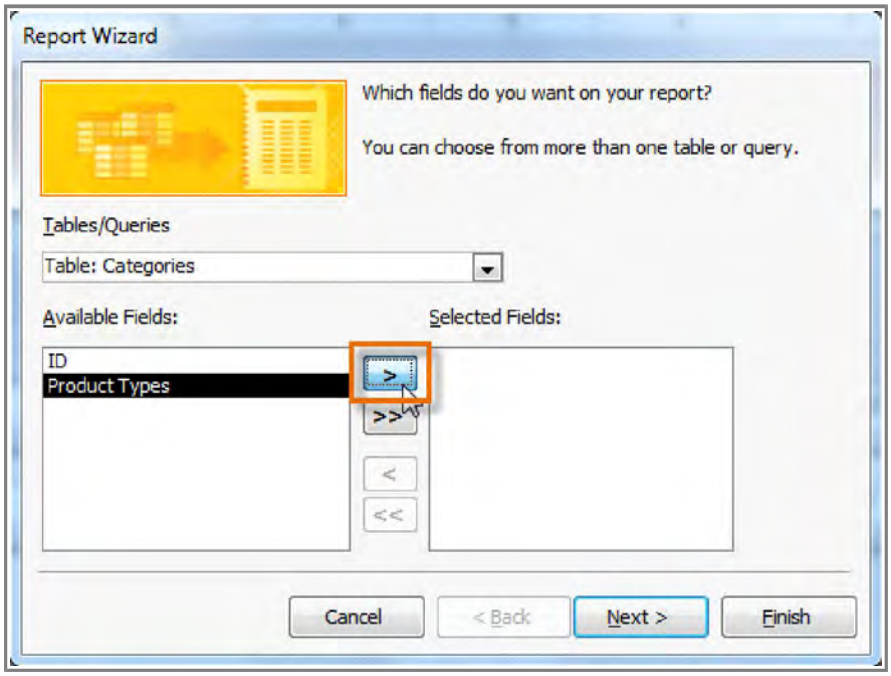


Selecting a table that contains fields to include in the report

2. Select a field from the list on the left and click the **right arrow** > to add it to the report.



Adding fields to a report

3. You can add fields from more than one table or query by repeating the above steps. Once you've added the desired fields, click **Next**.

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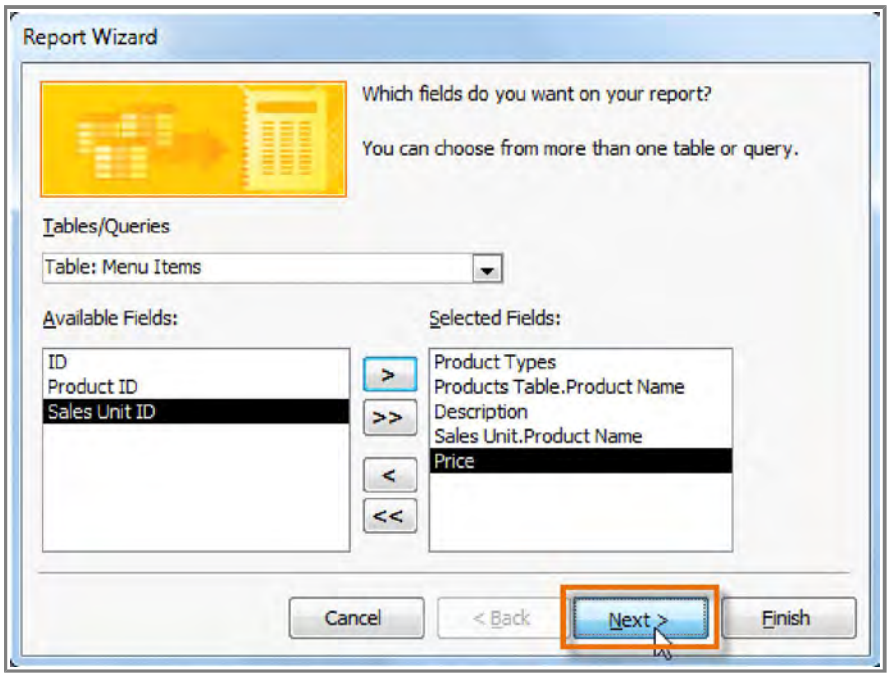

The added fields

Step 2: Organize the Report

The Report Wizard will provide you with options that let you choose how to view and organize your data. These options **group** like data within your fields and **organize** those fields into multiple levels, like in an outline or bulleted list.

If you are building a report from only one table or query, you can skip to #3 in this section.

