

# Utilizing Microsoft Access Forms and Reports

## The 2014 SAIR Conference – Workshop #3

October 4<sup>th</sup>, 2014



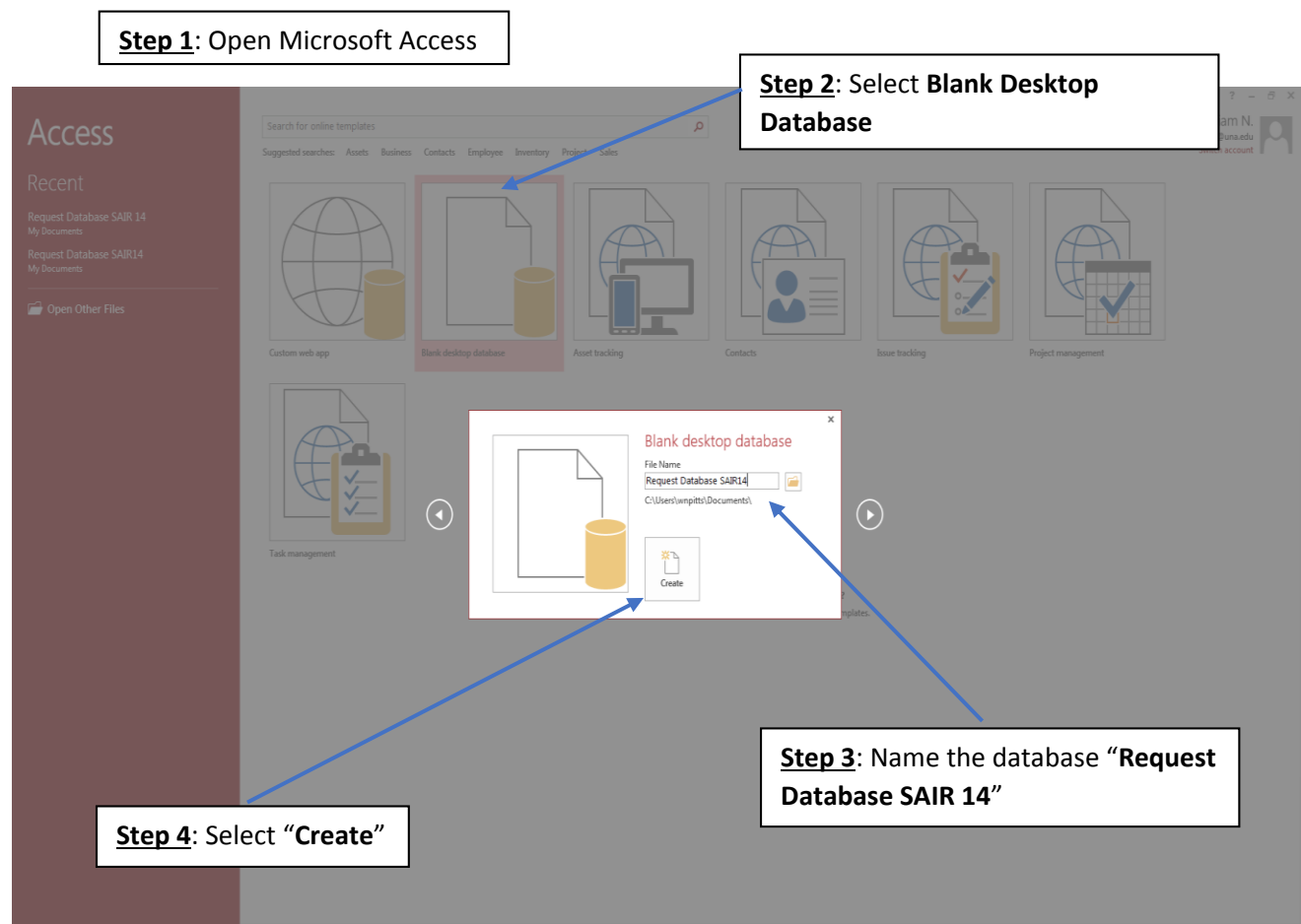
### Presented by:

Nathan Pitts (Sr. Research Analyst – The University of North Alabama)

Molly Vaughn (Associate Director of OIRPA – The University of North Alabama)



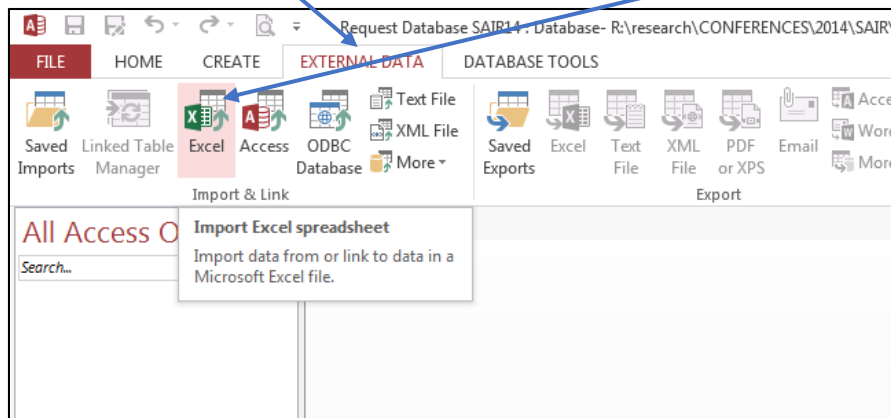
This workshop is designed to give an example of how to utilize Microsoft Access to create a Form that inputs data requests into a table. The workshop will also give a few examples of how to create reports that display selected information within a data request table. We will begin by importing a dummy set of data that we will use as our current request database.



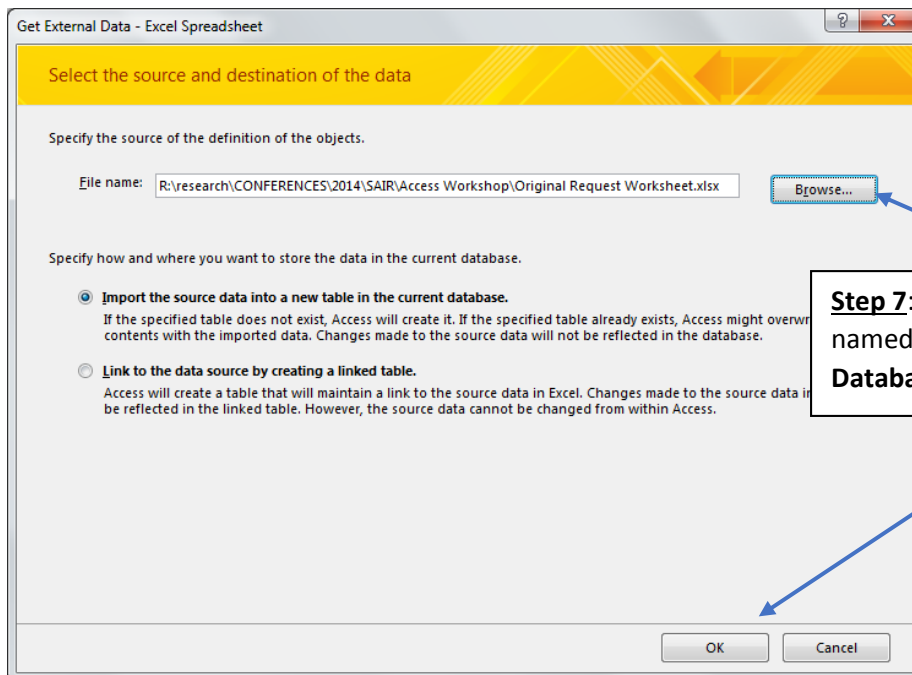
- A new database will be created.
- We will need to import an existing set of data that will serve as our data request log.

**Step 5:** Click on the **External Data** tab

**Step 6:** Select **Excel**



- This will bring up a window for you to browse and find your Excel spreadsheet, containing our request log. This document should be **saved** on your desktop and named **“Original Request Database”**.



**Step 7:** Browse and find the file named **“Original Request Database”**, then click **OK**.

- We will go through a few steps to import the spreadsheet.

**Step 8:** Be sure that this check box is checked, then click **Next**.

Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?

☒ First Row Contains Column Headings

	Req #	Date In	Due Date	Date Out	Type	Requester's Name	Requester's Department
1	IR0001	11/12/2013	11/12/2013	11/12/2013	Internal	Doug Reynolds	HR
2	IR0002	11/13/2013	1/15/2014	1/10/2014	External	Richard David	AAUP
3	IR0003	11/19/2013	11/20/2013	1/15/2014	Internal	Dr. Spurs	VPAA
4	IR0004	11/13/2013	11/15/2013	11/13/2013	Internal	Dr. Helio	OIRPA
5	IR0005	11/13/2013	11/13/2013	11/13/2013	Internal	Bonnie Billy	University Commun
6	IR0006	11/4/2013	11/29/2013	11/22/2013	Internal	Harry McCorkle	Education Technol
7	IR0007	12/4/2013	12/4/2013	12/4/2013	Internal	Hello Kitty	Ed Tech
8	IR0008	12/3/2013	1/3/2014	12/4/2013	External	Tammy Carter	ACHE
9	IR0009	12/2/2013	1/3/2014	1/9/2014	External	Brandy Rich	SACS Institutiona
10	IR0010	11/13/2013	1/15/2014	1/15/2014	Internal	Dr. Poker	Art
11	IR0011	11/1/2013	1/15/2014	1/7/2014	Internal	Dr. Tones	Music
12	IR0012	11/26/2013	1/16/2014	1/16/2014	Internal	Joy Borah	Social Work
13	IR0013	12/20/2013	2/14/2014	2/7/2014	Internal		Distance Learning
14	IR0014	12/20/2013	2/14/2014	2/10/2014	Internal	Dr. Helio	OIRPA

Cancel < Back **Next >** Finish

- This step translates the first row of our spreadsheet into Column headers.
- If you are importing a spreadsheet into Access, it is important to ensure that you do not have more than one row of column headers.

- The window below allows us to specify the data type for each field in our dataset, once we import them into access as a table. We will need to change 2 fields' data types.

You can specify information about each of the fields you are importing. Select fields in the area below. You can then modify field information in the 'Field Options' area.

Field Options

Field Name:  Data Type:

Indexed:  ☐ Do not import

Notes:

1	281PT Gr = 657TOTAL = 6931TOTAL F
2	
3	rate the report.
4	
5	
6	
7	
8	
9	3th of january.
10	
11	
12	
13	
14	

File Location

Cancel < Back Next > Finish

**Step 10:** Select the first field "Req#" and under the "Indexed" option, Select "Yes (no duplicates)". Then click Next.

**Step 9:** Scroll over until you see the field "File Location" and change the Data Type to "Hyperlink". You may also change the field "Requester's Email" to Hyperlink.

- We want to index the field "Req#" because that field will be our unique identifier. Also, we do not want any duplicates for this field, for obvious reasons.
- We chose to change the field "File Location" to a hyperlink, because we will link our final report for each request (if possible) from where it is stored on our computer or shared drive to the database.

**Step 11:** Choose “No primary key.” and click **Next**.

Import Spreadsheet Wizard

Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.

☐ Let Access add primary key.  
☐ Choose my own primary key.  
☒ No primary key.

	Req #	Date In	Due Date	Date Out	Type	Requester's Name	Requester's Depart
1	IR0001	11/12/2013	11/12/2013	11/12/2013	Internal	Doug Reynolds	HR
2	IR0002	11/13/2013	1/15/2014	1/10/2014	External	Richard David	AAUP
3	IR0003	11/19/2013	11/20/2013	1/15/2014	Internal	Dr. Spurs	VPAA
4	IR0004	11/13/2013	11/15/2013	11/13/2013	Internal	Dr. Helio	OIRPA
5	IR0005	11/13/2013	11/13/2013	11/13/2013	Internal	Bonnie Billy	University Commun
6	IR0006	11/4/2013	11/29/2013	11/22/2013	Internal	Harry McCorkle	Education Technol
7	IR0007	12/4/2013	12/4/2013	12/4/2013	Internal	Hello Kitty	Ed Tech
8	IR0008	12/3/2013	1/3/2014	12/4/2013	External	Tammy Carter	ACHE
9	IR0009	12/2/2013	1/3/2014	1/9/2014	External	Brandy Rich	SACS Institutiona
10	IR0010	11/13/2013	1/15/2014	1/15/2014	Internal	Dr. Poker	Art
11	IR0011	11/1/2013	1/15/2014	1/7/2014	Internal	Dr. Tones	Music
12	IR0012	11/26/2013	1/16/2014	1/16/2014	Internal	Joy Borah	Social Work
13	IR0013	12/20/2013	2/14/2014	2/7/2014	Internal		Distance Learning
14	IR0014	12/20/2013	2/14/2014	2/10/2014	Internal	Dr. Helio	OIRPA

Cancel < Back Next > Finish

Import Spreadsheet Wizard

That's all the information the wizard needs to import your data.

Import to Table:  
Request Database

☐ I would like a wizard to analyze my table after importing the data.

Cancel < Back Next > Finish

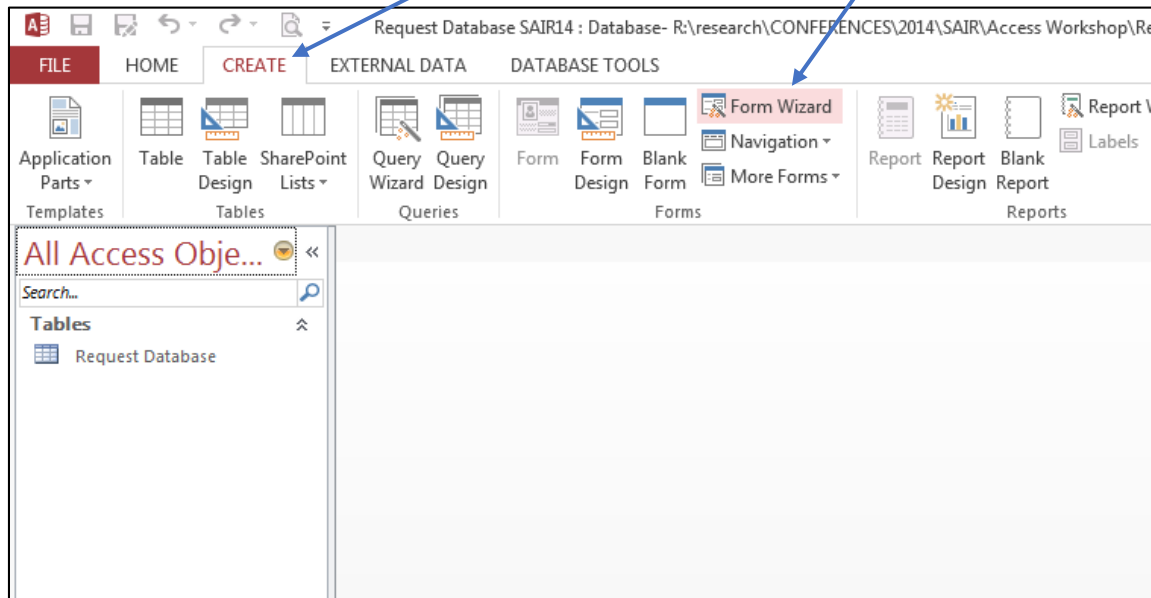
**Step 12:** Name the Table “Request Database” and click the **Finish** button.

- Our dataset should now be imported and ready to use.

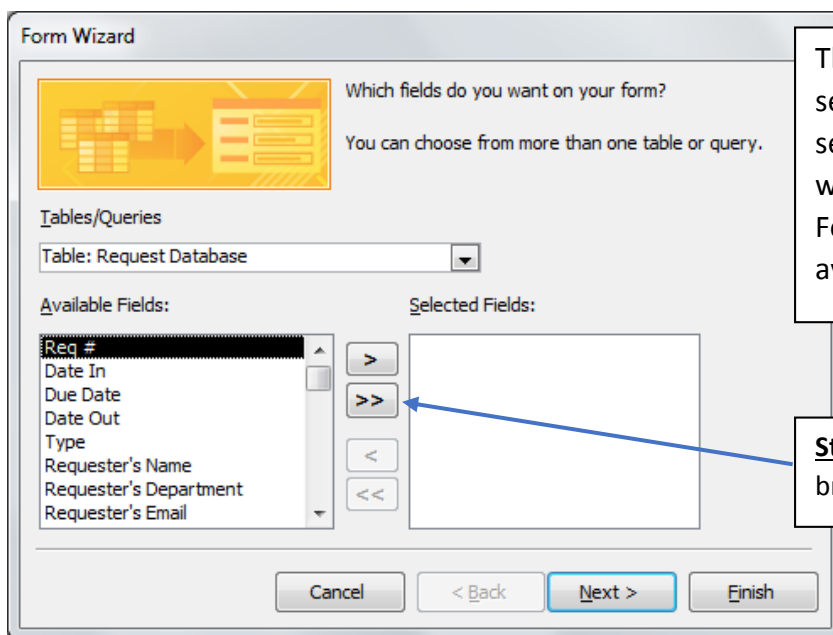
## Creating a Form to Enter New Data Requests

- We need to create a form that will allow us to enter new data requests and edit information regarding all data requests as they are updated and completed.
- We will utilize the **Form Wizard** to create a Request Database Form.

**Step 1:** Select the **CREATE** tab and then select **Form Wizard**.



- The Form Wizard window will magically appear.



This first screen allows us to select which of the fields in the selected Table or Query that we would like to populate our Form. We want all of the available fields in our Form.

**Step 2:** Select the >> button to bring in all fields.

**Form Wizard**

Which fields do you want on your form?  
You can choose from more than one table or query.

Tables/Queries  
Table: Request Database

Available Fields:

Selected Fields:

- Requester's Email
- Requester's Phone
- Request Description
- Assigned To:
- Completed By:
- Hours to Complete:
- Notes:
- File Location

Cancel < Back **Next >** Finish

**Step 3:** Once all fields are selected, click **Next**.

**Form Wizard**

What layout would you like for your form?

Columnar  
Tabular  
Datasheet  
**Justified**

Cancel < Back **Next >** Finish

Here we can decide the basic layout type of our form.

**Step 4:** Select **Justified**, then click **Next**.

**Step 5:** Title the form “Data Request Form”.

**Step 6:** Be sure “Open the form...” is selected, then click **Finish**.

Form Wizard

What title do you want for your form?

Data Request Form

That's all the information the wizard needs to create your form.

Do you want to open the form or modify the form's design?

☒ Open the form to view or enter information.

☐ Modify the form's design.

Cancel < Back Next > Finish

- Below is the form we have created. As you can see, there is a lot to be desired in terms of presentation i.e. formatting.

Request Database SAJR14 : Database- R:\research\CONFERENCES\2014\SAJR\Access Workshop\Request Database SAJR14.accdb (Access 2007 - 2013 file format) - Access

Pitts, William N.

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

View Paste Copy Cut Paste Format Painter Views Clipboard

Filter Ascending Descending Selection Advanced Refresh All Save New Totals Spelling Find Replace Go To Select Text Formatting

All Access Objects Search...

Tables Request Database

Forms Data Request Form

Data Request Form

Req # R0001

Date In 11/12/2013 Due Date 11/12/2013 Date Out 11/12/2013

Type Internal

Requester's Name Doug Reynolds

Requester's Department HR

Requester's Email IR0001@uni.edu

Requester's Phone

Record: 14 of 25

Form View NUM LOCK

- The Form is currently in “Form View”. In order to make edits to the form’s design and general layout, we will be switching between these 3 Views.

**Step 7:** Select the **Home** tab.

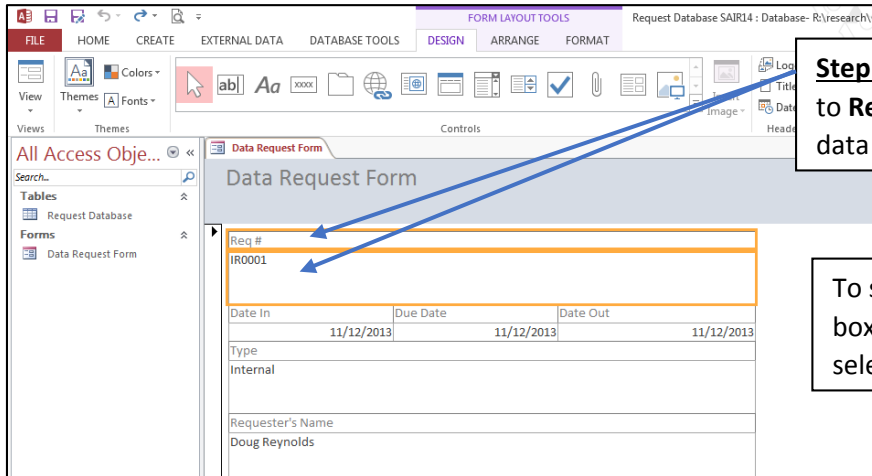
**Step 8:** Click on the pull-down arrow and Select **Design View**.

