

Report Designer – Sections and Groups Pt.2

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Sage



Agenda

- **RECAP**
- **Multiple Groups**
- **Sub-Totals**
- **Page Breaks**
- **Further support**

RECAP

What is a Group?

Divides report data into groups sharing something in common: -

- List of Customers grouped *by Department*
- List of Transactions grouped *by Supplier*
- List of Products *by Stock Location*

Benefits

- Provides structure to a report
- Report data automatically sorted on the grouped data field
- Multiple Groups
- Sub-totals
- Page Breaks
- And more!

Multiple Groups



Multiple Groups – Design Mode

1. Page Header					
Date:	DATE		NAME		Page: PAGE
Time:	TIME		NAME		
2. Report Header					
Cust Ref From :	CUSTOMER_RE	Date From:	TRAN_DATE_FR	Transaction From:	DETAIL_TRAN_
Cust Ref To:	CUSTOMER_RE	Date To:	TRAN_DATE_T	Transaction To:	DETAIL_TRAN_
3. ANALYSIS_1 Header					
Agent :	ANALYSIS_1				
4. ACCOUNT_REF Header					
Account Ref :	ACCOUNT_RE	Name :	NAME		
Tran. Type	Inv Ref	Details	Gross Amount	Tax Amount	Outstanding
5. Details					
TYPE	INV_REF	DETAILS	GROSS_AMOUNT	TAX_AMOUNT	OUTSTANDING
6. ACCOUNT_REF Footer					
			GROSS_AMOUNT	TAX_AMOUNT	OUTSTANDING
7. ANALYSIS_1 Footer					
Agent Totals :			GROSS_AMOUNT	TAX_AMOUNT	OUTSTANDING
8. Report Footer					
Totals :			GROSS_AMOUNT	TAX_AMOUNT	OUTSTANDING
	END_OF_REPORT				

Agents Commission Report

Page Header – *once per page*

Report Header – *once per report*

Group 1 Header – *once per group*

Group 2 Header – *once per group*

Details – *once per line of data*

Group 2 Footer – *once per group*

Group 1 Footer – *once per group*

Report Footer – *once per report*

Multiple Groups – Preview Mode

Date: 09/12/2022

Time: 11:59:20

Stationery & Computer Mart UK

Agents Commission Report

Page: 1

Cust Ref From :

Cust Ref To : 7777777

Date From: 15/01/2021

Date To: 29/01/2021

Transaction From: 1

Transaction To: 99,999,999

Agent : Abby

Account Ref : BRI001

Name : Fred Briant

Tran. Type	Inv Ref	Details	Gross Amount	Tax Amount	Outstanding
SI	3	PC Combo Pack 1	630.97	91.97	0.00
SI	3	SIMM 64mb 100Mhz	183.55	26.75	0.00
SI	3	LP100 Laser Printer	275.33	40.13	0.00
SI	3	LP100 Laser Printer Toner	114.72	16.72	0.00
			1,204.57	175.57	0.00

Account Ref : STE002

Name : Steven Stephenson

Tran. Type	Inv Ref	Details	Gross Amount	Tax Amount	Outstanding
SI	15	PC Combo Pack 3	2,581.23	376.23	0.00
SI	15	SIMM 32mb 100Mhz	229.44	33.44	0.00
SI	15	JP030 Jet Printer Cartridge	144.55	21.07	0.00
SI	15	Rubber Bands - Selection Pack (200)	13.77	2.01	0.00
SI	15	Copy Paper - Standard Grade	288.22	42.01	0.00
SI	15	JP010 Jet Printer	160.61	23.41	0.00
			3,417.82	498.17	0.00

Account Ref : STU001

Name : Edward Stuart

Tran. Type	Inv Ref	Details	Gross Amount	Tax Amount	Outstanding
SI	12	JP010 Jet Printer	160.61	23.41	0.00
SI	12	MTH1000 Motherboard	229.44	33.44	0.00
SI	12	DIMM 128mb 100Mhz	458.89	66.89	0.00
SI	12	Mouse Mat - (241 x 203) Black	3.44	0.50	0.00
SI	12	PCR700 Processor	917.77	133.77	0.00
			1,770.15	258.01	0.00

Agent Totals :