1. Access will offer a list of several organization options. Select an option from the list to preview it.

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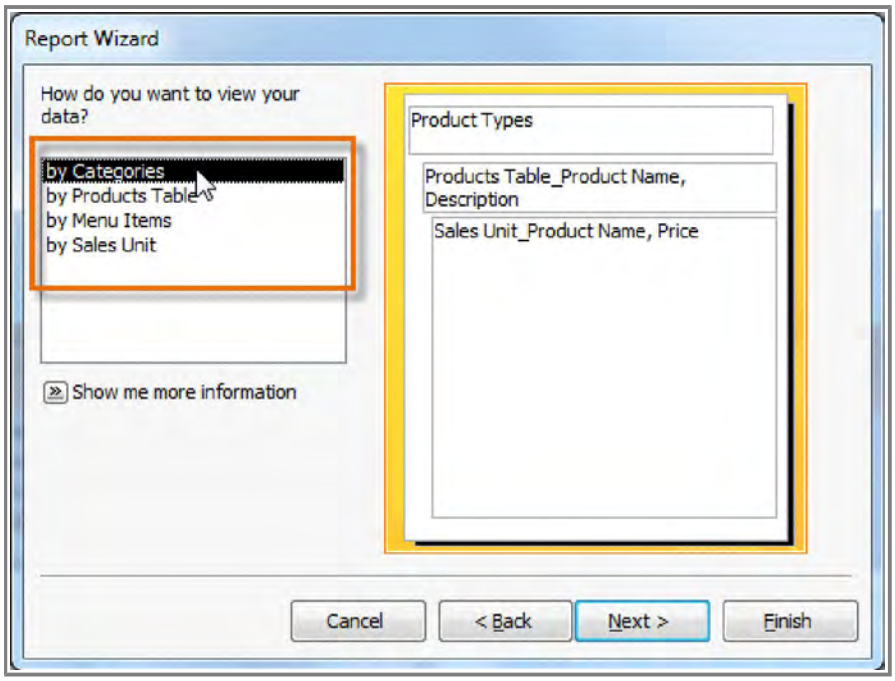
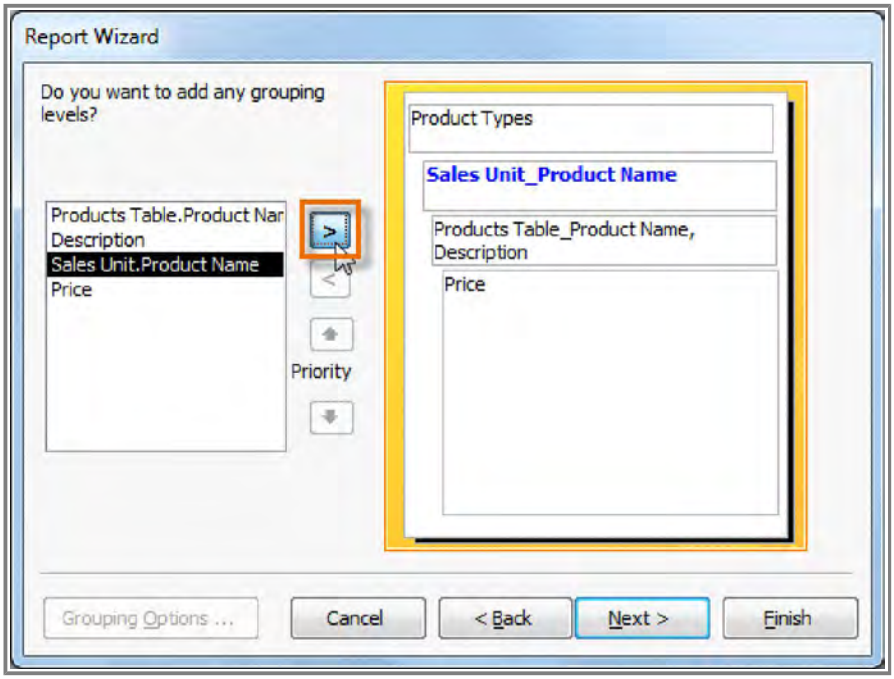


Grouping options

2. Click **Next** when you are satisfied with the basic organization of your data.
3. If you're not satisfied with the way your data is organized, you can now modify the grouping levels.
    - Select a field from the list and click the **right arrow** > to add it as a new level.



Adding a new grouped level

    - If necessary, modify the order of your grouped fields by selecting a field and clicking the **up** or **down**

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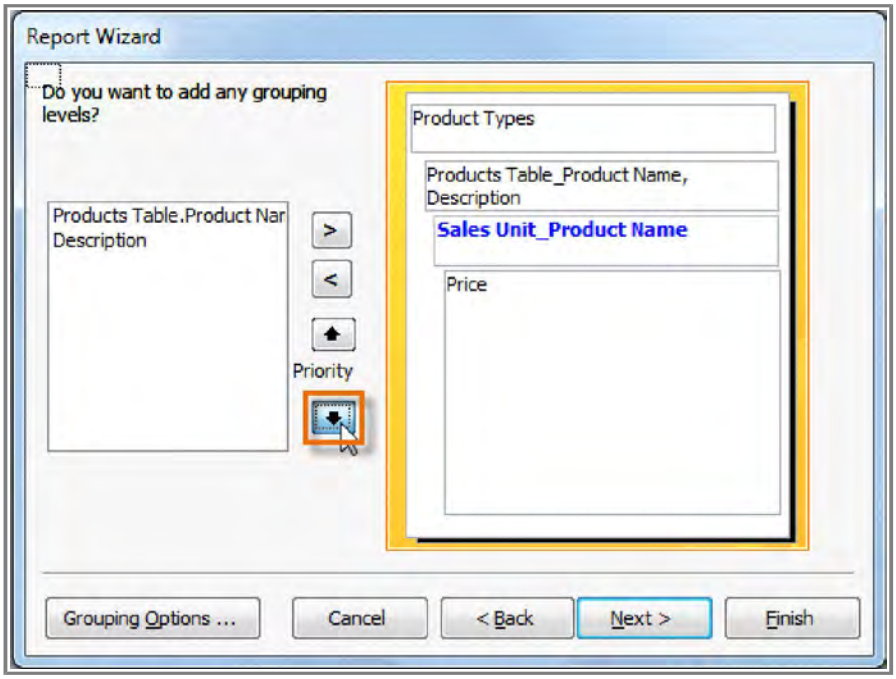
Priority arrow to move it up or down a level.

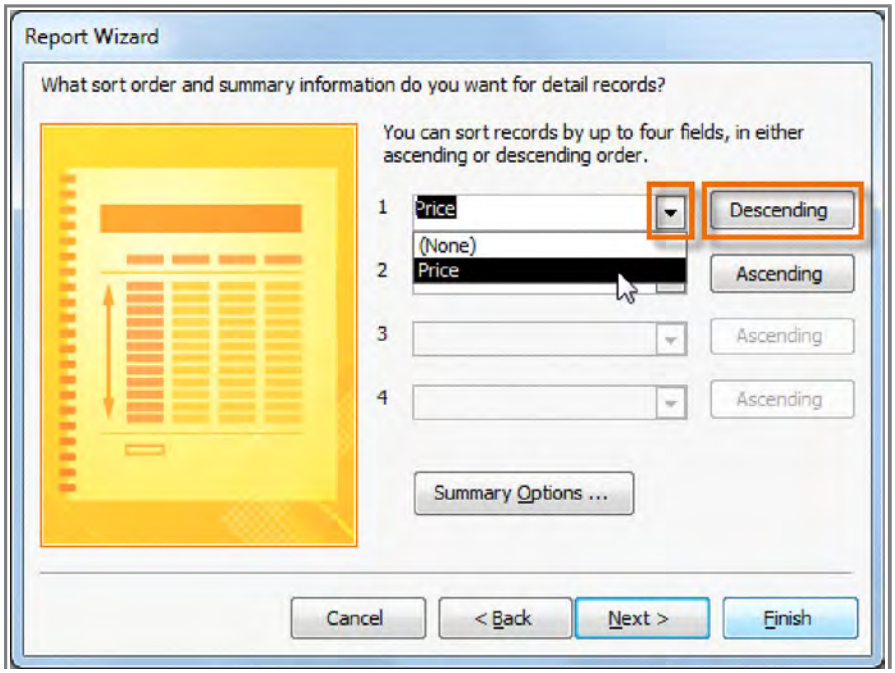


Moving the Sales Unit field down a grouping level

4. Once you are satisfied with the organization of your report, click **Next**.

Step 3: Sort your Report Data

1. Click the top drop-down arrow, and select the name of the first field you wish to sort.
2. Click the button on the right to change the sort to **ascending** or **descending**.