- Below is the form in **Design View**.

In Design View, the Header, Detail and Footer sections are much more distinct and editing is easier here than in Layout View.

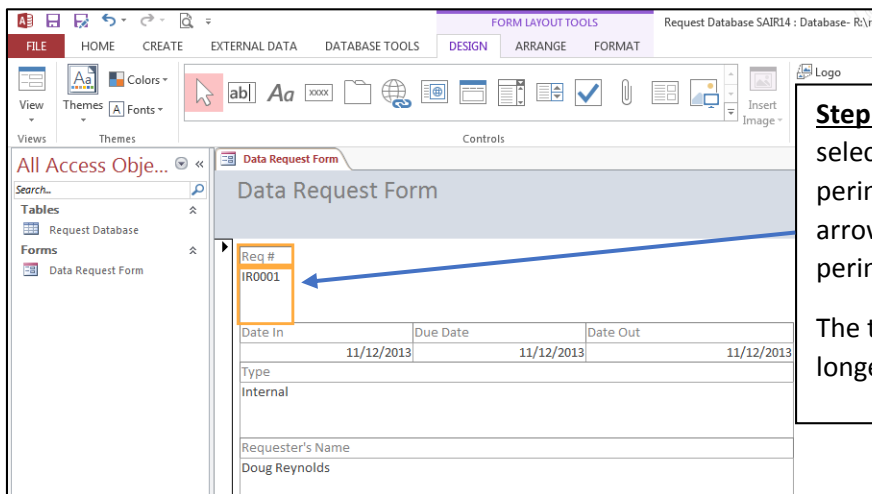
Each field has a Text Description text box and a text box containing that field’s data for each record.

- Switch back to **Layout View**
- It is easier to adjust the width of text boxes when in the Layout View, since you can actually see an example of the data contained in each box.



**Step 9:** Select both boxes related to **Req#** (the field name and the data field below).

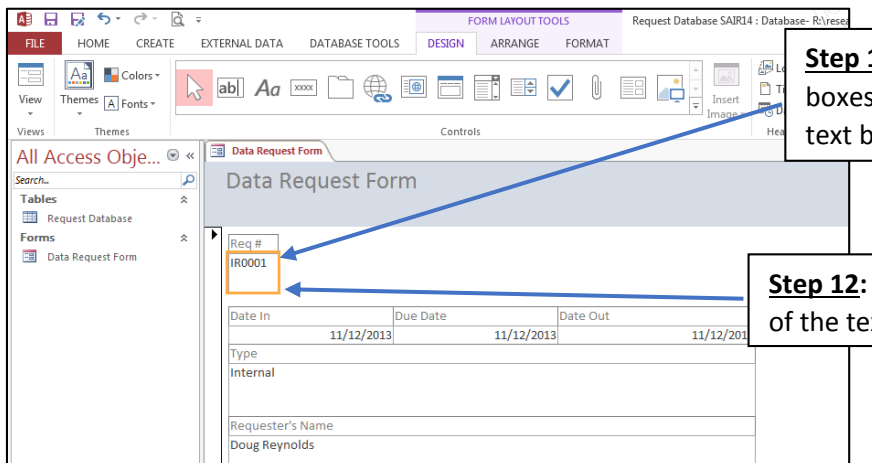
To select multiple objects, select a box, hold the Control key, and select additional boxes.



**Step 10:** With both boxes selected, hover over the right perimeter of the boxes until the arrow line appears. **Drag** the right perimeter to the left.

The total width should be just longer than the text within.

- Next, let's adjust the height of the data text box.



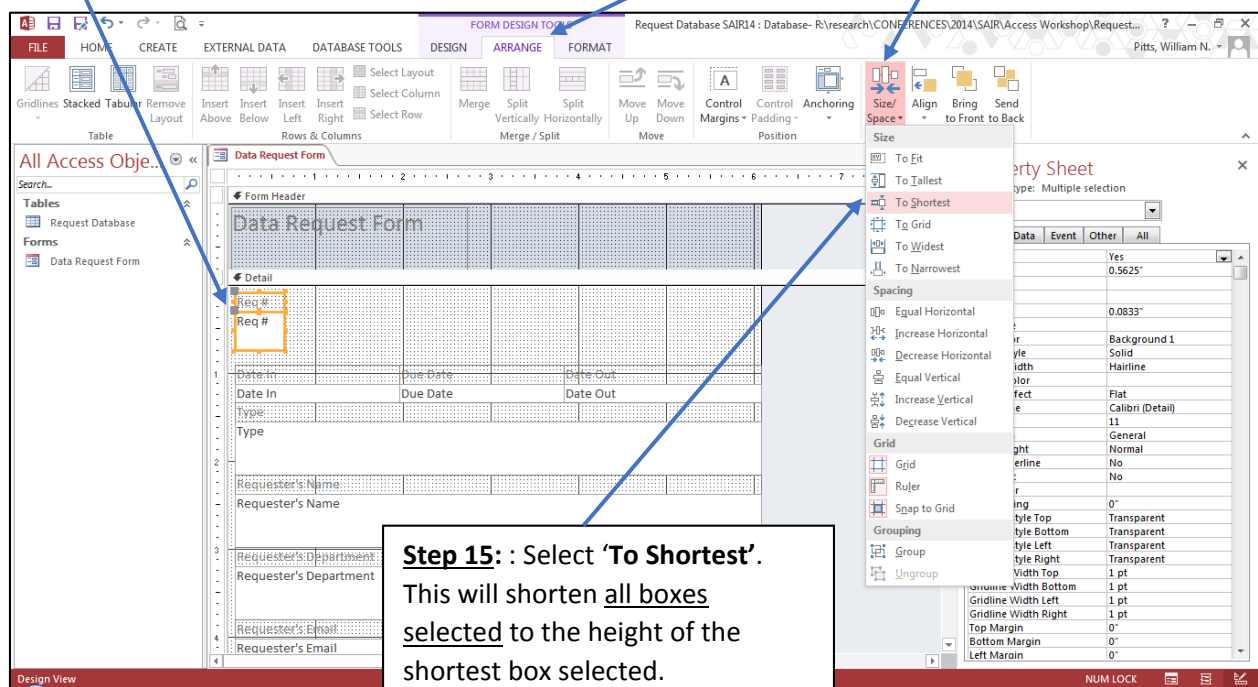
**Step 11:** Click off of the selected boxes and then select the bottom text box.

**Step 12:** Hover over the bottom of the text box and drag it up.

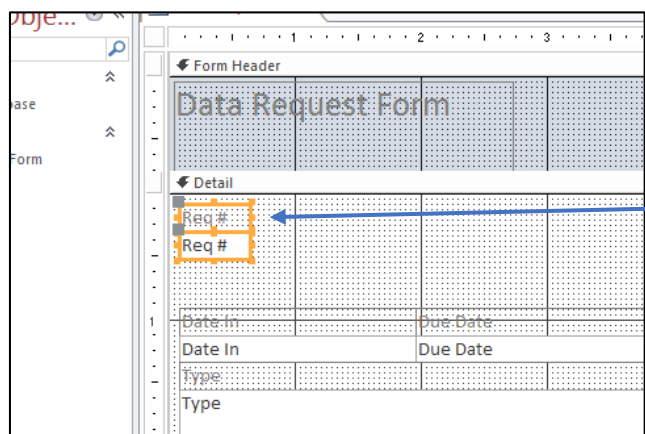
- If we want to make the data box the same height as the description box above it, we should switch over to design view, where there are tools that simplify this.

**Step 13:** Select both fields related to **Req#**

**Step 14:** Under the 'Arrange' tab select 'Size/Space'



**Step 15:** Select 'To Shortest'. This will shorten all boxes selected to the height of the shortest box selected.



Now the boxes should be the same height.

- Switch back to **Layout View**.

**Step 16:** Select one of the date fields (name and data box) and make it the width that you would like.

The screenshot shows the 'Data Request Form' in Design View. The 'Date In' field is selected, and its width is being adjusted. The form contains fields for 'Req #', 'Date In', 'Due Date', 'Date Out', 'Type', 'Requester's Name', and 'Requester's Department'.

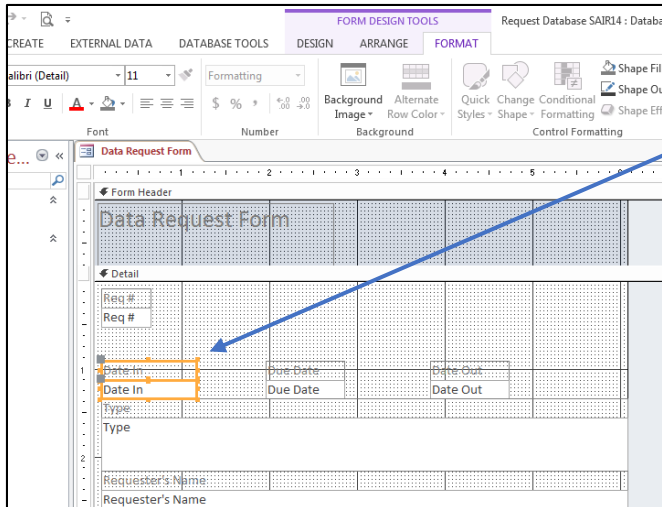
The screenshot shows the 'Data Request Form' in Design View with the 'Property Sheet' open. The 'Due Date' and 'Date Out' fields are selected, and their widths are being adjusted. The 'Property Sheet' shows the 'Width' property for the selected fields.

**Step 17:** Select the **Design** tab and open the **Property Sheet**.

**Step 18:** Select the date box you narrowed and **copy** the **width** value found in the **Property Sheet**.

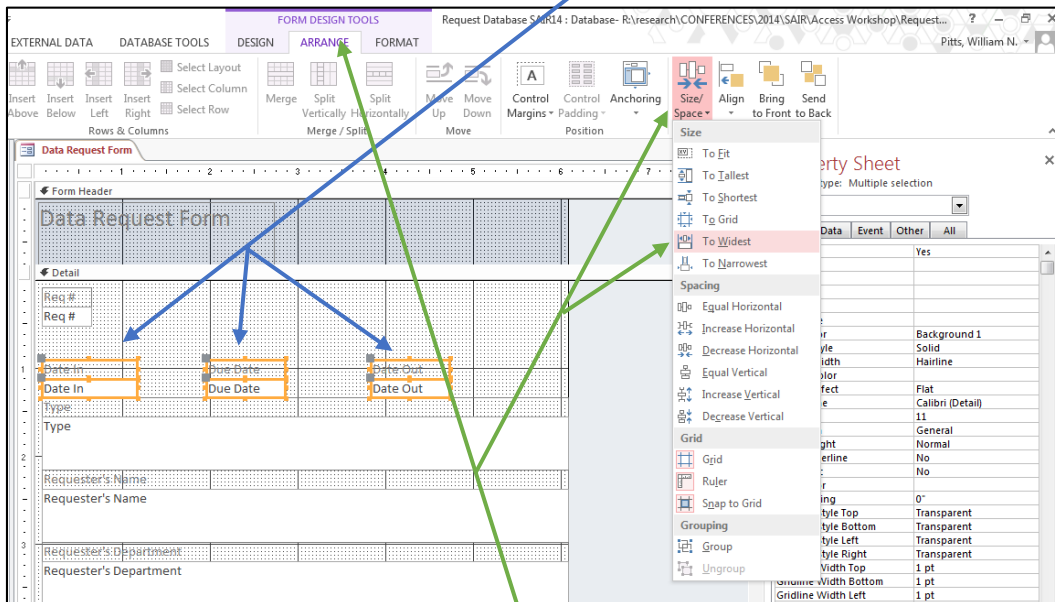
**Step 19:** Select the other four date boxes and **Paste** the width value in the width line of the **Property Sheet**. Then press **Enter**.

- This is one of several ways to ensure equally wide boxes. This may also be accomplished in the **Design View** by utilizing the '**Size/Space**' commands.
- Let's switch back over to the **Design View** (Home tab → View) to use this option.

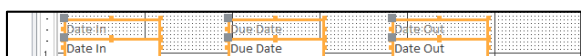


**Step 20:** Select the field name and the field data boxes for “Date In” and slightly increase their width by dragging their right border slightly to the right.

**Step 21:** Select all date related fields.

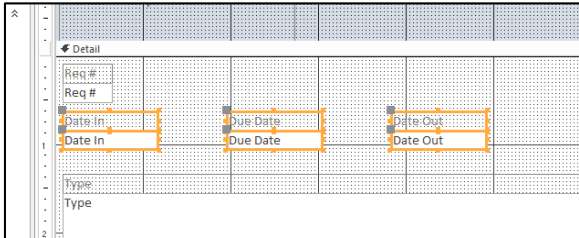


**Step 22:** Under the **Arrange** tab, Select **Size/Space** and then **To Widest**.



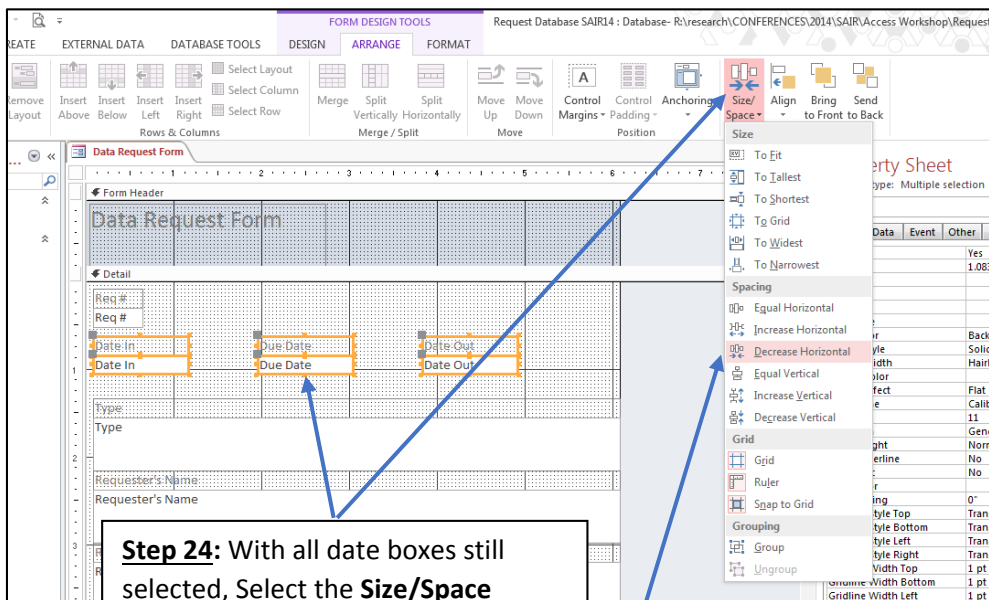
This will, of course, increase the width of the other date boxes to the width of the ‘Date In’ boxes.

- While they are all selected, we are going to move the date related boxes higher and closer to the Request # field.



**Step 23:** Left click in one of the boxes (The double crossed arrows should be visible), hold down and move boxes up to the desired position.

- Let's explore some other options within the **Size/Space** toolbox.

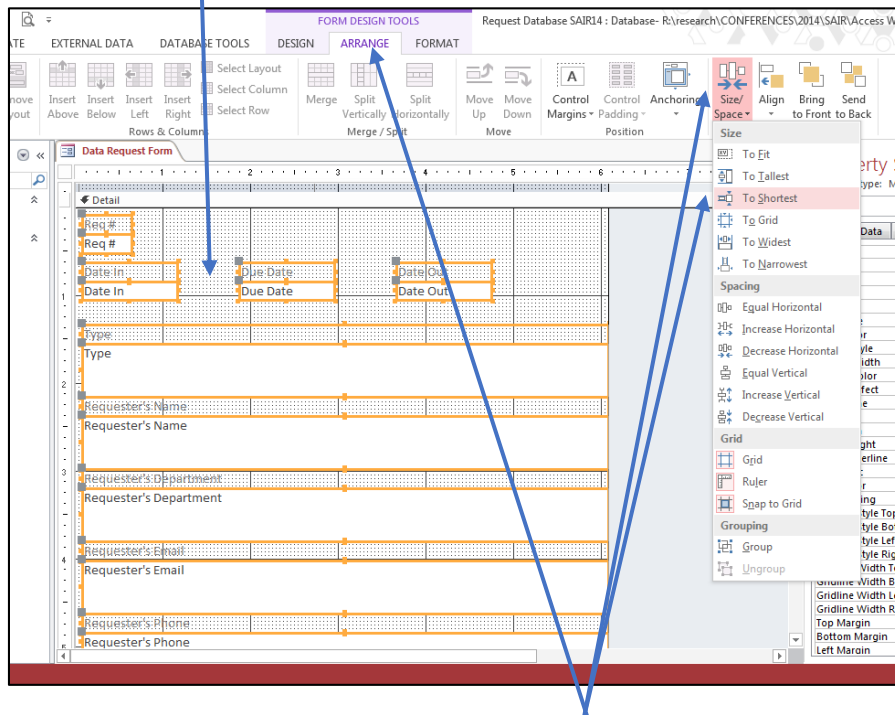


**Step 24:** With all date boxes still selected, Select the **Size/Space** option.

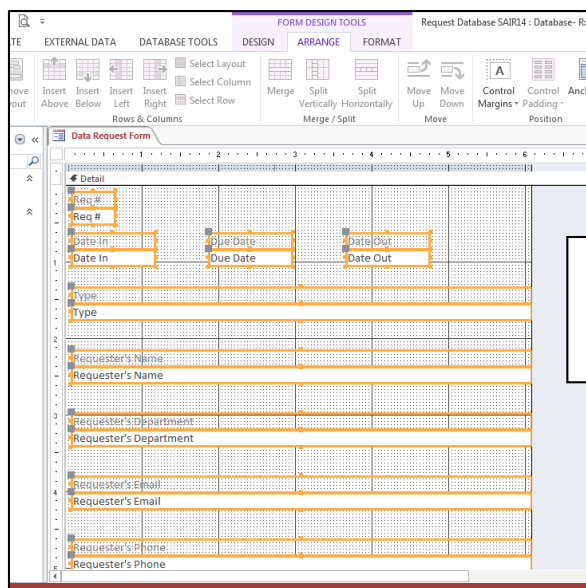
**Step 25:** Select **Decrease Horizontal**. This will decrease the horizontal distance between the selected boxes.

- Next, we need to decrease the height of several data text boxes.

**Step 26:** Select all boxes in the **Detail** section, except the **Request Description** and **Notes** fields.

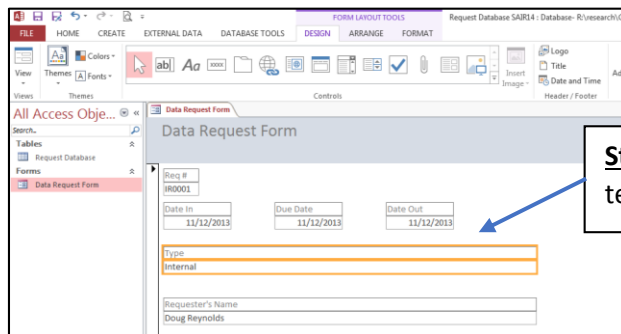


**Step 27:** Under the **Arrange** tab, select **Size/Space** and then select **To Shortest**.

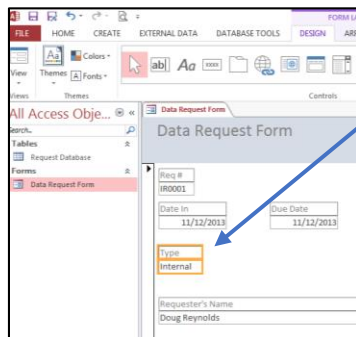


This will decrease the height of all selected boxes to the height of the shortest selected box.

- Next, we need to decrease the width of most of the fields. To ensure we have the proper width for each field, we need to see that data displayed for each field.
- Switch back over to **Layout View**.

