

ACCESS QUERIES AND REPORT WRITING FOR CHARITease

The screenshot shows the 'Main Menu' window of the CHARITease software. The window title is 'Main Menu'. The interface features the 'CHARITease' logo in blue, the 'JA Computer Solutions Ltd' logo, and a copyright notice: '© Copyright JA Computer Solutions Ltd 2003. Version 3B'. The main menu is divided into two columns of buttons. The left column contains: 'Maintain Supporters', 'Create Receipt Batches', 'Print / Close Receipt Batches', 'Print Letters From Batches', 'Post Batches to Accounts', 'Generate/ Print Tax Claim', 'Post Regular Gifts', and 'Mailshots'. The right column contains: 'To Do List' (dropdown), 'MONTHINC' (dropdown), 'Print Reports', 'Run Queries', 'Document' (dropdown), 'Maintain Details', 'Add Reports', 'Maintain Users', 'Add Queries', and 'Appointments'. At the bottom, there is a warning message: 'Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.' Below the warning, there are two input fields: 'Registered To: The Bubble Foundation' and 'Users: 2'.

Main Menu

CHARITease

JA Computer Solutions Ltd

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Maintain Supporters

Create Receipt Batches

Print / Close Receipt Batches

Print Letters From Batches

Post Batches to Accounts

Generate/ Print Tax Claim

Post Regular Gifts

Mailshots

To Do List

MONTHINC

Print Reports

Run Queries

Document

Maintain Details

Add Reports

Maintain Users

Add Queries

Appointments

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Registered To: The Bubble Foundation

Users: 2

AN INTRODUCTION

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INTRODUCTION

This training course is intended to give you an understanding of the basics of Microsoft Access Queries and how to produce results directly from your database. In addition, we will investigate how to analyse your data within Microsoft Excel and how to publish it and merge it with Microsoft Word.

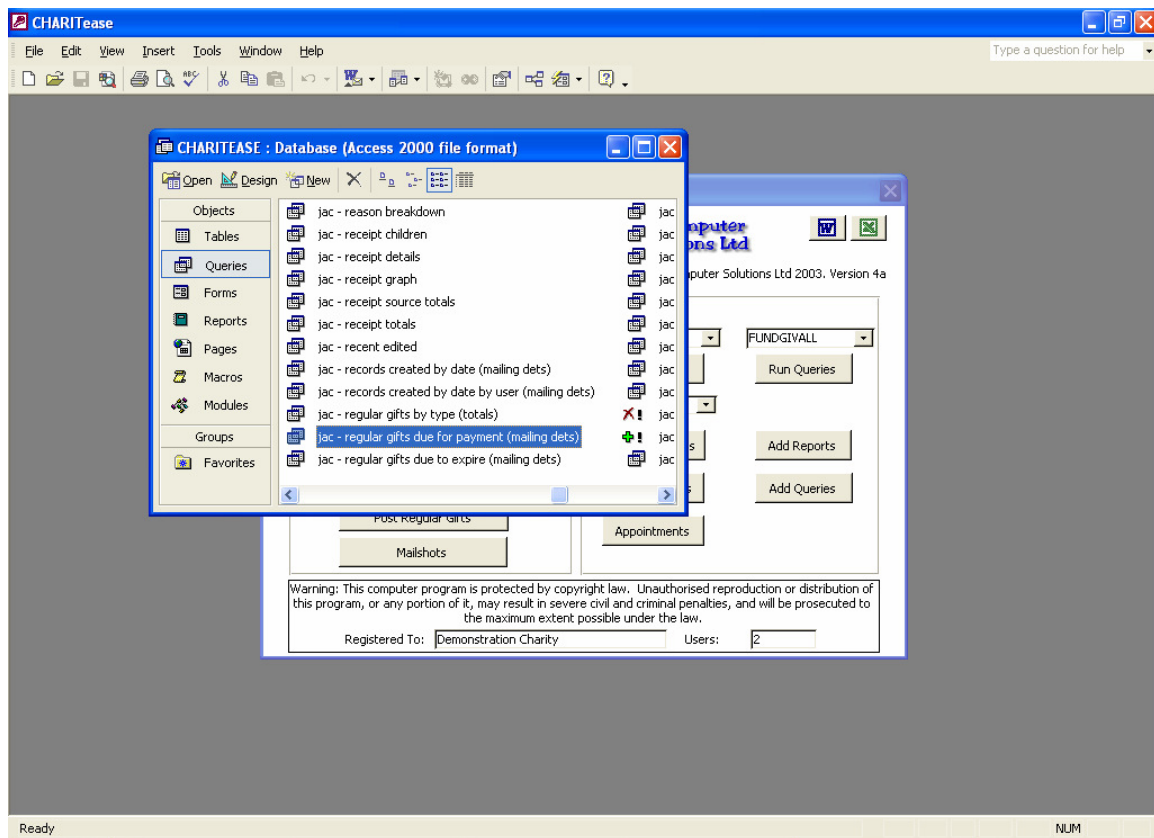
This course will explain Boolean expressions, tables, how tables link together and some basic report writing. The methods learned during this course apply to all Access and SQL databases, allowing you to apply the principles learned here to your chosen system.

GETTING STARTED

To start writing Queries, you need to login to the database that you wish to interrogate.

You will then see the main menu that identifies the database that you have logged into.

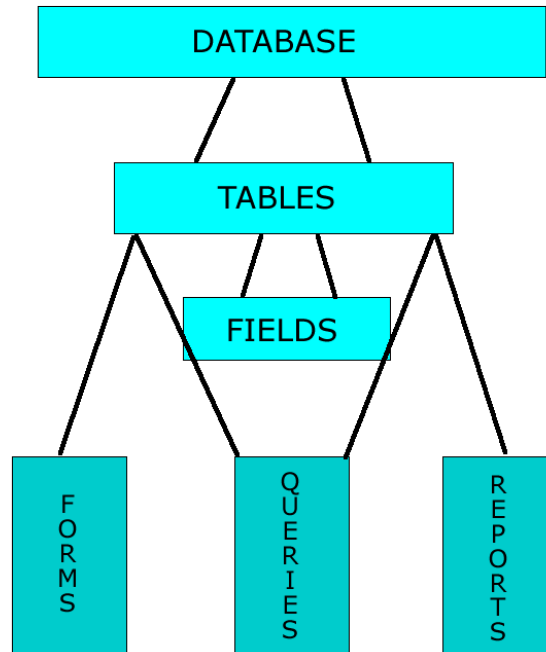
To write a Query, you need to press the F11 key on your keyboard. You will then see a screen that looks similar to this:



You will see a number of queries which have the prefix 'jac'. Please DO NOT delete or alter any of these queries as they are very important to the running of the database.

MICROSOFT ACCESS STRUCTURE

Before we learn about queries, we must understand how Microsoft Access is structured.



1. **Database**

The database is the system itself.

2. **Tables**

Each database contains a number of tables. These tables hold specific information, such as payment history or naming information. You need to know what the tables in your database are to enable you to write queries or reports.

3. **Fields**

Within each table there are many fields of information. Each field holds specific information, such as someone's Surname.

4. **Forms**

Forms are sometimes known as Screens and are the way that users most often enter and view information on screen. The creation of Forms is not covered in this course.

5. **Queries**

Queries allow you to view data held within your Tables and display it in a raw form (i.e. not presentation quality but pure facts). This is the main subject of this course, but you must understand what Tables exist within your database to be able to write a Query.

6. **Reports**

Reports are used to display information in a format that is easy to view. Usually this information will then be printed, but it can be previewed on the screen. Reports can be run from a Table, but are usually driven by a Query.

Tables & Fields – The Structure

Microsoft Access has a basic structure to all databases. Before creating queries you must understand the basic structure.

Tables

All data is stored in tables. A table is best explained as a spreadsheet full of information. A table can be linked to other tables by the use of fields.

A piece of information that is held in a table is called a record, e.g. Mr Owens' supporter details are held in a record.

Fields

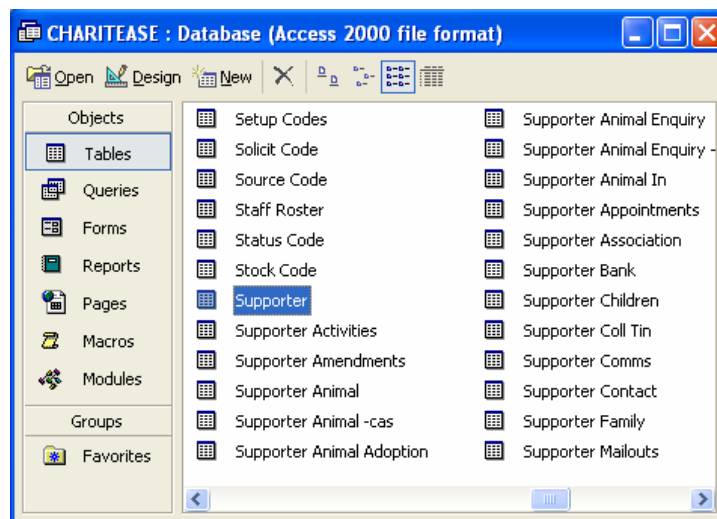
A field is a slot in a table where a specific item of information is stored. For Example:

In the table SUPPORTER there are the following fields:

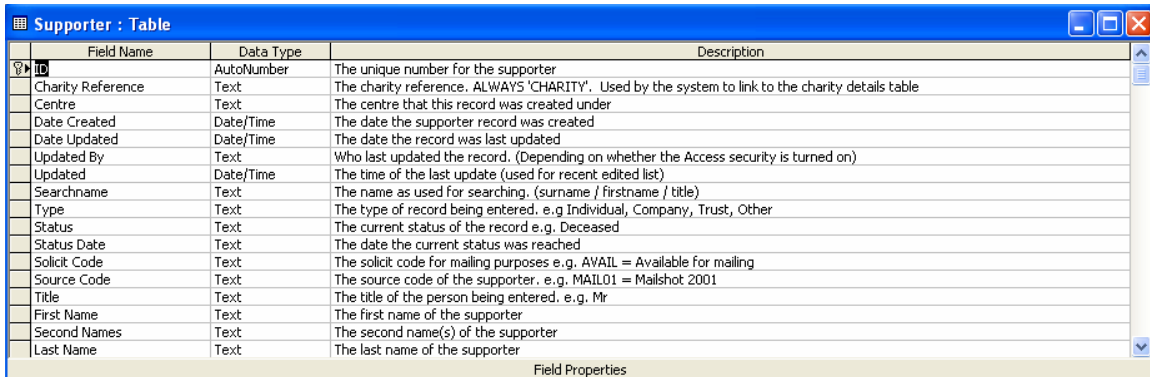
ID
MAILNAME
ADDRESS LINE ONE
ADDRESS LINE TWO
ADDRESS LINE THREE
TOWN
POSTCODE

To view the information within a Table, first click on the  Tables button.


You will then see a list of the Tables within your database.



