



# **REPORT BUILDER™ FOR MICROSOFT® ACCESS®**

**Application Guide**

11.18.2010

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## 1 Getting Started

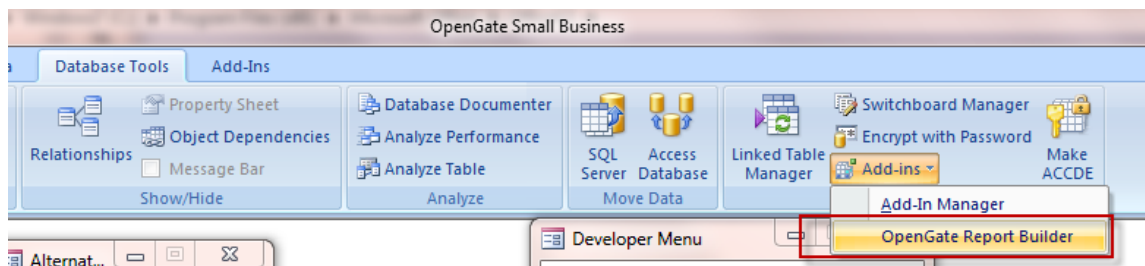
Report Builder allows you to create reports within any MS Access database starting with version 2000 and higher. Report Builder takes you through a multi-step wizard to define how you want your report to look and feel, where to collect the data from, what fields to display, and in what order and format.

This guide will help you understand how to install Report Builder, how reports are created, and how to get the most out of the product.

## 2 Installing Report Builder

Report Builder is installed as an add-in to Microsoft Access. The Report Builder setup application will perform all the tasks necessary to install the tool on your machine.

Once Report Builder installation is complete, open any Access database and select "OpenGate Report Builder" from the add-in menu. In Access 2000 through 2003, this will be in the Tools>>Addins menu bar. In Access 2007 and higher, the add-in dropdown is visible in the "Database Tools" Ribbon tab.



Report Builder will create a set of hidden configuration tables in your database, that will contain the report definitions specific to that database. Any reports you create with Report Builder will also be stored in your database. When you make your database available to other users on other machines, or move your database to another machine, you will simply need to have the Report Builder add-in installed to create new and edit existing report definitions.

### 2.1 **INSTALLING WITHOUT THE WINDOWS INSTALLER**

In some cases your IT administration may not allow you to run a Windows Installer on your machine. In this case, you can install Report Builder directly from within Access.

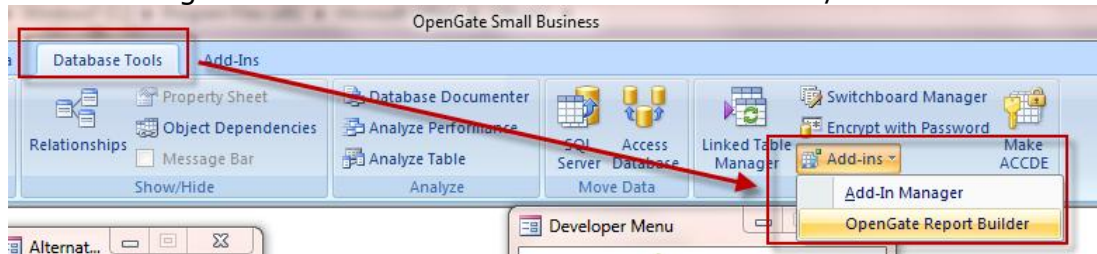
### 2.1.1 INSTALLING REPORT BUILDER ON WINDOWS VISTA AND WINDOWS 7 WITH ACCESS 2007 OR HIGHER

Access 2007 on Windows 7 requires that you run the program as administrator to be able to install add-ins.

- a) Navigate to C:\Program Files\Microsoft Office\Office12\ (or \Office14\)
- b) Locate the file "MSAccess.Exe"
- c) Right click the file and select "Run as Administrator"
- d) Follow the remaining steps in Section 3 below.

