# Reports That Total Items

An important feature of a database is its ability to calculate and display totals of sections of data. It might be a monthly total of sales or a total of items in stock, etc. In this chapter you will produce totals and sub-totals on a prepared database.

Loading the Sample File

1   Load Microsoft Access or close the current file and click on the FILE tab. Select OPEN OTHER FILES in the START window or the OPEN icon in the BACKSTAGE VIEW.

2   Access the CHAPTER 10 folder of the ACCESS 2016 SUPPORT FILES and open the CHAPTER 10 file as an OPEN READ-ONLY file.

3   Click on the SAVE AS icon in the WARNING BAR under the RIBBON.

4   Access your STORAGE folder and save the file as CHAPTER 10 COPY.

5   The database has a table that stores sales of items by a hardware store with a calculated field that calculates the amount of each sale.

6   Enable the content and open the table to familiarise yourself with the database.

Creating a Daily Sales Report

The database lists the sales of some items from a hardware store. Let's create a report that lists total sales at the end of each day. To do this we will need to set a GROUP that separates the sales for each day.
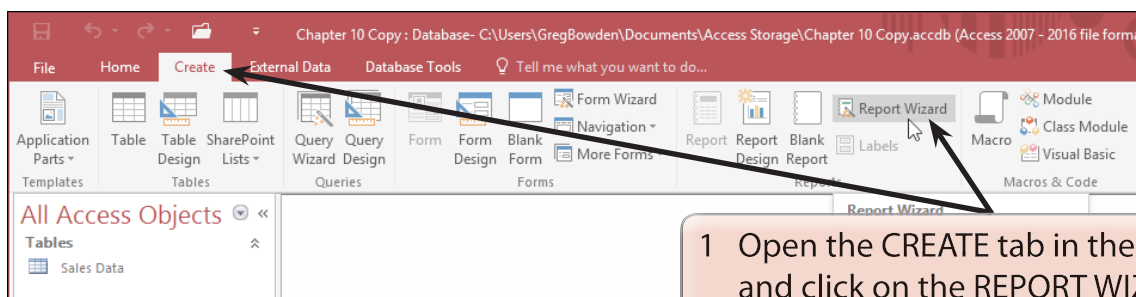

1   Open the CREATE tab in the RIBBON and click on the REPORT WIZARD icon.
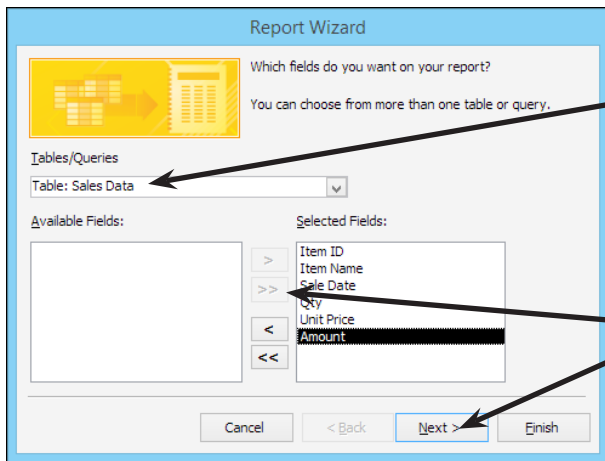
2 In the REPORT WIZARD dialogue box the TABLES/QUERIES box should be set to the SALES DATA table.

3 In this case we will use all the fields, so move all the fields into the SELECTED FIELDS frame and click on NEXT.

4   We want the program to provide us with totals at the end of each day, so we need to group the data so that all the records for a particular day are together.
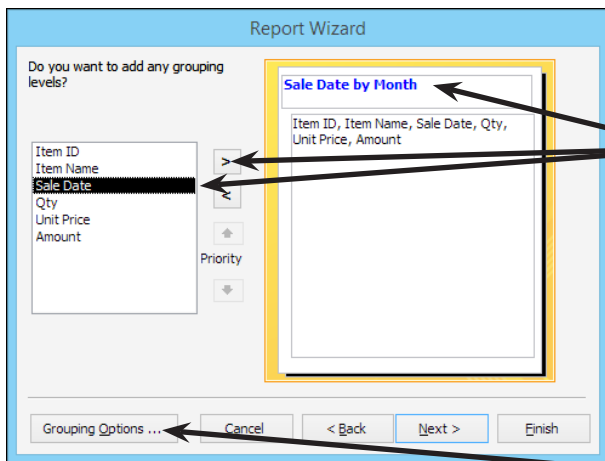