To view the structure of a table (a list of fields within a table); click on the Table that you wish to view and then click the  button. You will then see a screen similar to this:



Field Name	Data Type	Description
ID	AutoNumber	The unique number for the supporter
Charity Reference	Text	The charity reference. ALWAYS 'CHARITY'. Used by the system to link to the charity details table
Centre	Text	The centre that this record was created under
Date Created	Date/Time	The date the supporter record was created
Date Updated	Date/Time	The date the record was last updated
Updated By	Text	Who last updated the record. (Depending on whether the Access security is turned on)
Updated	Date/Time	The time of the last update (used for recent edited list)
Searchname	Text	The name as used for searching. (surname / firstname / title)
Type	Text	The type of record being entered. e.g Individual, Company, Trust, Other
Status	Text	The current status of the record e.g. Deceased
Status Date	Text	The date the current status was reached
Solicit Code	Text	The solicit code for mailing purposes e.g. AVAIL = Available for mailing
Source Code	Text	The source code of the supporter. e.g. MAIL01 = Mailshot 2001
Title	Text	The title of the person being entered. e.g. Mr
First Name	Text	The first name of the supporter
Second Names	Text	The second name(s) of the supporter
Last Name	Text	The last name of the supporter

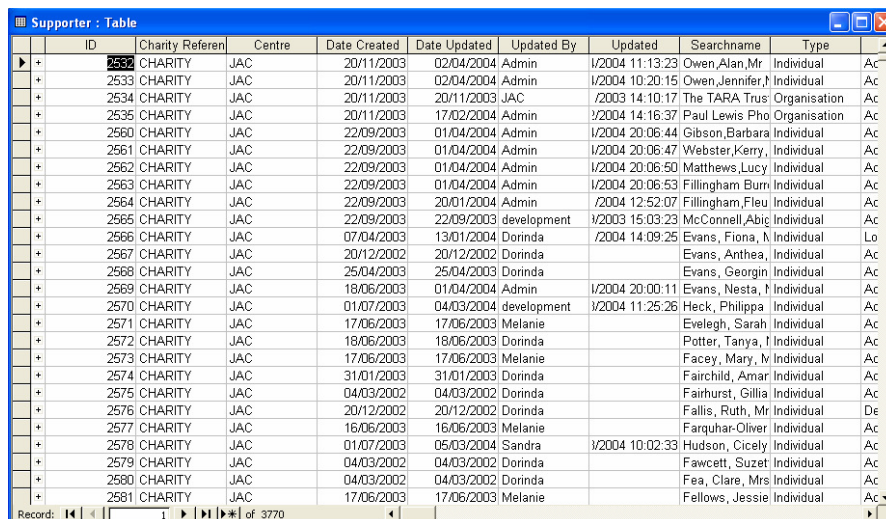
All tables have a key that determines how a record is accessed. You can see which field is the key by looking for the  symbol on the left and it is a special field called a primary key. The database uses this primary key to link the tables together so that they can be reported on using queries. The most common use of a primary key is an auto numbering key, e.g.

- 1234 - Mr Owen, 22 The Close
- 1235 - Mr Smith, 1 The Street
- 1236 - Mr Bloggs, 6 The Road

We will discuss linking tables together in a moment.

To view the data within a table from the list of tables, click on the  button.

You will then see a screen that look similar to this:

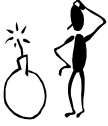


ID	Charity Referen	Centre	Date Created	Date Updated	Updated By	Updated	Searchname	Type
2532	CHARITY	JAC	20/11/2003	02/04/2004	Admin	1/2004 11:13:23	Owen, Alan, Mr	Individual Ac
2533	CHARITY	JAC	20/11/2003	02/04/2004	Admin	1/2004 10:20:15	Owen, Jennifer, I	Individual Ac
2534	CHARITY	JAC	20/11/2003	20/11/2003	JAC	/2003 14:10:17	The TARA Trus	Organisation Ac
2535	CHARITY	JAC	20/11/2003	17/02/2004	Admin	1/2004 14:16:37	Paul Lewis Pho	Organisation Ac
2560	CHARITY	JAC	22/09/2003	01/04/2004	Admin	1/2004 20:06:44	Gibson, Barbara	Individual Ac
2561	CHARITY	JAC	22/09/2003	01/04/2004	Admin	1/2004 20:06:47	Webster, Kerry,	Individual Ac
2562	CHARITY	JAC	22/09/2003	01/04/2004	Admin	1/2004 20:06:50	Matthews, Lucy	Individual Ac
2563	CHARITY	JAC	22/09/2003	01/04/2004	Admin	1/2004 20:06:53	Fillingham Burn	Individual Ac
2564	CHARITY	JAC	22/09/2003	20/01/2004	Admin	/2004 12:52:07	Fillingham, Fleu	Individual Ac
2565	CHARITY	JAC	22/09/2003	22/09/2003	development	1/2003 15:03:23	McConnell, Abig	Individual Ac
2566	CHARITY	JAC	07/04/2003	13/01/2004	Dorinda	/2004 14:09:25	Evans, Fiona, I	Individual Lo
2567	CHARITY	JAC	20/12/2002	20/12/2002	Dorinda		Evans, Anthea,	Individual Ac
2568	CHARITY	JAC	25/04/2003	25/04/2003	Dorinda		Evans, Georjin	Individual Ac
2569	CHARITY	JAC	18/06/2003	01/04/2004	Admin	1/2004 20:00:11	Evans, Nesta, I	Individual Ac
2570	CHARITY	JAC	01/07/2003	04/03/2004	development	1/2004 11:25:26	Heck, Philippa	Individual Ac
2571	CHARITY	JAC	17/06/2003	17/06/2003	Melanie		Evelegh, Sarah	Individual Ac
2572	CHARITY	JAC	18/06/2003	18/06/2003	Dorinda		Potter, Tanya, I	Individual Ac
2573	CHARITY	JAC	17/06/2003	17/06/2003	Melanie		Facey, Mary, I	Individual Ac
2574	CHARITY	JAC	31/01/2003	31/01/2003	Dorinda		Fairchild, Amar	Individual Ac
2575	CHARITY	JAC	04/03/2002	04/03/2002	Dorinda		Fairhurst, Gillia	Individual Ac
2576	CHARITY	JAC	20/12/2002	20/12/2002	Dorinda		Fallis, Ruth, Mr	Individual De
2577	CHARITY	JAC	16/06/2003	16/06/2003	Melanie		Farquhar-Oliver	Individual Ac
2578	CHARITY	JAC	01/07/2003	05/03/2004	Sandra	1/2004 10:02:33	Hudson, Cicely	Individual Ac
2579	CHARITY	JAC	04/03/2002	04/03/2002	Dorinda		Fawcett, Suzet	Individual Ac
2580	CHARITY	JAC	04/03/2002	04/03/2002	Dorinda		Fea, Clare, Mrs	Individual Ac
2581	CHARITY	JAC	17/06/2003	17/06/2003	Melanie		Fellows, Jessie	Individual Ac



This looks like a spreadsheet. Does it work like a spreadsheet?

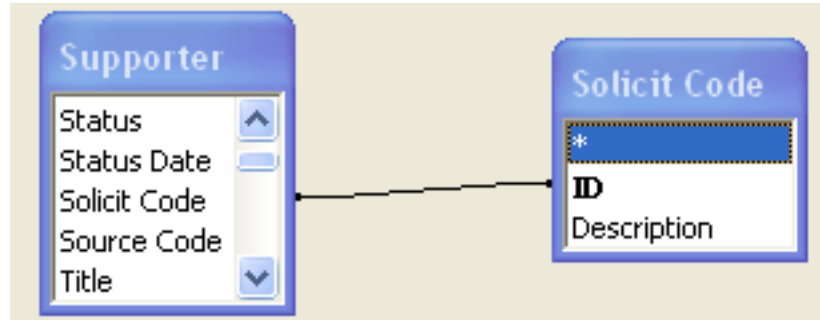
You can move around it in a similar way as you would a spreadsheet and alter data.



You can change data within a table through this feature, but it is dangerous to do so. If you delete a record here, you are deleting or altering a record within the database and there is no way to get it back (except by going back to a backup tape).

Linked Tables

Some tables are referred to as side tables. These tables contain information that is used in the supporter table, e.g. Solicit Code. These tables have a key that is used in the supporter record e.g.



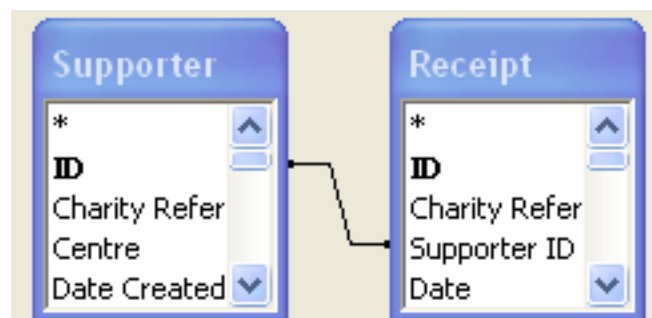
Record 1234 has a solicit code of AVAIL. We can look at the Solicit Code Table to see what the AVAIL means:

Solicit Code : Table			
		ID	Description
▶	+	AVAIL	Available For Mailings
	+	BIANN	Bi-Annually Only
	+	STOP	DO NOT MAIL
*			

In the example, there is a link from the SUPPORTER table to the SOLICIT CODE table.

However, sometimes there is more than just a link from one record in one table to one record in another table. Sometimes there can be a link from one record in one table to several records in another table – this is called a ONE-TO-MANY link.

In BENEFICIARease, this can be seen for the receipts that have been received from a Supporter in the past:



This is a one-to-many relationship because each Supporter could have a number of different receipts in the past. Similarly, there is a one-to-many relationship between Supporter and Supporter Reason. (As a supporter can have many reasons for being on the BENEFICIARease)

Queries – What they are and how they work.

Queries allow data to be selected and manipulated in a Microsoft Access or SQL Server Database. They provide a user interface to the database and allow users to view information in a “raw” state. This information can then be used for statistical analysis, merging or to create your own reports.

There are five types of queries available in Microsoft Access:

1. Select Queries

This is the most common type of query that you will write and the most widely used. These queries cannot do any damage to the database, as they only retrieve information from it and display it to you. Select Queries can be linked to reports, Microsoft Word documents and analysed in Excel spreadsheets.

2. Append Queries

These queries append data to the end of a table in Access. They can only add data and are used when creating new records en-mass (such as conversions).

3. Deletion Queries

These queries delete records in a table. They can cause the most damage and must be used with **extreme** caution. When creating deletion queries, the data that is deleted cannot be retrieved.

4. Make Table Queries

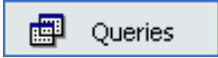
These queries take data from an existing table and create a new table. They are used to manipulate data without damaging the current data (such as what if analysis). You will rarely write a Make Table Query, but you cannot do damage unless you overwrite an existing table.


5. Update Queries

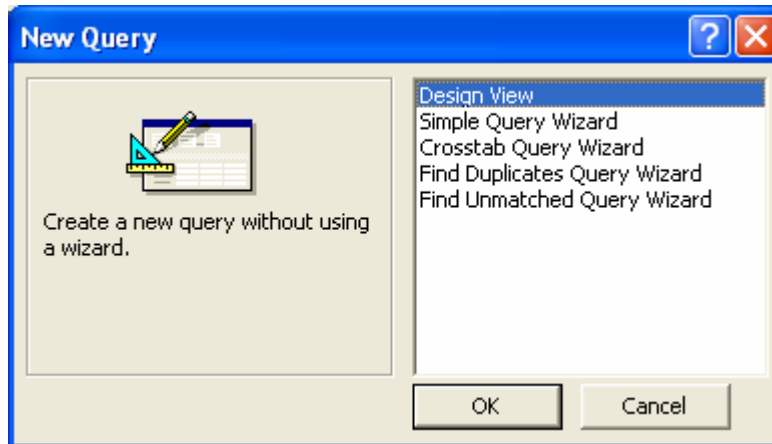
These queries replace data in an existing table and can remove information by overwriting it. They can cause significant alterations and damage to you database and must be used with **extreme** caution. You will rarely write a Deletion Query.


Creating a simple query

There are a number of ways to create a query. The screen below shows the five options available to you. For this course, we concentrate on the Design View option.

To create a new query, push F11 and click on the  button.

Now click on  button, which will display the following screen:



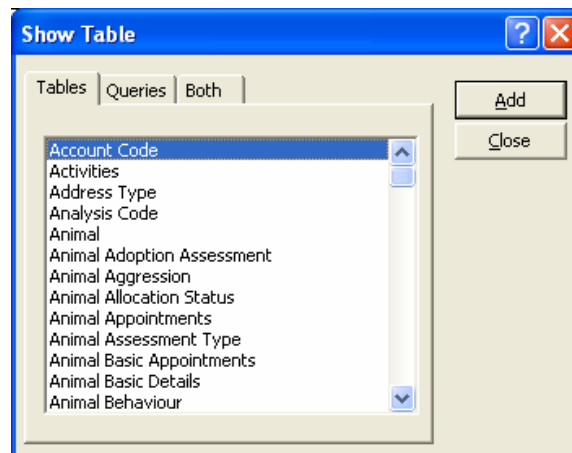
Highlight the **DESIGN VIEW** option and click the  button.



Why do we use the Design View option and not the others?

The queries that the Wizards create are not always very easy to understand. For this reason, we recommend that you start from scratch. This is also the best way to learn.