6,392.54

931.75

0.00

Group 1 Header – once per **START** of group

Group 2 Header – once per **START** of group

Group 2 Footer – once per **END** of group

Group 2 Header – once per **START** of group

Group 2 Footer – once per **END** of group

Group 2 Header – once per **START** of group

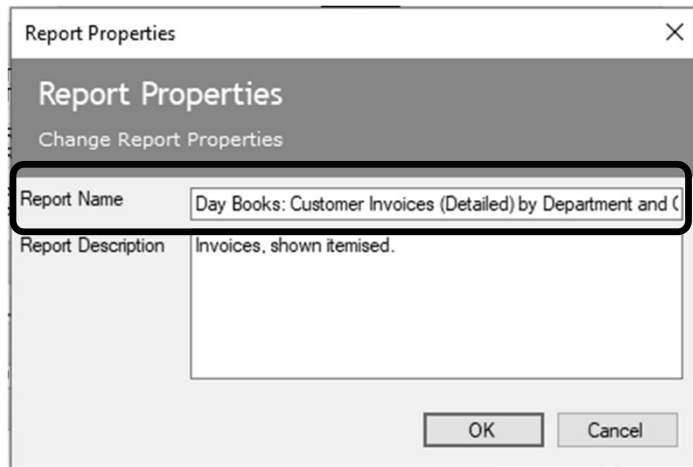
Group 2 Footer – once per **END** of group

Group 1 Footer – once per **END** of group

Creating a copy of a report

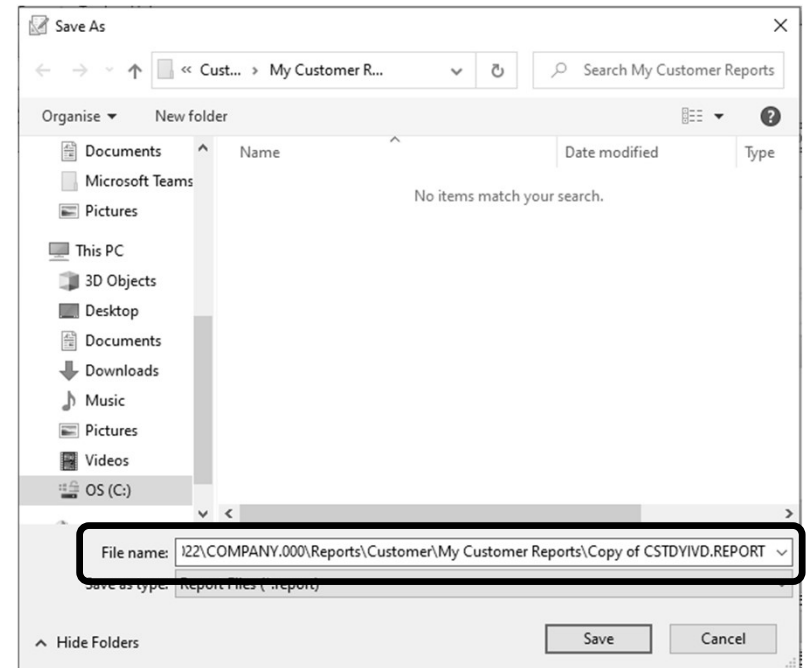
To change the **name** of the report: -

- Report > Report Properties > change Report Name > OK



To change the **filename** of the report: -

- File > Save As > either change filename or leave as “Copy of...” > Save



Adding Group 1

Sections > Add Section > Group Header and Footer > add table and variable in window > OK

A new **Group Header** and **Group Footer** section appears in the report design: -

BEFORE GROUP 1 (5 sections)

1. Page Header

Date: DATE
Time: TIME

NAME
NAME

Page: PAGE

2. Page Header

Date From: TRAN_DATE_FROM
Date To: TRAN_DATE_TO

Customer From: CUSTOMER_REF
Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA
Transaction To: DETAIL_TRA

N/C From: TRAN_NOM_CO
N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT
Dept To: TRAN_DEPT

3. Page Header

Tran No. Type Date A/C Ref N/C Inv Ref Dept. Details Net Amount Tax Amount T/C Gross Amount V B

4. Details

TRAN_N TY DATE ACCOUNT_ NOMINA INV_REF DEPT DETAILS NET_AMOUN TAX_AMOUNT TAX_ GROSS_AMO VABAN

5. Report Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

END_OF_REPORT

AFTER GROUP 1 (7 sections)

1. Page Header

Date: DATE
Time: TIME

NAME
NAME

Page: PAGE

2. Page Header

Date From: TRAN_DATE_FROM
Date To: TRAN_DATE_TO

Customer From: CUSTOMER_REF
Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA
Transaction To: DETAIL_TRA