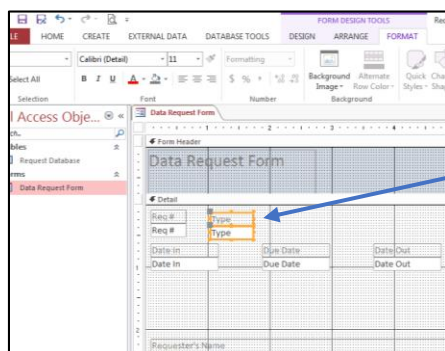


**Step 28:** Select the field name and data field text boxes related to 'Type'.

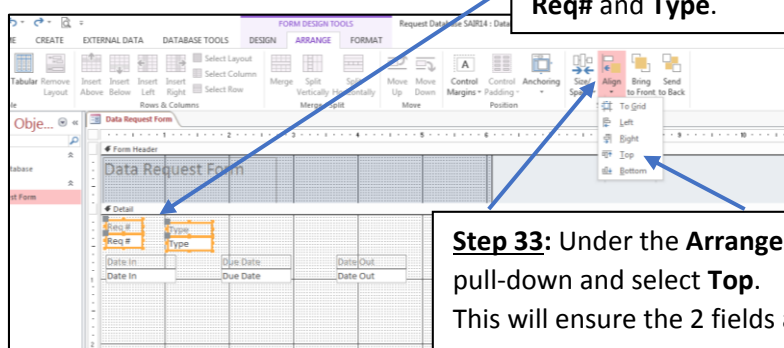


**Step 29:** Decrease the width of these boxes to the appropriate size by hovering over the right perimeter and dragging it to the left.

**Step 30:** Switch back to **Design View**

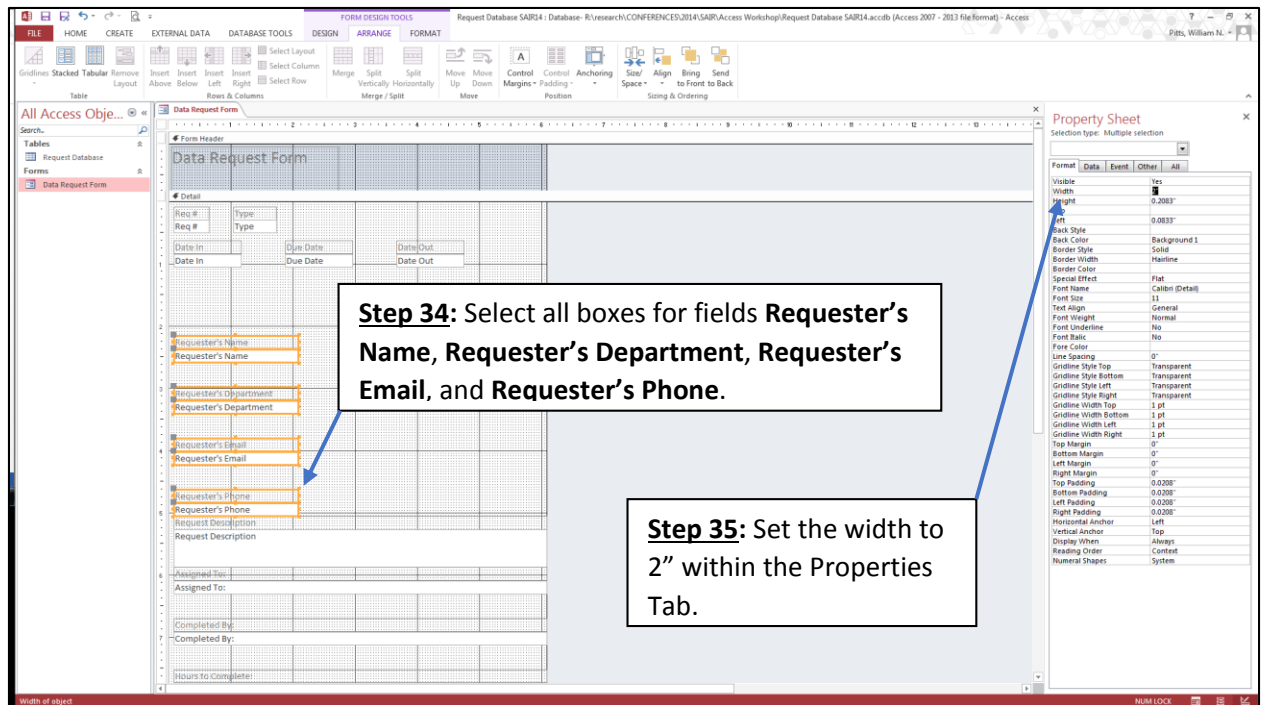


**Step 31:** With both **Type** boxes selected, drag these boxes up and to the right of the **Req#** boxes.

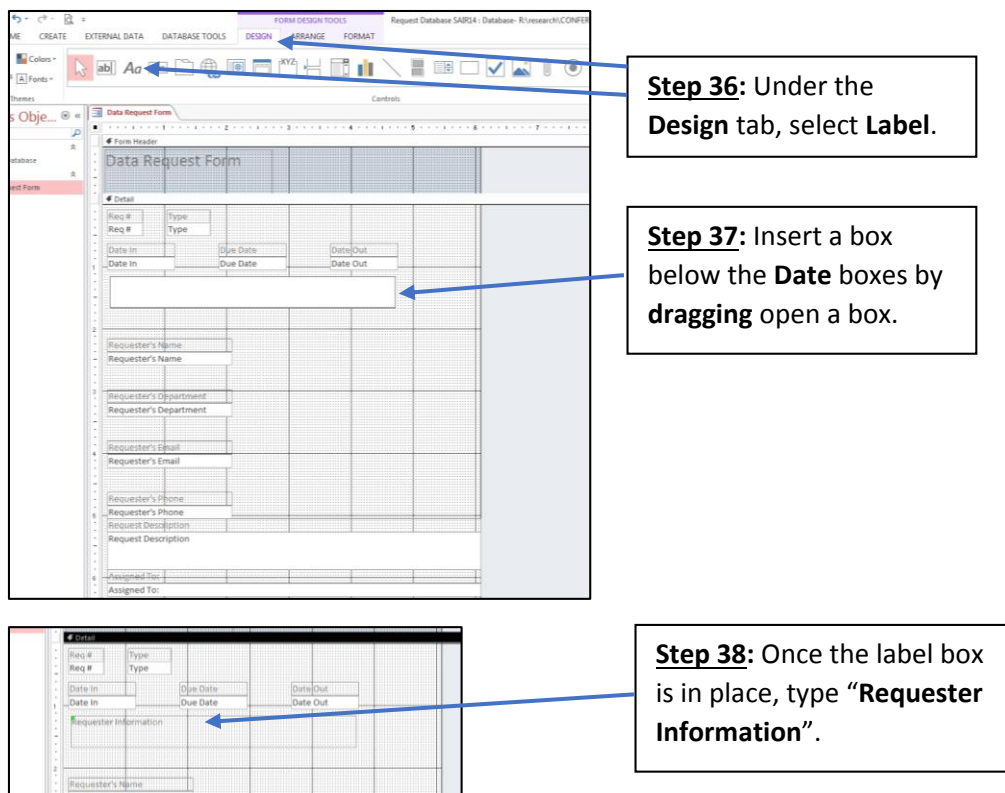


**Step 32:** Select all boxes related to **Req#** and **Type**.

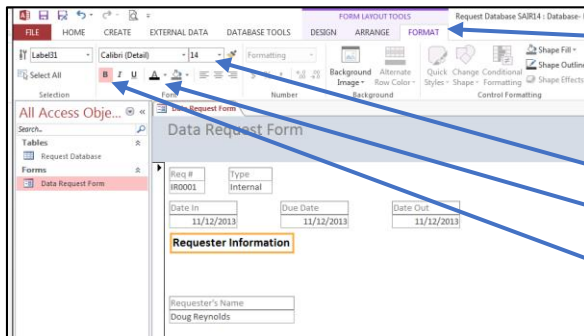
**Step 33:** Under the **Arrange** tab, select the **Align** pull-down and select **Top**. This will ensure the 2 fields are at equal heights.



- We would like to add text above the Requester related information and have it read “Requester Information”, creatively enough.



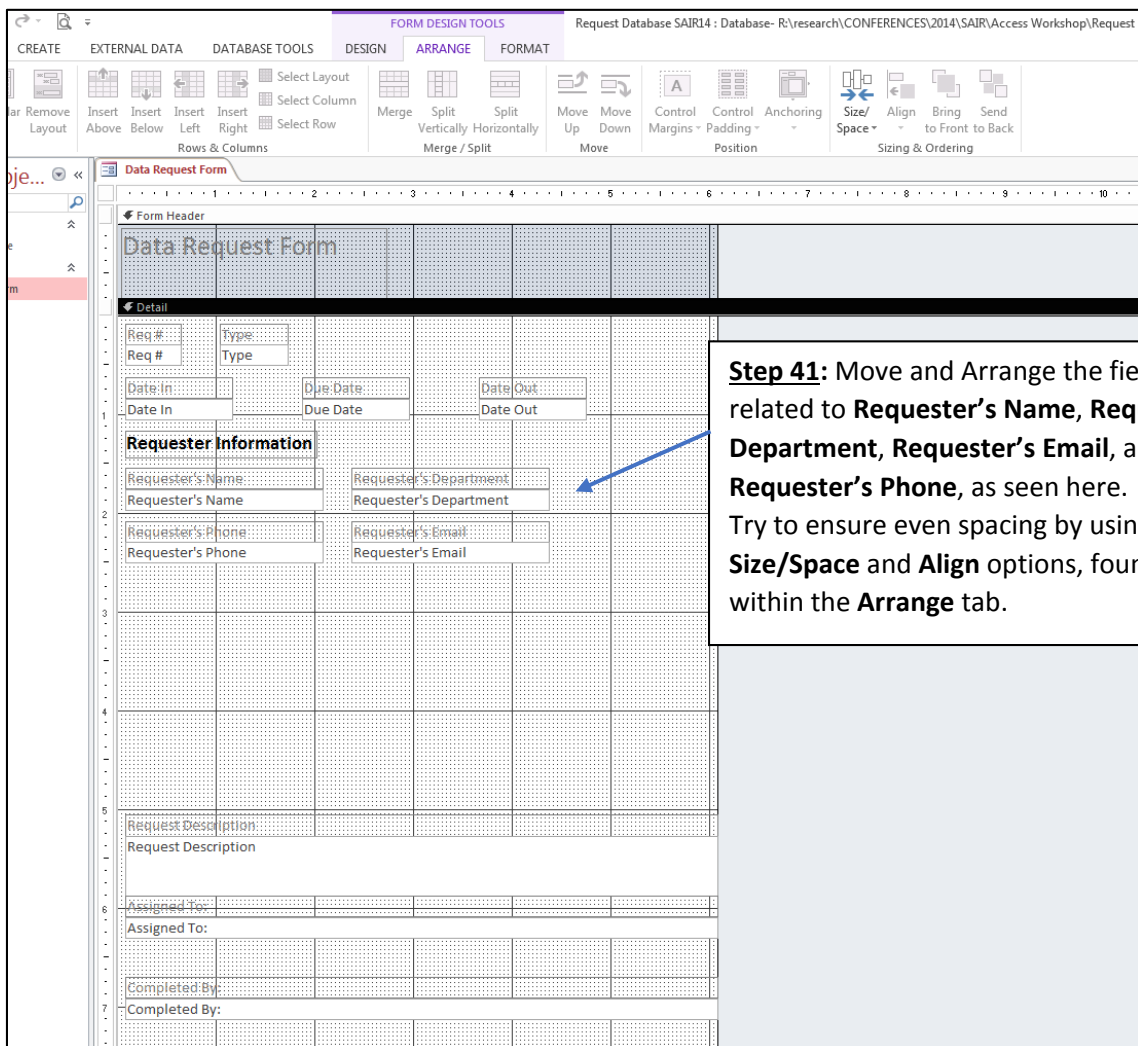
- We need to format the text that we just entered, so let's switch over to the **Layout View**.



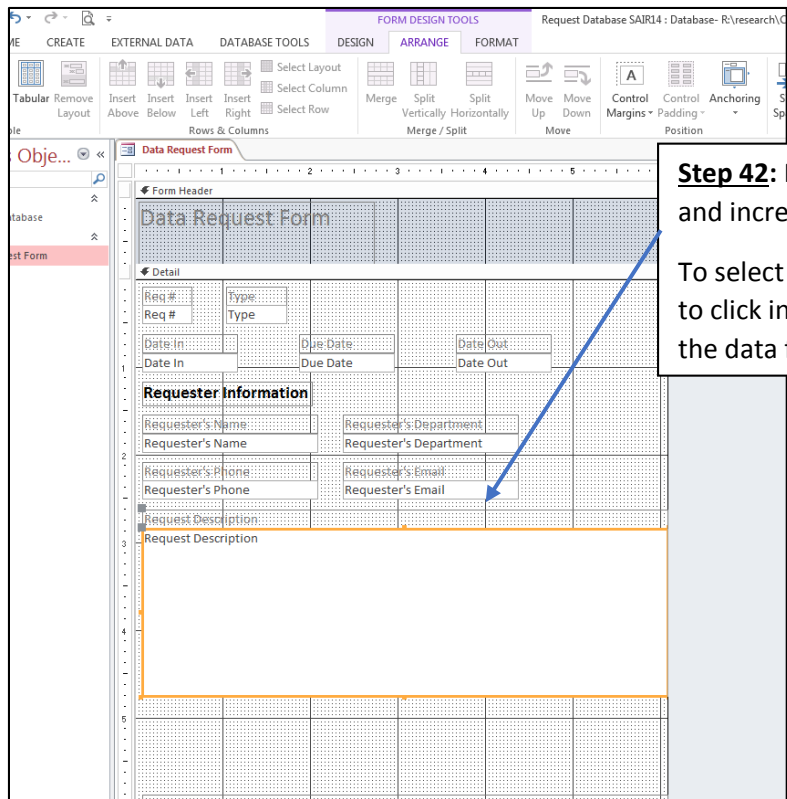
**Step 39:** Make sure the new text box is highlighted and select the **FORMAT** tab.

**Step 40:** Within the Font section of the FORMAT tab, change the **Font Size** to **14** and change the **Font Color** to **Black**. Also, **Bold** the text.

- We need to finish arranging the Request related text boxes. Let's **switch** over to **Design View** to do this.



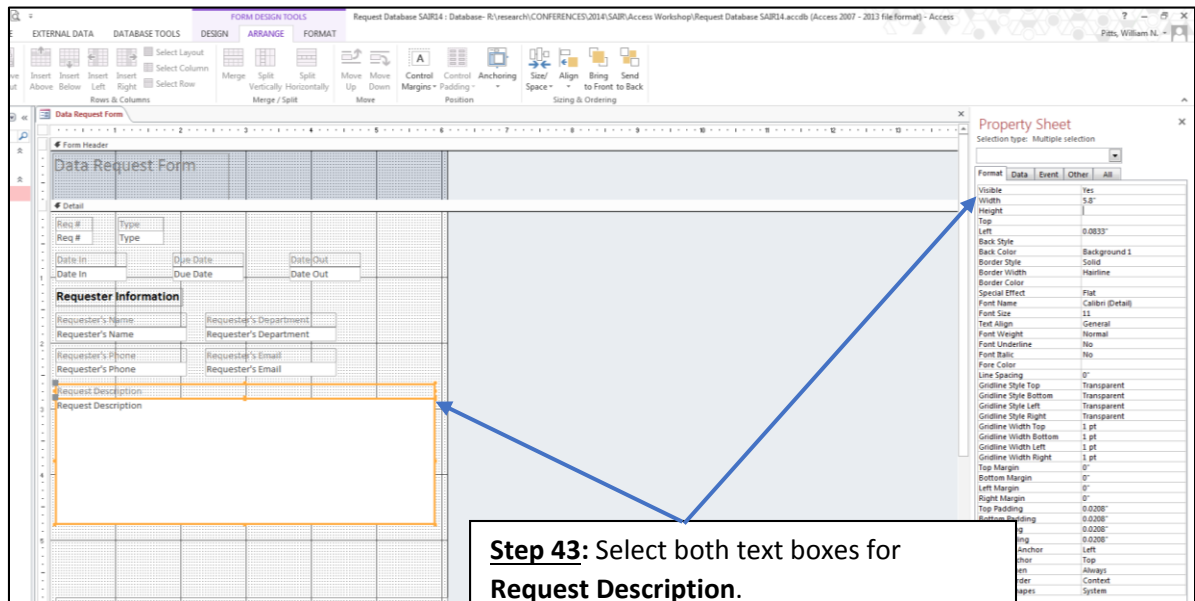
**Step 41:** Move and Arrange the fields related to **Requester's Name**, **Requester's Department**, **Requester's Email**, and **Requester's Phone**, as seen here. Try to ensure even spacing by using the **Size/Space** and **Align** options, found within the **Arrange** tab.



**Step 42:** Move **Request Description** up and increase the **height** of the data field.

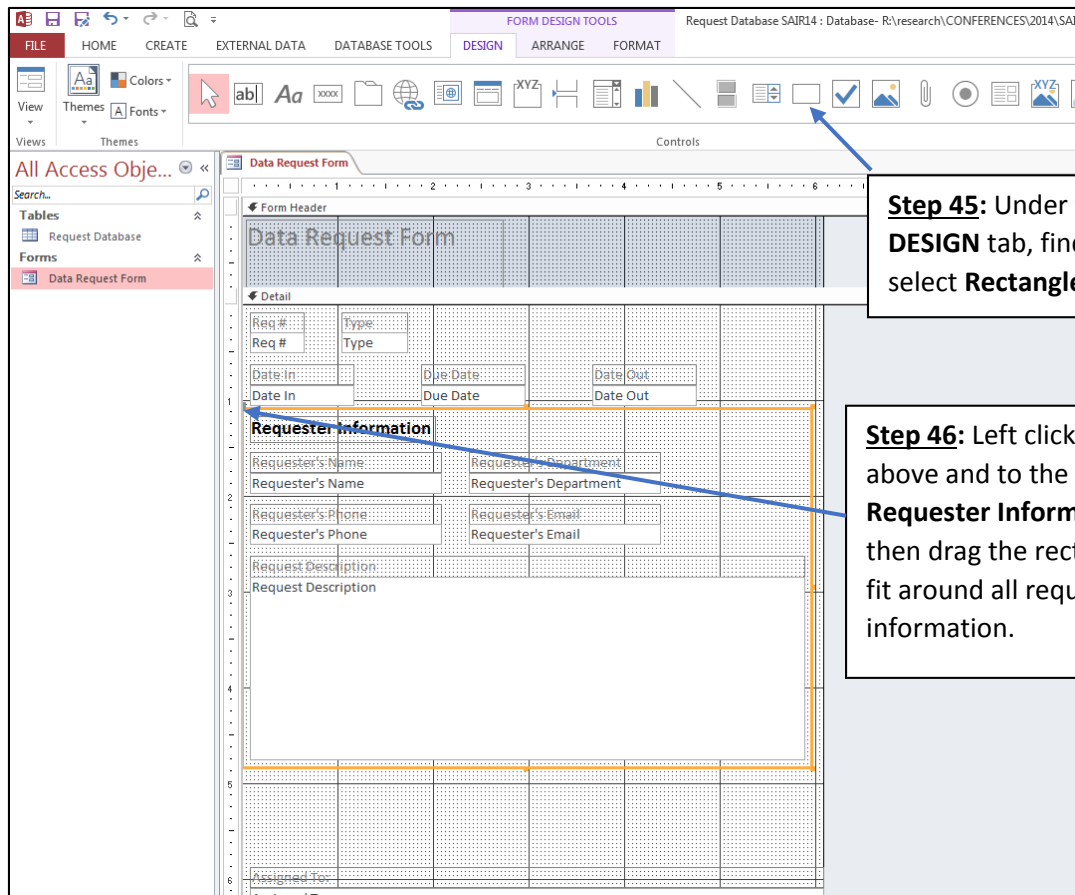
To select only the data field, you will need to click into the grid and then back onto the data field before you adjust the size.

- The text boxes for **Request Description** border the right edge of the page. We need to slightly reduce the width, in order to place a rectangle (in the following step) around all Requester Information.