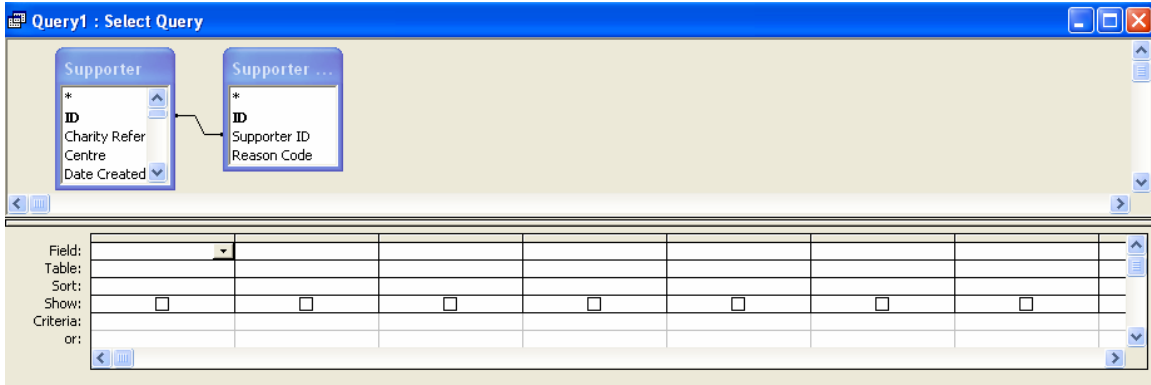
You will then see the following screen:



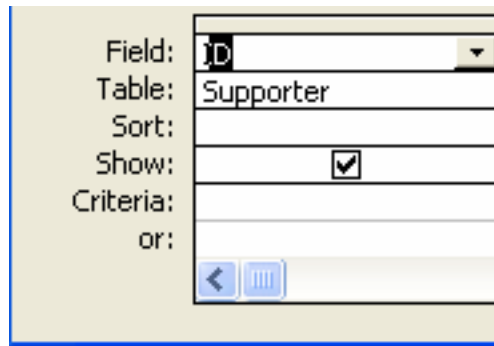
The first question you are asked is which table(s) you want to work with. Scroll up and down the list, finding the table(s) that you want in your query. Highlight the table that you require and click on the **Add** button. This will then display the table in the window behind.

When you have completed your selection, click on the **Close** button.

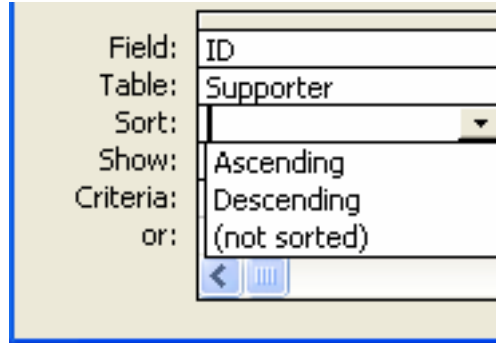
You will now see a screen that is similar to this:




To add fields to your query, scroll up and down the list and double click on the field(s) that you require. This will then display the field in the window below:



If you wish to sort the results of your query, choose which field you wish to sort by and click in the sort box below it. You will then be presented with a series of some sort options:



The in the show box indicates that this field is to be shown in the results on the query.

Once you have built your query, click on the  in the middle of the toolbar to run it.

This will give you a datasheet view of the query:

ID	Mailname	Address Line One	Address Line Two
2532	Mr A J Owen BSC	23 The Street	
2532	Mr A J Owen BSC	23 The Street	
2533	Mrs J A Owen BSC	23 the street	
2533	Mrs J A Owen BSC	23 the street	
2533	Mrs J A Owen BSC	23 the street	
2533	Mrs J A Owen BSC	23 the street	
2534	Mrs Tara Owen	Unit 5	Compton Centre
* (AutoNumber)			

Record: 1 of 7

To return to the design view, click on the design view button.



If I sort by more than one field, how does it know which to put first?

Access works from left to right, so whichever field is sorted first, on the left, is where it will start. Then it will sort by the next sorting field to the right, and so on.



Queries are just a window into your data. **If you delete a row from your query (when in Datasheet View) you will be deleting data.** In addition, if you change data shown in a query, you will be changing live data. Be very careful when using queries.

Adding selection criteria

Queries rely on you understanding the Boolean expressions. These expressions are essential to any query you may design. A Boolean expression is a mathematical symbol that allows you to select fields in a specific way.

Types

- > Greater Than
- < Less Than
- = Equal To
- >= Greater Than or Equal To
- <= Less Than or Equal To
- <> Not equal to
- Like Like (used for matching non-specific text)

When creating a query, the database expects to have the expressions in a standard format. This is:

Field Name	Boolean	Expression
Forename	=	Fred
Amount	>	10.00
Date	<	30/1/2004

When creating queries, you must also enter the expression in a standard format. This is:

Type	Rule	Example
Text	Must be in quotes	"Fred"
Numbers	Must not have quotes or a currency symbol	10.00
Dates	Must not have quotes, but must have / between the day, month and year.	04/08/2001
Question	Must be enclosed within square brackets.	[Which Town?]

As well as using Boolean expressions, you can put two expressions together using the following connectors:

- AND - The data must meet both expressions.
- OR - The data must meet only one of the expressions.

Here are some examples:

Field:	Postcode	Country	Status	Solicit Code	Type
Table:	Supporter	Supporter	Supporter	Supporter	Supporter
Sort:					
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:			"active"	"avail"	"individual"
or:					

The above example selects only the Supporters who have a status of 'Active', a solicit code of 'avail' and are of type 'Individual'.

Field:	Paid To Date		Membership Status	Status
Table:	Membership		Membership	Supporter
Sort:				
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Criteria:	>=[Please enter date from] And <=[Please enter date to]		[Please enter Membership Status]	[Please enter Supporter Status]
or:				

The above example asks the user to input a date range for the paid to date of the supporter's membership and asks the user to input the membership status and status of the supporter.



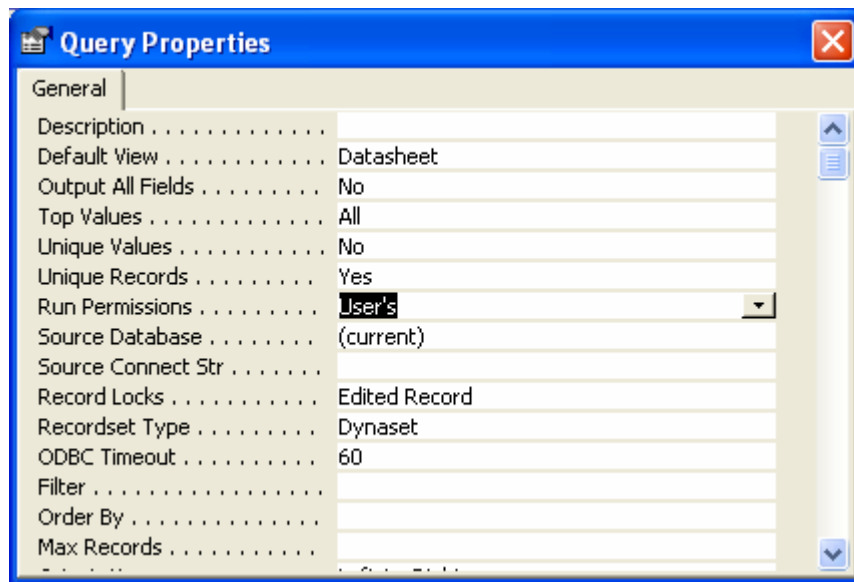
Why does my query return so many records that appear the same?

There can be two reasons for this:

1. Your selection criteria is incorrect
2. Some tables have more than one entry per person (see below).

The common problem when executing a query is the fact that the query returns multiple records than one record. This is due to the fact that some tables have more than one entry per person, for example the Receipt table contains multiple entries for a Supporter.

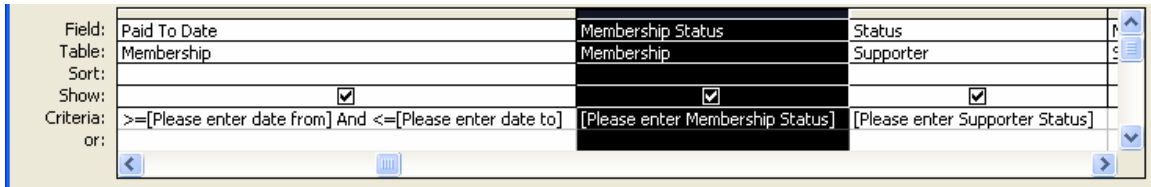
To combat this problem, Access has a unique record function that allows you to select unique records only. To access this, right click in the grey area and select Properties, then change the setting for Unique Records to Yes. The following screen will be displayed:



Moving fields in your query

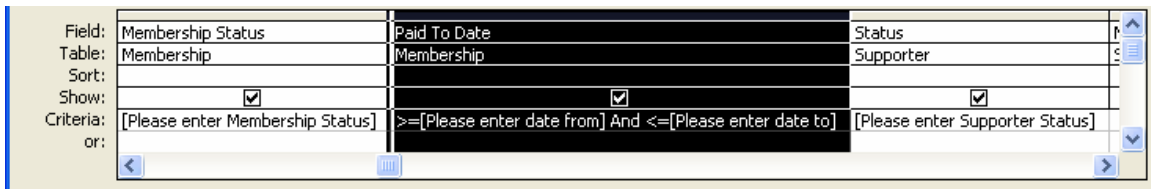
If you wish to change the order that the fields are displayed in your query, you need to follow these steps:

1. Click on the grey box at the top of the column once with your left mouse button:



2. The whole column will now be highlighted. Click on the same grey box again, but this time hold the left mouse button down.

3. Drag the column to where you wish it to be positioned:

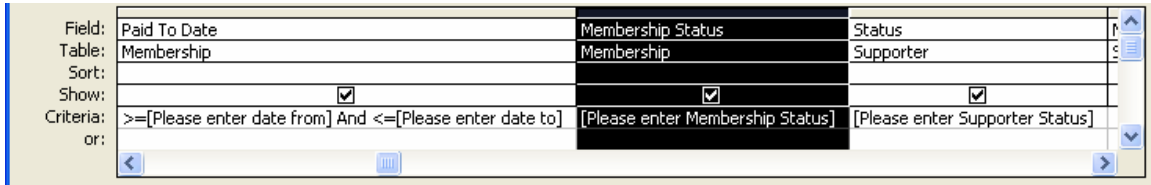


4. Let go of the mouse button to drop the column in your chosen new location.

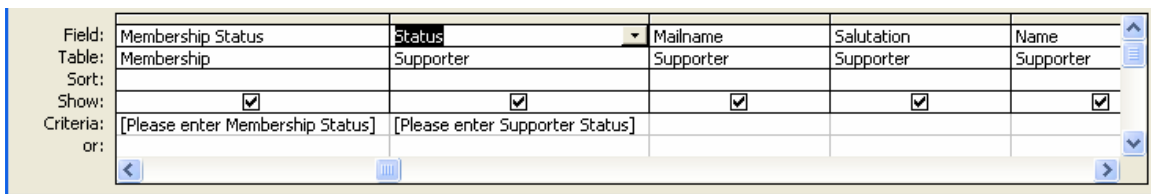
Deleting a field from your query

If you wish to delete a field from your query, you need to follow these steps:

1. Click on the grey box at the top of the field column once with your left mouse button:



2. The whole column will now be highlighted.
3. Press the Delete key on your keyboard. The field will now be deleted.




Linking more than one table

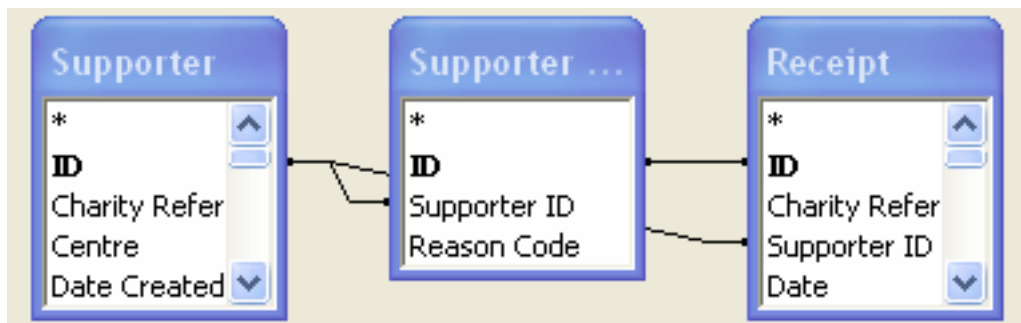
All tables are linked together using keys. Each table is linked to another table by a relationship. There are different types of relationships:

- ONE TO MANY** - A record can have many records
- ONE TO ONE** - A record can only have one record

Adding an additional table

To add an additional table to an existing query, click on the  button. Alternatively, if you are creating a new query, add more than one table.