N/C From: TRAN_NOM_CO
N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT
Dept To: TRAN_DEPT

3. Page Header

Tran No. Type Date A/C Ref N/C Inv Ref Dept. Details Net Amount Tax Amount T/C Gross Amount V B

4. AUDIT_SPLIT.DEPT_NUMBER Header

5. Details

TRAN_N TY DATE ACCOUNT_ NOMINA INV_REF DEPT DETAILS NET_AMOUN TAX_AMOUNT TAX_ GROSS_AMO VABAN

6. AUDIT_SPLIT.DEPT_NUMBER Footer

7. Report Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

END_OF_REPORT

Adding Group 2

Sections > Add Section > Group Header and Footer > add table and variable in window > OK

A new **Group Header** and **Group Footer** section appears in the report design: -

BEFORE GROUP 2 (7 sections)

The screenshot shows a report design window with 7 sections:

- 1. Page Header**: Contains fields for Date, Time, NAME, and Page.
- 2. Page Header**: Contains fields for Date From, Date To, Transaction From, Transaction To, Customer From, Customer To, N/C From, N/C To, Dept From, and Dept To.
- 3. Page Header**: Contains a table header with columns: Tran No, Type, Date, A/C Ref, N/C, Inv Ref, Dept, Details, Net Amount, Tax Amount, T/C, Gross Amount, V, B.
- 4. AUDIT_SPLIT.DEPT_NUMBER Header**: A header section for the audit split department number.
- 5. Details**: A table with columns: TRAN_N, TY, DATE, ACCOUNT, NOMINA, INV_REF, DEPT, DETAILS, NET_AMOUN, TAX_AMOUNT, TAX, GROSS_AMO, VA, BAN.
- 6. AUDIT_SPLIT.DEPT_NUMBER Footer**: A footer section for the audit split department number.
- 7. Report Footer**: Contains a Totals section with fields for NET_AMOUN, TAX_AMOUNT, and GROSS_AMO, and an END_OF_REPORT field.

AFTER GROUP 2 (9 sections)

The screenshot shows the same report design window as before, but with two additional sections added, highlighted by red boxes:

- 1. Page Header**: Same as before.
- 2. Page Header**: Same as before.
- 3. Page Header**: Same as before.
- 4. AUDIT_SPLIT.DEPT_NUMBER Header**: Same as before.
- 5. AUDIT_SPLIT.ACCOUNT_REF Header**: A new header section for the audit split account reference.
- 6. Details**: Same as before.
- 7. AUDIT_SPLIT.ACCOUNT_REF Footer**: A new footer section for the audit split account reference.
- 8. AUDIT_SPLIT.DEPT_NUMBER Footer**: Same as before.
- 9. Report Footer**: Same as before.

Group Header Content

BEFORE AMENDMENTS

1. Page Header

Date: DATE

NAME

Page: PAGE

Time: TIME

NAME

2. Page Header

Date From: TRAN_DATE_FROM

Customer From: CUSTOMER_REF

Date To: TRAN_DATE_TO

Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA

N/C From: TRAN_NOM_CO

Transaction To: DETAIL_TRA

N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT

Dept To: TRAN_DEPT_

3. Page Header

Tran No.	Type	Date	A/C Ref	N/C	Inv Ref	Dept.	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
----------	------	------	---------	-----	---------	-------	---------	------------	------------	-----	--------------	---	---

4. AUDIT_SPLIT.DEPT_NUMBER Header

5. AUDIT_SPLIT.ACCOUNT_REF Header

6. Details

TRAN_N	TY	DATE	ACCOUNT_	NOMINA	INV_REF	DEPT	DETAILS	NET_AMOUN	TAX_AMOUNT	TAX_	GROSS_AMO	VA	BAN
--------	----	------	----------	--------	---------	------	---------	-----------	------------	------	-----------	----	-----

7. AUDIT_SPLIT.ACCOUNT_REF Footer

8. AUDIT_SPLIT.DEPT_NUMBER Footer

9. Report Footer

Totals:

NET_AMOUN

TAX_AMOUNT

GROSS_AMO

END_OF_REPORT

AFTER AMENDMENTS

1. Page Header

Date: DATE

NAME

Page: PAGE

Time: TIME

NAME

2. Page Header

Date From: TRAN_DATE_FROM

Customer From: CUSTOMER_REF

Date To: TRAN_DATE_TO

Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA

N/C From: TRAN_NOM_CO

Transaction To: DETAIL_TRA

N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT

Dept To: TRAN_DEPT_

3. Page Header

4. AUDIT_SPLIT.DEPT_NUMBER Header

Dept. DEPT

5. AUDIT_SPLIT.ACCOUNT_REF Header

A/C Ref ACCOUNT_

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
----------	------	------	-----	---------	---------	------------	------------	-----	--------------	---	---

6. Details

TRAN_N	TY	DATE	NOMINA	INV_REF	DETAILS	NET_AMOUN	TAX_AMOUNT	TAX_	GROSS_AMO	VA	BAN
--------	----	------	--------	---------	---------	-----------	------------	------	-----------	----	-----

7. AUDIT_SPLIT.ACCOUNT_REF Footer

8. AUDIT_SPLIT.DEPT_NUMBER Footer

9. Report Footer

Totals:

NET_AMOUN

TAX_AMOUNT

GROSS_AMO

END_OF_REPORT

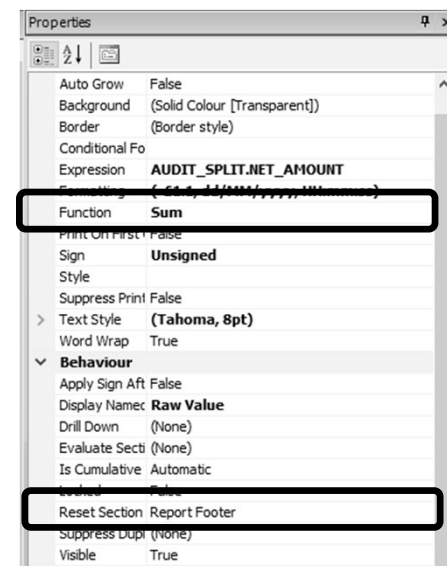
Group Footers

Any **value data fields** added to a group footer section provide **sub-totals** for that group, i.e. :-

- sub-totals for **Department** can be added to the DEPT_NUMBER Footer
- sub-totals for **Customer** can be added to the ACCOUNT_REF Footer

Two properties to check to ensure totals work correctly: -

- **Function** property – needs to be set to **SUM**
- **Reset Section** property – needs to be set to the section the data fields are in



Group Footer Content

BEFORE AMENDMENTS

1. Page Header

Date: DATE

NAME

Page: PAGE

Time: TIME

NAME

2. Page Header

Date From: TRAN_DATE_FROM

Customer From: CUSTOMER_REF

Date To: TRAN_DATE_TO

Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA

N/C From: TRAN_NOM_CO

Transaction To: DETAIL_TRA

N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT

Dept To: TRAN_DEPT

3. Page Header

4. AUDIT_SPLIT.DEPT_NUMBER Header

Dept. DEPT

5. AUDIT_SPLIT.ACCOUNT_REF Header

A/C Ref ACCOUNT_

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
----------	------	------	-----	---------	---------	------------	------------	-----	--------------	---	---

6. Details

TRAN_N	TY	DATE	NOMINA	INV_REF	DETAILS	NET_AMOUN	TAX_AMOUNT	TAX_	GROSS_AMO	VATBAN
--------	----	------	--------	---------	---------	-----------	------------	------	-----------	--------

7. AUDIT_SPLIT.ACCOUNT_REF Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

8. AUDIT_SPLIT.DEPT_NUMBER Footer

9. Report Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

END_OF_REPORT

AFTER AMENDMENTS

1. Page Header

Date: DATE

NAME

Page: PAGE

Time: TIME

NAME

2. Page Header

Date From: TRAN_DATE_FROM

Customer From: CUSTOMER_REF

Date To: TRAN_DATE_TO

Customer To: CUSTOMER_REF

Transaction From: DETAIL_TRA

N/C From: TRAN_NOM_CO

Transaction To: DETAIL_TRA

N/C To: TRAN_NOM_CO

Dept From: TRAN_DEPT

Dept To: TRAN_DEPT

3. Page Header

4. AUDIT_SPLIT.DEPT_NUMBER Header

Dept. DEPT

5. AUDIT_SPLIT.ACCOUNT_REF Header

A/C Ref ACCOUNT_

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
----------	------	------	-----	---------	---------	------------	------------	-----	--------------	---	---

6. Details

TRAN_N	TY	DATE	NOMINA	INV_REF	DETAILS	NET_AMOUN	TAX_AMOUNT	TAX_	GROSS_AMO	VATBAN
--------	----	------	--------	---------	---------	-----------	------------	------	-----------	--------

7. AUDIT_SPLIT.ACCOUNT_REF Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

8. AUDIT_SPLIT.DEPT_NUMBER Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

9. Report Footer

Totals: NET_AMOUN TAX_AMOUNT GROSS_AMO

END_OF_REPORT

Page Break

Can be applied to either **Group Header** or **Group Footer** sections.