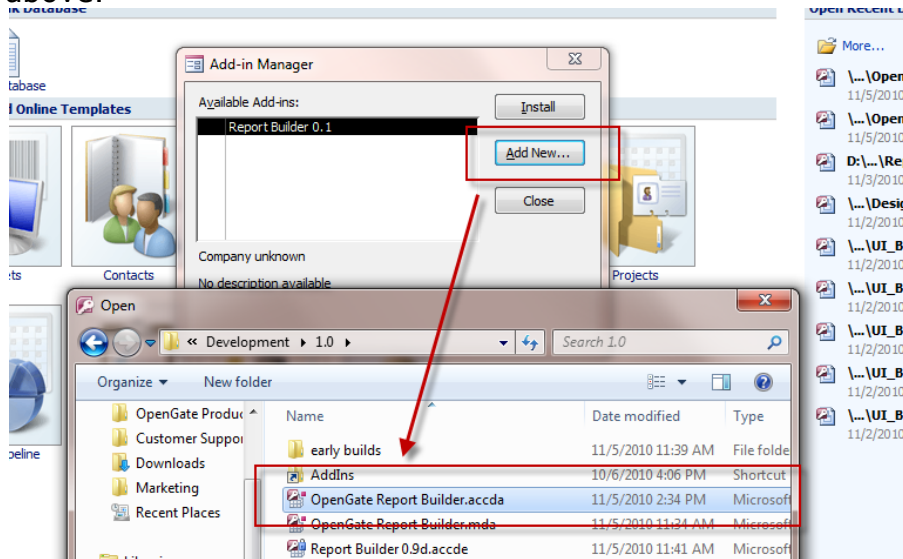
### 2.1.2 INSTALLING REPORT BUILDER

- a) Download the appropriate Report Builder add-in file
  - a. For Access 2000, 2002, and 2003, the file is named "OpenGate Report Builder.mda"
  - b. For Access 2007 and 2010 (32-bit) the file is named "OpenGate Report Builder.acdda" An Office 2010 64-bit version will not be available until the full 1.0 release.
- b) Open any Access database.
- c) Select Add-Ins from the Tools menu in 2000/2003, or Add-in Manager from the Database Tools ribbon in 2007/2010.

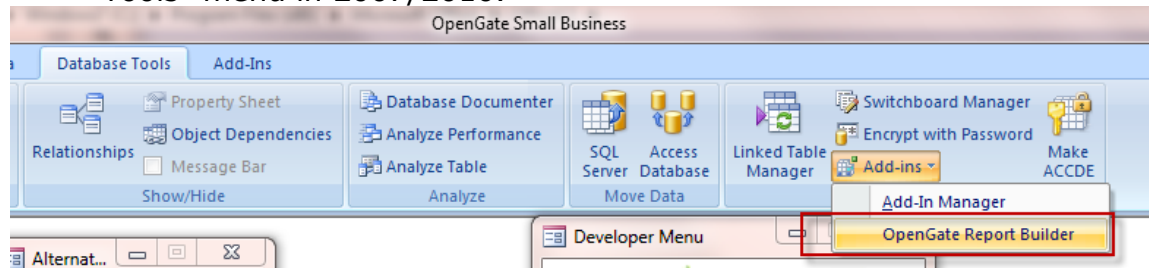


- d) Select "Add New"

- e) Locate the appropriate add-in file you downloaded in step (a) above.



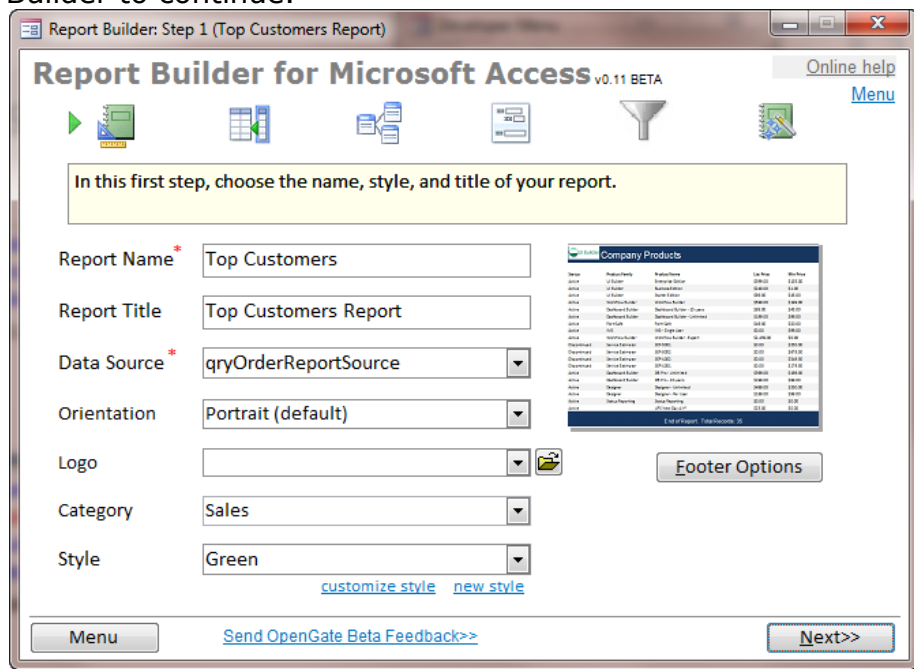
- f) Once the add-in is installed, you can open it from the toolbar in 2000/20003, or by selecting "Add-ins" from the "Database Tools" menu in 2007/2010.