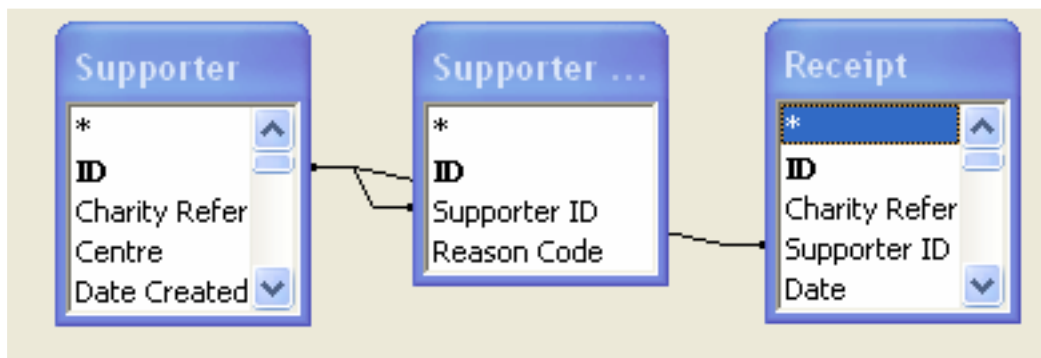
When you have more than one table on your query it will look like this:



It may not always link the tables correctly (as in this example). It is easy to identify this, because each table should only have one line linking it to another.

Removing a link

To remove a link from one table to the next, click on the link once with the right mouse button and select the Delete option, the link will be removed:



Creating a link

To create a new link from one table to the next, click and hold on the field from the first table and drag it to the field that it is to be linked to on the next table. The link will then be created.

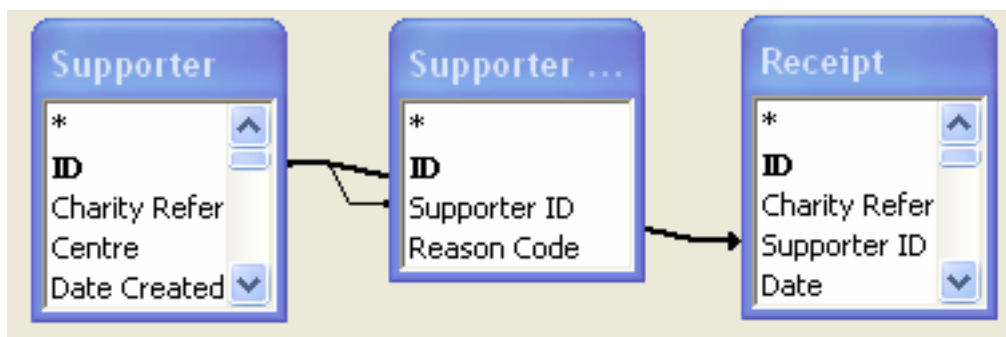
Changing the links

To reflect a “one-to-many” relationship, you may need to change the link. Click on the link once with the right mouse button and select the Join Properties option.

This will then show the following screen:



Choose the appropriate option from the three offered and click on **OK**. This will then change the appearance of the link:



You will notice that the link between the Supporter and Receipt table now has an arrow pointing to the receipt table.



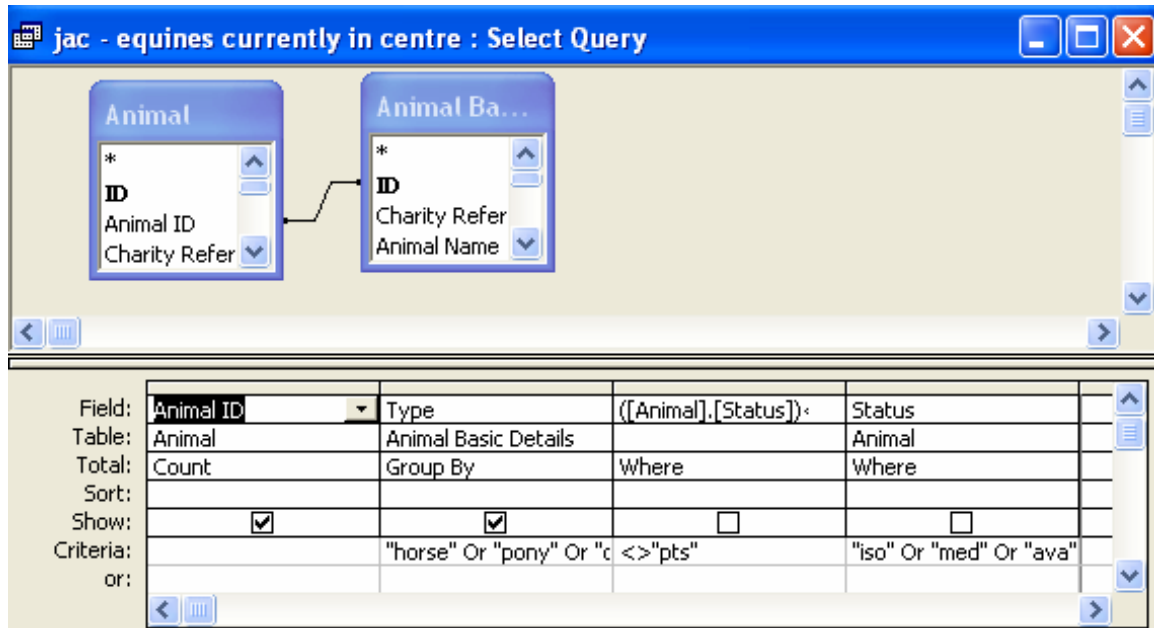
Is there a way to help me remember which way the arrow should point?

Yes. If you point the arrow at the table where the most records are (that will match those from the table where the arrow originated) this will usually be the correct link.

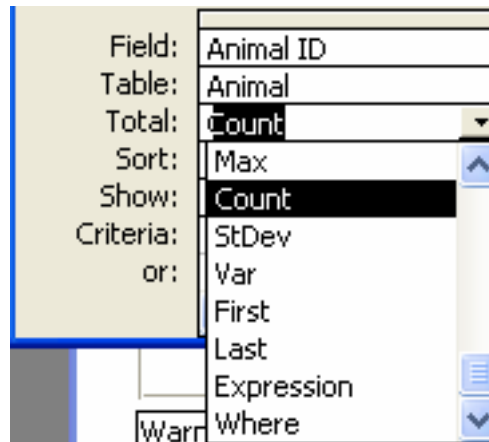
Totalling and counting

You can use Queries to count the number of records returned and to perform other calculations. To use this feature, click on the Σ button in the Design View.

This will add a new element to your query:



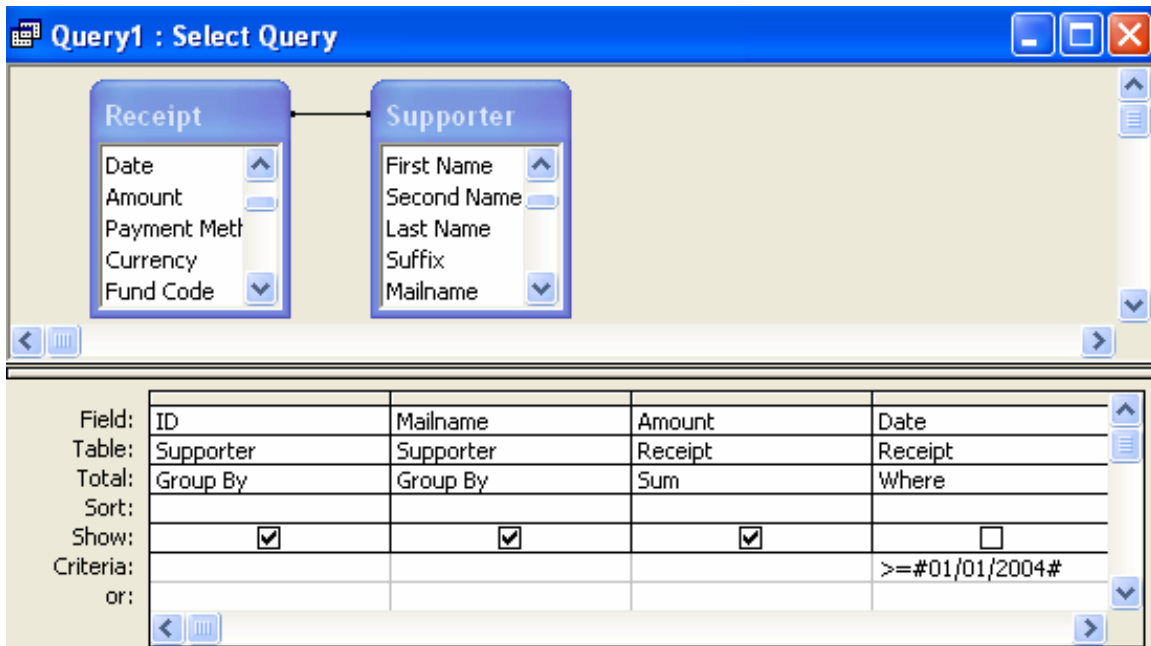
This will then enable you to choose a Total Method from the list available:



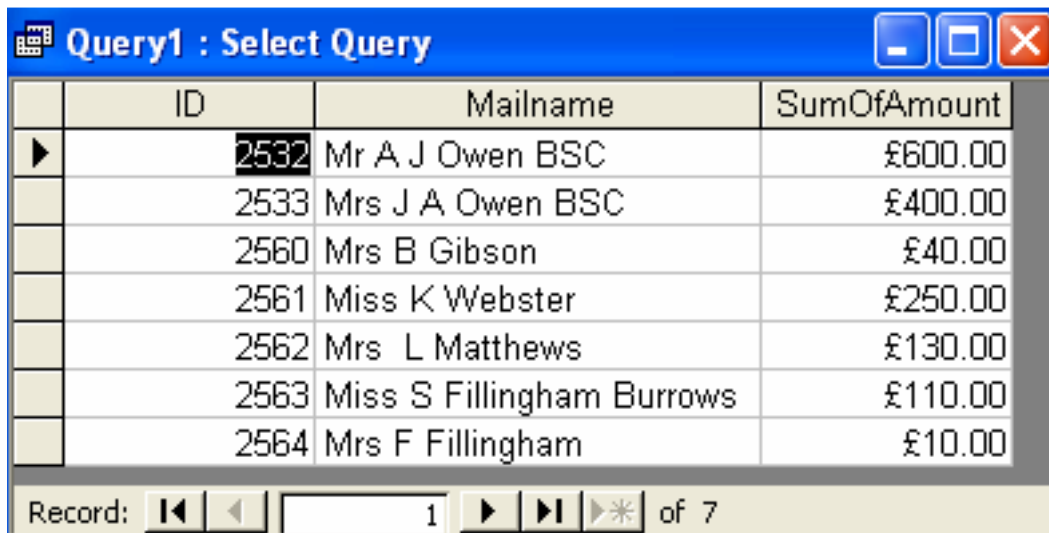
There are many functions available here but you will only use some of them:

- SUM This will sum the field so that it can be totalled.
- COUNT This will count the number of records.
- AVG This will calculate the average of the records.
- MIN This will calculate the minimum amount.
- MAX This will calculate the maximum amount.
- WHERE This is used where a condition (Boolean) is used but no calculation is to be made.

Here is an example:



This will show the ID of each person, their mailname and the total amount for all records where the date in the receipt file is on or after 1 January 2004.





Why is it not totalling correctly?

There are usually two causes for this:

1. You have selection criteria and have not added a "Where" in the Total field.
2. You are showing data that is not unique, so it is sub-totalling rather than totalling.