**Step 43:** Select both text boxes for **Request Description**.

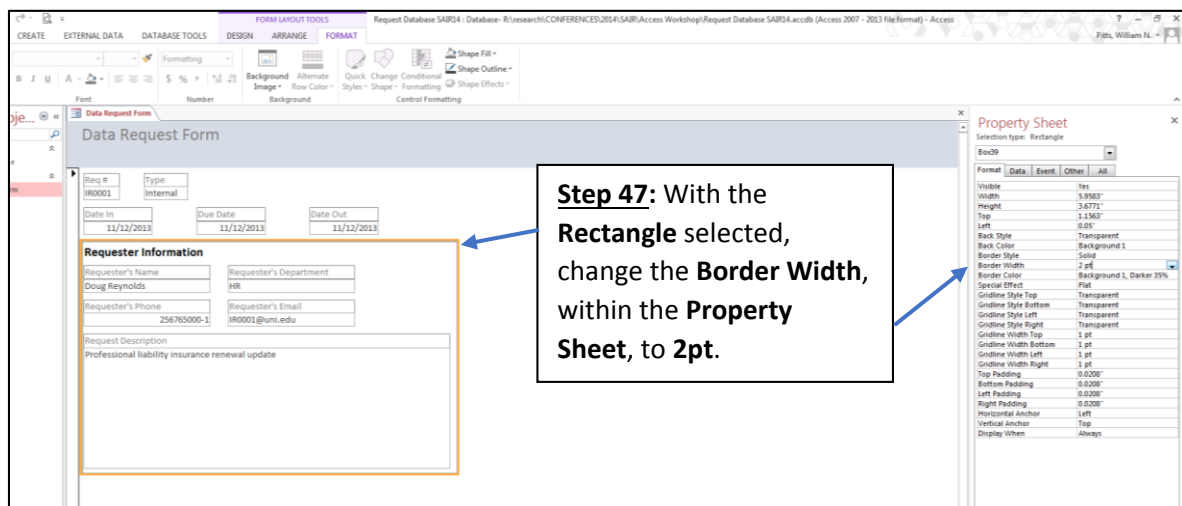
**Step 44:** In the **Property Sheet** enter **5.8** as the width.



**Step 45:** Under the **DESIGN** tab, find and select **Rectangle**.

**Step 46:** Left click just above and to the left of **Requester Information**, then drag the rectangle to fit around all requester information.

- Let's increase the **Border Width** of the **Rectangle** surrounding the requester's data.
- To do so, let's switch back over to **Layout View**, so that we can get a better perspective of the form's look.



**Step 47:** With the **Rectangle** selected, change the **Border Width**, within the **Property Sheet**, to 2pt.

Request Database SAIR14 : Database- R:\research

FORM DESIGN TOOLS

CREATE EXTERNAL DATA DATABASE TOOLS DESIGN ARRANGE FORMAT

ular Remove Layout Insert Above Insert Below Insert Left Insert Right Select Layout Select Column Select Row Merge Split Split Move Move Control Control Anchoring  
Vertically Horizontally Up Down Margins Padding Position

bje... Data Request Form

Detail

Req #	Type				
Req #	Type				
Date In	Due Date	Date Out			
Date In	Due Date	Date Out			
<b>Requester Information</b>					
Requester's Name	Requester's Department				
Requester's Name	Requester's Department				
Requester's Phone	Requester's Email				
Requester's Phone	Requester's Email				
Request Description					
Request Description					
Assigned To:	Completed By:	Hours to Complete			
Assigned To:	Completed By:	Hours to Complete			
Notes:					
Notes:					
File Location:					
File Location					

**Step 48:** Arrange the fields **Assigned To:**, **Completed By:**, **Hours to Complete**, as seen here.

**Step 49:** Arrange the fields **Notes:** and **File Location**, as seen here.

- **Save** and **Close** the form.

- We need the text boxes for **Request Description** and **Notes** to hold more information than they currently hold. We brought those fields in originally as “Short Text” data types, which only hold a maximum of 255 characters. These are the fields where we may have a lot to enter. We’ll need to change their data type to “Long Text”, which can hold up to 64,000 characters.

**Step 50:** Open the table **Request Database** and select the **Design View** option.

Short Text fields only 255 characters .

Field Name	Data Type
Request	Short Text
Date In	Date/Time
Due Date	Date/Time
Date Out	Date/Time
Type	Short Text
Requester's Name	Short Text
Requester's Department	Short Text
Requester's Email	Short Text
Requester's Phone	Number
Request Description	Short Text
Assigned To:	Short Text
Completed By:	Short Text
Hours to Complete:	Number
Notes:	Short Text
File Location	Hyperlink

Property	Value
Field Size	255
Format	
Input Mask	
Caption	
Default Value	
Validation Rule	
Validation Text	
Required	No
Allow Zero Length	Yes
Indexed	Yes (No Duplicates)
Unicode Compression	No
IME Mode	No Control
IME Sentence Mode	None
Text Align	General

Design view. F6 = Switch panes. F1 = Help.

**Step 51:** Simply change the **Data Type** from **Short Text** to **Long Text** for fields **Request Description** and **Notes**:

**Step 52:** Save and Close the table.

Field Name	Data Type
Req #	Short Text
Date In	Date/Time
Due Date	Date/Time
Date Out	Date/Time
Type	Short Text
Requester's Name	Short Text
Requester's Department	Short Text
Requester's Email	Short Text
Requester's Phone	Number
Request Description	Long Text
Assigned To:	Short Text
Completed By:	Short Text
Hours to Complete:	Number
Notes:	Long Text
File Location	Short Text

Field Properties for 'Notes':

Property	Value
Format	@
Caption	
Default Value	
Validation Rule	
Validation Text	
Required	No
Allow Zero Length	Yes
Indexed	No
Unicode Compression	No
IME Mode	No Control
IME Sentence Mode	None
Text Format	Plain Text
Text Align	General
Append Only	No

Design view. F6 = Switch panes. F1 = Help.

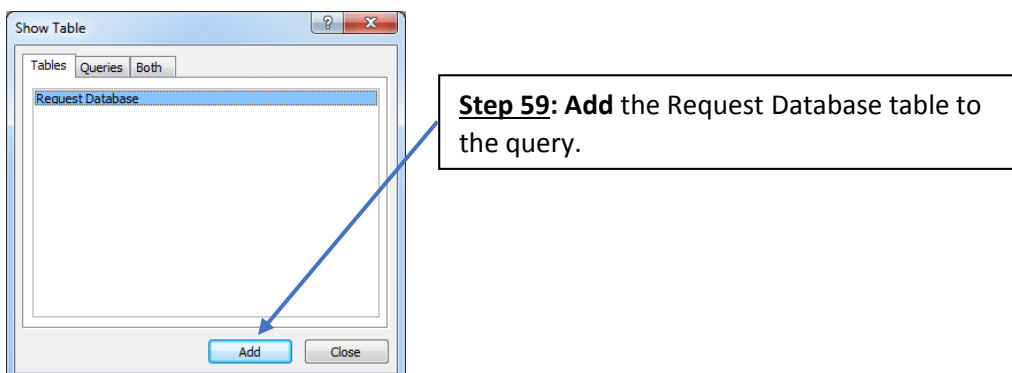
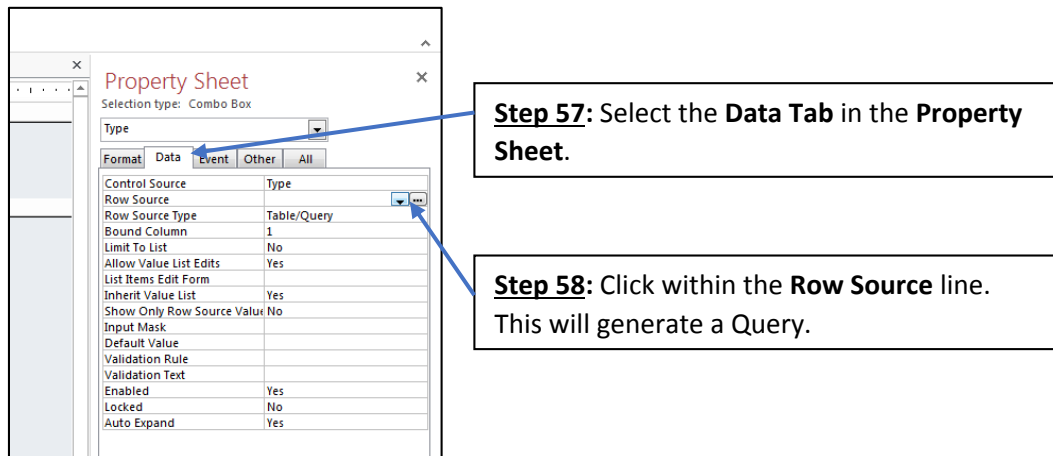
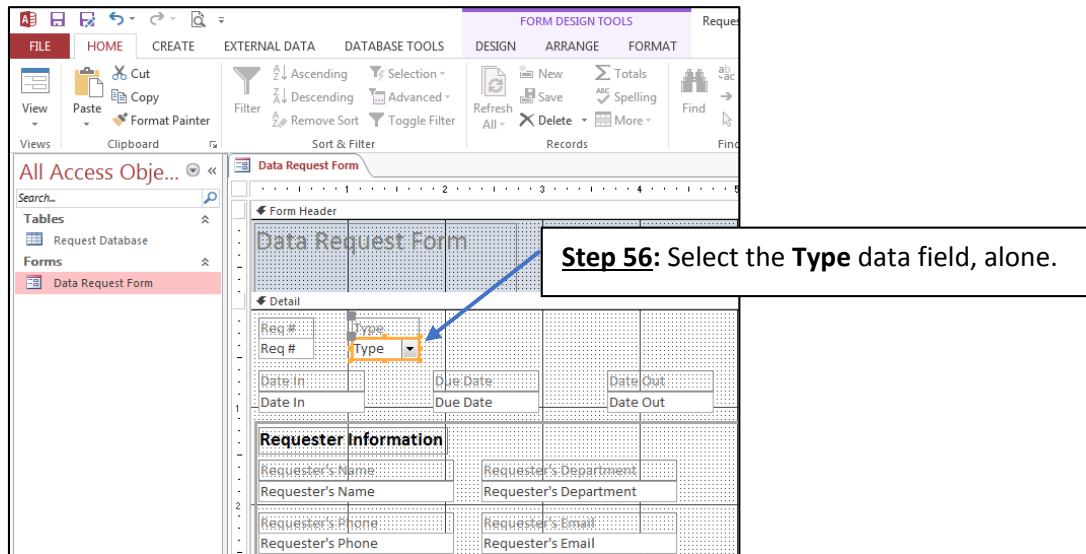
- We want the fields **Type**, **Assigned To**, and **Completed By** to be **Combo Boxes** that use drop down choices. This ensures data consistency for these fields. We need to change these fields' data boxes from simple text boxes to **combo boxes**, which will enable the drop-down choices feature.
- Let's open our **Data Request Form** and switch over to the **Design View**.

**Step 53:** Right-click on the **Type** data field.

**Step 54:** Select **Change To** and then select **Combo Box**.

**Step 55:** Repeat Steps 53 and 54 for the fields **Assigned To** and **Completed By**.

- Now that we have turned these text boxes into combo boxes, we need to populate the drop-down choices with data previously used in these fields.
- To do this we will utilize a query function that groups by these fields' current data.
- Also, as we add new data requests that may be completed by a new person, we will add to the drop-down choices.



**Step 60:**  
Double-click or drag the field **Type** into the bottom of the query.

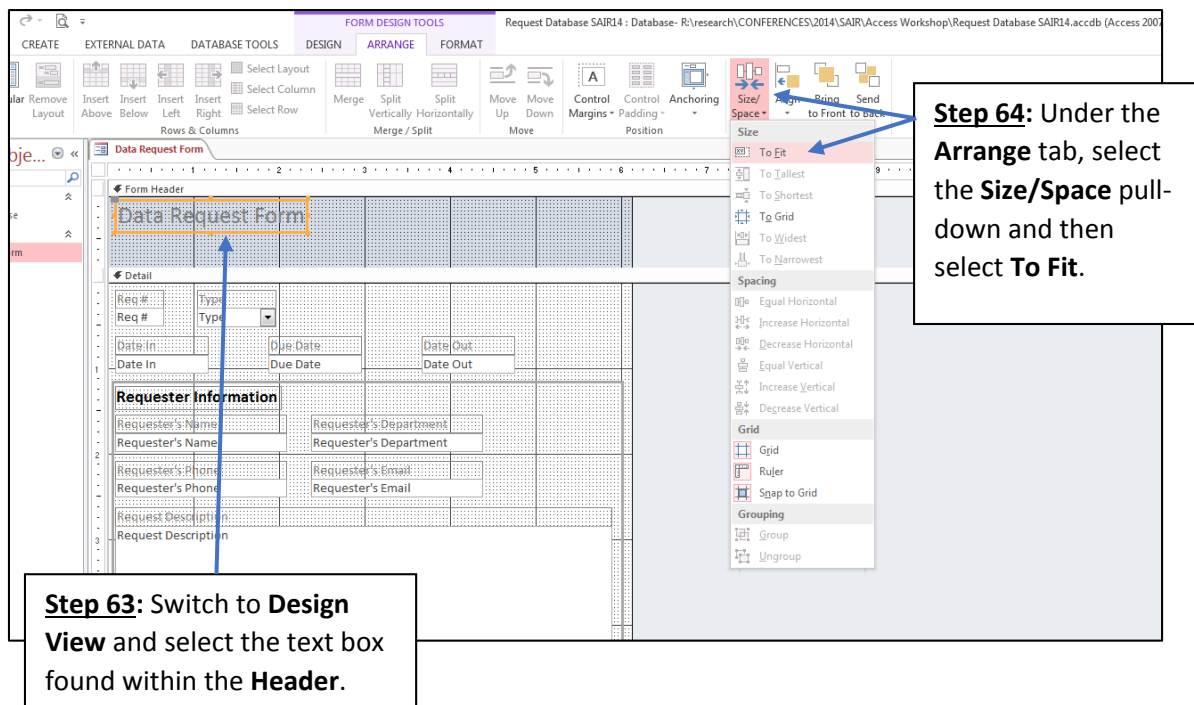
**Step 61:** Select the **Totals** button in the **Design** tab.  
This will allow us to **Group By** the **Type** field.

If you view this query's results, you will see that it returns two lines, **Internal** and **External**. These will be the available choices in our drop-down for the field **Type**.

**Step 62:** Close and Save this query by clicking the **Black X** in the top right and corner of the query box.

- Repeat Step 56 – 62 for the fields **Assigned To** and **Completed By**.

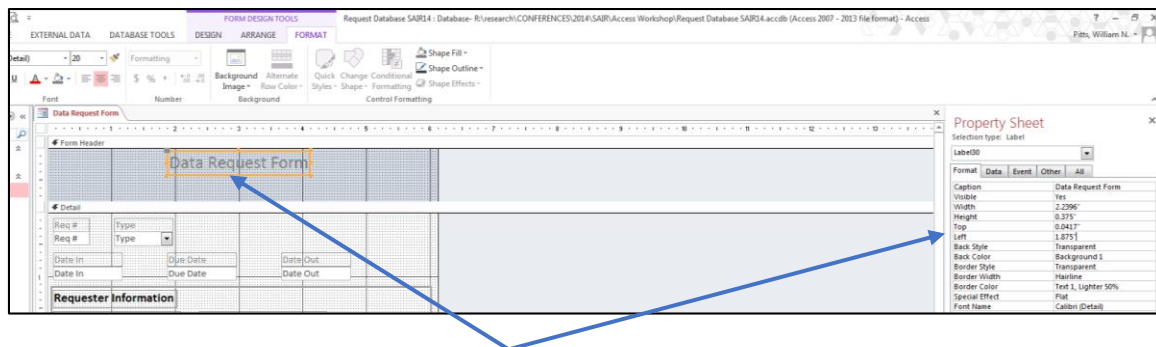
- Now let's format the Header section



**Step 63:** Switch to **Design View** and select the text box found within the **Header**.

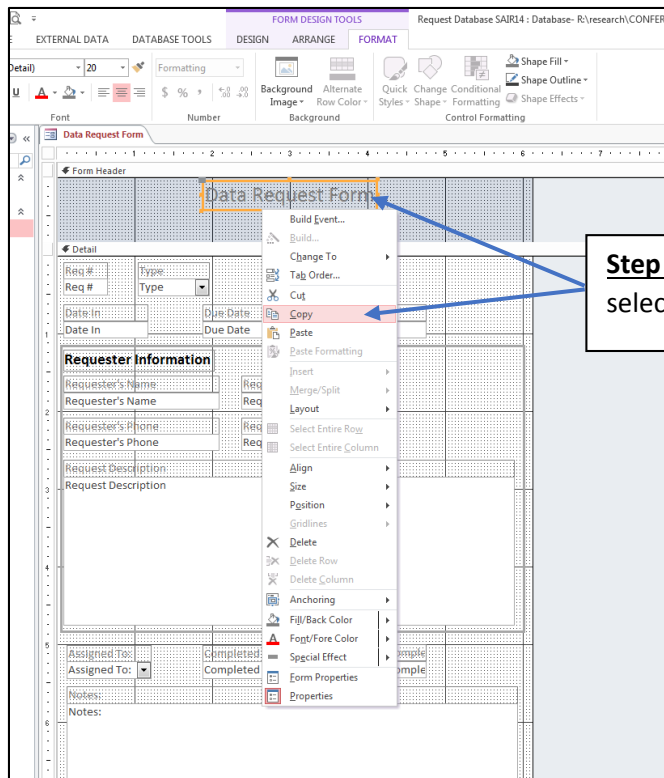
**Step 64:** Under the **Arrange** tab, select the **Size/Space** pull-down and then select **To Fit**.

- Using the **To Fit** option fits the size of the text box surrounding the text.

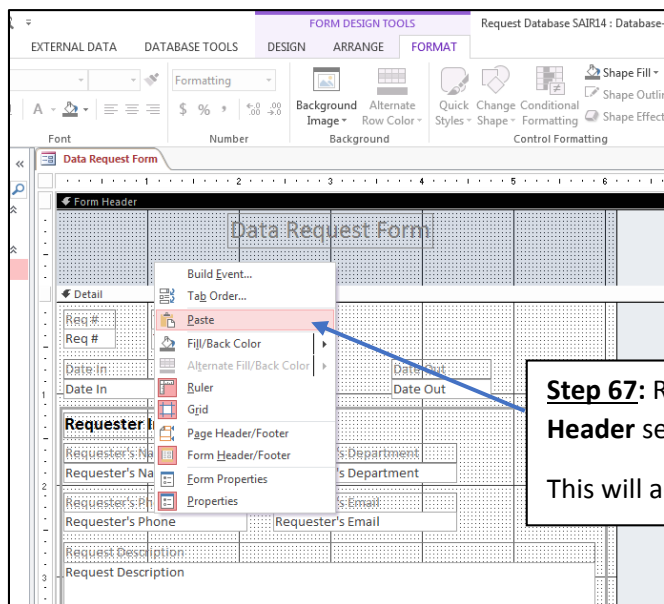


**Step 65:** Either manually center the text box or center it by entering **1.875** in the **Left** line of the **Property Sheet**.

- Next, let's add a 2<sup>nd</sup> text that will read the name of your institution and have that text box placed above the text that reads **Data Request Form**.
- To do this, the easiest way will be to copy and paste the current text within the Header.
- Then we will place that text below the current text.
- Then we will alter the text on top to read the name of your institution.

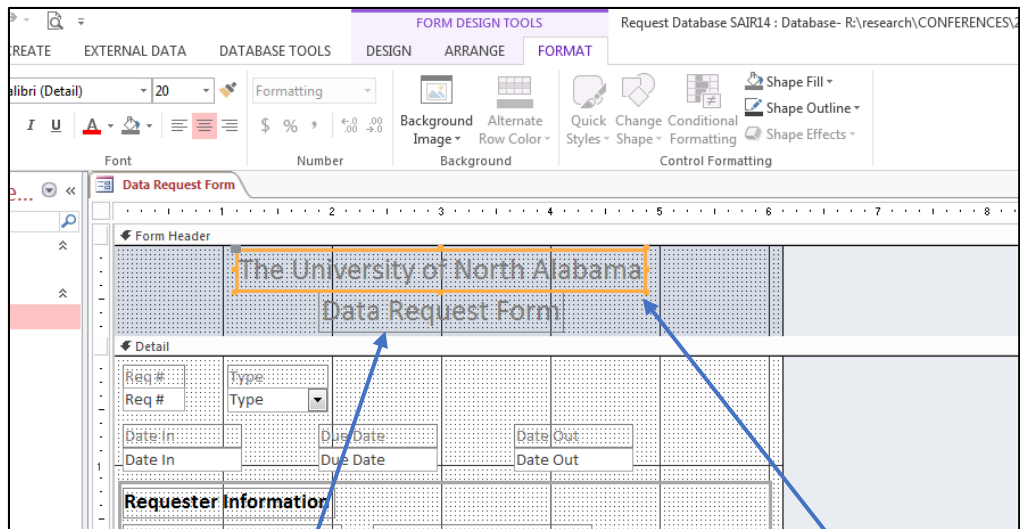


**Step 66:** Right-click on the text box and select **Copy**.



**Step 67:** Right-click anywhere within the **Header** section and select **Paste**.

This will add a 2<sup>nd</sup> Label to the header.