## 3 Creating Reports

### 3.1 BASIC REPORT SETUP

In the first step of Report Builder, you define the basic information for your report. Fields with a red asterisk (\*) are required for Report Builder to continue.



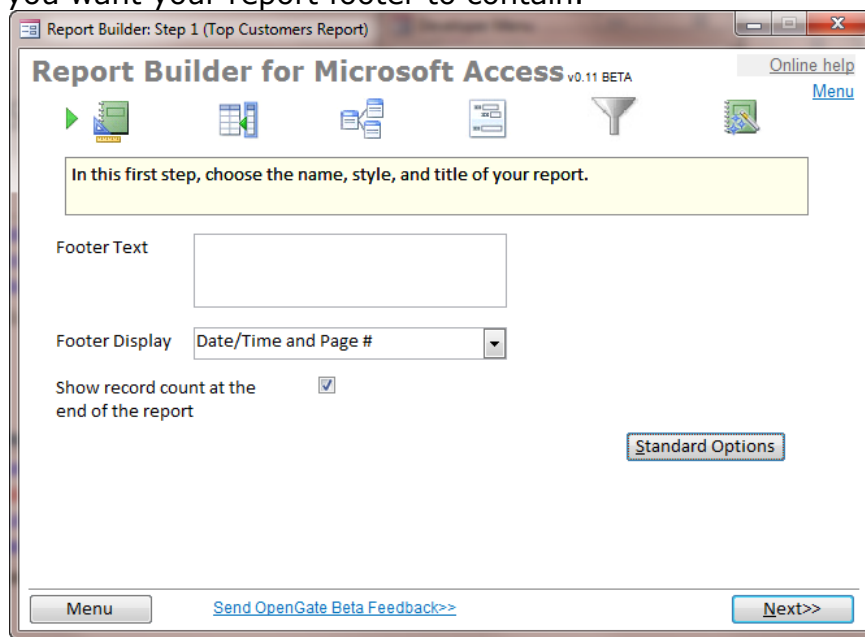
- Report Name The name of the report. This name will be used to create the actual report object (preceded by "rpt") in Access.
- Report Title The title that will appear at the top of the report.
- Data Source The source of data for the report. The data source can be a table, linked table, or query in your database.
- Orientation Select from several orientation options. By default, US Letter portrait is selected.

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- Logo** You can optionally choose to display a logo at the top left of your reports. You can select the browse icon to choose an image, or select from the list if you have previously chosen a logo for other reports.
- Category** You can optionally specify a category for the report. The category is informational only, and can be used to sort your reports in the main welcome screen.
- Style** Select from several report styles, or create your own. Additional guidance for creating and customizing styles can be found in the section [Report Styles](#).

### 3.2 FOOTER OPTIONS

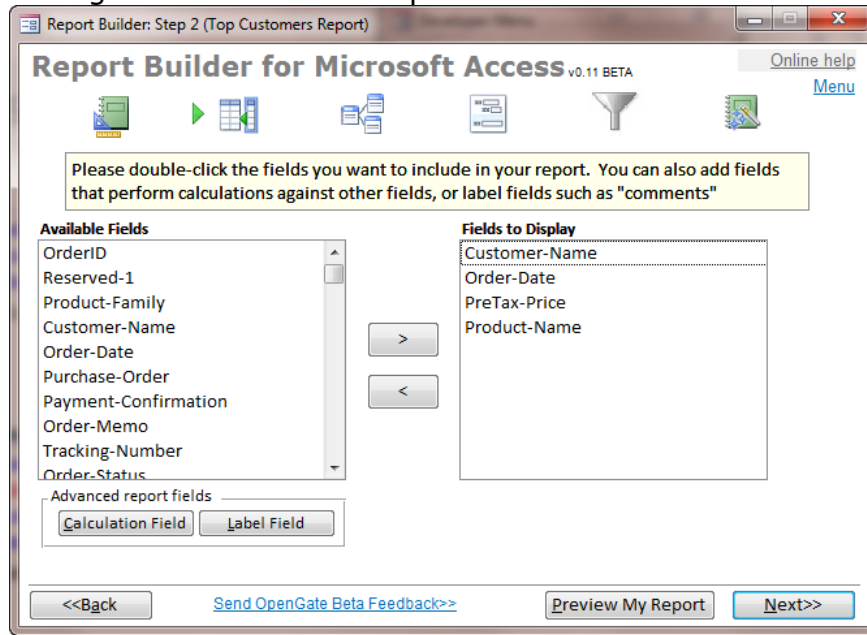
Select the "Footer Options" button to change to define what information you want your report footer to contain.