Naming queries – Tips

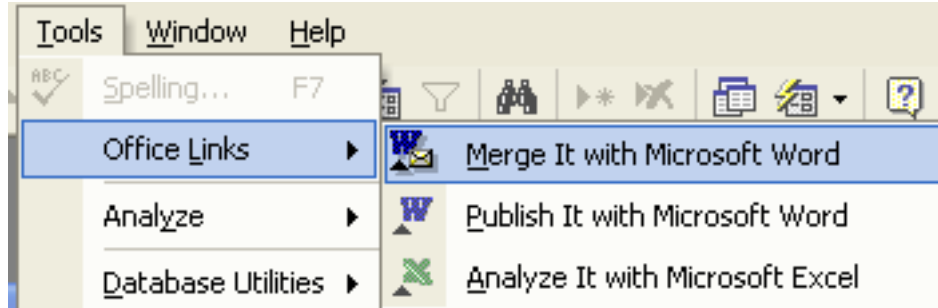
Whenever a query is saved it is stored onto the fileserver and can be accessed by any user (as long as they have permission to do so). Therefore, any query that is saved must have a unique name.

All queries must therefore be saved using a naming convention. The easiest way of naming queries is to **precede any query with the initials of the person who has created it**. In addition, it is important to remember to give your query a meaningful name.

By using a naming convention queries are not overwritten and can be easily identified by other members of staff.

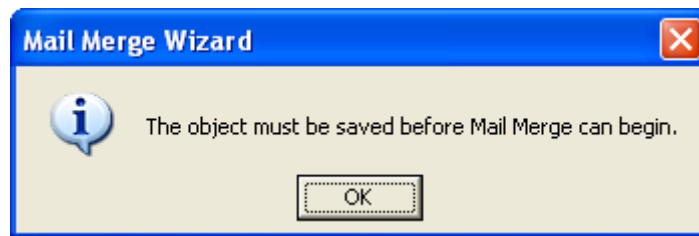
Office links – Merging with Word and Excel

Microsoft Access provides powerful links to both Microsoft Word and Excel. There are three types of links available to you:



You can access these options by clicking on Tools / Office Links and then the appropriate option.

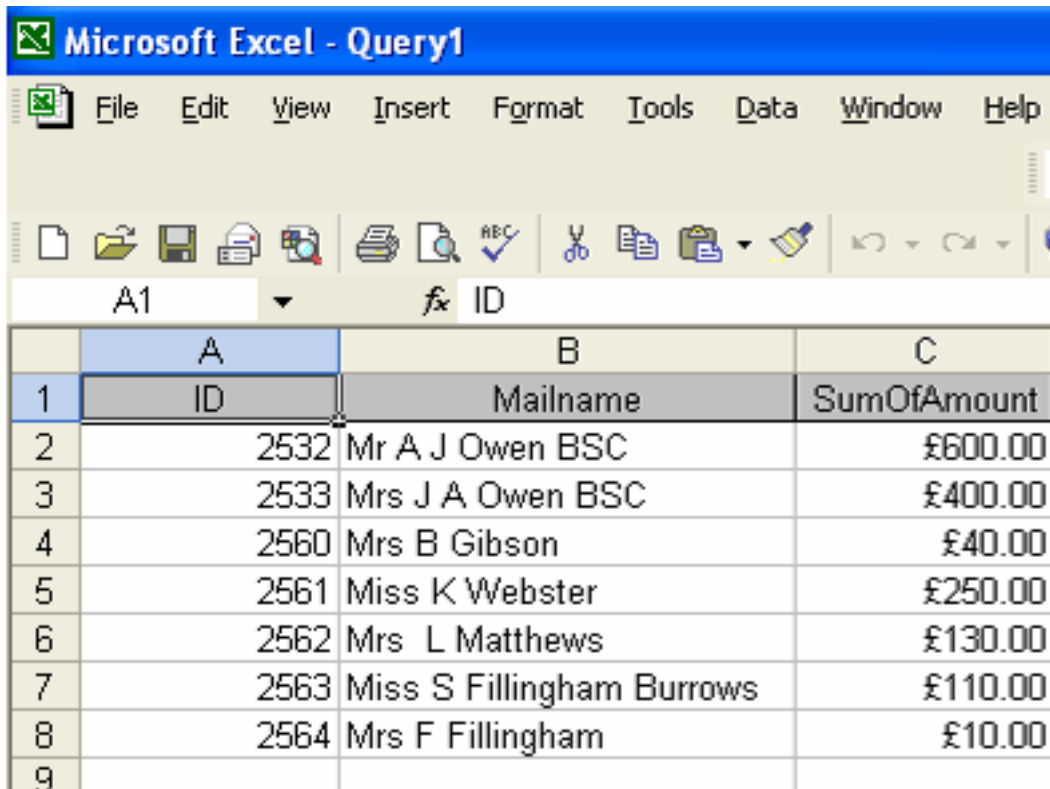
You must save the query first before you try to merge it with Microsoft Word. If you do not the following message will appear:



After a select query has been performed, the data is displayed on the screen in a spreadsheet format. You can then click on the Tools menu and follow the Office Links.

Analyse it with MS Excel

This option will take the current fields and data that is currently displayed on screen and will open MS Excel and create a spreadsheet containing data.



	A	B	C
1	ID	Mailname	SumOfAmount
2	2532	Mr A J Owen BSC	£600.00
3	2533	Mrs J A Owen BSC	£400.00
4	2560	Mrs B Gibson	£40.00
5	2561	Miss K Webster	£250.00
6	2562	Mrs L Matthews	£130.00
7	2563	Miss S Fillingham Burrows	£110.00
8	2564	Mrs F Fillingham	£10.00
9			

Publish it with MS Word

This option will take the current fields and data currently displayed on screen and will open MS Word and create a table containing all of the data.

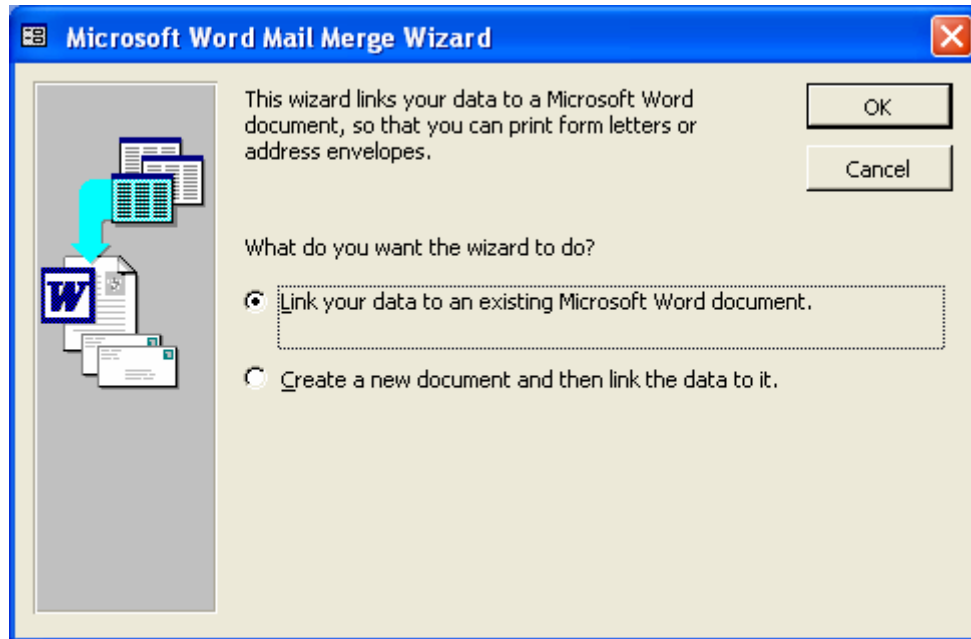
ID	Mailname	SumOfAmount
2532	Mr A J Owen BSC	£600.00
2533	Mrs J A Owen BSC	£400.00
2560	Mrs B Gibson	£40.00
2561	Miss K Webster	£250.00
2562	Mrs L Matthews	£130.00
2563	Miss S Fillingham Burrows	£110.00
2564	Mrs F Fillingham	£10.00

This table can then be edited without any of the records changing in the database.

Merge it with MS Word

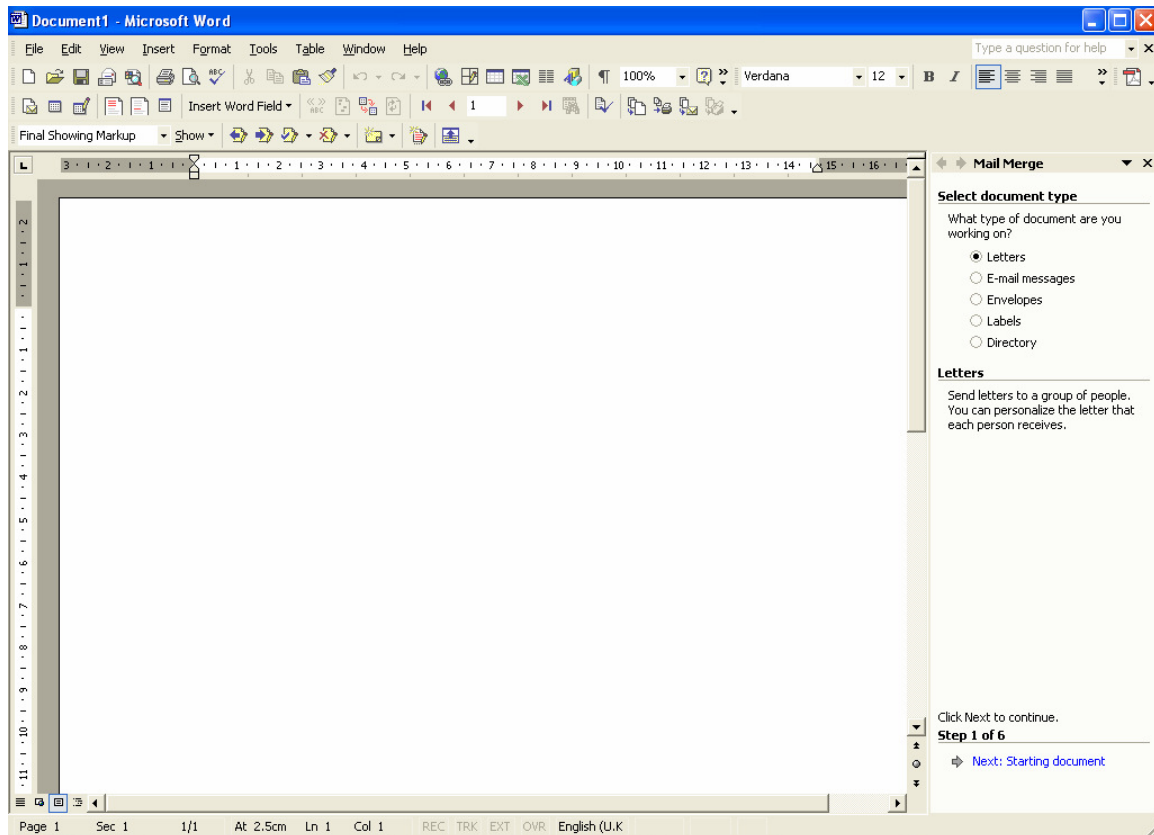
This option is the most powerful option and will link a mail merge document to a query in the database and will merge the data in a format that you define.

A wizard is available to allow you to perform the link. It must be remembered that once the word document is linked to the query, every time the document is opened, it will query the database and select the latest records.



The above screen is displayed when you choose this option. Choose the first option if you already have a document that you want to link to this query. If you want to create a new document, choose the second option.

If you choose the second option, Access will open Word and will link the documents together. As shown below:



Click the Next: Starting document option in the bottom right hand corner of the screen. This will take you to Step 2 of 6.

Click the Next: Select Recipients option in the bottom right hand corner of the screen. This will take you to Step 3 of 6.

Click the Next: Write your letter option in the bottom right hand corner of the screen. This will take you to Step 4 of 6.

From Word, click on the Insert Field option to insert the fields from your query into the letter that you are creating. Remember to save the document.

Click the Next: Preview your letter option in the bottom right hand corner of the screen. This will take you to Step 5 of 6.

To see the document merged, click on the <<ABC>> button, this will show you how your records look merged.



Click the Next: Complete the Merge option in the bottom right hand corner of the screen. This will take you to step 6 of 6.

From this option you can either merge the letters directly to the printer or merge the documents to a new document so that you can edit them.