5 Click on the SALE DATE field in the left frame then click on the forward arrow to place the SALE DATE in the group frame at the right of the dialogue box. The fields in the report are listed below the DATE group.
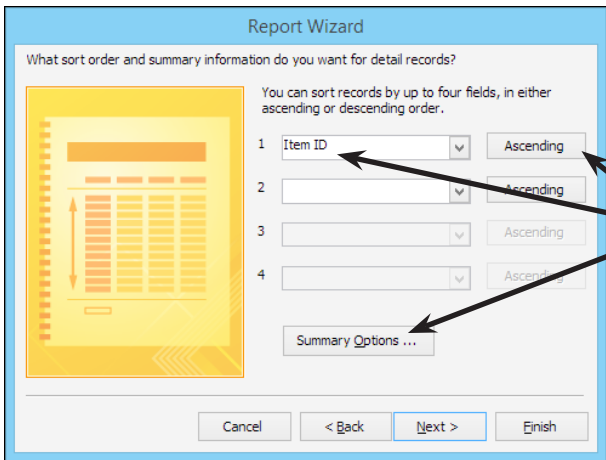
6 The default setting for the program is to group dates by MONTH (the most common date setting in reports). In this case the grouping is required by DAY so click on the GROUPING OPTIONS button.
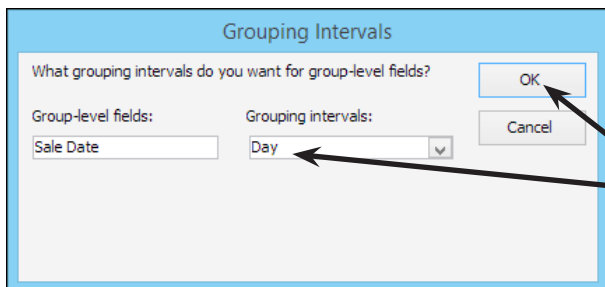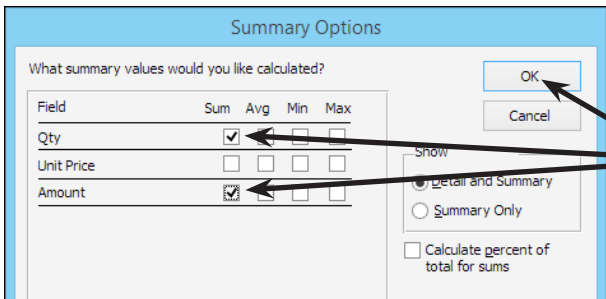

7 Set the GROUPING INTERVALS box to DAY and select OK.
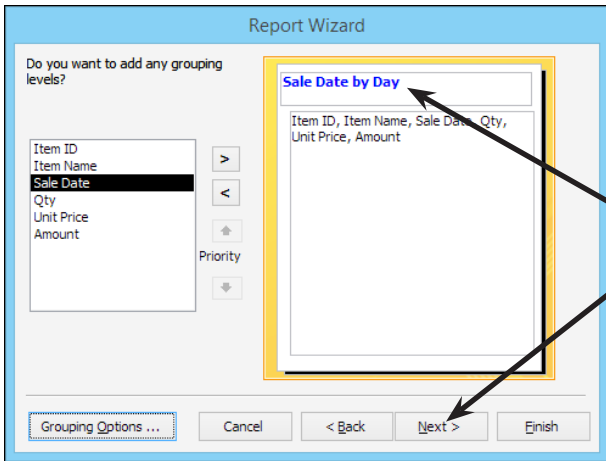
8   The GROUPING is altered to BY DAY. Click on NEXT.

9   We will sort the daily sales within the group into ITEM ID order, so set the first SORT box to ITEM ID, leave the box next to ITEM ID as ASCENDING and click on the SUMMARY OPTIONS button.