- Footer Text** You can display text, such as copyright or confidentiality notices at the bottom of the report by entering it here.
- Footer Display** Determines whether the footer includes date and/or page numbers.
- Show record count** If checked, the count of records displayed in the report will appear in the report footer.

### 3.3 ADDING FIELDS

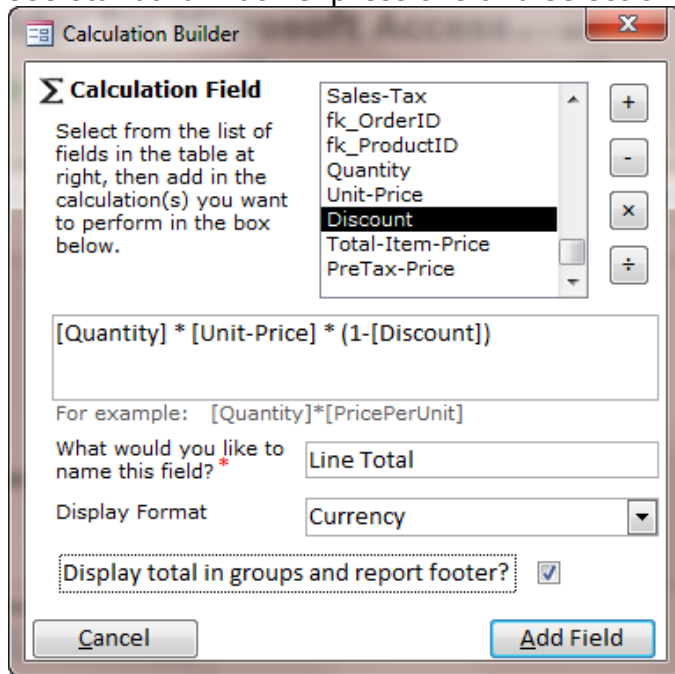
In the second step of the wizard, you can choose the fields you want to include in your report. You do not need to set the display order or other settings until the fourth step of the wizard.



#### 3.3.1 CALCULATED FIELDS

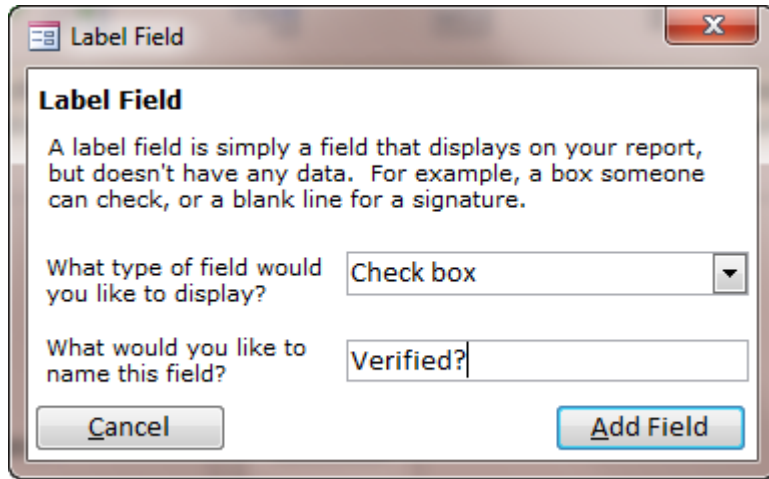
Report Builder can help you create special fields in your report that are calculated based on the values of one or more fields in the data source.

Use standard math expressions and select the field(s) from the list.