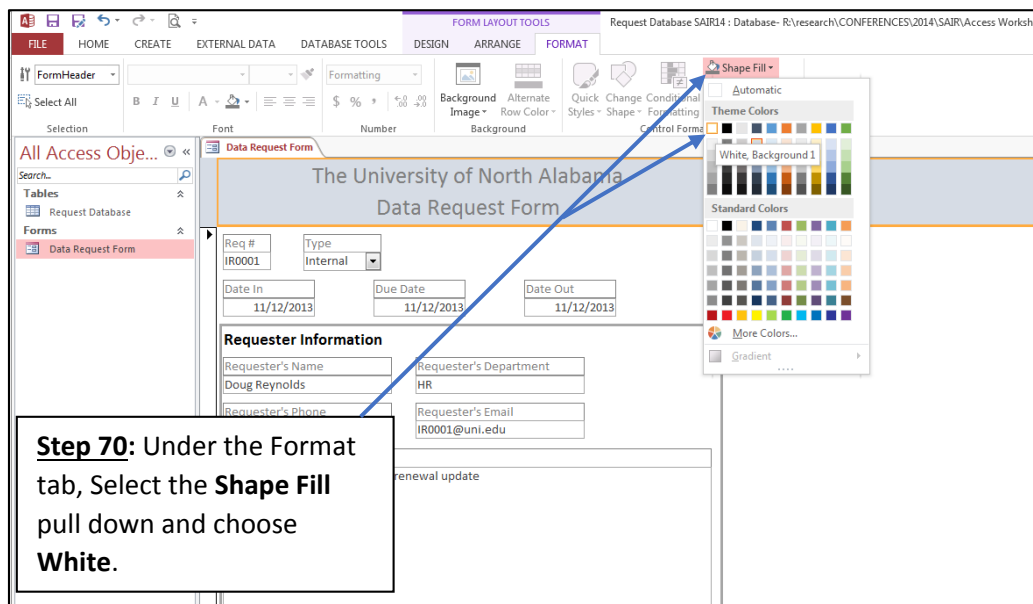


**Step 68:** Position the 2<sup>nd</sup> label box below the other.

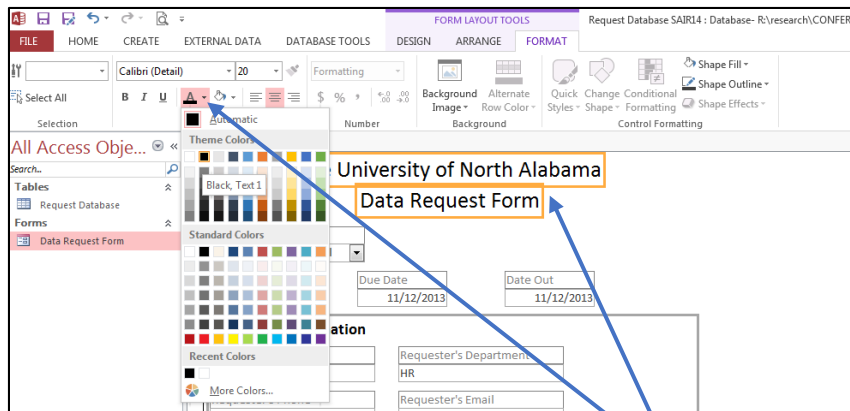
Feel free to use the **Arrange** options.

**Step 69:** Change the top text to read the name of your institution. You'll notice that the size of the box will adjust to fit your next text as you type.

- Let's switch back to **Layout View** to see how our changes look.
- I believe it would look better if the Header's background color was white and if the text within the Header was darker.

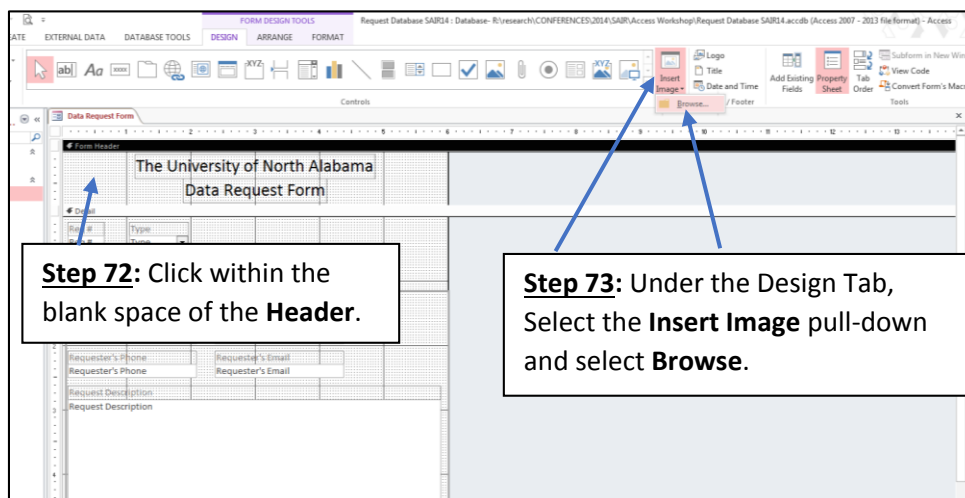


**Step 70:** Under the Format tab, Select the **Shape Fill** pull down and choose **White**.



**Step 71:** Select both boxes of text within the Header and select **Black** as the **Font Color**.

- Now let's spruce up this Header by adding a couple of images on both sides of the text. To do this, we'll need to **switch** back over to **Design View**.

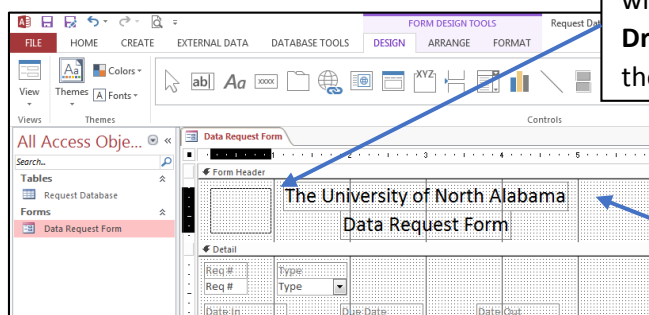


**Step 72:** Click within the blank space of the **Header**.

**Step 73:** Under the Design Tab, Select the **Insert Image** pull-down and select **Browse**.

- Browse and find the file named **Torch.jpg**.

**Step 74:** Once selected, a cross-hair with the image icon will appear. **Drag** this image across the space to the left of the titles in the **Header**.



**Step 75:** **Copy** and **Paste** this image to the right of the header's text and **Arrange** these 2 images to be equal sizes and distances from the Header's text.

- Switch back over to **Form View** to see the changes we have made to the form.

The University of North Alabama  
Data Request Form

Req #  Type

Date In  Due Date  Date Out

**Requester Information**

Requester's Name  Requester's Department

Requester's Phone  Requester's Email

Request Description

Assigned To:  Completed By:  Hours to Complete:

Notes:

File Location

Records: 1 of 25

- If you click within the Req# data field and then TAB through you'll notice that the order is somewhat off.
- We can easily change the order that the form TABs through.
- Let's **switch** back over to **Design View** to make these **Tab Order** changes.

**Step 76:** Select the **Design** tab and then select **Tab Order**.

The **Tab Order** window will appear.

Tab Order dialog box controls (in order):

- Req #
- Date In
- Due Date
- Date Out
- Requester's Name
- Requester's Department
- Requester's Email
- Requester's Phone
- Assigned To
- Completed By
- Hours to Complete
- Notes
- File Location

**Tab Order**

Section:

- Form Header
- Detail**
- Form Footer

Custom Order:

Req #
Type
Date In
Due Date
Date Out
Requester's Name
Requester's Department
Requester's Phone
Requester's Email
Request Description
Assigned To:
<b>Completed By:</b>
Hours to Complete:
Notes:
File Location

Click to select a row, or click and drag to select multiple rows. Drag selected row(s) to move them to desired tab order.

OK Cancel **Auto Order**

**Step 77:** Either manually adjust the order by left-clicking the box to the left of those fields out of order and dragging them to their correct position OR simply click **Auto Order**.

Request Database SAHQ4 - Database: R:\research\CONFERENCES\2014\SAIR\Access

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

View Filter Sort & Filter

All Access Objects

Search Tables Request Database Forms

**Data Request Form**

The University of North Alabama  
Data Request Form

Req # 80025 Type Internal

Date In 2/7/2014 Due Date 2/7/2014 Date Out 2/7/2014

**Requester Information**

Requester's Name Hello Kitty Requester's Department Ed Tech

Requester's Phone 2567650025 Requester's Email j80025@uni.edu

Request Description Number of physical bodies in all courses

Assigned To: mv Completed By: mv Hours to Complete: 0.005

Notes: The number is 27,062

File Location

Record: 14 of 25 of 25

**Step 78:** Switch back over to **Form View** and Tab through the fields to ensure the order is correct.

## ADDING A NEW DATA REQUEST

- Now that the Data Request Form is complete, let's go through the steps of adding a new data request.
- When we add the new request, this process will add a new record to the **Request Database** table.

The screenshot shows a 'Data Request Form' interface. At the top, there are fields for 'Req #' (containing 'IR0025'), 'Type' (a dropdown menu set to 'Internal'), 'Date In' (2/7/2014), 'Due Date' (2/7/2014), and 'Date Out' (2/7/2014). Below these is a 'Requester Information' section with fields for 'Requester's Name' (Hello Kitty), 'Requester's Department' (Ed Tech), 'Requester's Phone' (2567650025), and 'Requester's Email' (IR0025@uni.edu). A 'Request Description' field contains the text 'Number of physical bodies in all courses'. Further down are 'Assigned To' (mv) and 'Completed By' (mv) dropdowns, followed by a 'Notes' field with the text 'The number is 27,062'. At the bottom, there is a 'File Location' field and a 'Next record' button. A red bar at the very bottom contains the text 'Form View'.

**Step 1:** Within the **Record** line at the bottom of the form, select the **Last Record** by clicking on the **Last Record Button (>|)**. This will take us to the last record in the dataset, IR0025.

- We want to keep the request numbers in Alpha-numeric order. Our next data request ID should be "IR0026".

The number is 27,062

File Location

Record: 25 of 25 **Next record** No Filter Search

**Step 2:** Click the right arrow button(**Next Record**) to take us to a new record, where we will input the new data request.

- Enter the following data into the blank record:

Field	Information to Input
Req#	IR0026
Type	Internal
Date In	2/10/2014
Due Date	2/24/2014
Date Out	Leave Null
Requester's Name	Bobby Charles
Requester's Department	Music
Requester's Phone	2567650026
Requester's Email	<a href="mailto:IR0026@uni.edu">IR0026@uni.edu</a>
Request Description	Spring 2014 Music Majors by Class Level
Assigned To:	mv
Completed By:	Leave Null
Hours to Complete	Leave Null
Notes:	Leave Null
File Location	Leave Null

- The record should look like the image below:

Request Database SAIR14 - Copy : Database- R:\research\CONFERENCES

**FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS**

View Paste Cut Copy Format Painter Views Clipboard

Filter Ascending Descending Advanced Remove Sort Toggle Filter Sort & Filter

New Save Refresh All Delete More Records

Totals Spelling Find Replace Go To Select Find

**All Access Objects**

Search...

**Tables**

Request Database

**Forms**

Data Request Form

**Data Request Form**

The University of North Alabama  
Data Request Form

Req # IR0026 Type Internal

Date In 2/10/2014 Due Date 2/24/2014 Date Out

**Requester Information**

Requester's Name Bobby Charles Requester's Department Music

Requester's Phone 2567650026 Requester's Email IR0026@uni.edu

Request Description  
Spring 2014 Music Majors by Class Level

Assigned To: mv Completed By: Hours to Complete:

Notes:

File Location

Record: 14 of 26 of 26 No Filter Search

Form View

- Now we have entered a new data request and this request and that information is now saved in our **Data Request** table.
- Let's move forward in time, to the time when we have completed the request, so that we can go through the steps involved in logging out the request and mapping the final file serving as the completed request.

Request Database SAIR14 - Copy : Database- R:\research\CONFERENCES\2014

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

Filter Filter Ascending Selection Advanced Refresh Save Spelling Find Replace

Views View Paste Copy Cut Copy Paste Format Painter Sort & Filter Remove Sort Toggle Filter Records Find

All Access Objects

Search...

Tables Request Database

Forms Data Request Form

### The University of North Alabama Data Request Form

Req # IR0026 Type Internal

Date In 2/10/2014 Due Date 2/24/2014 Date Out 2/23/2014

**Requester Information**

Requester's Name Bobby Charles Requester's Department Music

Requester's Phone 2567650026 Requester's Email IR0026@uni.edu

**Request Description**

Spring 2014 Music Majors by Class Level

Assigned To: mv Completed By: mv Hours to Complete: 1

Notes:  
All 2nd Bachelor's were grouped in Senior class level.

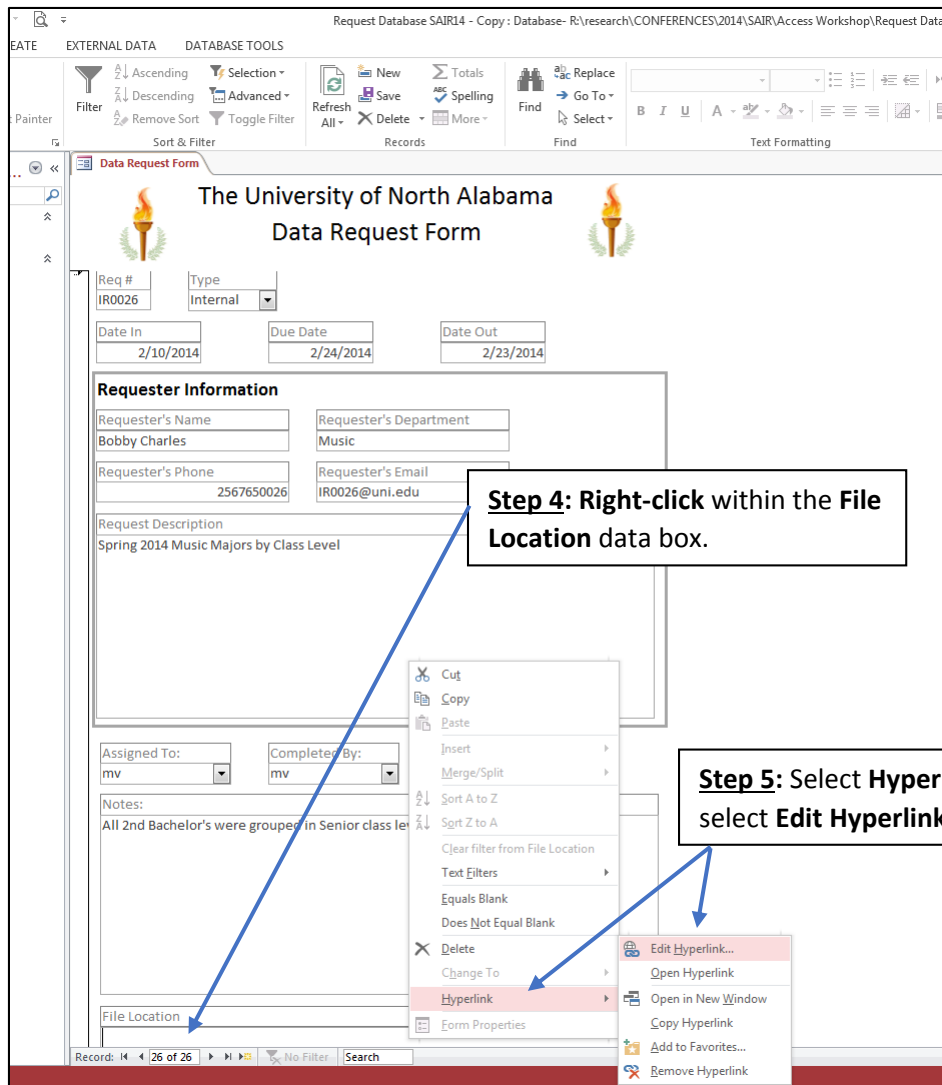
File Location

Record: 26 of 26 No Filter Search

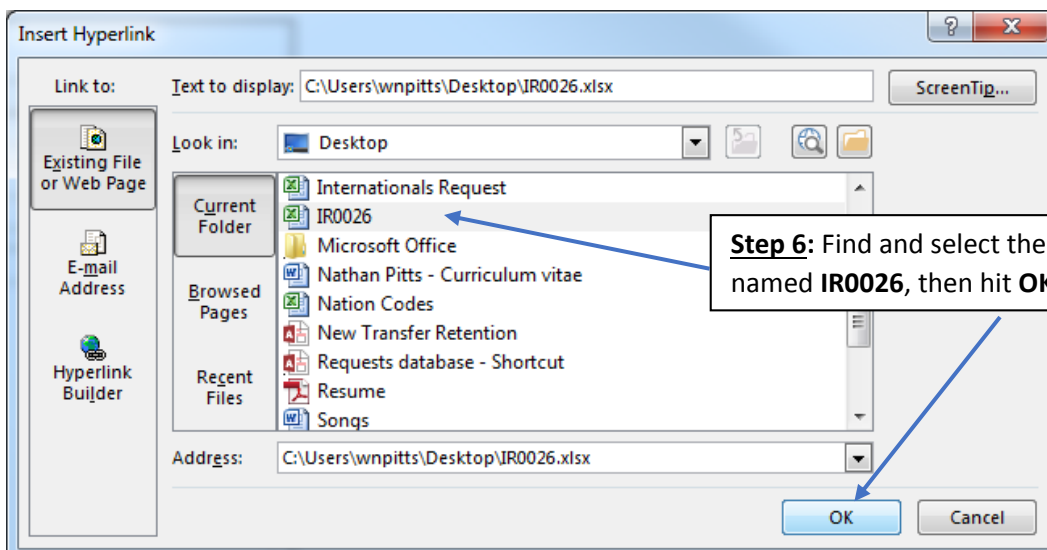
**Step 3:** Enter the following data:

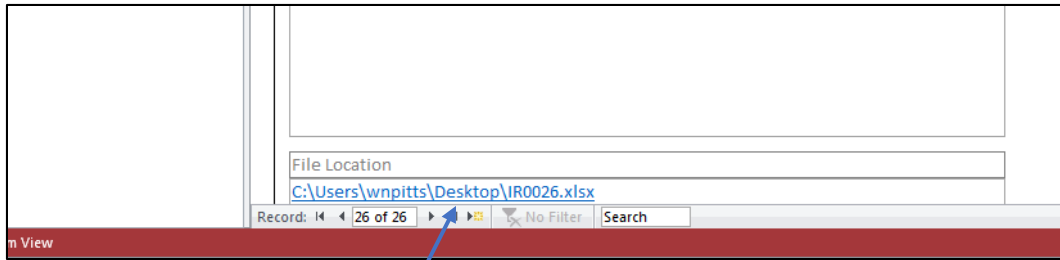
- Date Out: 2/23/2014
- Completed By: mv
- Hours to Complete: 1
- Notes: All 2<sup>nd</sup> Bachelors were grouped in Senior class level.

- Lastly, we need to map the completed file, within the **File Location** section.
- There is a file named **IR0026** (check your desktop) that we will use as our completed request.



- A browse window will appear.





The file is now mapped to the data request.

## CREATING REPORTS TO ANALYZE OUR DATA REQUESTS

- Being able to create reports based on our Request Database table is a great tool. One very useful report is an **Outstanding Data Requests** report, which will allow you to view what data requests that have yet to be completed.
- You can also create reports that allow you to see what reports have been completed within certain time frames (i.e. within the past 2 weeks) or what reports have been completed by specific individuals.
- We will begin by creating the Outstanding Data Requests report.
- Reports may be built on Tables or Queries. Since we need to limit our report to only those requests that are outstanding, we will need to create a query that displays all of the data for only those requests yet to be fulfilled.

Request Database SAIR14 : Database- R:\research\CONFERENCES\2014\SAI

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

Application Parts Templates Table Table Design Lists Tables Query Wizard Query Design Form Form Design Blank Form More Forms Form Wizard Navigation Report Report Design Blank Report Labels Macro Module Class M Visual B Macros & Code

All Access Objects Search... Tables Request Database Forms Data Request Form

Query Design Create a new, blank query in Design view. You can then use the Show Table dialog box to add tables or queries to the query design.