Select section > Properties > change Page Break Before / After to **True**

The screenshot displays the Sage software interface with a report design area on the left and a Properties window on the right. The report design area shows a header section with fields for Date, Time, Name, and Page. Below this, there are sections for Page Header, Transaction, and Dept. The Properties window is open, showing the 'Behaviour' tab. The 'Page Break Before' property is highlighted with a red box and set to 'True'. Other properties like 'Character Count', 'Filter', 'Group Expression', 'Group Sort Direction', 'Keep Together', 'Print On First Copy Only', 'Suppress Printing', 'Repeat on Each Page', 'Start On Page', 'Visible', 'Layout', and 'Height' are also visible.

Section	Page Break Before
2. Page Header	True
3. Page Header	False
4. AUDIT_SPLIT.DEPT_NUMBER Header	False

Report Preview – Multiple Groups Added

BEFORE AMENDMENTS

AFTER AMENDMENTS

Date: 12/12/2022

Time: 13:16:16

Stationery & Computer Mart UK

Day Books: Customer Invoices (Detailed)

Page: 1

Date From: 15/01/2021

Date To: 17/01/2021

Transaction From: 1

Transaction To: 99,999,999

Dept From: 0

Dept To: 999

Customer From:

Customer To: ZZZZZZZZ

N/C From:

N/C To: 99999999

Tran No.	Type	Date	A/C Ref	N/C	Inv Ref	Dept.	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
143	SI	15/01/2021	BR1001	4000	3	1	PC Combo Pack 1	539.00	91.97	T1	630.97	R	-
144	SI	15/01/2021	BR1001	4000	3	1	SIMM 64mb 100Mhz	156.80	26.75	T1	183.55	R	-
145	SI	15/01/2021	BR1001	4000	3	1	LP100 Laser Printer	235.20	40.13	T1	275.33	R	-
146	SI	15/01/2021	BR1001	4000	3	1	LP100 Laser Printer Toner	98.00	16.72	T1	114.72	R	-
190	SI	17/01/2021	BU5001	4000	4	1	A4 Ledger Book - 5 Column	42.06	7.36	T1	49.42	R	-
191	SI	17/01/2021	BU5001	4000	4	1	A4 Carbon Copy Book -	31.47	5.51	T1	36.98	R	-
192	SI	17/01/2021	BU5001	4000	4	1	Shorthand Notebook - 80	67.13	11.75	T1	78.88	R	-
193	SI	17/01/2021	BU5001	4000	4	1	Calculator - Desktop	8.78	1.54	T1	10.32	R	-
194	SI	17/01/2021	BU5001	4000	4	1	CDR12432 Read/Write CD	587.05	102.73	T1	689.78	R	-
195	SI	17/01/2021	BU5001	4000	4	1	Correction Fluid - White	17.55	3.07	T1	20.62	R	-
196	SI	17/01/2021	BU5001	4000	4	1	Disk - CDR (640MB)	35.10	6.14	T1	41.24	R	-
197	SI	17/01/2021	BU5001	4000	4	1	Copy Paper - Economy Grade	181.74	31.80	T1	213.54	R	-
198	SI	16/01/2021	GRA001	4000	7	1	Envelope - Brown (110 x	127.59	21.77	T1	149.36	R	-
199	SI	16/01/2021	GRA001	4000	7	1	FX020 Multifunctional Fax	353.40	60.30	T1	413.70	R	-
200	SI	16/01/2021	GRA001	4000	7	1	A4 Labels (68x99) - Inkjet	52.60	8.98	T1	61.58	R	-
201	SI	16/01/2021	GRA001	4000	7	1	Inkjet Paper - Premium	44.08	7.52	T1	51.60	R	-
202	SI	16/01/2021	GRA001	4000	7	1	Pencil - H	8.82	1.51	T1	10.33	R	-
203	SI	16/01/2021	GRA001	4000	7	1	Letter Trays - 3 pack (Black)	18.55	3.17	T1	21.72	R	-
204	SI	16/01/2021	GRA001	4000	7	1	SCAN1000 Scanner	75.98	12.96	T1	88.94	R	-
205	SI	16/01/2021	GRA001	4000	7	1	Remember-Me Sticky Notes	15.90	2.71	T1	18.61	R	-
Totals:								2,696.80	464.39		3,161.19		