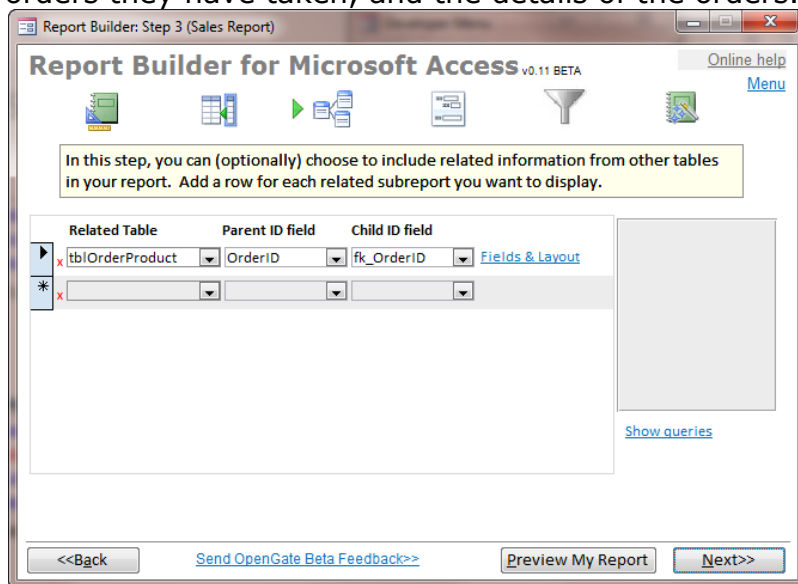
### 3.3.2 LABEL FIELDS

Report Builder allows you to create special fields in your report that do not contain data, but display a horizontal line or checkbox. For example, where you want someone to write their name on the printed report, or check off they have performed an activity.



### 3.4 CREATING SUBREPORTS

In the third step of the wizard, you can optionally add one or more subreports to your report. Subreports are useful in cases where you want to show related information available in other tables or queries. For example, for each sales representative, you might want to show the orders they have taken, and the details of the orders.



To begin, you will select the table that related to your report's main data source. If Access is aware of a relationship between the main data source and table you have selected, Report Builder will automatically fill in the Parent ID and Child ID fields. These indicate how the main report should be related to the subreport.

If Access is not aware of a relationship between your report's data source and other tables, refer to the section [Defining Relationships](#) below.

If you would like to use a query as the subreport's data source, select the "Show queries" hyperlink at the right of the screen.

### **3.4.1 DEFINING RELATIONSHIPS**

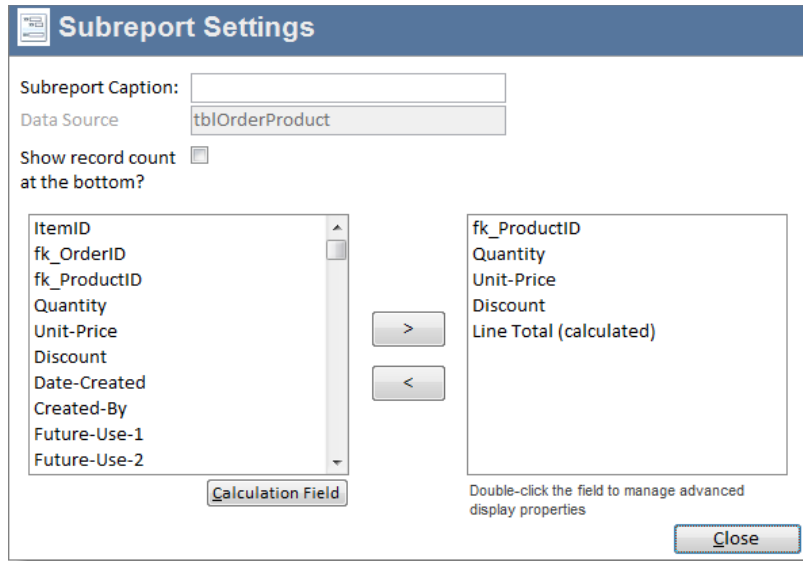
Relationships in Microsoft Access are used to define how tables relate to each other. While not critical to your database's operation, it can be helpful to define relationships to make it easier to work with queries, reports, and Report Builder. If you receive a notice that no relationships have been detected for your report's data source, you can select the "Edit Relationships" button to open the Access Relationship Manager. After making any changes, you can click the "Refresh" button to allow Report Builder to detect and show related tables.

For information on how to draw relationships between tables, please refer to this online tutorial (content provided by FunctionX.com): <http://www.functionx.com/access/Lesson36.htm>

If you decide not to edit relationships, you can click the "I'll manage manually" to see the list of all tables/queries available to use for your subreport(s).