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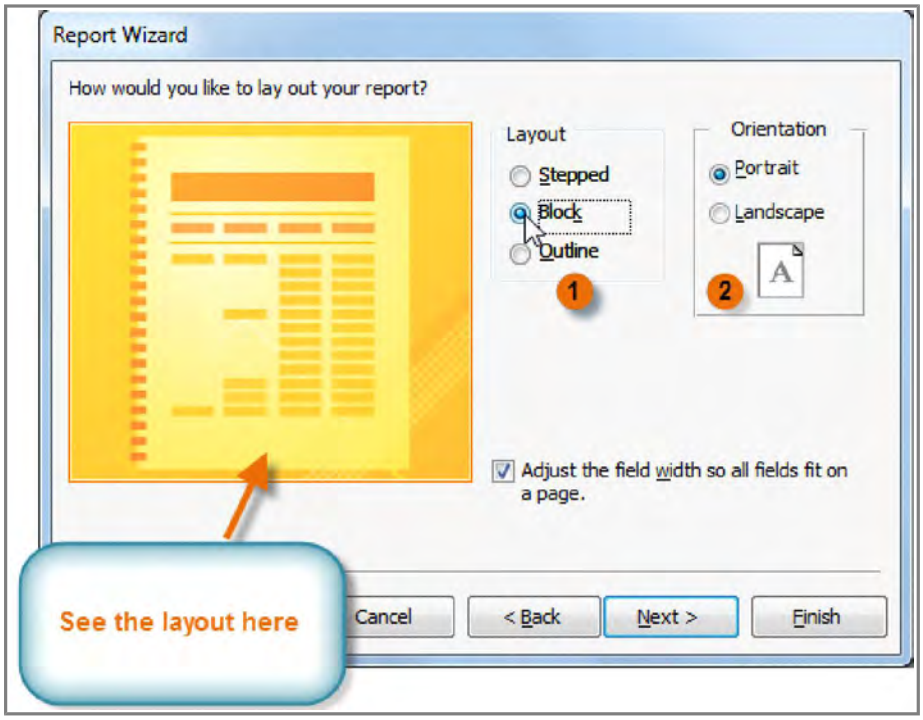
Sorting the report

3. Add any additional sorts. You may sort up to **four fields.** The sort will be applied from top to bottom, meaning that the sort at the top of the list will be the main sort.
4. When you are satisfied with the way your data is sorted, click **Next.**

Depending on the grouping you have chosen for your data, your sorting options may be limited.

Step 4: Select a Layout and Title

1. Click the various layout options to see how they look, then **select** one to use in your report.
2. Select either a **portrait** (tall) or **landscape** (wide) orientation for your report.



Setting the report layout

3. Once you are satisfied with your report layout, click **Next.**
4. Place your cursor in the text box and type the **title** you would like for your report.
5. Select whether you want to **preview** the report or **modify** its design, then click **Finish.**

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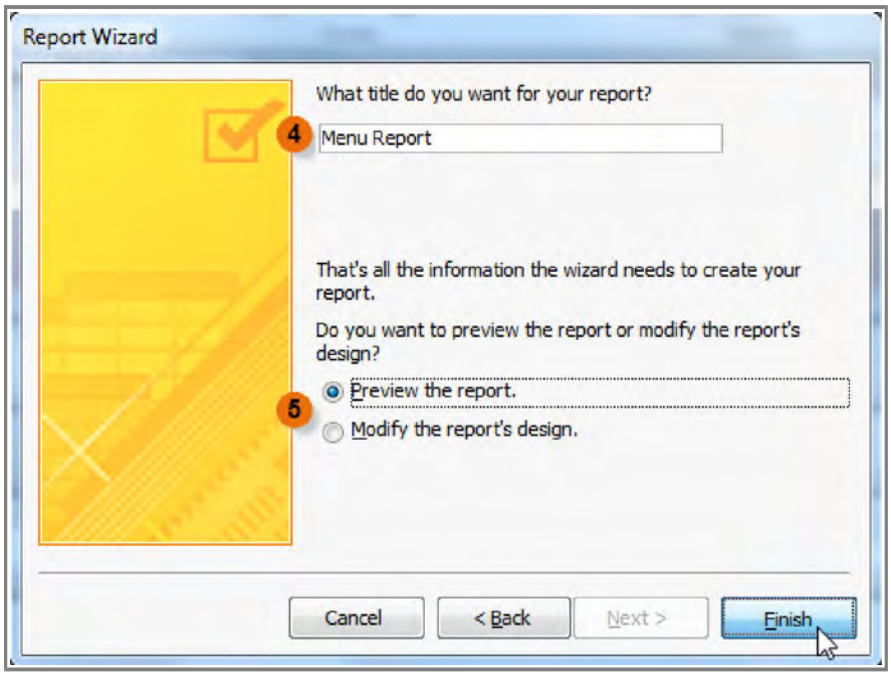

Finishing the report

6. Your report will be created and saved.

Just as with other reports, you may have to adjust your field and row **size** and **location** to make sure that all your data fits the way you want it to.

Formatting Reports

One of the strengths of reports is that you can modify their appearance to make them look how you want. You can add **headers** and **footers** to your report, apply new **colors** to the layout, and even add a **logo.** All of these things can help you create visually appealing reports.

Video: Formatting Reports in Access 2010

Watch the video (3:54). Need help?

