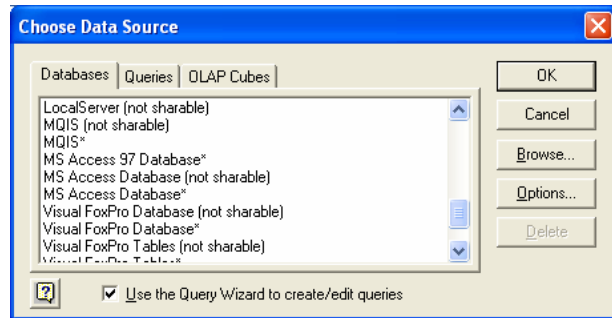
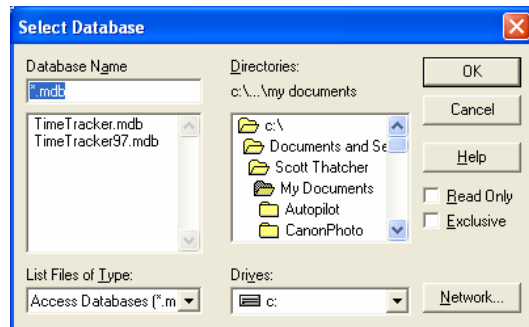


Creating a Report using Access and Excel

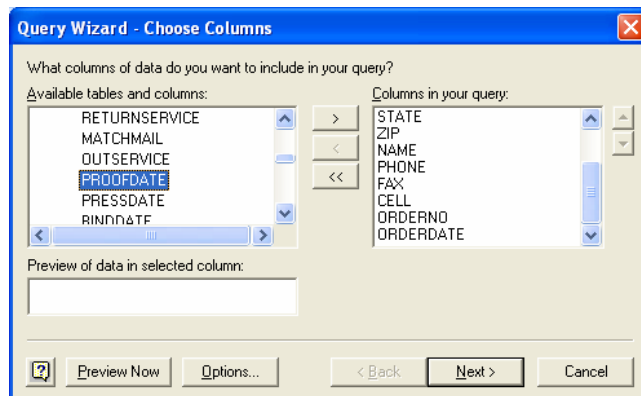
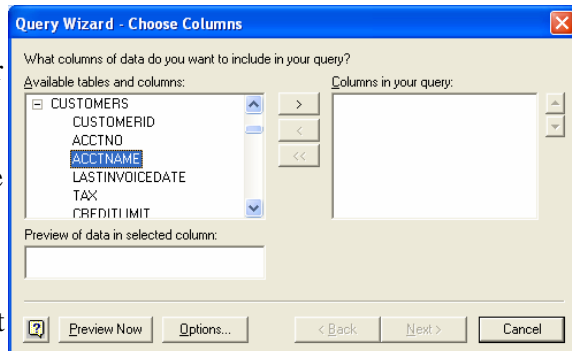
1. Start your Excel program.
2. Click on menu item “Data” and select “Import External Data”
3. From the sub menu that appears, select “New Database Query”
4. Scroll to the bottom of the “Choose Data Source” (see screen shot right) and select “MS Access 97 Database”
5. The “Select Database” window then appears. Select the correct drive letter and then select the Millennium and Data folders. Then select the database called “gtdata.mdb” and be sure it is displayed under “Database Name”. Then click OK.



6. The “Query Wizard” then appears which allows you to select the tables and items within the table to include in your report. Most reports contain what is called a common link. For example, the Customer table and the Orders table both contain “CustomerID” which is how the two tables are linked to each other. In other words, we can select the “AcctName” from the Customer table along with any other items in that table and then choose the Orders table and select any number of items in that table as well. We can even use a third table as long as the table contains the “CustomerID” index. If you plan to use a table that does not contain the “CustomerID” then you will need to be sure that a common index exists between the two tables. For example, the tables might both have the heading called “ClientID”.

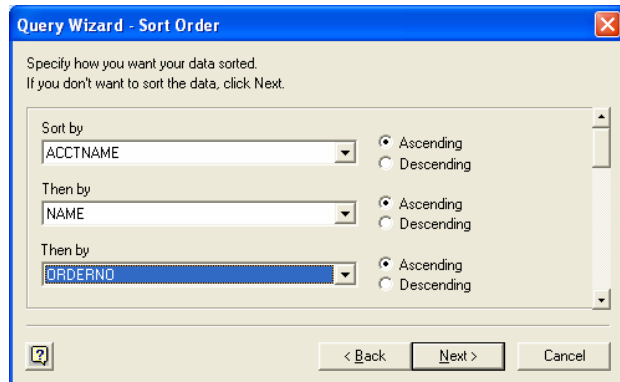


7. For now, we’re going to look at a simple report that includes the AcctName from the Customer table, the Street1, Street2, City, State, Zip from the Address table, the Name, Phone, Fax, Cell from the Contacts table and Order Number, Order Date from the Orders table. That gives us a report in which the CustomerID is common to all four tables.
8. The final Query Wizard looks similar to that shown to the right.

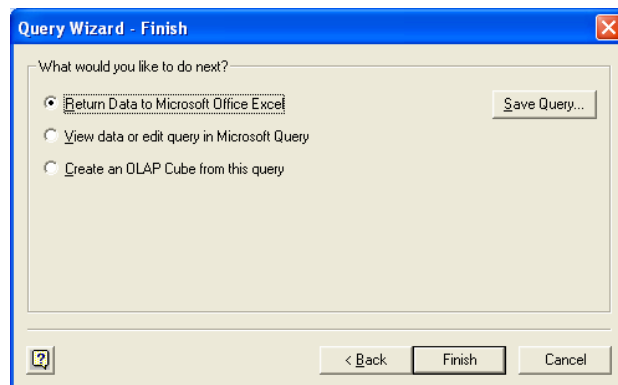


9. In order to move each item (Column) in each table to the right, we need to select it on the left and click the > arrow in the middle of the Query Wizard.
10. When you have selected everything you need, then click on the word NEXT at the bottom of the screen.
11. For now, disregard the next screen that appears called “Filter Data”. This would be used only if you need to list only the data for a single customer, or a range of job numbers, etc. For now, we want to include everything in the report.

12. The next screen that appears is called “Sort Order”. In this example, we have chosen the AcctName (or the Customer Name) as the primary sort key. Once we have that sorted, the Contact Names (Name) are then sorted. Finally, we want to have all job numbers sorted as well.
13. Sometimes its hard to realize just what you will wind up with once you select more than two sort on a report, but this is the fun of experimenting. Hit next.



14. The “Finish” screen then appears. At this point, be sure to Save Query so that you can call it up again in the future and have it perform the same report on any new data you may have. Also, be sure to save it in the “My Documents” folder or you may never be able to find it again.



15. For now, click Finish and click OK when the small screen appears. This will bring the data into the existing worksheet.
16. Any time you want to bring up the report with new data, dbl-click the file name you saved in My Documents. It will have the extension of DQY. If you dbl-click the name that contains the XLS extension, the same report that you saved will appear... it will not update for new data.

To edit the file, select the same “Import External Data” as you did in step 1. You will note that all selections are gray except for “Edit Query”. This will bring up the report to the same location as in step 7. Just remove and add items as desired, save the query under a new name and you are done!