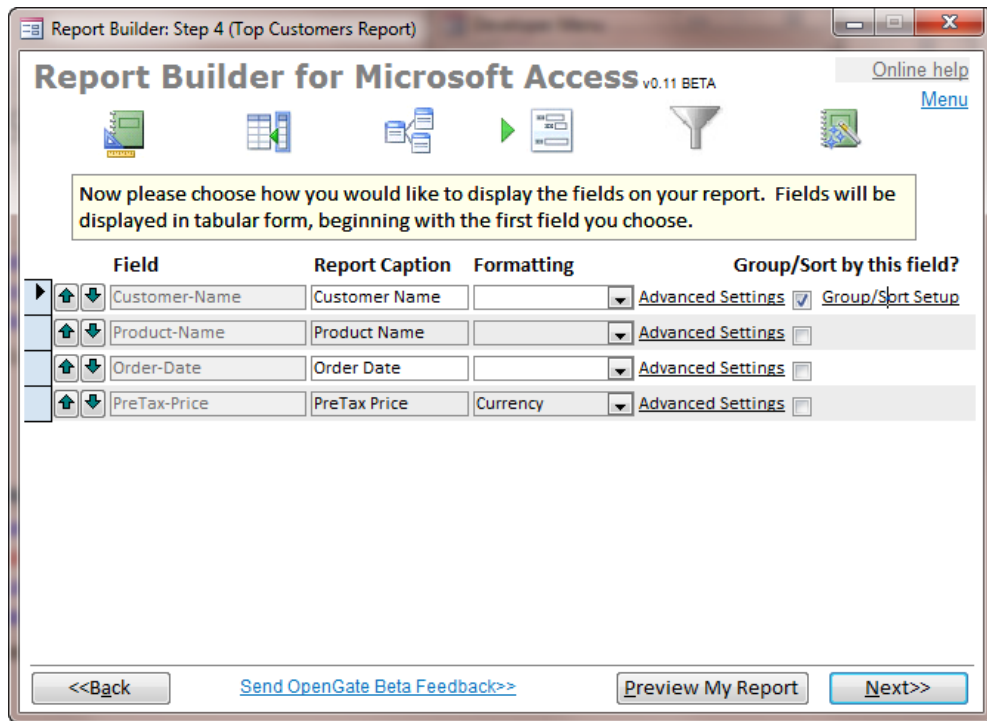
### **3.4.2 ADDING FIELDS TO YOUR SUBREPORT**

Select the "Fields & Layout" hyperlink to add the fields you want to display in your subreport.



### 3.5 FIELD GROUPING, SORTING, AND DISPLAY

The fourth step of the Report Builder wizard allows you to configure the appearance of your report fields.



#### 3.5.1 BASIC FIELD SETTINGS

- Report Caption            The field label that will be displayed in the report.
- Formatting                Based on the field type, you can select from one or more

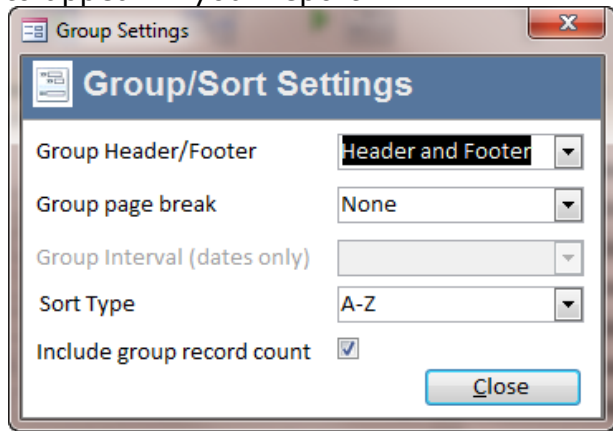
display formats. If your report uses a query for the data source, all formats will be listed.

Group/Sort by this field?

If checked, the report will be grouped and sorted by this field.

### 3.5.2 GROUPING AND SORTING

If you check the grouping/sorting box for a field, you can then select the Group/Sort Setup hyperlink to specify how you want the grouping to appear in your report.



Group Header/Footer

Select whether to display a header and/or footer for the group. If the header will be displayed, the field value will be displayed in the header.

Group page break

Choose whether to start a new page after the group changes value.

Group Interval

For data fields, you can choose whether to group by a specified date interval (e.g., month, quarter).