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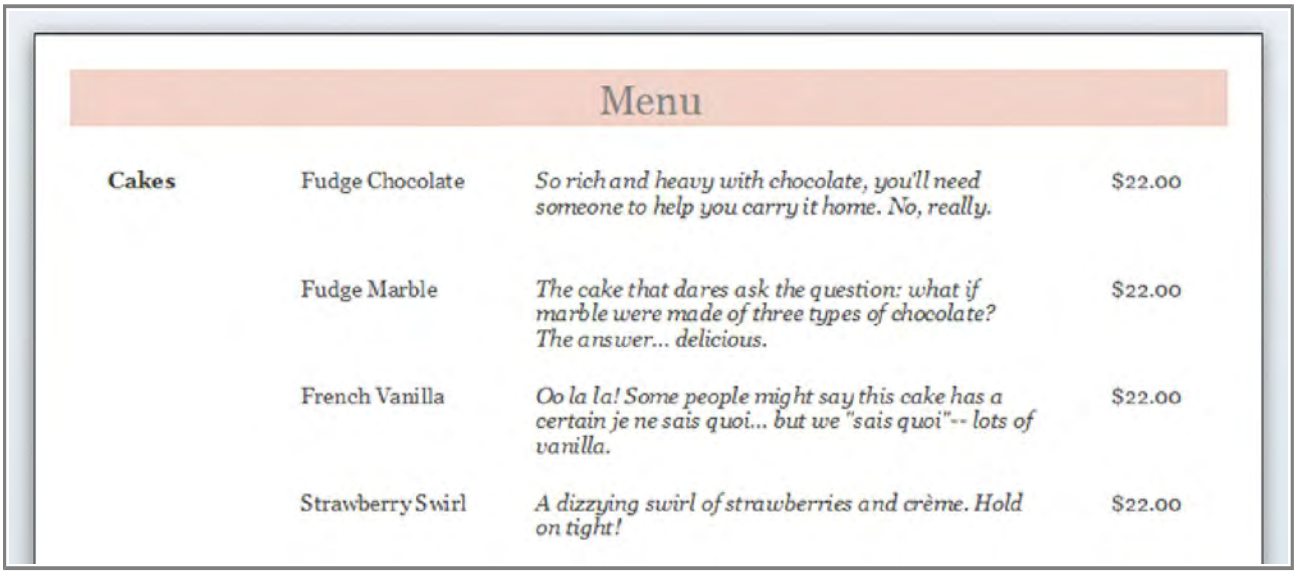
Modifying Report Text

The bulk of the information in your report comes straight from the query or table you built it from, which means you can't edit it within the report. However, you can change, add, or delete label text, headers, and footers to make your report clearer and easier to read. For example, in our report, we decided that we didn't need the field headings to understand our data, so we simply **deleted** them.

When working with text and text boxes in reports, you can use many of the text and shape formatting tools you use in other Office programs to modify color, font, and more. If you're not sure how to perform basic text and shape formatting, please visit the Formatting Text and Working With Shapes lessons in our Word 2010 course.



The report, with simple text formatting applied

Modifying the Page Header and Footer

To view and modify the **header** and **footer** that appear on every page of your report, select the **View** command on the Ribbon and switch to **Design View**. The header and footer are located in the white space beneath the **Page Header** and **Page Footer** bars.

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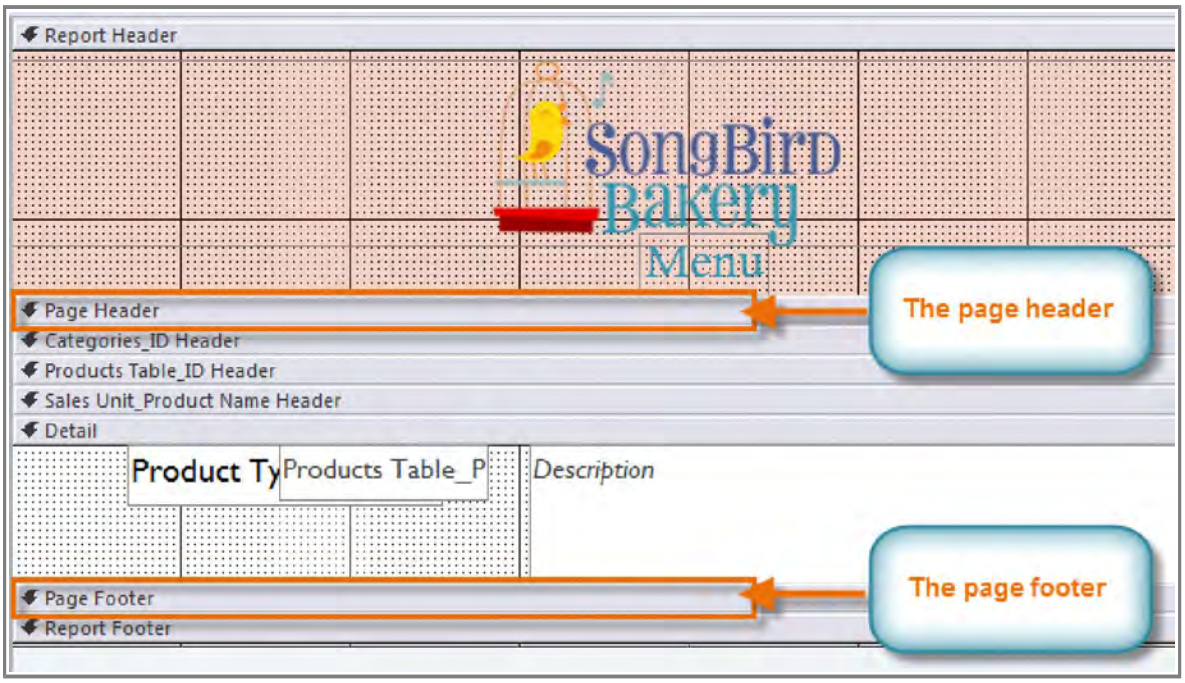
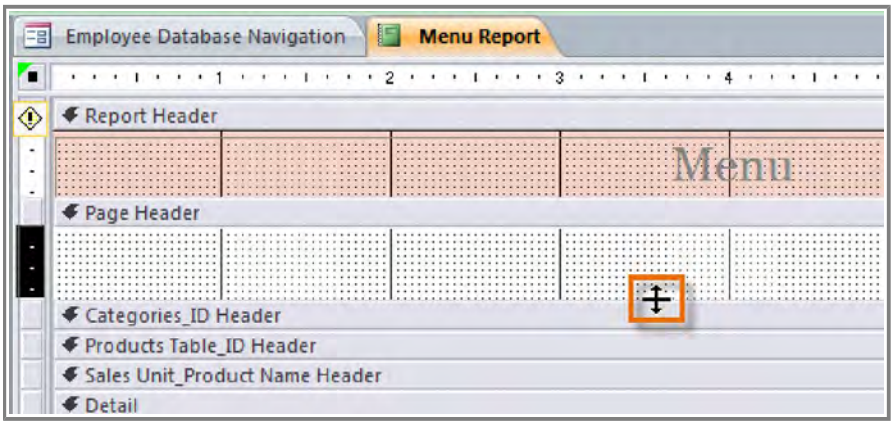


The page header and footer in Design View

Depending on your report's design, sometimes you may find that there is no white space in the page header and footer, as in the image above. If this is the case, you must **resize** the header and footer before you can add anything to them. Simply **click** and **drag** the bottom border of the header or footer to make it larger.