Req # IR0001 Type Internal

Date In 11/12/2013 Due Date 11/12/2013 Date Out 11/12/2013

**Requester Information**

Requester's Name Doug Reynolds Requester's Department HR

Requester's Phone 2567650001 Requester's Email IR0001@uni.edu

**Request Description**

Professional liability insurance renewal update

Assigned To: mv Completed By: mv Hours to Complete: 0.2

**Notes:**

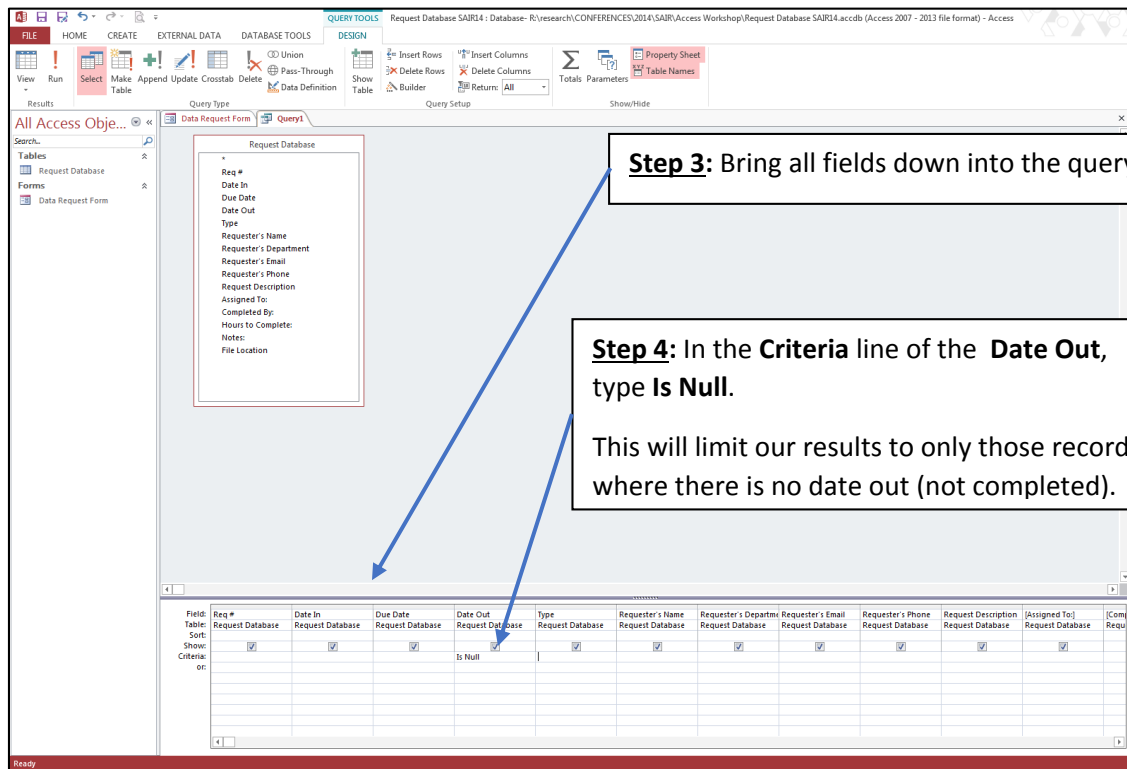
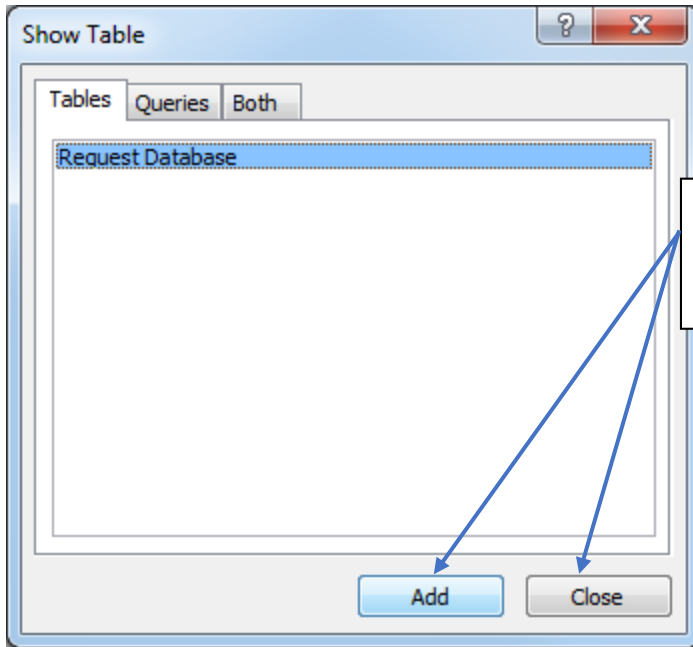
Fall 2013: FT Und = 4852PT Und = 1141FT Gr = 281PT Gr = 657TOTAL = 6931TOTAL FTE (FT+(PT/3)) = 5785

File Location

Record: 1 of 26 No Filter Search

Form View

Step 1: Under the Create tab and within the Queries section, select Query Design.



- Now run the query.

Request Database SAIR14 - Database- R:\research\CONFERENCES\2014\SAIR\Access Workshop\Request Database SAIR14.accdb (Access 2007 - 2013 file format) - Access

EXTERNAL DATA DATABASE TOOLS

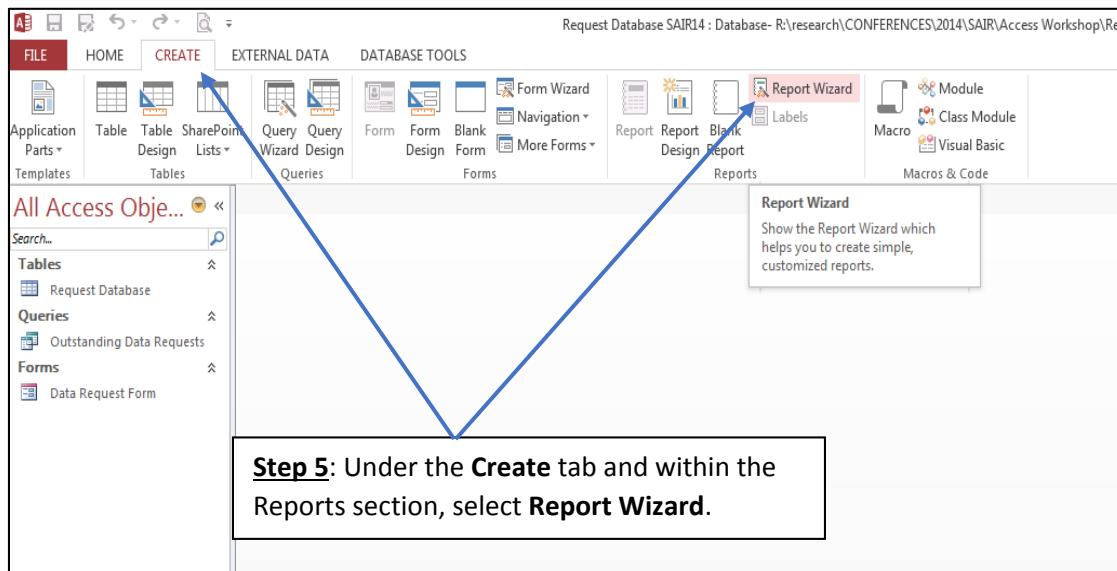
Filter Ascending Selection Refresh All New Save Replace Find Go To Text Formatting

Sort & Filter

Req #	Date In	Due Date	Date Out	Type	Requester's Name	Requester's Department	Requester's Email	Requester's Phone	Request Description	Assigned To	Completed	Hours to Complete	Notes	File Location
IR0016	1/16/2014	2/21/2014		External	Kenny Kennetl Peterson's und	IR0016@uni.edu	2567650016	Complete 2013 mv/np						
IR0017	1/16/2014	3/7/2014		External	Kenny Kennetl Peterson's fina	IR0016@uni.edu	2567650017	Get informatio lh						
IR0019	1/16/2014	3/21/2014		External	Lana Givens	Open Doors Su	IR0019@uni.edu	2567650019	2014 Open Doc np					
IR0020	1/16/2014	4/4/2014		External	Levi Thompson	Wintergreen O	IR0020@uni.edu	2567650020	Wintergreen O mv					

The query returns 4 records. These are the data requests that are yet to be completed. We will need to save this query and base our report on it.

- Save the query as **Outstanding Data Requests**, then close it.



- This will open the **Report Wizard** window. Here we can select which fields we would like to populate the report.

Report Wizard

Which fields do you want on your report?  
You can choose from more than one table or query.

Tables/Queries  
Query: Outstanding Data Requests

Available Fields:  
Req #  
Date In  
Due Date  
Date Out  
Type  
Requester's Name  
Requester's Department  
Requester's Email

Selected Fields:

Cancel < Back Next > Finish

**Step 5:** To move all available fields into the report, hit the double arrow to the right.

**Report Wizard**

Which fields do you want on your report?  
You can choose from more than one table or query.

Tables/Queries  
Query: Outstanding Data Requests

Available Fields:  
Date Out  
Completed By:  
Hours to Complete:  
Notes:  
File Location

Selected Fields:  
Req #  
Date In  
Due Date  
Type  
Requester's Name  
Requester's Department  
Requester's Email  
Requester's Phone

Cancel < Back **Next >** Finish

**Step 6:** Remove **Date Out**, **Completed By**, **Hours to Complete**, **Notes** and **File Location** by selecting each and hitting the single left arrow. Then hit **Next**.

**Report Wizard**

Do you want to add any grouping levels?

Req #  
Date In  
Due Date  
Type  
Requester's Name  
Requester's Department  
Requester's Email  
Requester's Phone  
Assigned To:

Req #, Date In, Due Date, Type, Requester's Name, Requester's Department, Requester's Email, Requester's Phone, Request Description, Assigned To:, Notes:

Grouping Options ... Cancel < Back **Next >** Finish

**Step 7:** We can group by specific fields in the next step, but we do not need to for this report. Select **Next** without grouping.

**Report Wizard**

What sort order do you want for your records?  
You can sort records by up to four fields, in either ascending or descending order.


1 Due Date Ascending  
2 Ascending  
3  
4

Cancel < Back **Next >** Finish

**Step 8:** We can sort by any field. Since this is a report to view our outstanding data requests, sort by **Due Date**, ascending, and click **Next**.

Report Wizard

How would you like to lay out your report?



Layout

☐ Columnar


☐ Tabular

☒ Justified

Orientation

☒ Portrait

☐ Landscape



☒ Adjust the field widths to fit a page.

Cancel < Back Next > Finish

**Step 9:** Like in the Form Wizard, we will use the **Justified Layout** and a **Portrait Orientation**. Then click **Next**.

Report Wizard

What title do you want for your report?

Outstanding Data Requests

That's all the information the wizard needs to create your report.

Do you want to preview the report or modify the design?

☒ Preview the report.

☐ Modify the report's design.

Cancel < Back Next > Finish

**Step 10:** Title the report "**Outstanding Data Requests**" and Click **Finish** to Preview the Report.

- There is a lot of wasted space in the report.
- We will need to format this report, like we formatted the Data Request Form.
- We will first adjust the width of the fields to the appropriate size.
- We will utilize the **Layout View** to do this, so let's switch over to that view.

Request Database SAIR14 : Database- R:\research\CONFER

REPORT LAYOUT TOOLS: DESIGN, ARRANGE, FORMAT, PAGE SETUP

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

Size Margins ☒ Show Margins ☐ Print Data Only

Page Size Page Layout

All Access Objects: Search... Tables: Request Database Queries: Outstanding Data Requests Forms: Data Request Form Reports: Outstanding Data Requests

Outstanding Data Requests

Due Date	2/21/2014
Req #	IR0016
Date In	1/16/2014
Type	External
Requester's Name	Kenny Kenneth Pigg
Requester's Department	Peterson's undergraduate survey
Requester's Email	IR0016@uni.edu
Requester's Phone	2567650016
Request Description	Complete 2013-14 UG Survey
Assigned To:	mw/np
Due Date	3/7/2014
Req #	IR0017
Date In	

Layout View

**Step 11:** Select the **Date Fields** and manually adjust these fields' **width** by dragging their right border to the left.

Request Database SAIR14 : Database- R:\research\CONFER

REPORT LAYOUT TOOLS: DESIGN, ARRANGE, FORMAT, PAGE SETUP

FILE HOME CREATE EXTERNAL DATA DATABASE TOOLS

Size Margins ☒ Show Margins ☐ Print Data Only

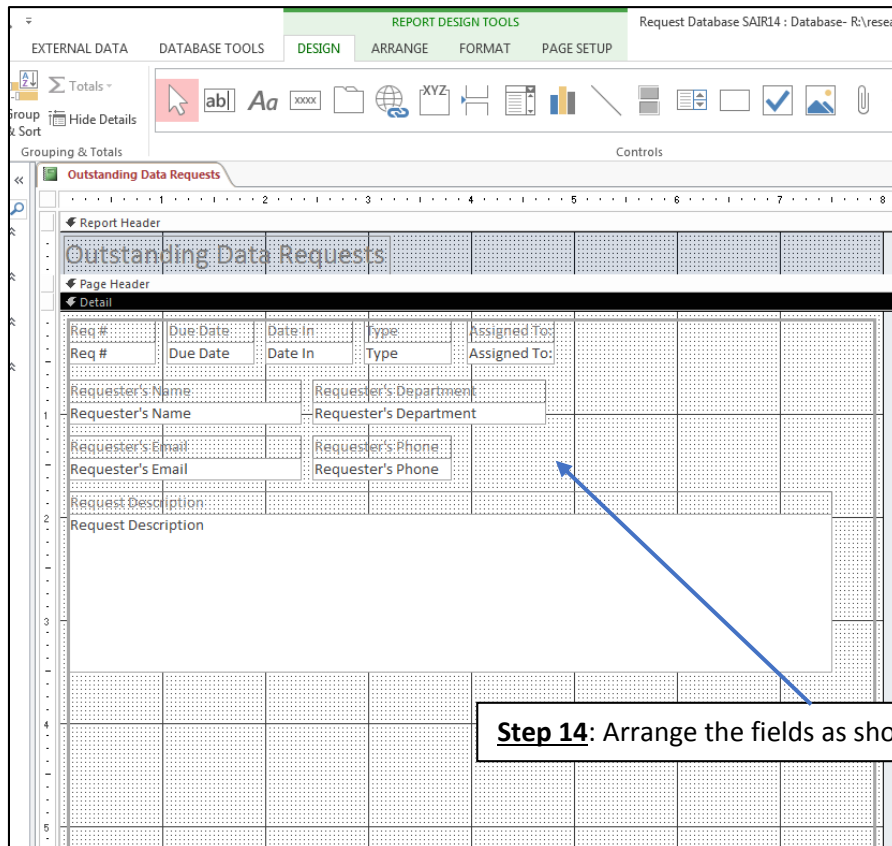
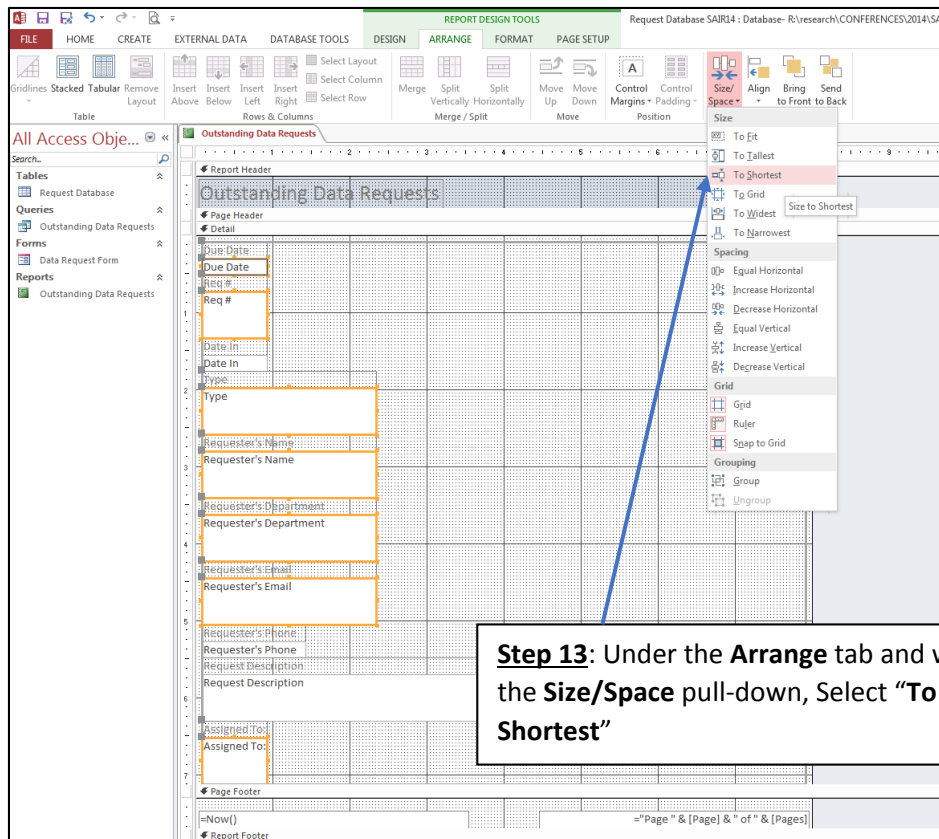
Page Size Page Layout

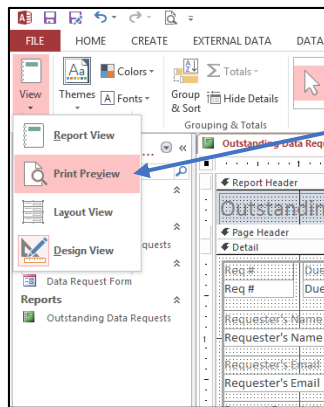
All Access Objects: Search... Tables: Request Database Queries: Outstanding Data Requests Forms: Data Request Form Reports: Outstanding Data Requests

Outstanding Data Requests

Due Date	2/21/2014
Req #	IR0016
Date In	1/16/2014
Type	External
Requester's Name	Kenny Kenneth Pigg
Requester's Department	Peterson's undergraduate survey
Requester's Email	IR0016@uni.edu
Requester's Phone	2567650016
Request Description	Complete 2013-14 UG Survey
Assigned To:	mw/np
Due Date	3/7/2014
Req #	

**Step 12:** Adjust the **width** of the fields **Req#**, **Type**, **Requester's Name**, **Requester's Department**, **Requester's Email**, **Requester's Phone**, and **Assigned To:** to appropriate sizes.





**Step 15:** Switch over to **Print Preview** to see the report as is.

Text PDF Email More Close Print Preview Close Preview  
File or XPS Data

### Outstanding Data Requests

Req #	Due Date	Date In	Type	Assigned To:
IR0016	2/21/2014	1/16/2014	External	mv/np

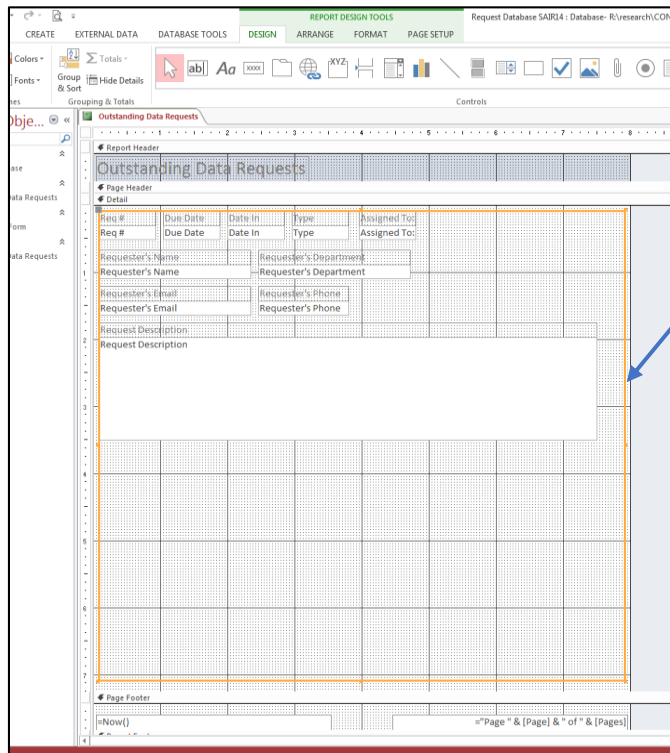
Requester's Name: Kenny Kenneth Pigg  
Requester's Department: Peterson's undergraduate survey  
Requester's Email: IR0016@uni.edu  
Requester's Phone: 2567650016

Request Description  
Complete 2013-14 UG Survey

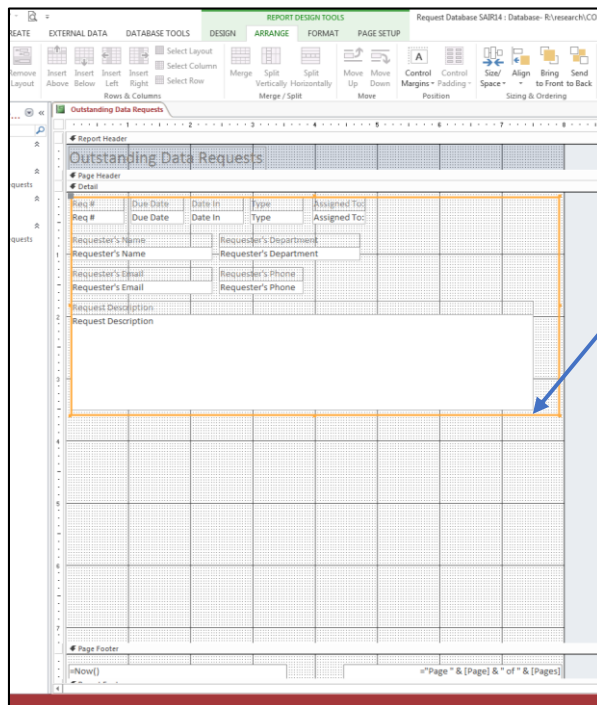
Saturday, September 27, 2014 Page 1 of 4

- There is still several areas that need formatting.
- To begin, we would like to have more than one outstanding request to be shown per page.
- Also, the header could be formatted to look better.
- We will work on this next. **Close the Print Preview.**

- To allow more than one request to display per page, we will need to reduce the size of the **Detail** section.