Sort Type

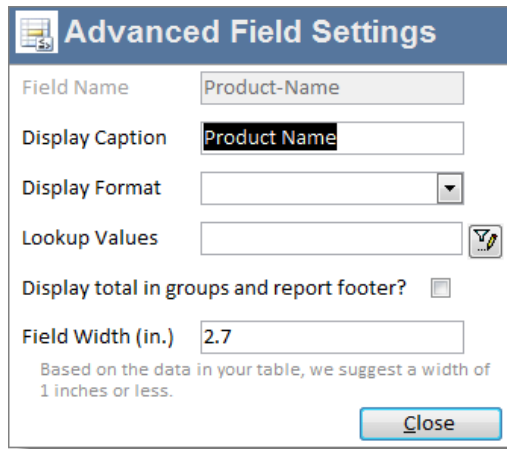
The default sort order is A-Z, but you can choose to sort from Z-to-A if desired.

Include group record count

If checked, the count of records will be displayed in the footer.

### 3.5.3 ADVANCED FIELD OPTIONS

Select the Advanced Settings hyperlink to further customize the look and feel of each field.



Display total in groups and footer?

If checked, the total of all rows will be displayed at the end of any groupings, and at the bottom of the report. This can only be used for numeric fields.

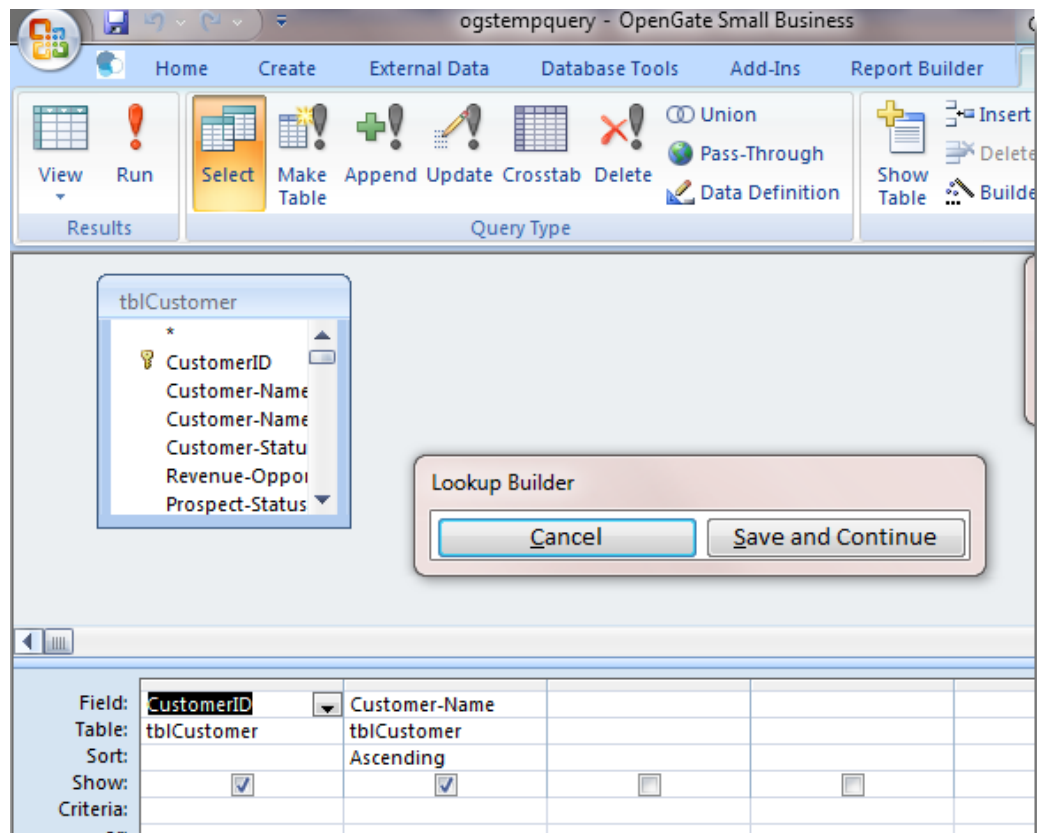
Field Width

Report Builder will automatically determine the best width for each field. You can however manually override the calculated width.

### 3.5.3.1 Configuring Lookup Fields

If a field is actually a foreign key (ID) that relates to another table, you can specify how you want the text to display in the report for that lookup field. When you click on the edit icon, the Query Designer will be opened. You can select the table where value will come from. You must have the first field be the unique ID field from the related table, and the second column of the query be the column from the table that you want to display in your report.