Resizing the page header

To Add Text to a Header or Footer:

1. On the Ribbon, select the **Design** tab in the **Report Design Tools** group and locate the **Controls** group.
2. Select the **Label** command.

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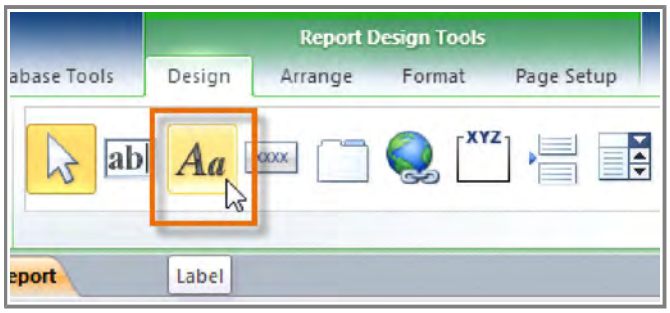
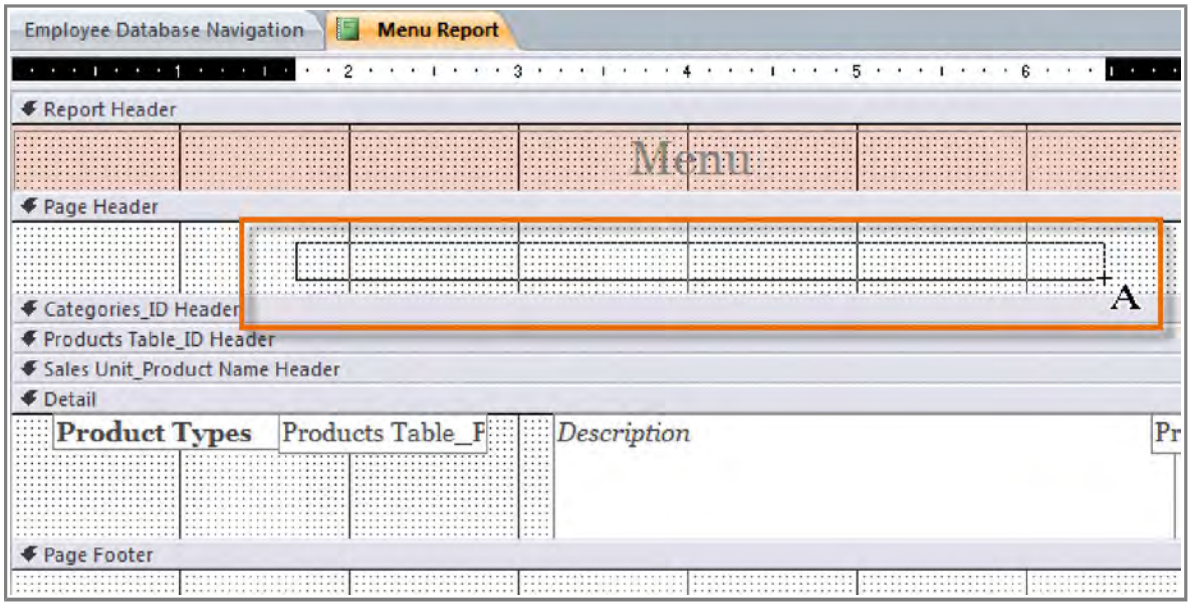


The Label command

3. Place your cursor in the white space in your header or footer, and click and drag to create your label. **Release** the mouse when it is the desired size.



Clicking and dragging to create a label

4. Place your cursor in the text box, click once, and **type** the desired text.

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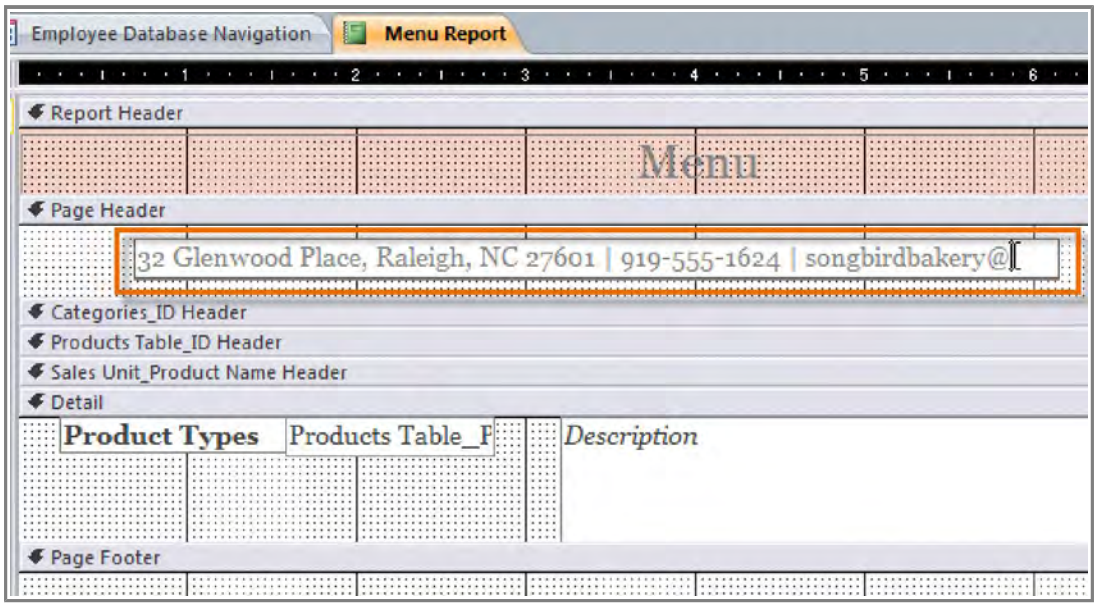
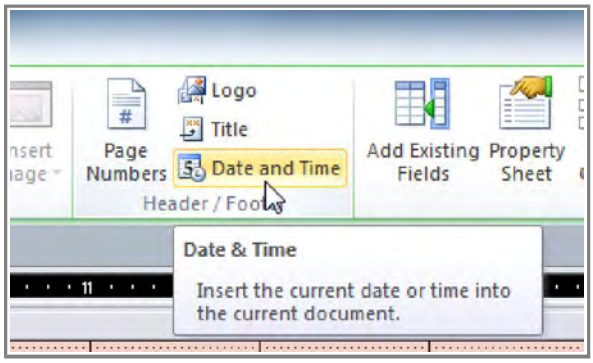