**Step 16:** Click on the **Rectangle** surrounding the detail fields.



**Step 17:** Pull up the bottom of the rectangle until it is close to the bottom of the **Request Description**.

REPORT DESIGN TOOLS

Request Database SAIRL4 : Database- R:\research\CONFEREN

RECREATE EXTERNAL DATA DATABASE TOOLS DESIGN ARRANGE FORMAT PAGE SETUP

Remove Layout Insert Above Insert Below Insert Left Insert Right Select Layout Select Column Merge Split Vertically Split Horizontally Move Up Move Down Move Control Margins - Padding - Position Size/Space Align Bring to Front to Back Send Sizing & Ordering

Outstanding Data Requests

Report Header

Outstanding Data Requests

Page Header

Detail

Req #	Due Date	Date In	Type	Assigned To:
Req #	Due Date	Date In	Type	Assigned To:
Requester's Name		Requester's Department		
Requester's Name		Requester's Department		
Requester's Email		Requester's Phone		
Requester's Email		Requester's Phone		
Request Description				
Request Description				

Page Footer

=Now()

= "Page " & [Page] & " of " & [Pages]

Report Footer

**Step 18:** Hover over the top of the **Page Footer** border, Left-click and drag it up to just below the bottom of the rectangle.

Outstanding Data Requests

Req #	Due Date	Date In	Type	Assigned To:
IR0016	2/21/2014	1/16/2014	External	mv/np

Requester's Name: Kenny Kenneth Pigg

Requester's Department: Peterson's undergraduate survey

Requester's Email: IR0016@unl.edu

Requester's Phone: 2567650016

Request Description: Complete 2013-14 UG Survey

---

Req #	Due Date	Date In	Type	Assigned To:
IR0017	3/7/2014	1/16/2014	External	lh

Requester's Name: Kenny Kenneth Pigg

Requester's Department: Peterson's financial aid

Requester's Email: IR0016@unl.edu

Requester's Phone: 2567650017

Request Description: Get information from SFS

Saturday, September 27, 2014

Page 1 of 2

**Step 18:** View the **Print Preview**.

Now there are 2 requests per page. If we could create a bit more room, we could fit 3 requests per page.

REPORT DESIGN TOOLS Request Database SAIR14 : Database- R:\research\CONFERENCES\2014

DESIGN ARRANGE FORMAT PAGE SETUP

Grouping & Totals

Outstanding Data Requests

Report Header

Outstanding Data Requests

Page Header

Detail

Req #	Due Date	Date In	Type	Assigned To:
Req #	Due Date	Date In	Type	Assigned To:
Requester's Name	Requester's Department	Requester's Email	Requester's Phone	
Request Description				

Page Footer

=Now()

Report Footer

= "Page " & [Page] & " of " & [Pages]

**Step 19:** Switch to **Design View** and arrange the fields as shown above.

- **Switch back to Print Preview**

Excel Text File PDF Email More Close Print Preview Close Preview

Outstanding Data Requests

Req #	Due Date	Date In	Type	Assigned To:
IR0016	2/21/2014	1/16/2014	External	ms/jnp
Requester's Name	Requester's Department	Requester's Email	Requester's Phone	
Kenny Kenneth Pigg	Peterson's undergraduate survey	IR0016@uni.edu	2567650016	
Request Description	Complete 2013-14 UG Survey			

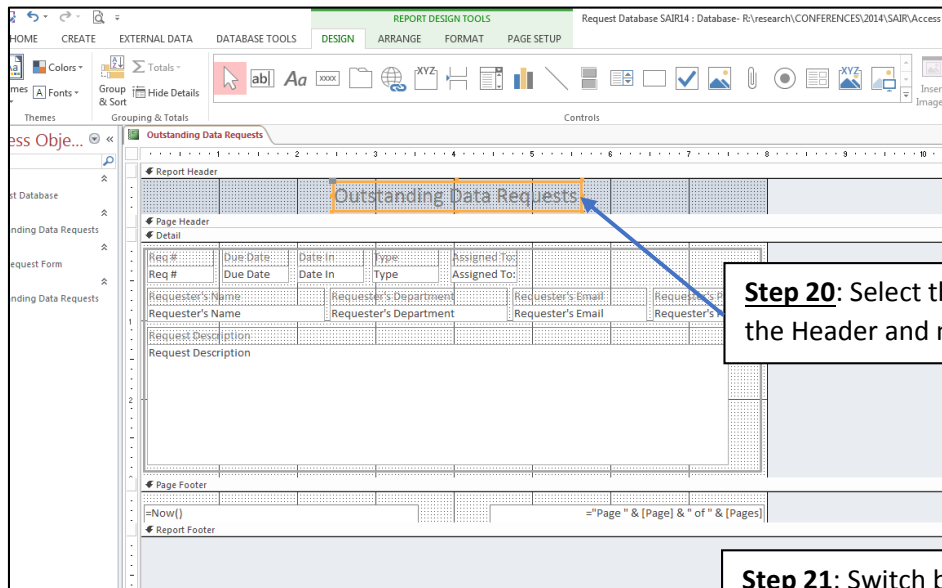
Req #	Due Date	Date In	Type	Assigned To:
IR0017	3/7/2014	1/16/2014	External	ph
Requester's Name	Requester's Department	Requester's Email	Requester's Phone	
Kenny Kenneth Pigg	Peterson's financial aid	IR0016@uni.edu	2567650017	
Request Description	Get information from SFS			

Req #	Due Date	Date In	Type	Assigned To:
IR0019	3/21/2014	1/16/2014	External	np
Requester's Name	Requester's Department	Requester's Email	Requester's Phone	
Lane Givens	Open Doors Survey	IR0019@uni.edu	2567650019	
Request Description	2014 Open Doors Survey			

Saturday, September 27, 2014 Page 1 of 2

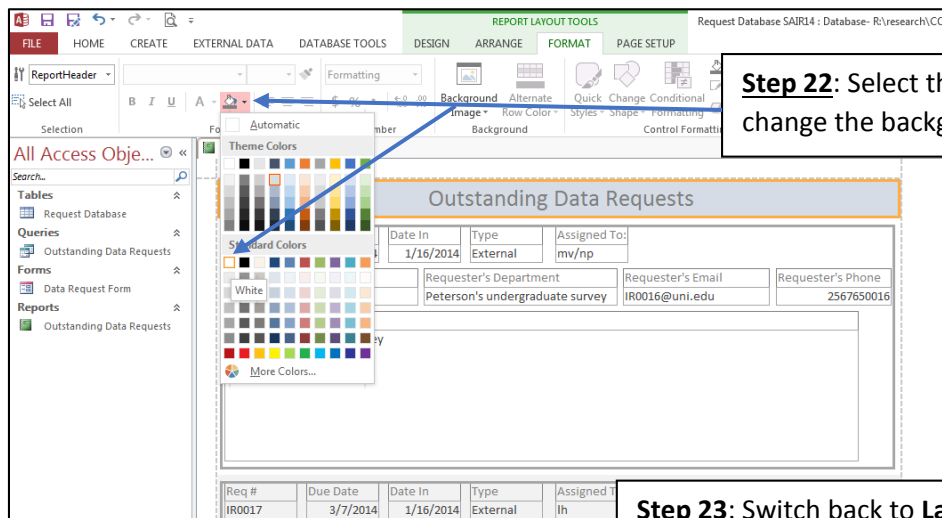
We now have 3 requests on page 1 and 1 remaining request on page 2.

- We now need to format the **Header**, so switch back to **Design View** again.



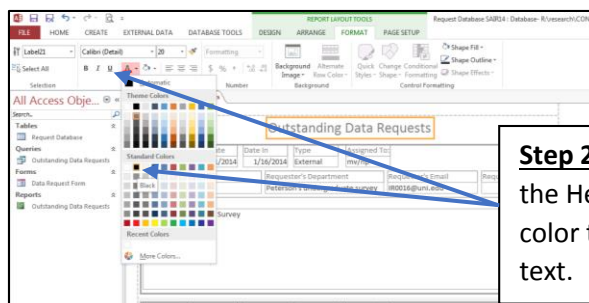
**Step 20:** Select the **Text Box** within the Header and manually center it.

**Step 21:** Switch back to **Layout View**.



**Step 22:** Select the **Header** and change the background to **White**.

**Step 23:** Switch back to **Layout View**.



**Step 24:** Select the text box within the Header and change the font color to **Black** and **Underline** the text.

- 
- The screenshot shows the Microsoft Access 2016 ribbon with the 'CREATE' tab selected. The 'EXTERNAL DATA' group contains the 'Query Design' button, which is highlighted by a blue arrow. A tooltip for 'Query Design' is visible, stating: 'Create a new, blank query in Design view. You can then use the Show Table dialog box to add tables or queries to the query design.' The 'Navigation - More Forms' group also contains a 'Form Design' button. The 'REPORTS' group contains 'Report Wizard', 'Report Design', and 'Reports'. The 'MACROS' group contains 'Macro', 'Class Module', 'Visual Basic', and 'Macros & Code'. The 'LEFT NAVIGATION' pane on the left shows the 'All Access Objects' list with 'Outstanding Data Requests' selected under the 'Queries' section.

The screenshot shows the Microsoft Access interface with the 'Query Design' view for 'Query1'. The design grid is as follows:

Field Name	Req #	Date In	Date Out	Type	Requester's Name	Requester's Department	Requester's Email	Requester's Phone	Request Description	Assigned To	Completed By	Hours to Complete	Notes	File Location
Request Database														
Criteria				>=#2/1/2014#										
or				<=#2/28/2014#										

Annotations in the image:

- Step 2:** Like before, bring all fields into the query. (Points to the field list on the left)
- Step 3:** Type >=#2/1/2014# and <=#2/28/2014# in the Criteria line under the **Date Out** field. (Points to the Date Out criteria cell)
- Step 4:** Type Like "\*np\*" into the Criteria line under the **Completed By** field. (Points to the Completed By criteria cell)

Request Database SAIR14 : Database - R:\research\CONFERENCES\2014\SAIR\Access Workshop\Request Database SAIR14.accdb (Access 2007 - 2013 file format) - Access

EXTERNAL DATA DATABASE TOOLS

Filter Ascending Selection New Totals Replace Calibri 11 Find B I U Text Formatting

Sort & Filter Refresh Save Spelling Go To Select

Query1

Req #	Date In	Due Date	Date Out	Type	Requester's	Requester's	Requester's Email	Requester's	Request Der	Assigned To	Completed f	Hours to Cor	Notes	File Location
IR0013	12/20/2013	2/14/2014	2/7/2014	Internal	Tina Jones	Distance Learn	IR0013@uni.edu	2567650013	Fall 2013 Onlin	np	np	10		
IR0014	12/20/2013	2/14/2014	2/10/2014	Internal	Dr. Helio	OHIPA	IR0004@uni.edu	2567650014	Fall 2013 Cours	np	np	40		

When you run the query, you'll see that there were 2 reports completed by "np" within the month of February.

- This may be interesting data, however a more useful report may be to look at all reports completed in the past X number of days.
- We could create a report that looked at all requests completed in the past 30 days, for example. However, since our data set's dates out are between Nov. 2013 and February 2014, that query would return zero records.
- We will modify the formula to look at requests completed within the past 250 days.

Append Update Crosstab Delete Pass Through Show Table Builder Delete Rows Delete Columns Totals Parameters Table Names

Query Type Recently Completed Data Requests Request Database Query Setup Show/Hide

Request Database

Req #  
Date In  
Due Date  
Date Out  
Type  
Requester's Name  
Requester's Department  
Requester's Email  
Requester's Phone  
Request Description  
Assigned To:  
Completed By:  
Hours to Complete:  
Notes:  
File Location

Field:	Req #	Date In	Due Date	Date Out	Type	Requester's Name	Requester's Department	Requester's Email
Table:	Request Database	Request Database	Request Database	Request Database	Request Database	Request Database	Request Database	Request Database
Sort:								
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:				>Date()-250				
or:								

**Step 5:** Return to **Design View**, within the query, and type **>Date()-250** into the Criteria line under **Date Out**.

**Step 6:** Remove the criteria **Like "\*np\*"** under the **Completed By:** field.

**Step 7:** Run the query to view the results.

Request Database SAIR14 - Database - R:\research\CONFERENCES\2014\SAIR\Access Workshop\Request Database SAIR14.accdb (Access 2007 - 2013 file format) - Access

EXTERNAL DATA DATABASE TOOLS

Filter Ascending Selection Filter New Totals Replace Filter Descending Advanced Refresh Save Spelling Find Filter Remove Sort Toggle Filter All Records Go To Select Text Formatting

Req #	Date In	Due Date	Date Out	Type	Requester's	Requester's	Requester's Email	Requester's	Request Des	Assigned To	Completed I	Hours to Cor	Notes	File Location
IR0013	12/20/2013	2/14/2014	2/7/2014	Internal	Tina Jones	Distance Learn	IR0013@uni.edu	2567650013	Fall 2013 Onlin	np	np	10		
IR0014	12/20/2013	2/14/2014	2/10/2014	Internal	Dr. Helio	OIRPA	IR0004@uni.edu	2567650014	Fall 2013 Cours	np	np	40		
IR0015	1/8/2014	1/23/2014	1/31/2014	Internal	Peter Parker	Nursing	IR0015@uni.edu	2567650015	A list of Nursin	mv	mv	2		
IR0018	1/16/2014	3/7/2014	3/7/2014	External	Phillip Suage	CSRDE	IR0018@uni.edu	2567650018	Main retentiori	mv	mv	6		
IR0021	2/6/2014	2/6/2014	2/6/2014	Internal	Muscles Malon	Athletics	IR0021@uni.edu	2567650021	GPA of athletic	mv	mv	0.002	athletes = 2.75	
IR0022	2/3/2014	2/7/2014	2/7/2014	Internal	Dean Stone	Nursing	IR0022@uni.edu	2567650022	Number of grai	mv	mv	1		
IR0023	2/7/2014	2/7/2014	2/7/2014	Internal	Pearl Bluetooth	Judicial Affairs	IR0023@uni.edu	2567650023	List of Majors	mv	mv	0.2	Included level	
IR0024	2/7/2014	2/7/2014	2/7/2014	Internal	President Phill	President's Off	IR0024@uni.edu	2567650024	Update housin	mv	mv	0.2		
IR0025	2/7/2014	2/7/2014	2/7/2014	Internal	Hello Kitty	Ed Tech	IR0007@uni.edu	2567650025	Number of phy	mv	mv	0.005	The number is	
IR0026	2/10/2014	2/10/2014	2/24/2014	Internal	Bobby Charles	Music	IR0026@uni.edu	2567650026	Spring 2014 Mu	mv	mv			

- All requests completed within the past 250 days are displayed.
- We should save this query and create a report based on this data.
- Keep in mind that if you utilized this query at your institution and wanted to look at the requests completed in the past 30 days, simply replace 250 with 30 in the formula above.

**Step 8:** Save the query as **Recently Completed Data Requests** and close the query.

- Instead of creating a report from scratch, as we did before, let's modify the existing report to display our recently completed requests.

**Step 9:** Open the report **Outstanding Data Requests** in design view.

REPORT DESIGN TOOLS

DESIGN ARRANGE FORMAT PAGE SETUP

Outstanding Data Requests

Report Header

Page Header

Detail

Page Footer

Report Footer

Property Sheet

Record Source: Outstanding Data Requests

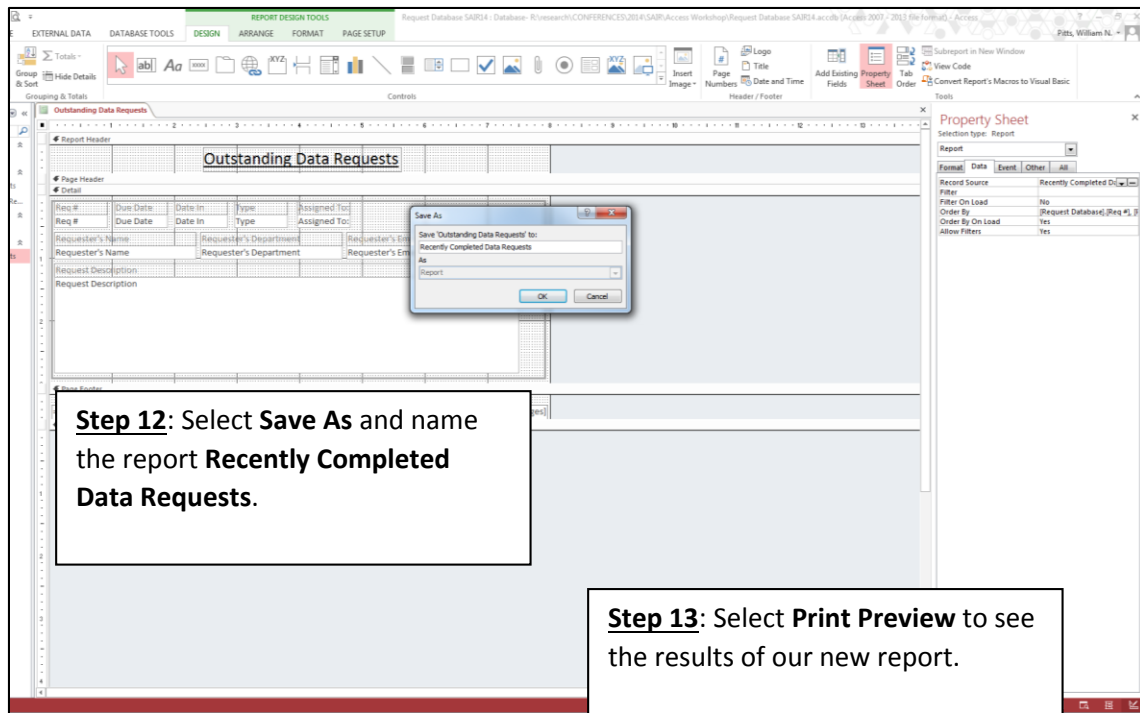
Filter: Recently Completed Data Requests