End of Report

Date: 12/12/2022

Time: 13:14:45

Stationery & Computer Mart UK

Day Books: Customer Invoices (Detailed) by Dept and Customer

Page: 1

Date From: 15/01/2021

Date To: 17/01/2021

Customer From: Customer To: ZZZZZZZZ

Transaction From: 1

Transaction To: 99,999,999

N/C From: N/C To: 99999999

Dept From: 0

Dept To: 999

Dept: 1

A/C Ref BR1001

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
143	SI	15/01/2021	4000	3	PC Combo Pack 1	539.00	91.97	T1	630.97	R	-
144	SI	15/01/2021	4000	3	SIMM 64mb 100Mhz	156.80	26.75	T1	183.55	R	-
145	SI	15/01/2021	4000	3	LP100 Laser Printer	235.20	40.13	T1	275.33	R	-
146	SI	15/01/2021	4000	3	LP100 Laser Printer Toner	98.00	16.72	T1	114.72	R	-
Totals:						1,029.00	175.57		1,204.57		

A/C Ref BU5001

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
190	SI	17/01/2021	4000	4	A4 Ledger Book - 5 Column	42.06	7.36	T1	49.42	R	-
191	SI	17/01/2021	4000	4	A4 Carbon Copy Book -	31.47	5.51	T1	36.98	R	-
192	SI	17/01/2021	4000	4	Shorthand Notebook - 80	67.13	11.75	T1	78.88	R	-
193	SI	17/01/2021	4000	4	Calculator - Desktop	8.78	1.54	T1	10.32	R	-
194	SI	17/01/2021	4000	4	CDR12432 Read/Write CD	587.05	102.73	T1	689.78	R	-
195	SI	17/01/2021	4000	4	Correction Fluid - White	17.55	3.07	T1	20.62	R	-
196	SI	17/01/2021	4000	4	Disk - CDR (640MB)	35.10	6.14	T1	41.24	R	-
197	SI	17/01/2021	4000	4	Copy Paper - Economy Grade	181.74	31.80	T1	213.54	R	-
Totals:						970.88	169.90		1,140.78		

A/C Ref GRA001

Tran No.	Type	Date	N/C	Inv Ref	Details	Net Amount	Tax Amount	T/C	Gross Amount	V	B
198	SI	16/01/2021	4000	7	Envelope - Brown (110 x	127.59	21.77	T1	149.36	R	-
199	SI	16/01/2021	4000	7	FX020 Multifunctional Fax	353.40	60.30	T1	413.70	R	-
200	SI	16/01/2021	4000	7	A4 Labels (68x99) - Inkjet	52.60	8.98	T1	61.58	R	-
201	SI	16/01/2021	4000	7	Inkjet Paper - Premium	44.08	7.52	T1	51.60	R	-
202	SI	16/01/2021	4000	7	Pencil - H	8.82	1.51	T1	10.33	R	-
203	SI	16/01/2021	4000	7	Letter Trays - 3 pack (Black)	18.55	3.17	T1	21.72	R	-
204	SI	16/01/2021	4000	7	SCAN1000 Scanner	75.98	12.96	T1	88.94	R	-
205	SI	16/01/2021	4000	7	Remember-Me Sticky Notes	15.90	2.71	T1	18.61	R	-
Totals:						696.97	118.97		815.94		
Totals:						2,696.80	464.39		3,161.19		
Totals:						2,696.80	464.39		3,161.19		

End of Report



Recap

- Adding a new group? Two new sections, **Group Header** and **Group Footer**
- Objects should be moved / added into **Group Header** to explain the purpose of the group
- Titles for report data should sit in **last group header** if multiple groups on report (section above details)
- Sub-totals for each group can be achieved by adding value data fields into a **Group Footer** section
- **Always check – Function** = SUM and **Reset Section** = section the data fields are in, for any value fields in footer sections
- **Page Breaks** can be applied to either a Group Header or Footer to force a new group of data onto a new page

Further Support

Add a Group

Add Totals

Group Properties

Tables and Variables

Sage Report Design Service