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

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Multiple Groups – Design Mode

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 | | Stationery & Computer Mart UK | | Page: | 1 |
| Time: | 11:59:20 | | Agents Commission Report | | | |

| Cust Ref From : | | | Date From: 15/01/2021 | | Transaction From: 1 |
| Cust Ref To: | ZZZZZZZZZ | | Date To: 29/01/2021 | | 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*

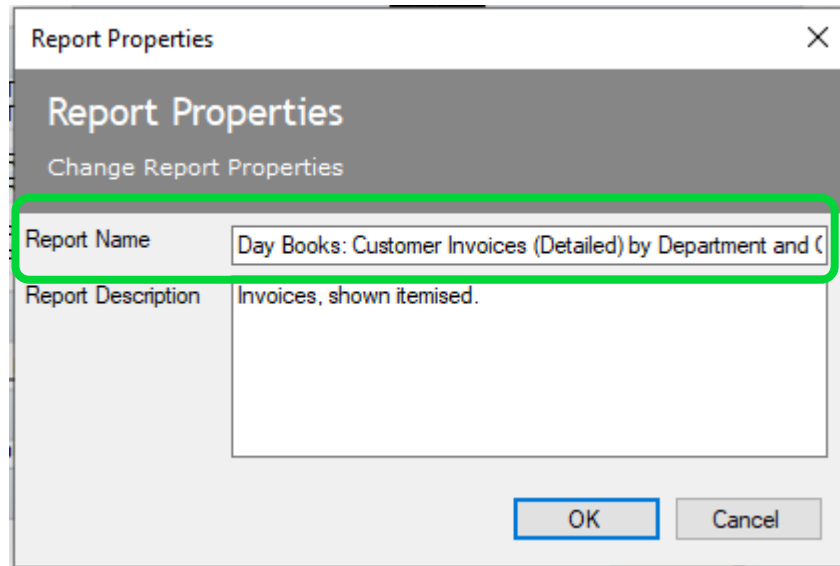**Group 2 Header** – *once per **START** of group*

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*
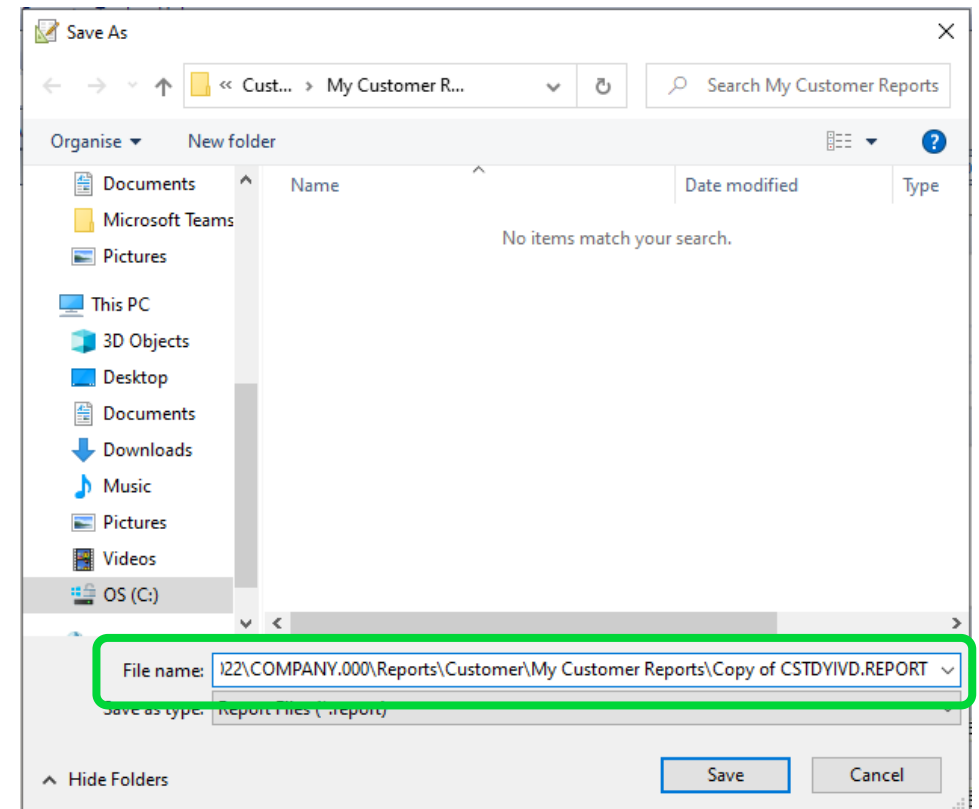
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Creating a copy of a report

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)

AFTER GROUP 1 (7 sections)

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)

AFTER GROUP 2 (9 sections)

Group Header Content

BEFORE AMENDMENTS

AFTER AMENDMENTS

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
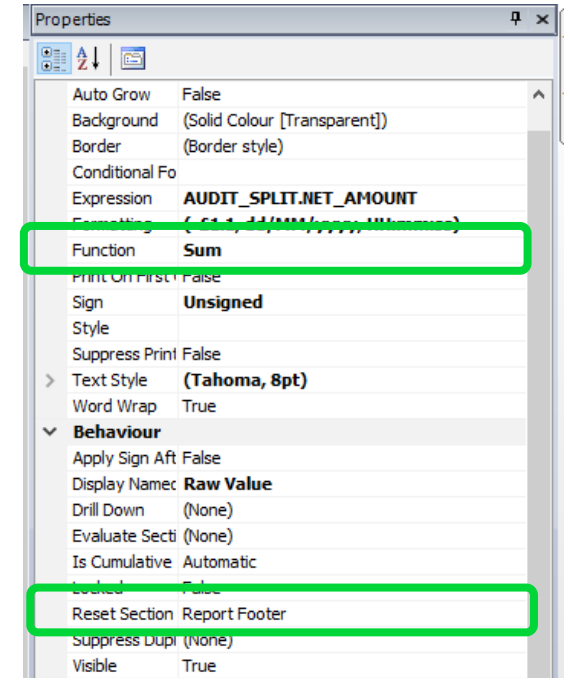
Group Footer Content

BEFORE AMENDMENTS

AFTER AMENDMENTS

Page Break

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

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

Report Preview – Multiple Groups Added

BEFORE AMENDMENTS

AFTER AMENDMENTS

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