

# Re: Calculate Year To date Totals

**Source:**

<http://www.tech-archive.net/Archive/Access/microsoft.public.access.reports/2006-02/msg00005.html>

- From: "Allen Browne" <[AllenBrowne@xxxxxxxxxxxxxxxx](mailto:AllenBrowne@xxxxxxxxxxxxxxxx)>
- Date: Wed, 1 Feb 2006 10:00:18 +0800

You are right: if you filter for one month, the approach I suggested will not give the YTD figures.

Couple of alternatives:

1. A DSum() expression in the Control Source of the text box:  
Example:

```
=DSum("Amount", "Table1", "([Location] = "" & [Location] &
"" ) AND ([InvoiceDate] Between " &
Format(DateSerial(Year([InvoiceDate]),1,1), "\#mm\dd\yyyy\#") & " And " &
Format(DateSerial(Year([InvoiceDate]), Month([InvoiceDate])+1,0),
"\#mm\dd\yyyy\#") & ")")
```

2. A subquery in the report's recordsource.

If subqueries are new, see:

How to Create and Use Subqueries

at:

<http://support.microsoft.com/?id=209066>

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Allen Browne - Microsoft MVP. Perth, Western Australia.  
Tips for Access users - <http://allenbrowne.com/tips.html>  
Reply to group, rather than allenbrowne at mvps dot org.

"Dave C" <[DaveC@xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx](mailto:DaveC@xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx)> wrote in message  
<news:3AA8E402-BB49-4227-8108-00006F79DE70@xxxxxxxxxxxxxxxxxxxxxxxx>

> Allen,  
> Thanks for your quick reponse. I've had a look at what you suggested and  
> it  
> goes some way to achieving what I need. Your suggestion seems to require  
> each  
> successive month totals to be included on the report in order to achieve  
> the  
> aggregated annual total, but what I really need is a summary report  
> including  
> the totals for a single month (for each location), together with the full  
> year to date totals. Ideally they should be printed on a single row. See  
> below for a rough example of what I'm trying to achieve.

```
>
> Month      Location      Interest(Month)  Tax(Month)      Interest(YTD)
> Tax(YTD)
> August
>
>           A                100.00           20.00
> 1000.00      200.00
>
>           B                50.00           10.00
> 500.00      100.00
```

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```
> -----
>
> Total 150.00 30.00
> 1500.00 300.00
>
> ----- end of report -----
>
> I'm not sure of this can be achieved within the report itself or if it
> needs
> to commence within the underlying query, as I need to limit the visible
> data
> on the report to a single month (in the above case, August), per location,
> but at the same time provide the year to date totals for the individual
> locations as well.
>
> Thanks & Regards,
>
> David
>
>
>
> "Allen Browne" wrote:
>
>> In report design view, open the Sorting And Grouping dialog.
>> Choose the date field, and in the lower pane of the dialog set:
>> Group Header: Yes
>> Group On: Year
>> This gives you a group header to put the year in.
>>
>> On the 2nd row of the dialog, choose the date field again.
>> This time, set:
>> Group Footer: Yes
>> Group On: Month
>>
>> In this Group Footer section, add another text box with these properties:
>> Control Source: =Sum([Amount])
>> Running Sum: Over Group
>> replacing "Amount" with the name of the field you want to sum YTD.
>>
>> The text box will accumulate the totals over the group. Since the parent
>> group is the year, it will reset each year.
>>
>> "Dave C" <DaveC@xxxxxxxxxxxxxxxxxxxxxxxxxxxx> wrote in message
>> news:F9D5C98D-D7D6-4B21-905A-0A559B3ACC52@xxxxxxxxxxxxxxxxxxxx
>> >I have a table that contains the monthly values (one record for the
>> >monthly
>> > totals of each account) from which I need to produce a report that
>> > shows
>> > not
>> > only the value for each of the various financial fields for a
>> > particular
>> > month, but an accumulated Year To Date (calendar year) value for each
>> > of
>> > the
>> > various fields.
>> >
>> > eg: The report for August would show the values for August plus
>> > additional
>> > columns showing the sum of the monthly values January - August.
>> >
>> > The month values aren't a problem but I'm struggling with how to
>> > calculate
```

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>> > the Year to Date totals.

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