10   In this case we want to total the QTY and AMOUNT fields for each day so click on the SUM check boxes next to each of those fields, then select OK.
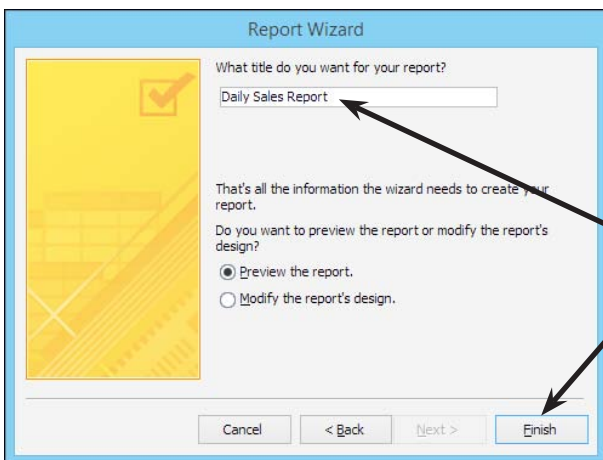
NOTE: The SUMMARY OPTIONS dialogue box allows you to set calculations on number type fields to add, average, find the maximum or minimum values or provide percentages on grouped data.
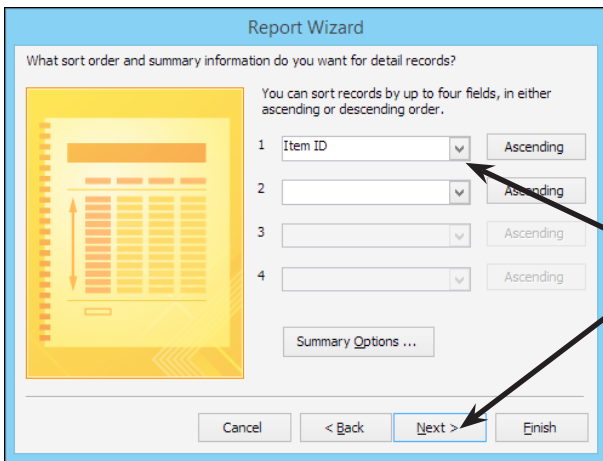
11 You are returned to the SORT ORDER dialogue box, click on NEXT.
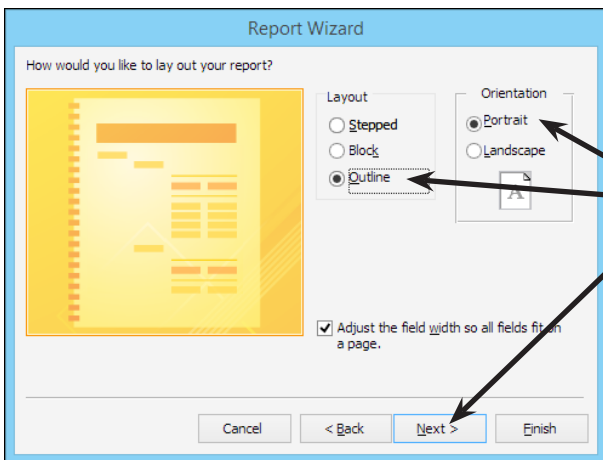
12 For the report LAYOUT select OUTLINE in the LAYOUT frame and PORTRAIT in the ORIENTATION frame, then click on NEXT.
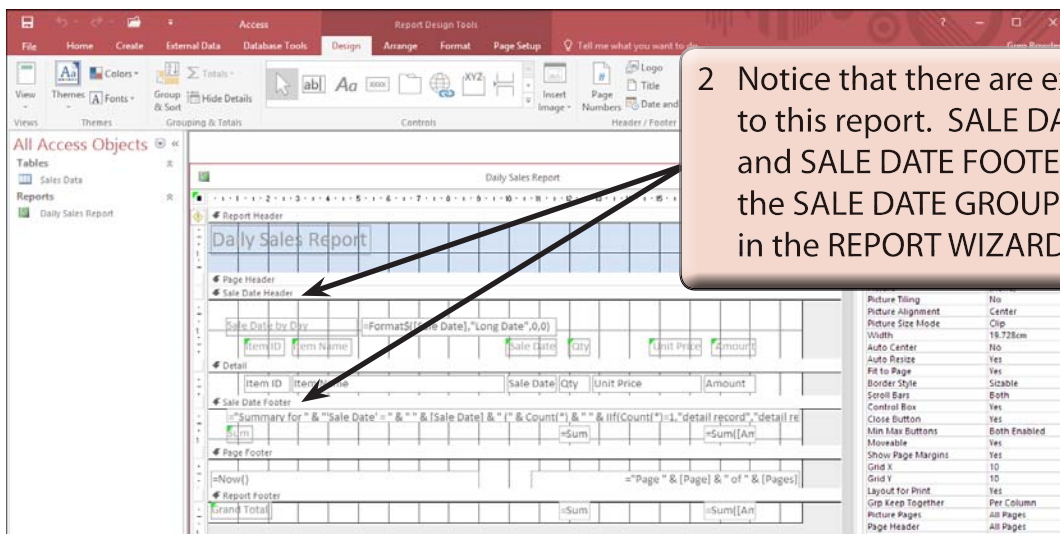

13 Name the report:

Daily Sales Report

and click on the FINISH button to generate the report.

14   Scroll through the report preview.

Adjusting the Report

As with most REPORT WIZARD generated reports some modifications are required to make the report totally suitable for your individual needs. Some fields have been given too much space and some of the headings and labels are not appropriate. This process of getting the wizard to produce a report and then modifying the result is quicker than producing the report from scratch.

1   Click on the CLOSE PRINT PREVIEW icon in the RIBBON to close the preview and return to DESIGN VIEW.

2   Notice that there are extra sections to this report. SALE DATE HEADER and SALE DATE FOOTER are part of the SALE DATE GROUP that was set in the REPORT WIZARD.

NOTE: i   Items in the GROUP HEADER are printed at the top of each group of records. Items in the GROUP FOOTER are printed at the end of each group of records.

ii   There is probably an error icon at the top of the report to indicate a width issue. You can select IGNORE to the error as the width of the report will be adjusted shortly.

A   Adjusting the Report Header

The company name needs to be added to the REPORT HEADER section.

1   Check that the PROPERTY SHEET pane is open at the right of the screen. If it isn't, click on the PROPERTY SHEET icon in the DESIGN tab of the REPORT DESIGN TOOLS.