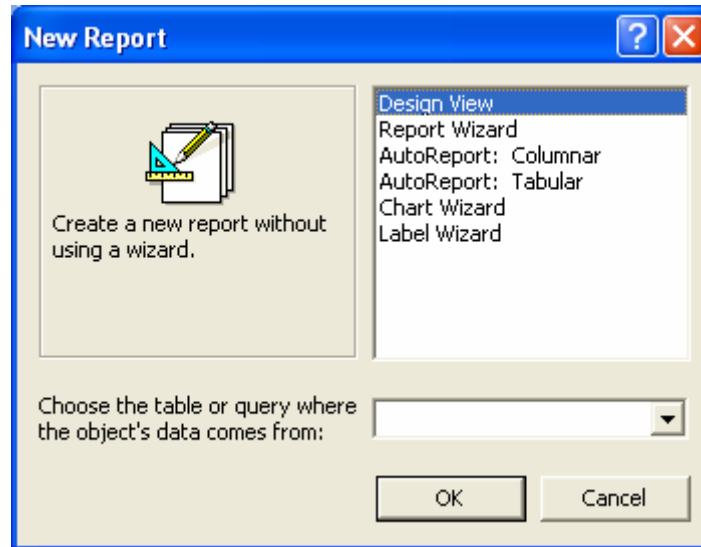
When you open this document, Word will start Access, query the database and retrieve the current data.

Reports – Creating from queries

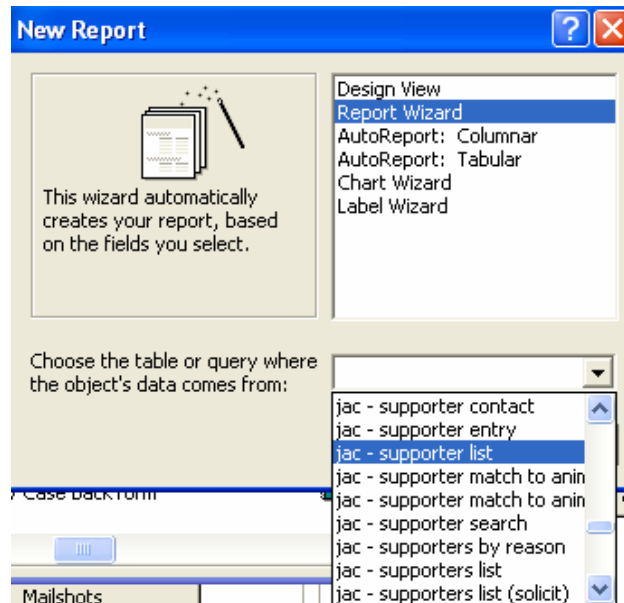
Once a select query has been created, reports can be created from the query using various methods. We will create two different reports using the wizards.

To create a report using the wizard, push the F11 key and click on the  button, then click on the  button.

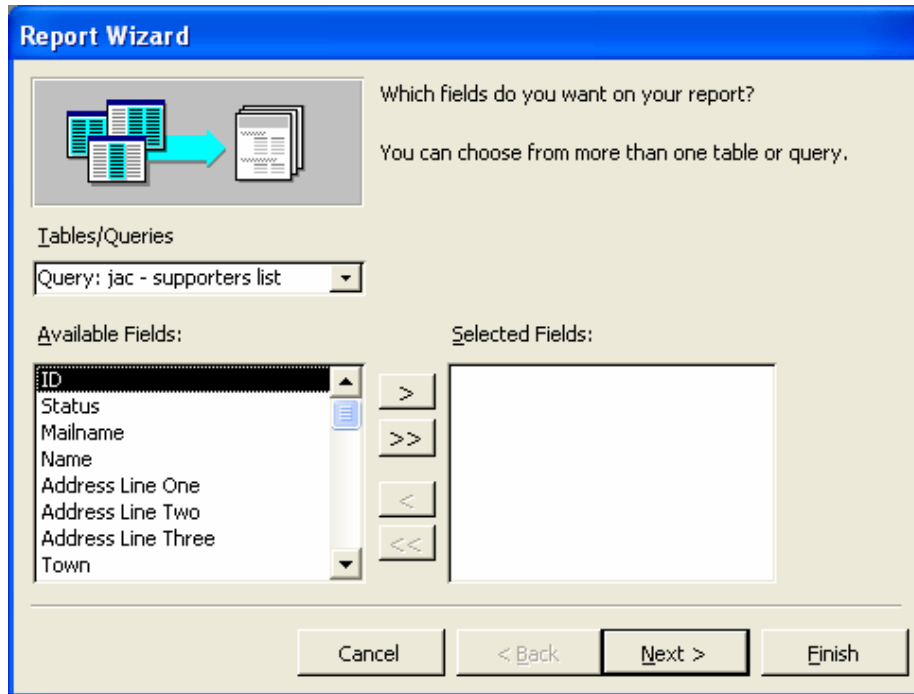
You will then be presented with the screen below:



Highlight the Report Wizard option.



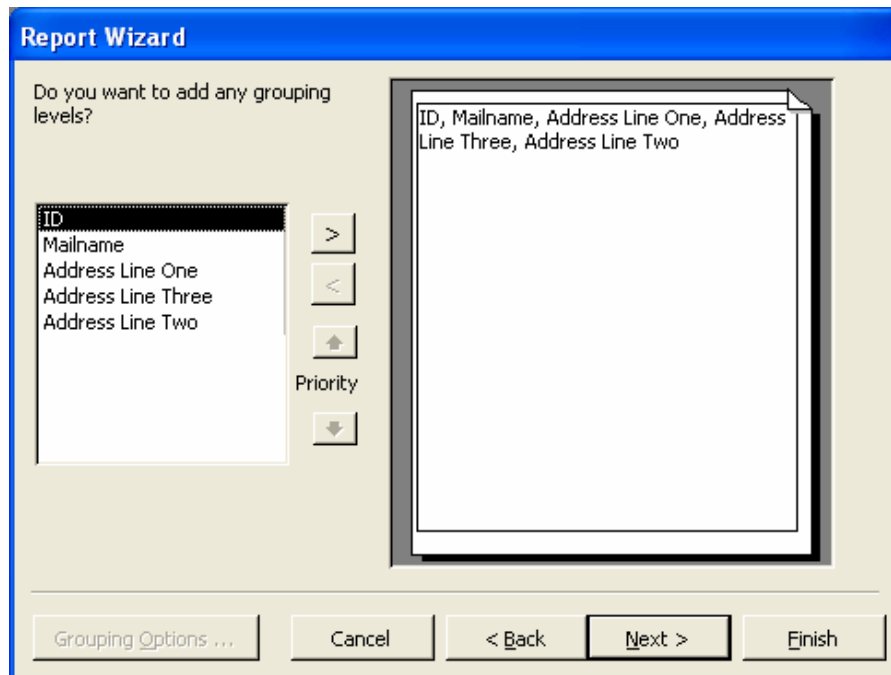
Choose the query on which you want to base the report by clicking in the drop down box, and then click the **OK** button.



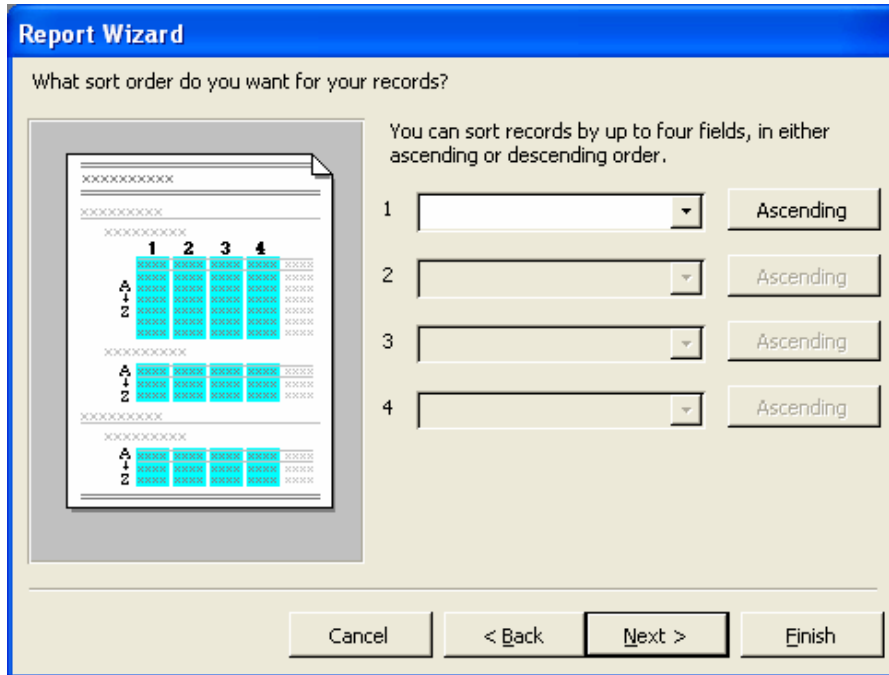
The above screen will be presented to you.

Choose the fields that you want to appear in your report by highlighting them and clicking the **>** button. To remove a field, highlight it and click the **<** button.

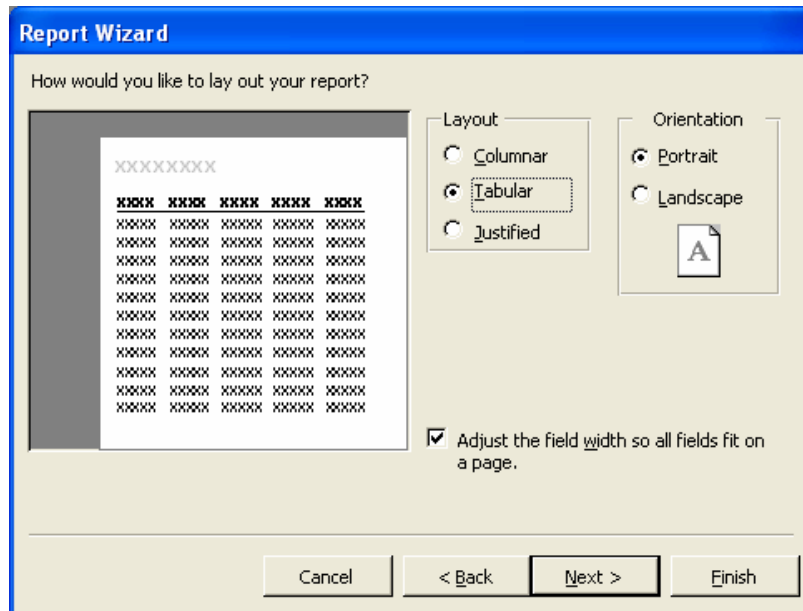
When you have chosen your fields, click the **Next >** button. The following screen will be displayed:



If you want to add any grouping levels for the report (groups allow you to sub total etc.) then choose the fields that you want to group on. Click the **Next >** button. The following screen will be displayed:



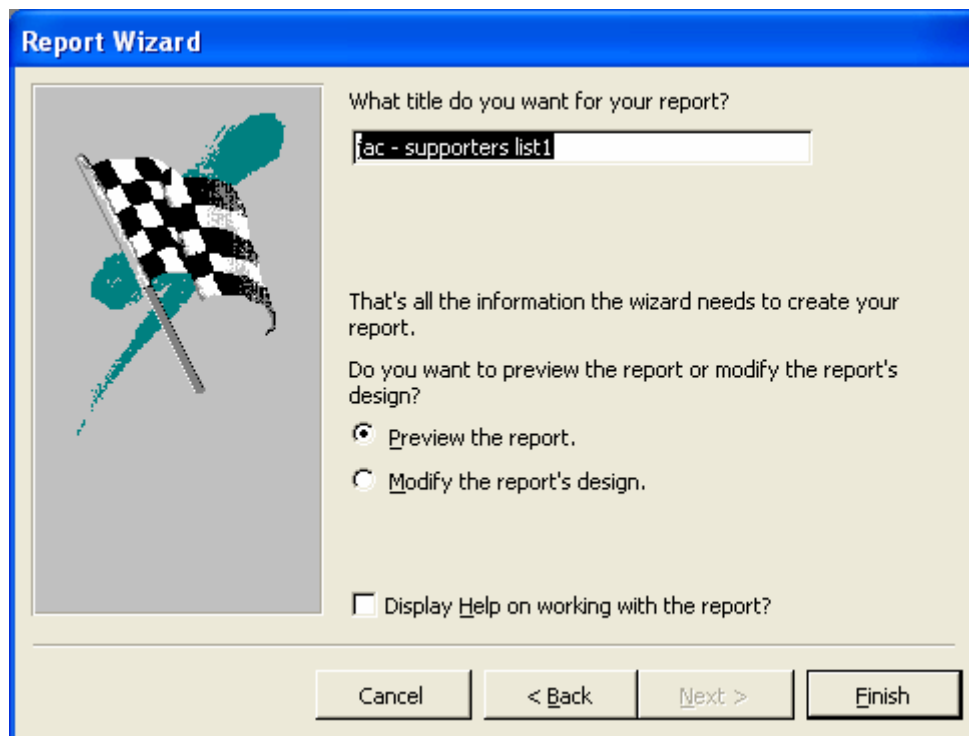
If you want to sort the report in a particular order, choose the fields that you want to sort on in an order of preference. Click the **Ascending** button to sort them into ascending or descending order. Click the **Next >** button. The following screen will be displayed:




Choose a layout for your report and choose the orientation, if you want to Access to automatically adjust the fields so that they all fit on one page, click the box at the foot of the screen. Click the **Next >** button. The following screen will be displayed:



Choose a layout for your report; there are six to choose from. We recommend that you use Soft Grey as your standard report layout. Click the **Next >** button. The following screen will be displayed:



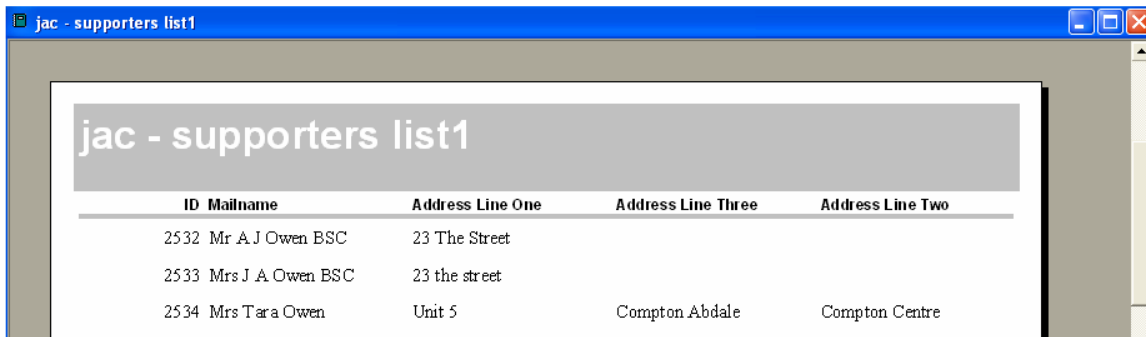
Choose a name for your report and click the  button.

Whenever a report is saved, it is stored on to the fileserver and can be accessed by any user (as long as they have permission to do so). Therefore, any report that is saved must have a unique name

All report must therefore be saved using a naming convention. The easiest way of naming a report is to **precede any report with the initials of the person who has created it**. In addition, it is important to remember to give your report a meaningful name.

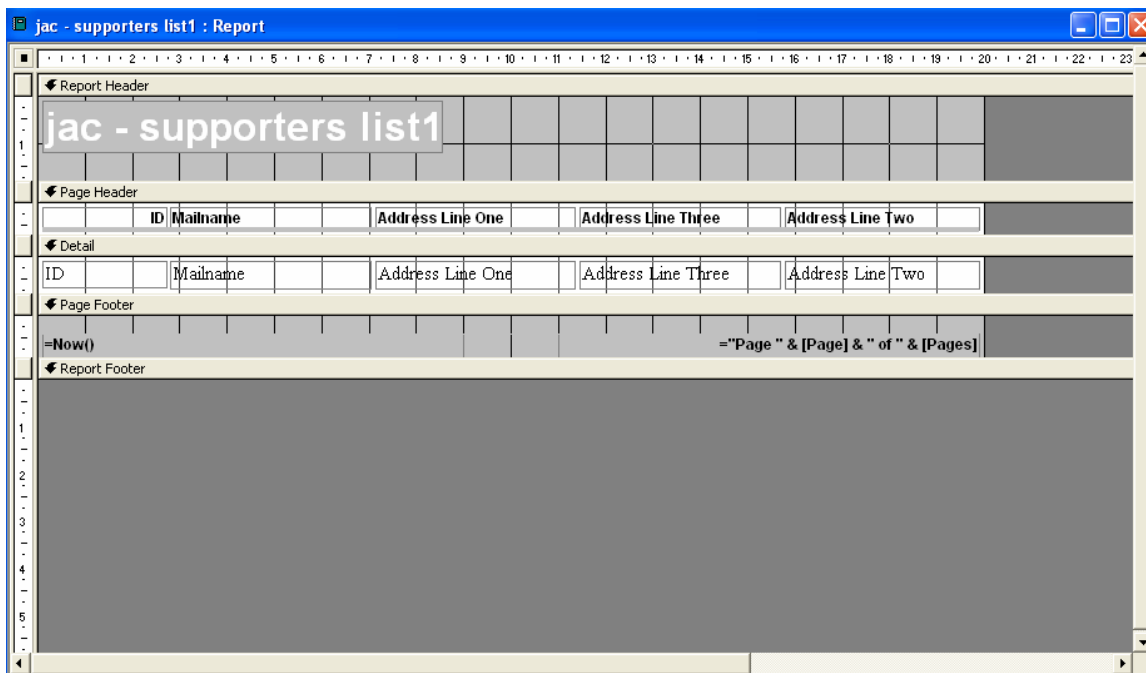
By using a naming convention, reports are not overwritten and can be easily identified by other members of staff.

Your report will then be displayed on screen as shown below:



ID	Mailname	Address Line One	Address Line Three	Address Line Two
2532	Mr A J Owen BSC	23 The Street		
2533	Mrs J A Owen BSC	23 the street		
2534	Mrs Tara Owen	Unit 5	Compton Abdale	Compton Centre


To amend the report layout, click the Design View button on the menu bar.



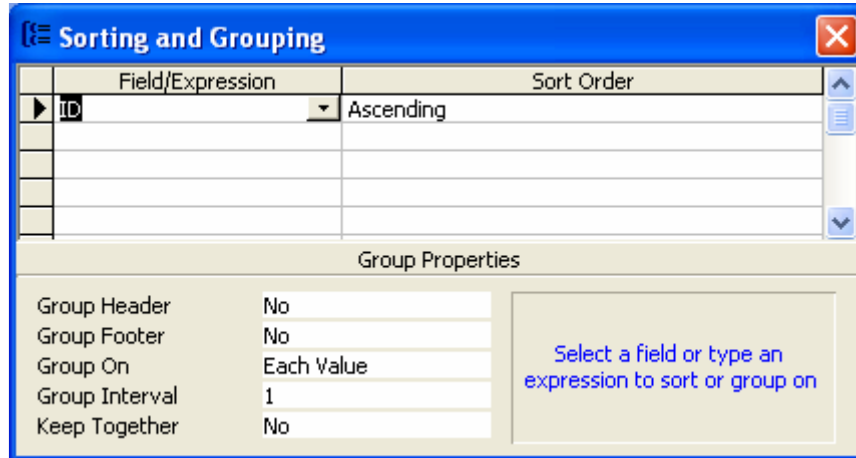
The design view shows a grid layout for the report sections:

- Report Header:** Contains the text 'jac - supporters list1'.
- Page Header:** A row of empty cells.
- Detail:** A row of cells with headers: ID, Mailname, Address Line One, Address Line Three, Address Line Two.
- Page Footer:** A row of empty cells.
- Report Footer:** A row of cells with the text '=Now()' and '="Page " & [Page] & " of " & [Pages]'.

You will be presented with the above screen. You can now move fields around using the mouse, change the title and add extra fields.

To add a field, use the field lookup button , click the field and drag it to the position that you want it to appear on the report. (This process can take some time to get used to).



To change the sort order for a report, click on View, Sorting and Grouping from the menu bar. The following screen will be displayed:

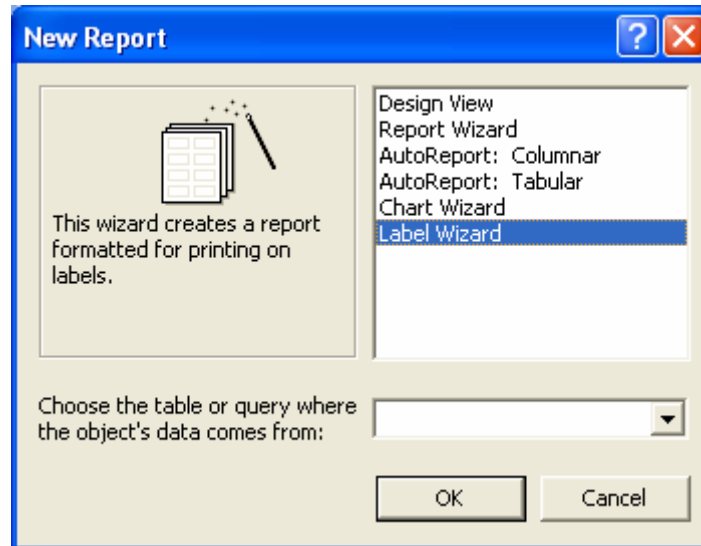


Add and delete fields as necessary. Change the sort order from ascending to descending as necessary.

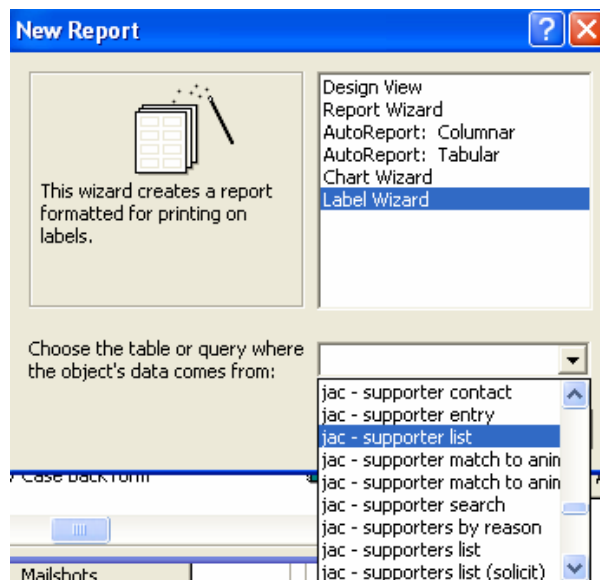
Labels – Creating from queries


Access allows you to create labels quickly and easily from any table or query. A label wizard is available that allows you to use standard Avery labels, or allows you to create your own definition.

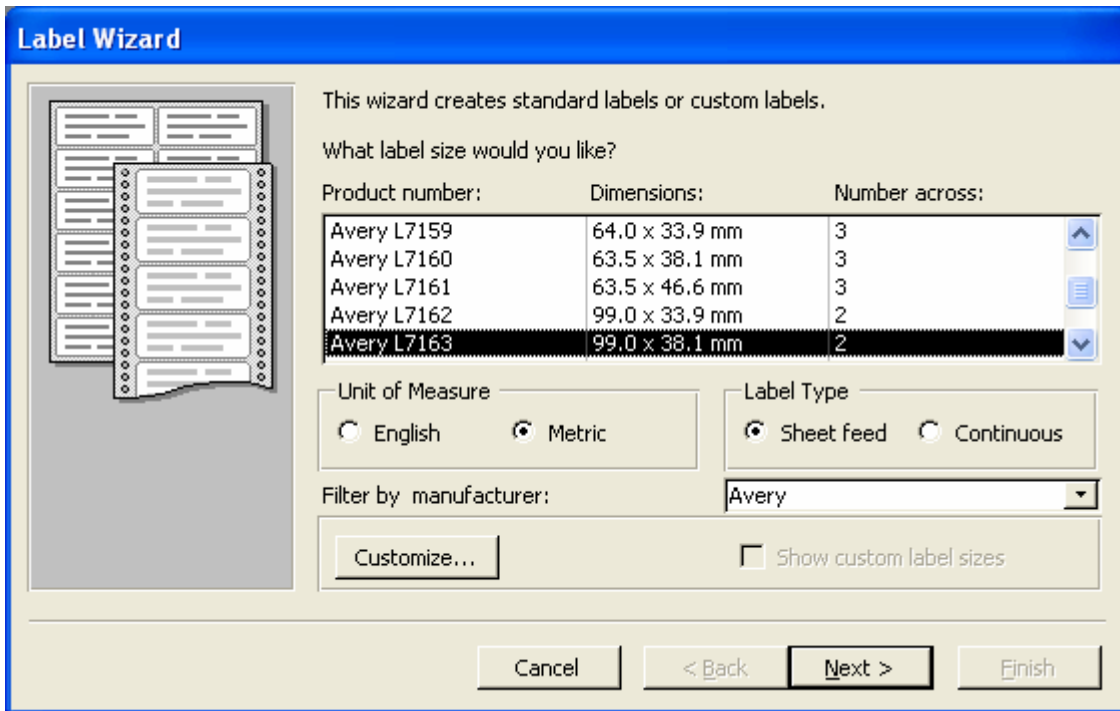
To create a report using the wizard, push the F11 key and click on the  Reports button, then click on the  button. You will then be presented with the screen below:



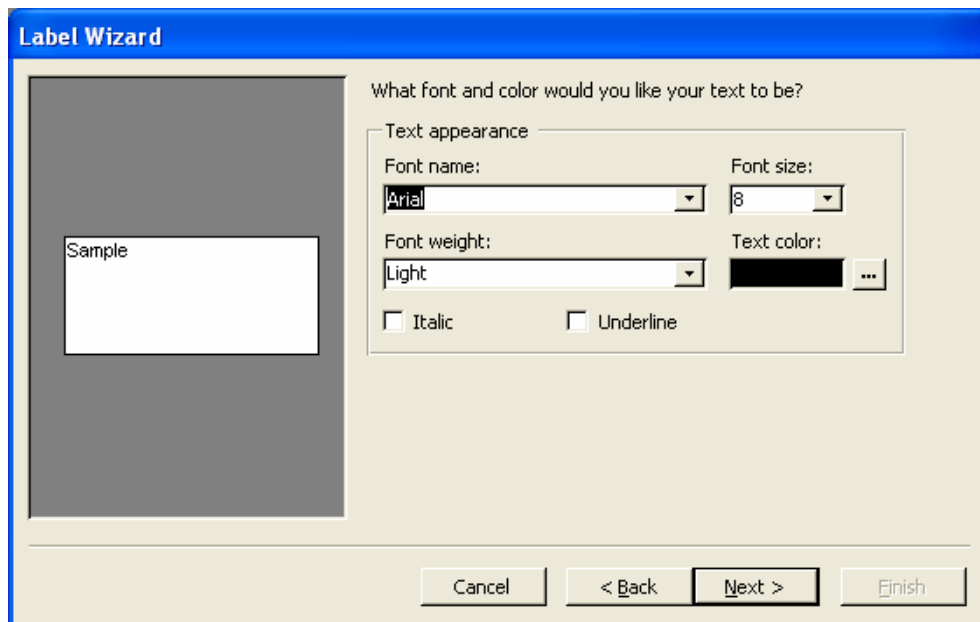
Choose the Label Wizard option and choose the table or query on which you wish to base the labels.




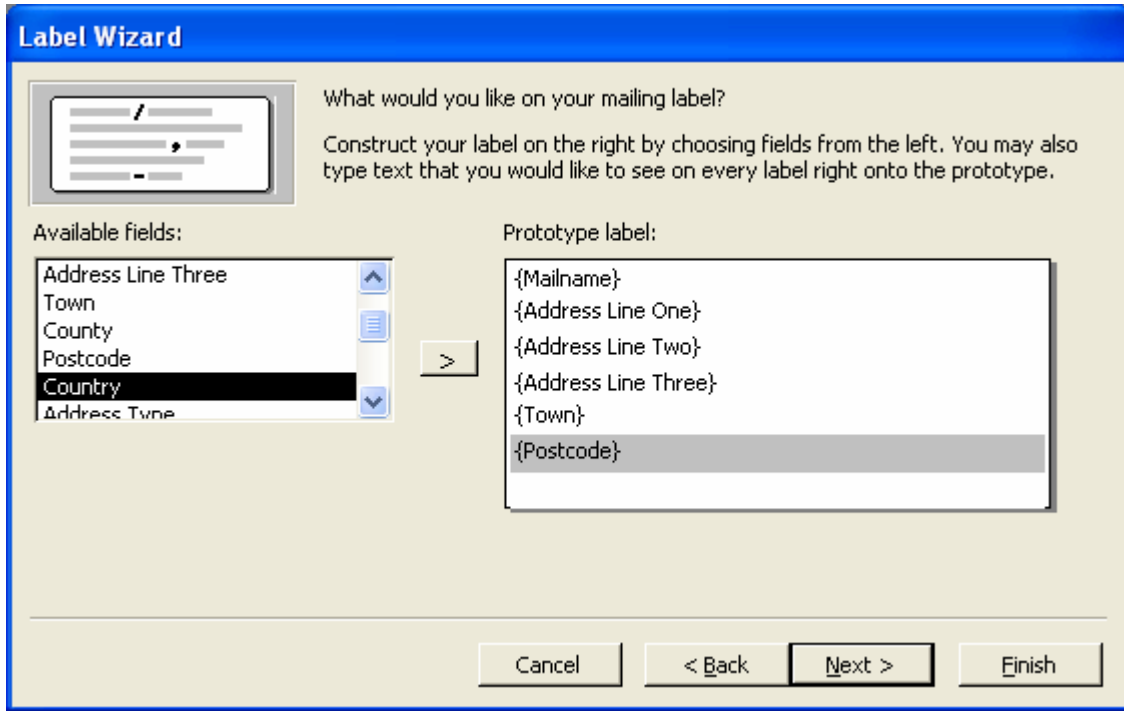
Click the  button. The following screen will be displayed:




Choose the type of label that you are going to print to. If you use Avery laser labels chose the label code printed on the top of the label. If you do not have Avery laser labels, click the customise button. Otherwise click the **Next >** button. The following screen will be displayed:

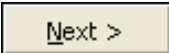


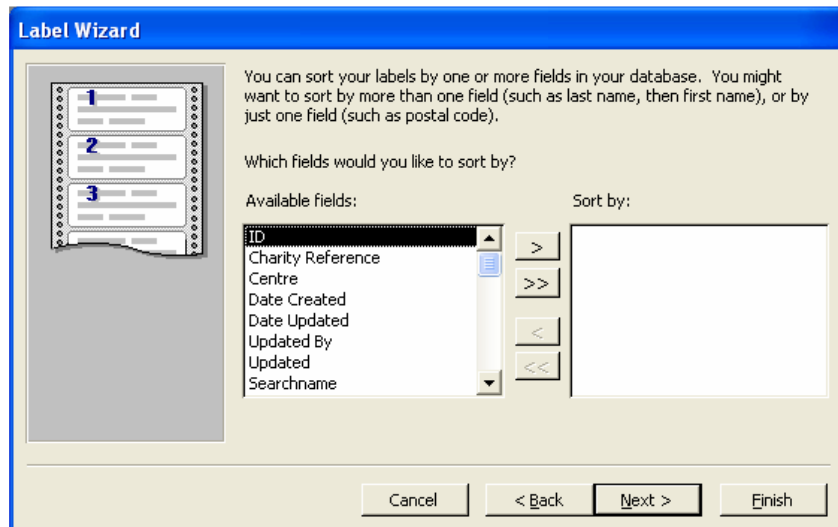
Choose the size, weight, colour and type of font that you want to appear on the label. You can also choose italics and underline options. Click the  button. The following screen will be displayed:




Choose the fields that you want to appear on the label. Highlight them in the left hand window and click the  button. The field will be transferred to the prototype label window.

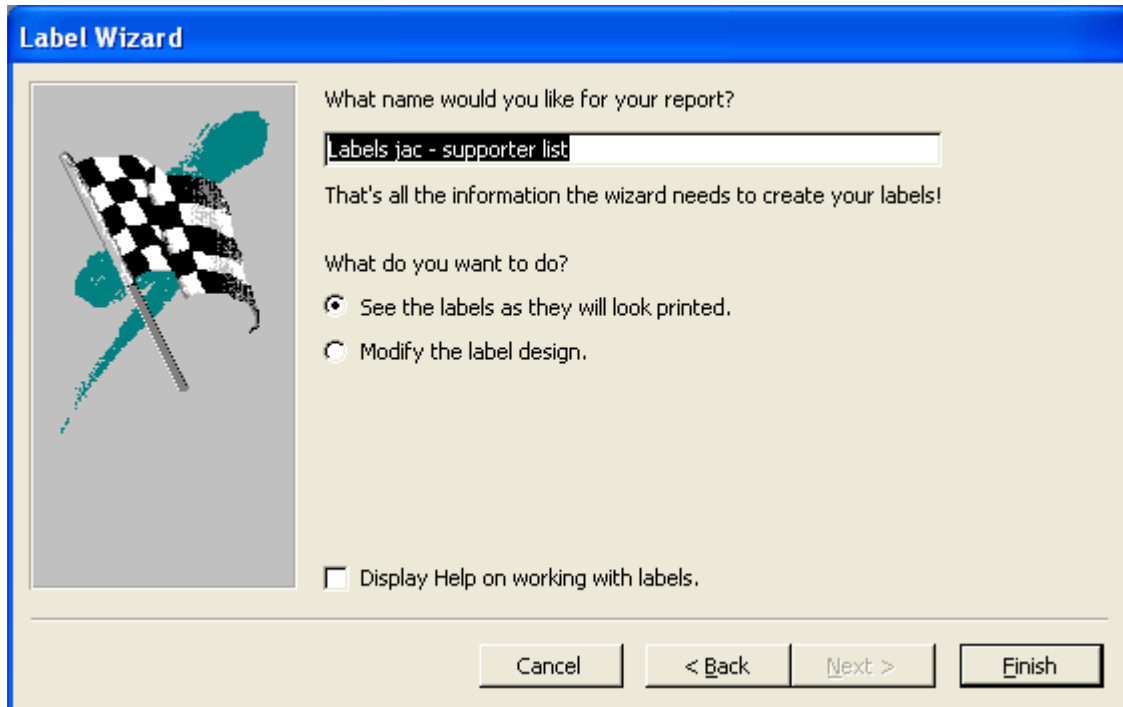
Press return between each field to format the label correctly.

Click the  button. The following screen will be displayed:



Choose a sort order (if any) from your lists of fields. The labels will be sorted in the order that you choose the fields.

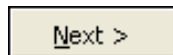
Click the  button. The following screen will be displayed:

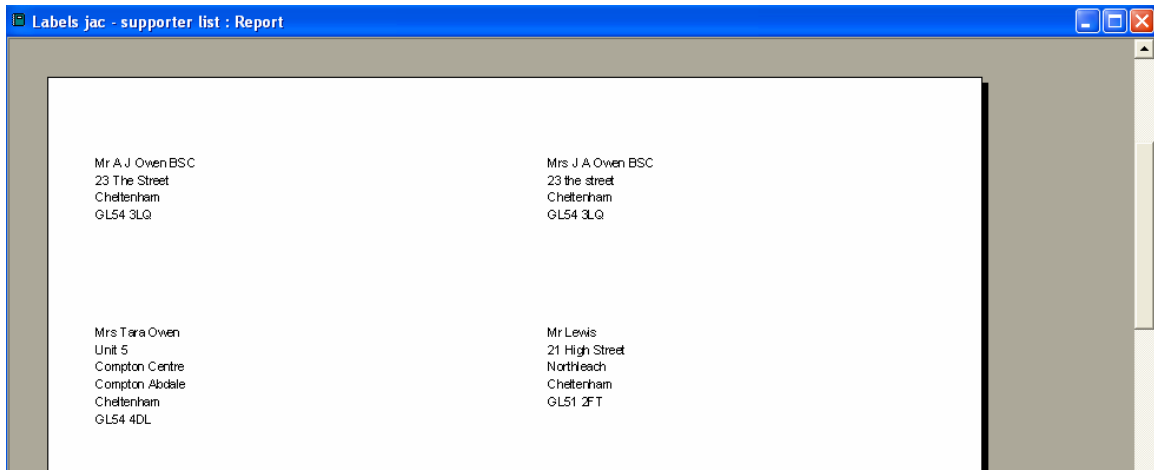


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By using a naming convention, reports are not overwritten and can be easily identified by other members of staff.

Click the  button. The labels will now be displayed on screen for you to see. If you wish to modify the design of the labels, click on the Design View button from the menu bar. The screen below will be displayed.



CONGRATULATIONS!



**YOU HAVE SUCCESSFULLY
FINISHED THE COURSE!**