Adding text to the label

To Add the Date and Time to a Header or Footer:

1. On the Ribbon, select the **Design** tab in the **Report Design Tools** group and locate the **Header/Footer** group.
2. Select the **Date and Time** command.



The Date and Time command

3. The **Date and Time** dialog box will appear. Select the desired formatting options. A preview of the text that will be included in your report will appear. When you are satisfied with the appearance of the date and time, click **OK**.

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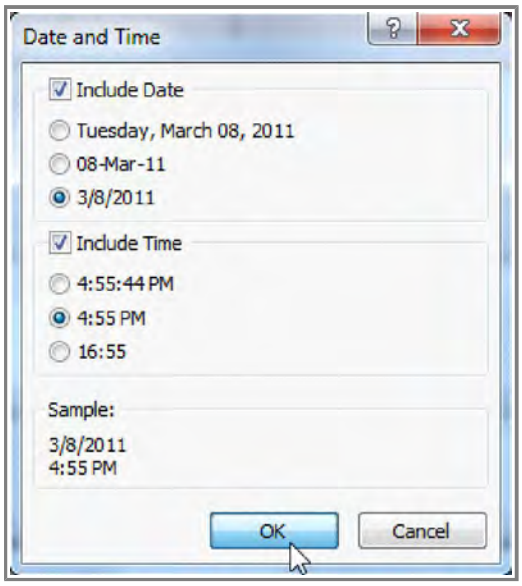
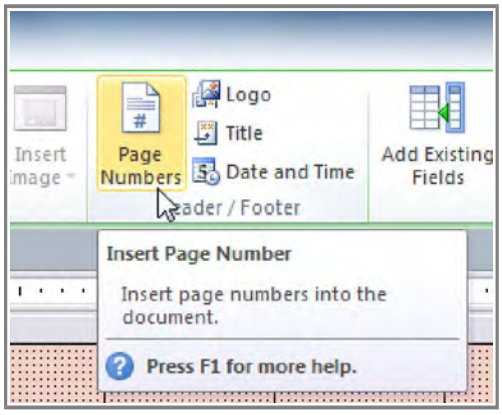


Selecting the date and time format in the Date and Time dialog box

By default, the date and time appear in the **header.** If you would like to move them to the **footer** instead, simply **click** the date and time boxes and **drag** them to the desired location.

To Add Page Numbers to a Header or Footer:

1. On the Ribbon, select the **Design** tab in the **Report Design Tools** group and locate the **Header/Footer** group.
2. Select the **Page Numbers** command.



The Page Numbers command

3. The **Page Numbers** dialog box will appear. Select the **format** of the page numbers.
   - Select **Page N** to display the number of only the current page.
   - Select **Page N of M** to display the number of the current page and the number of total pages.
4. Select whether to put your page numbers in the header or footer.
5. Click the drop-down arrow to select the **alignment** of the page numbers.

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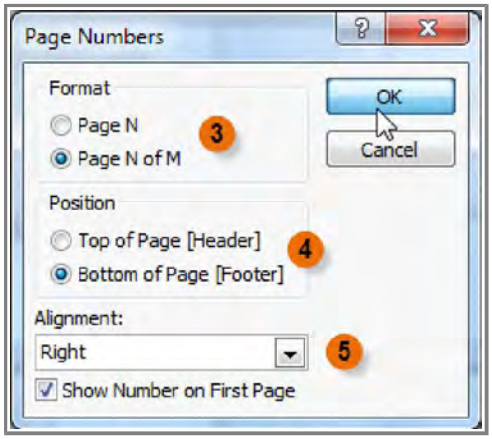


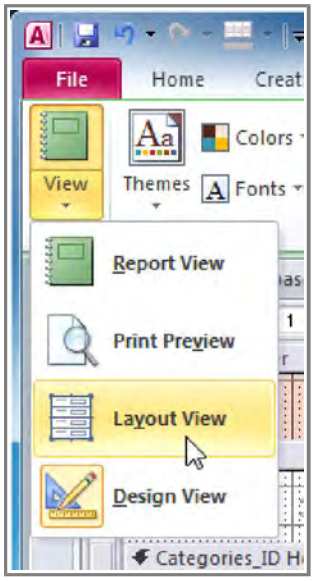
Selecting page number settings in the Page Numbers dialog box

6. When you are satisfied with the settings, click **OK**.

Enhancing Report Appearance

To Add a Logo:

1. On the **Home** tab of the **Ribbon**, click the **View** command and select **Layout View** from the drop-down list.



Switching to Layout View

2. Select the **Design** tab and locate the **Header/Footer** group, then select the **Logo** command.

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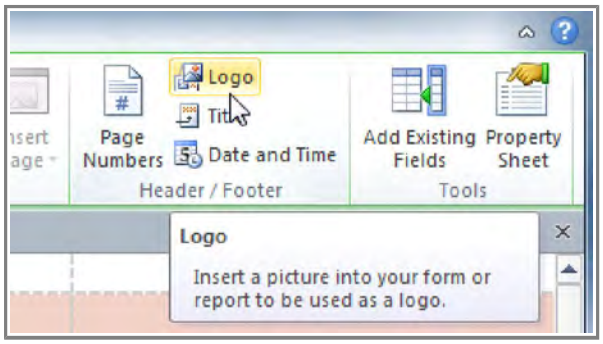
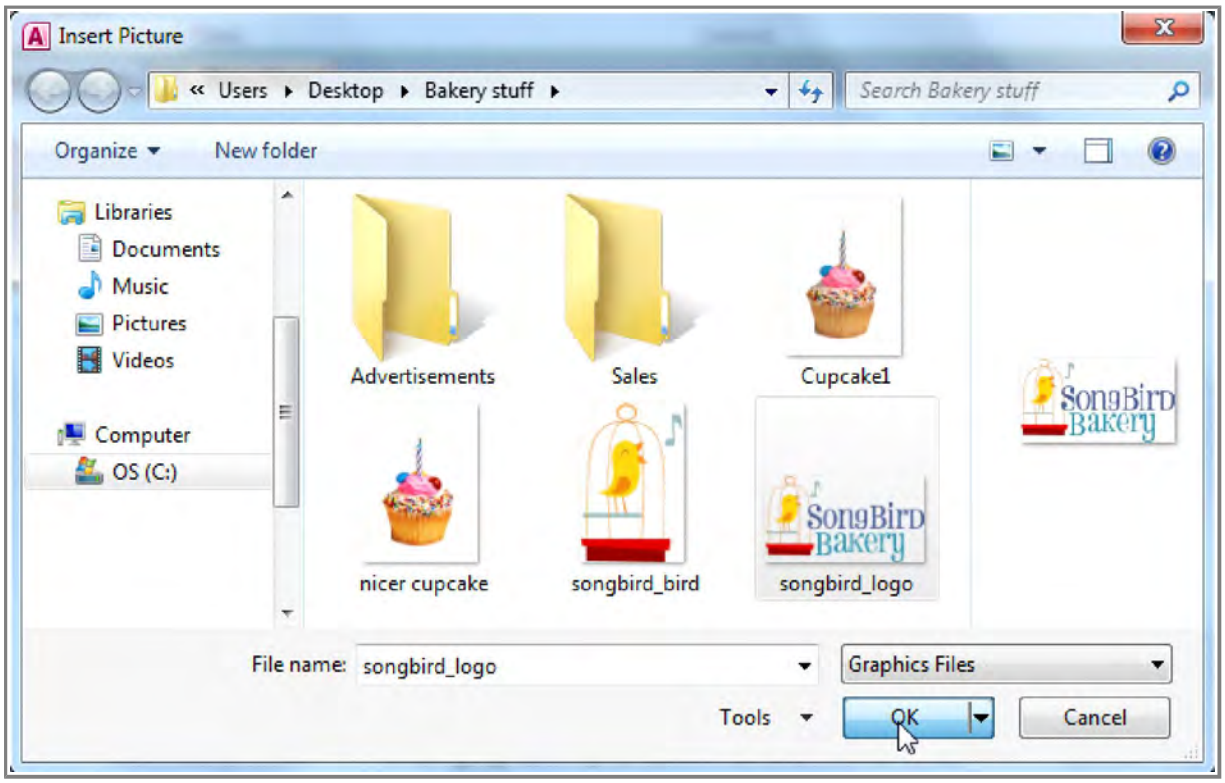


The Logo command

3. The **Insert Picture** dialog box will appear. Locate and select the desired image file and click **OK** to add it to your report.



Inserting a logo

4. A shrunken version of your image will appear in the header. Click and drag the image border to resize it.

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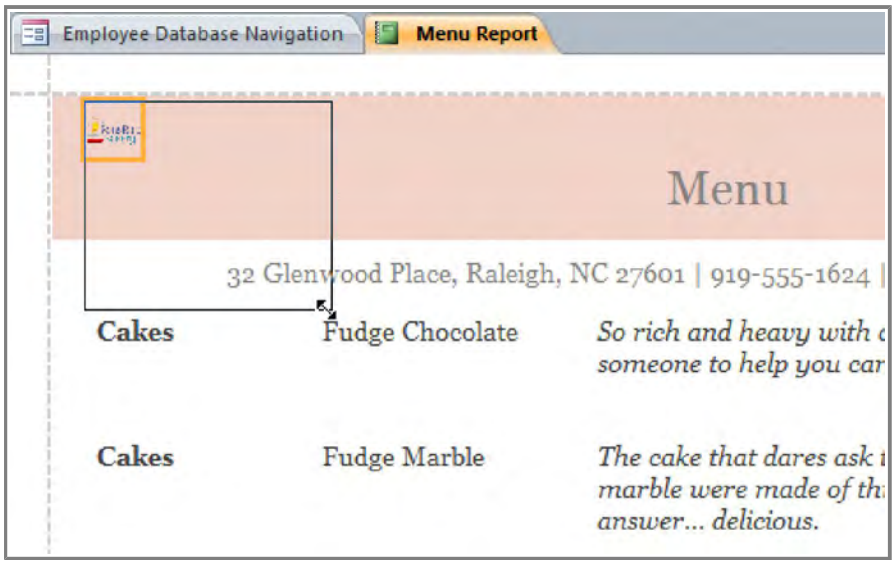

Resizing the logo

5. If necessary, move your logo to the desired location by **clicking** and **dragging** it.

The resized, repositioned logo

Themes and Fonts

A **theme** is a set of **colors** and **fonts** that applies to the **entire database** to give it a consistent, professional look. By default, databases use the Office theme. When you change the theme, all of the theme fonts and colors in your database change to match the new theme. Designing and modifying reports using theme elements can help you keep the appearance of your reports consistent.

To Change the Theme:

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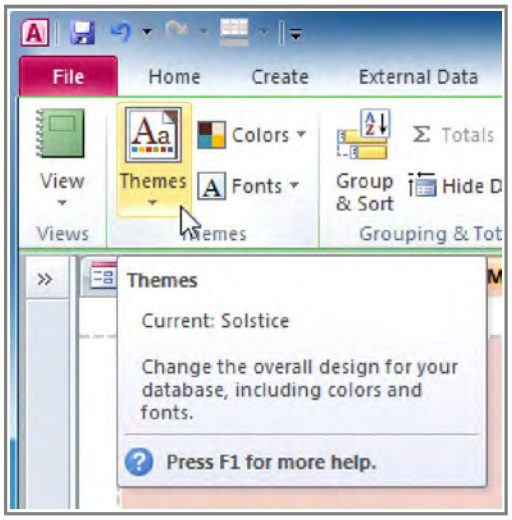
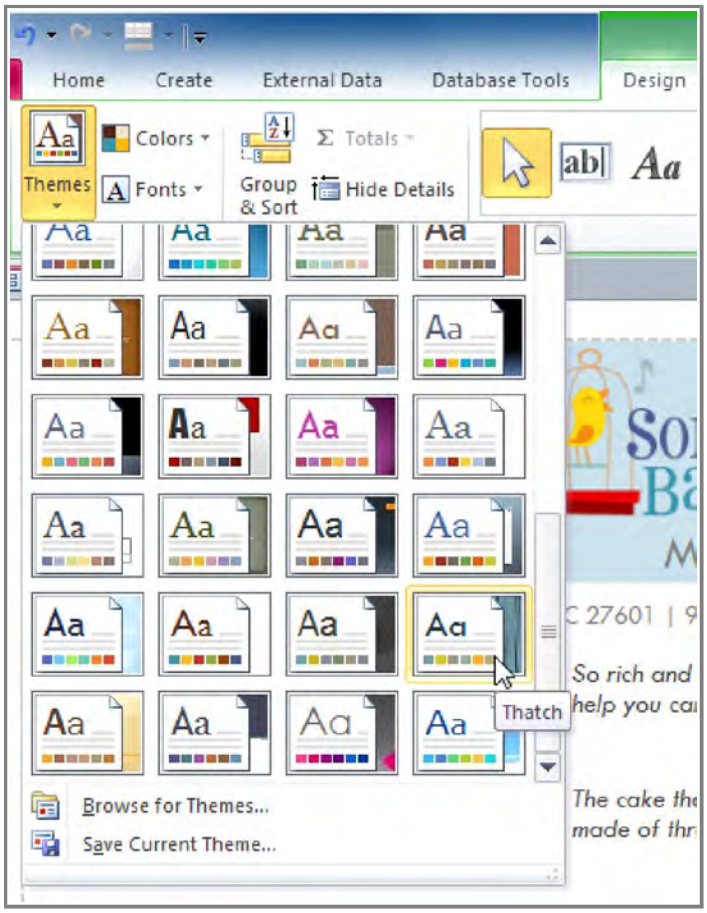
1. Select the **Design** tab and locate the **Themes** group.
2. Click the **Themes** command.



The Themes command

3. A drop-down menu will appear. Hover the mouse over a theme to see a **live preview** of it.



Hovering to preview a new theme

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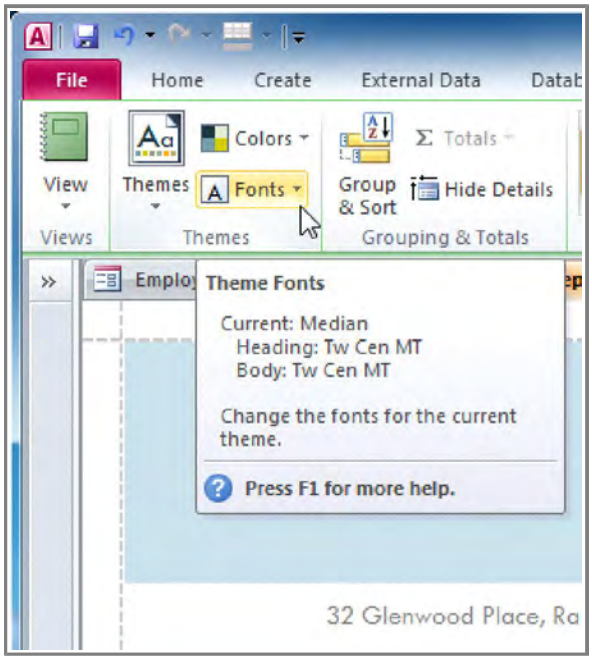
4. Select the desired theme. The theme will be applied to your entire database.

The report, now with a new theme

To Change the Theme Fonts:

1. Select the **Design** tab and locate the **Themes** group.
2. Click the **Fonts** command.



The Fonts command

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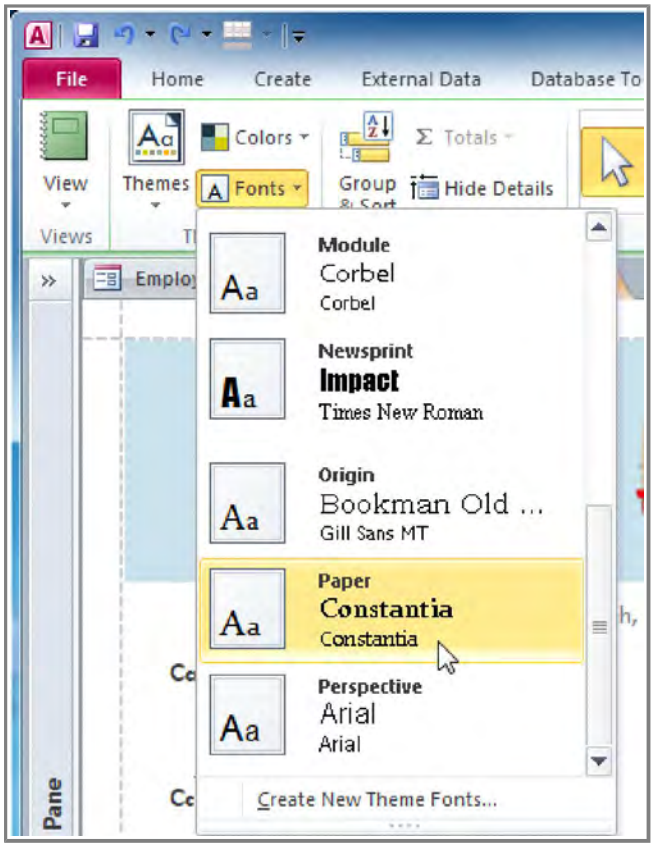
3. A drop-down menu will appear. Select a set of **Theme Fonts**.



Selecting a new set of theme fonts

4. The fonts will be applied to your entire database.

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The report, now with new fonts

Challenge!

1. If you haven't already, download our sample database and **open** it.
2. Open the **December Orders** report.
3. Add the **Date** and **Time** to the **Header**.
4. Add **Page Numbers** to the **Footer**.
5. Select the report title and **edit** it to say **December Orders**.
6. Choose a new **theme** and new **theme fonts**.
7. Add a **logo.** You can use an image from your computer or download our logo.

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