Order By: Request Date

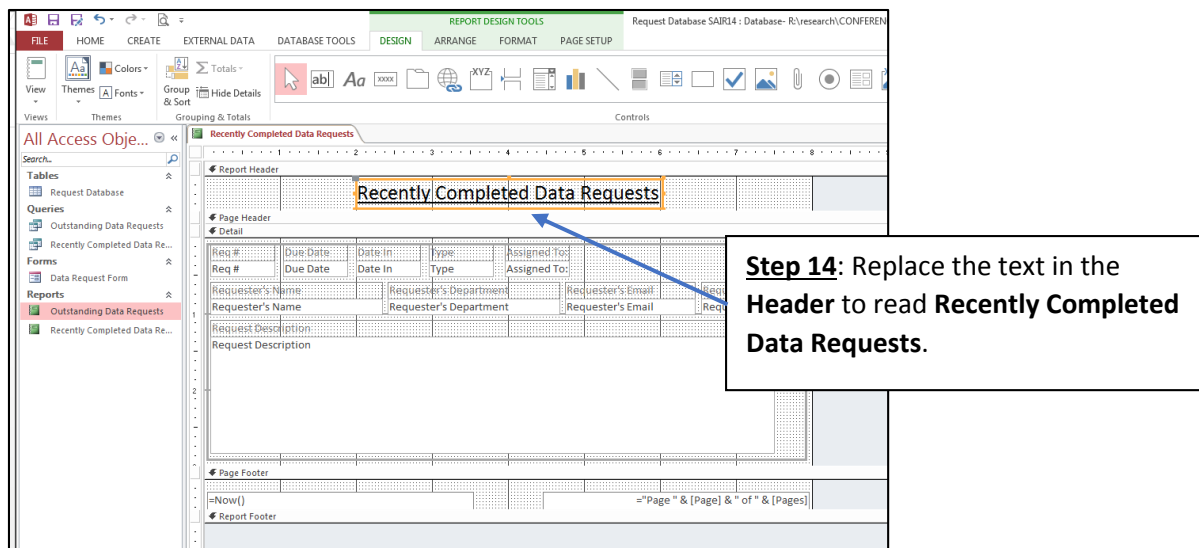
Allow Filters: Yes

**Step 10:** Open the Property Sheet.

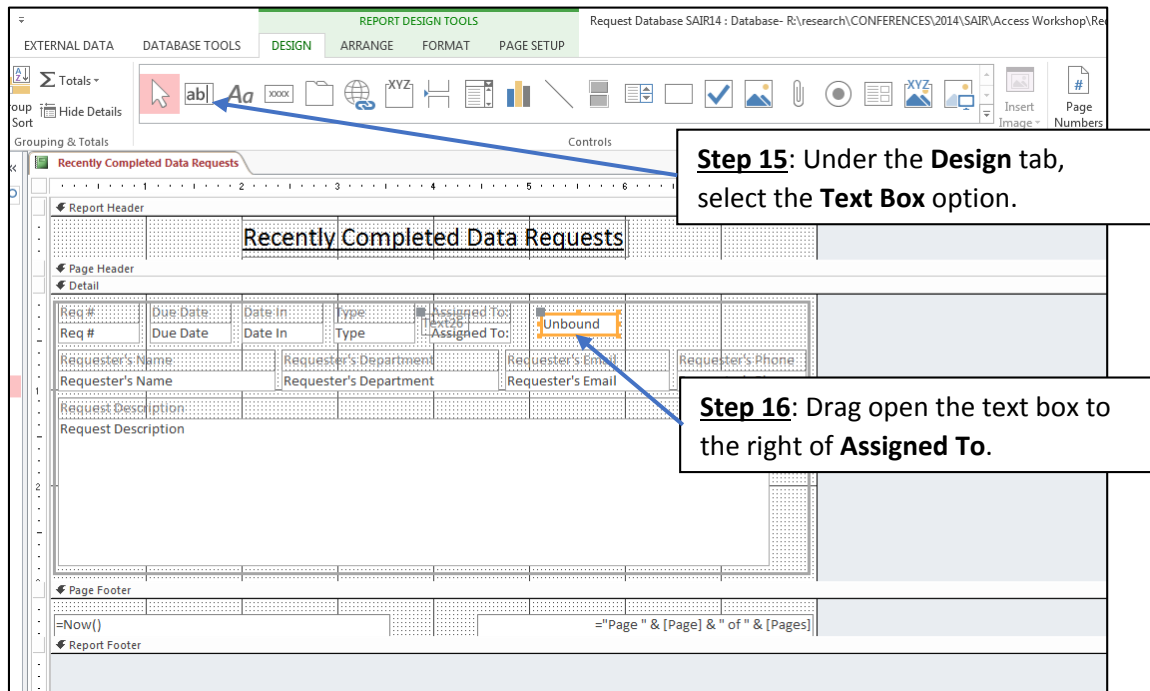
**Step 11:** In the **Record Source** line of the Property Sheet, change the source to **Recently Completed Data Requests**.



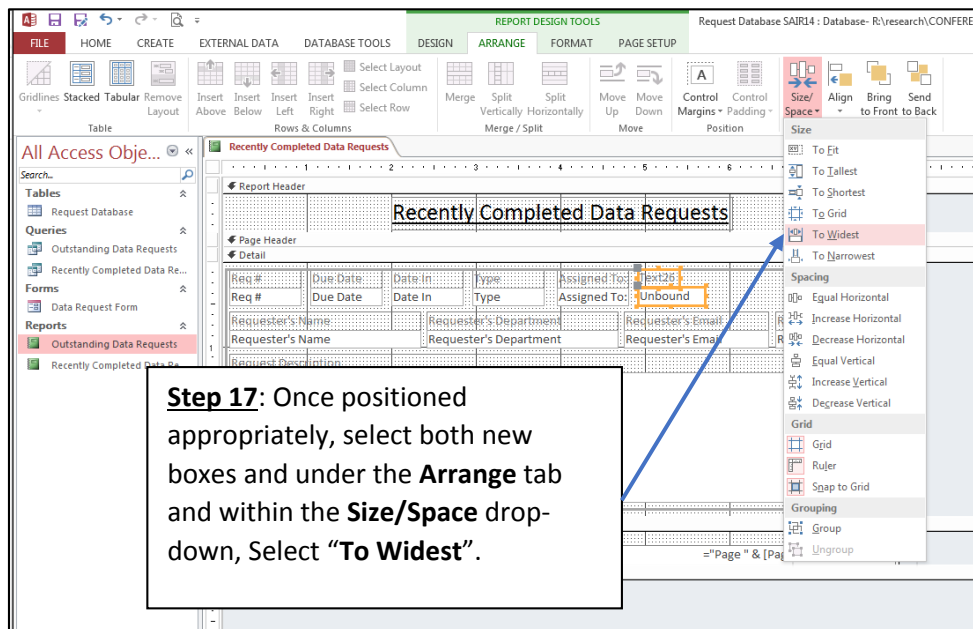
- There are a couple of changes that need to be made to the report, though most of the work is done.
- Of course, we need to change the **title** in the **Header**.
- We also need to include a couple of fields that were omitted from the Outstanding Data Requests report.
  - We need to include the fields **Completed By:** and **Hours to Complete**. We could also include the **Notes** field and **File Location** fields, if we would like.
- **Close the Print Preview** and switch over to **Design View**.

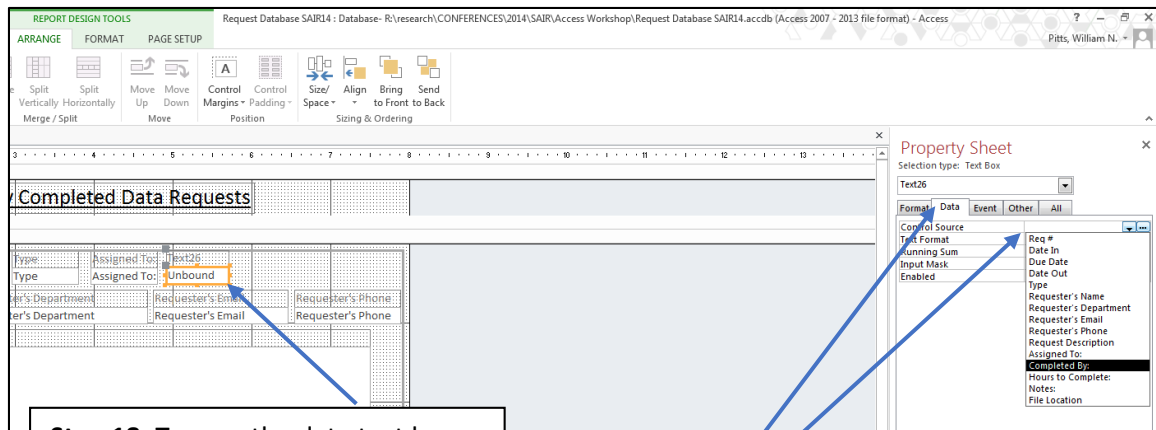


- To add the fields **Completed By** and **Hours to Complete**, follow the steps below.



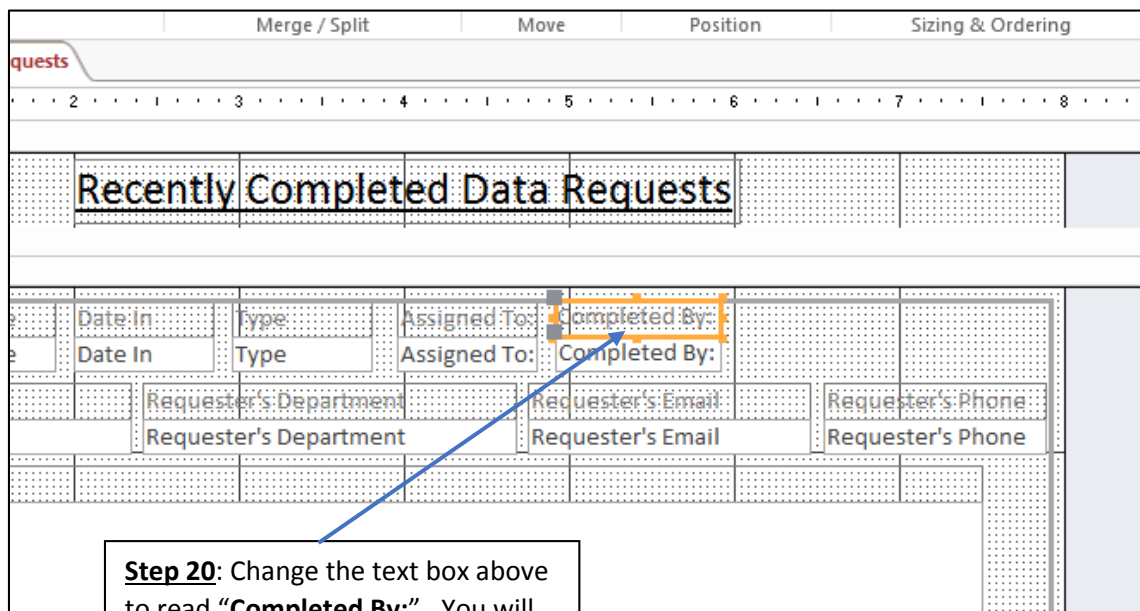
- You'll notice that the text box that reads "Text26" is to the left of the data text box you just created. To place the text box above the data box, grab the box in the top left corner of the text box and pull the text box over and above the data text box.





**Step 18:** To map the data text box to data found within the **Completed By** field, Click **only** on the **data text box**.

**Step 19:** In the **Data** tab, within the **Property Sheet**, pull down the options for **Control Source** and Select **"Completed By:"**



**Step 20:** Change the text box above to read **"Completed By:"**. You will need to increase the width of these text boxes.

**Step 21:** View the Report

Sort & Filter      Records      Find      Text Formatting

**Outstanding Data Requests**

### Recently Completed Data Requests

Req #	Due Date	Date In	Type	Assigned To:	Completed By:
IR0015	1/23/2014	1/8/2014	Internal	mv	mv
Requester's Name		Requester's Department		Requester's Email	
Peter Parker		Nursing		IR0015@uni.edu	
Requester's Phone					
2567650015					
Request Description					
A list of Nursing majors - name, ethnicity, GPA.					

Req #	Due Date	Date In	Type	Assigned To:	Completed By:
IR0021	2/6/2014	2/6/2014	Internal	mv	mv
Requester's Name		Requester's Department		Requester's Email	
Muscles Malone		Athletics		IR0021@uni.edu	
Requester's Phone					
2567650021					
Request Description					
GPA of athletics vs non-athletes f13 undergrads					

Req #	Due Date	Date In	Type	Assigned To:	Completed By:
IR0022	2/7/2014	2/3/2014	Internal	mv	mv
Requester's Name		Requester's Department		Requester's Email	
Dean Stone		Nursing		IR0022@uni.edu	
Requester's Phone					
2567650022					
Request Description					
Number of graduates by divisio 2008-2013					

- We now see that the report contains the field displaying the person that completed the request. However, the text box above does not have a border surrounding it. We can change this in that text box's **property sheet**.
- Switch back to **Design View**.

OL5      Request Database SAIR14 : Database - R:\research\CONFERENCES\2014\SAIR\Access Workshop\Request Database SAIR14.accdb (Access 2007 - 2013 file format) - Access      ?      -      X

AT      PAGE SETUP      Logo      Title      Add Existing Fields      Property Sheet      Tab Order      Subreport in New Window      View Code      Convert Report's Macros to Visual Basic

Controls      Header / Footer      Tools

**Data Requests**

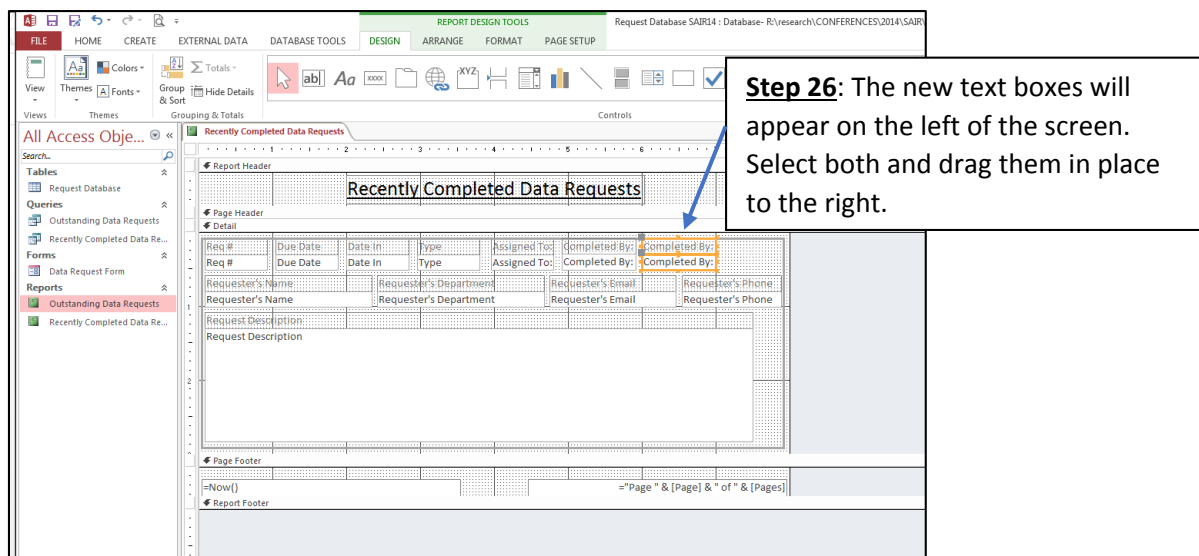
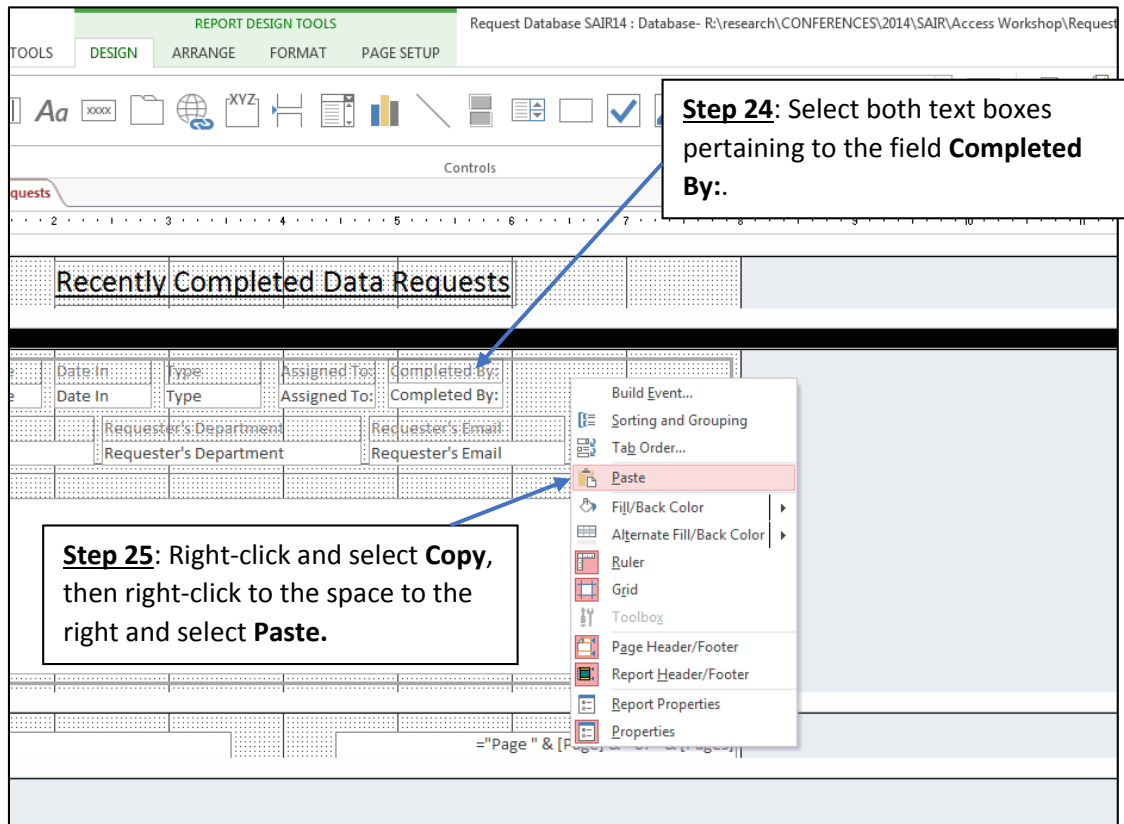
**Step 22:** Select the text box above the data for Completed By.

**Step 23:** Within the Property Sheet, change the border style from "Transparent" to "Solid".

**Property Sheet**  
Selection type: Label  
Label127

Format	Data	Event	Other	All
Caption	Completed By:			
Visible	Yes			
Width	1"			
Height	0.2188"			
Top	0.0833"			
Left	4.9167"			
Back Style	Transparent			
Back Color	Background 1			
Border Style	<b>Solid</b>			
Border Width	Hairline			
Border Color	Text 1, Lighter 50%			
Special Effect	Flat			
Font Name	Calibri (Detail)			
Font Size	11			
Text Align	General			
Font Weight	Normal			
Font Underline	No			

- When you view the report now, the border for the text box will be visible.
- Lastly, we need to add a text box displaying the information for the field **Hours to Complete**.
- We will use another method to add this box.



**Step 27:** Select the data text box alone.

**Step 28:** In the Property Sheet's Data tab, change the Control Source from Completed By: to Hours to Complete:

The screenshot shows the Microsoft Access interface with the 'Property Sheet' window open. The 'Data' tab is selected, and the 'Control Source' is set to 'Hours to Complete'. The 'Text29' text box is selected in the 'Format' tab. The 'Control Source' is set to 'Hours to Complete'.

**Step 29:** Type Hours to Complete: in the text box.







The screenshot shows the 'Recently Completed Data Requests' report. The 'Hours to Complete' text box is highlighted. The report has a header section and a data section with columns for 'Due Date', 'Date In', 'Type', 'Assigned To', 'Completed By', and 'Hours to Complete'.

**Step 30:** Increase the Width of the data text box to equal the text box above it.

The screenshot shows the 'Recently Completed Data Requests' report. The 'Hours to Complete' text box is highlighted. The report has a header section and a data section with columns for 'Due Date', 'Date In', 'Type', 'Assigned To', 'Completed By', and 'Hours to Complete'.

- Save the report and view it in **Print Preview**.

R:\research\CONFERENCES\2014\SAIR\Access Workshop\Request Database SAIR14.accdb (Access 2007 - 2013 file format) - Access

Text File  
 PDF or XPS  
 Email  
 More  
 Close Print Preview  
 Close Preview

Data

### Recently Completed Data Requests

Req #	Due Date	Date In	Type	Assigned To:	Completed By:	Hours to Complete:
IR0015	1/23/2014	1/8/2014	Internal	mv	mv	2

Requester's Name	Requester's Department	Requester's Email	Requester's Phone
Peter Parker	Nursing	IR0015@uni.edu	2567650015

Request Description

A list of Nursing majors - name, ethnicity, GPA.

Req #	Due Date	Date In	Type	Assigned To:	Completed By:	Hours to Complete:
IR0021	2/6/2014	2/6/2014	Internal	mv	mv	0.002

Requester's Name	Requester's Department	Requester's Email	Requester's Phone
Muscles Malone	Athletics	IR0021@uni.edu	2567650021

Request Description

GPA of athletics vs non-athletes f13 undergrads

Req #	Due Date	Date In	Type	Assigned To:	Completed By:	Hours to Complete:
IR0022	2/7/2014	2/3/2014	Internal	mv	mv	1

Requester's Name	Requester's Department	Requester's Email	Requester's Phone
Dean Stone	Nursing	IR0022@uni.edu	2567650022

Request Description

Number of graduates by divisio 2008-2013

Saturday, September 27, 2014

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Thank you for attending. If you need any additional information or help, please feel free to contact either of us:

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Molly Vaughn – [mjmathis@una.edu](mailto:mjmathis@una.edu); (256) 765-4343