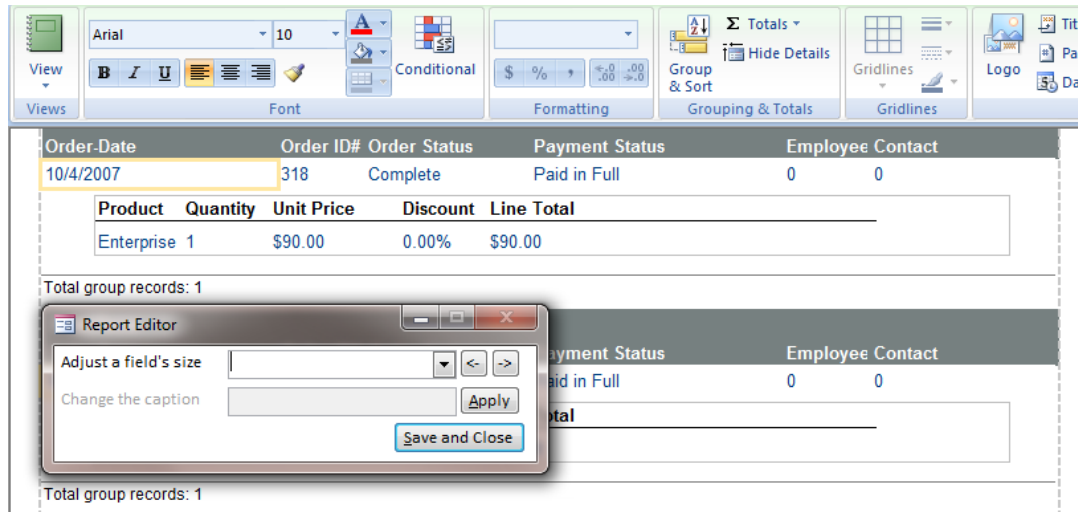
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When you are done editing the lookup query, select “Save and Continue” to save your work.

### 3.6 PREVIEWING YOUR REPORT

Most steps of the wizard will allow you to preview your report. Report Builder will create a preview version of your report, and display the Report Editor toolbar where you can make minor adjustments to the look and feel of the fields on your report.



### 3.7 REBUILDING REPORTS

After you have created your report, you can make any changes to the setup for that report. When you do so, Report Builder will let you know the report needs to be recreated to apply the new changes. If you click "Ok" the report object will be overwritten with the new changes. If you would like to keep any manual changes you've made outside of the Report Builder wizard, refer to "[Customizing Reports without Report Builder.](#)"

If you make changes to a style definition, you will need to recreate your reports that use that style. You can do so by holding down the Shift key while double-clicking the report name in the main menu screen.

## 4 Report Styles

Report Builder allows you to create and customize the display style of your reports through the Style Editor. The Style Editor can be launched from the first step of the Report Builder wizard. Once open, you can create and modify styles.

**Important!** Changes you make to a style will apply to any reports that are using that same style. In order to apply the changes to other reports, you will need to recreate them. Refer to "[Rebuilding Reports](#)" for additional information.

## 5 Customizing Reports without Report Builder

Once you have created a report with Report Builder, you can continue to make changes to the report using the Report Builder wizard. If you want

to make even more dramatic changes not supported by Report Builder, we suggest one of the two following methods:

- a) Create a new copy of your report and subreports and make changes to them. This will ensure Report Builder does not overwrite any changes you make if you decide to continue working with the report definition in Report Builder.
- b) Change the "Report Name" in Report Builder. This will cause Report Builder to create a brand new report object in the database when you click "Create My Report" or run the report from the Report Builder menu.

## 6 Frequent Questions

Question	Answer
How do I change the size of a field?	<a href="#">Advanced Field Options</a>
How do I change the format of a field?	<a href="#">Advanced Field Options</a>
How do I add page numbers?	<a href="#">Footer Options</a>
How do I sort fields in a report without grouping them?	Check the Group/Sort By This Field option in the field settings, then set the Group Header/Footer option to "None"
How can I group my report by Month or another date interval?	<a href="#">Grouping and Sorting</a>

## 7 Support Resources

### 7.1 OPENGATE SUPPORT

Should you need assistance with Report Builder or other OpenGate products, please visit our [support site](#), send an email to [support@opengatesw.net](mailto:support@opengatesw.net), or visit our [support forums](#) online.

### 7.2 GENERAL MICROSOFT ACCESS HELP

[UtterAccess.com](#) - Dedicated MS Access community

[AccessWeb](#) - Access examples and code snippets

[DatabaseDev.co.uk](#) - Access Tutorials, Articles, and Downloads

[Access 2007 Tutorials from Microsoft](#)