

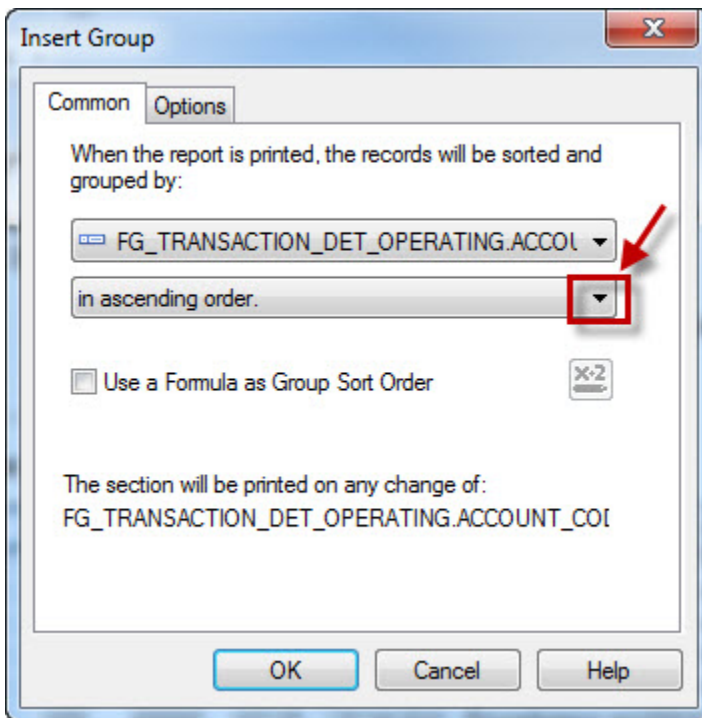
CRYSTAL REPORTS

Grouping Data

For example: A report lists transactions one after another. You wish to group the records by a specific field in a certain order (usually ascending or descending).

Adding a group

1. In the **Preview tab**, **click** on the field you want to use to group the records - a blue border will appear around it/the field will be highlighted. For example, if you want to group records by Account code, click on the data in Account code field – do not click on the column heading.
2. Click on **Insert > Group**.
3. The Insert Group dialog box will open and the field you selected in Step 1 appears with the statement “When the report is printed, the records will be sorted and grouped by:” above it.
4. **Click** to view the pull down options for the sorting order of this grouping and select an option OR leave as is – the default order is ascending.

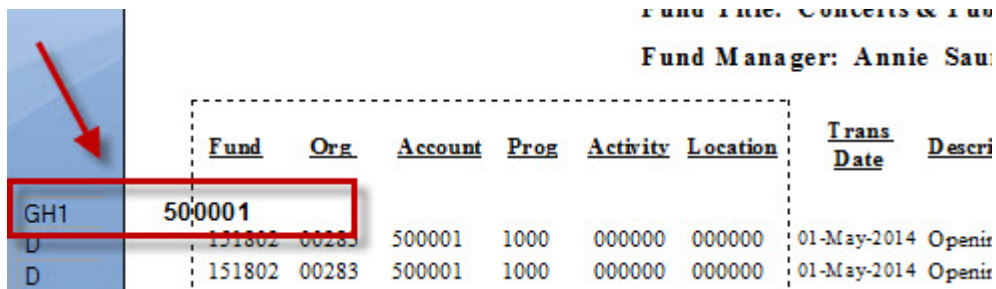


5. Click on **OK**.

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Grouping Data

6. A grouping has been added to the report. For example, if the Account code field was selected above, records are now grouped by Account code. GH1 appears to the left of the field denoting Group Header 1 and each different Account code is displayed once, at the beginning of the set of records, in bold.



Fund Title: CONCEPTS & FUN
Fund Manager: Annie Sau

	<u>Fund</u>	<u>Org</u>	<u>Account</u>	<u>Prog</u>	<u>Activity</u>	<u>Location</u>	<u>Trans Date</u>	<u>Descri</u>
GH1	500001							
D	151802	00283	500001	1000	000000	000000	01-May-2014	Openir
D	151802	00283	500001	1000	000000	000000	01-May-2014	Openir

TIP: Delete a Grouping

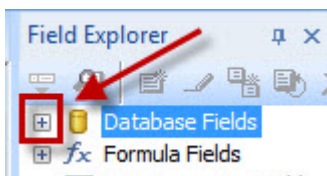
To delete a grouping, go to the Design tab. Right-click on the Group Header you wish to delete and click on Delete Group.

TIP: Hide/Suppress transaction details for a Group

If you do not necessarily want to see the transaction details for a Group, you can Hide or Suppress them.

To display the field title associated to the grouping

1. Click on the “+” sign next to **Database Fields** in the **Field Explorer** dialog box. This will list the views associated with the report.



2. Click on the “+” sign next to a view name. This will list the fields associated with the selected view.
3. In the **Design tab**, **drag and drop** a field from the Field Explorer dialog box to a blank area within the Group Header section of the report. For example, to display the title for the object Group #1 Name, which refers to the Account code grouping, drag and drop ACCOUNT_TITLE next to it in the Group Header.

Note: Fields already included in the report will have a checkmark appearing before the field name in the Field Explorer dialog box

4. If needed, edit the formatting, size, and alignment of the field and Field heading to match other elements in the report.

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Grouping Data

	Fund	Org	Account	Prog	Activity	Location	Date	Description
Group Header #1:								ACCOUNT_TITLE
Details	_CODE	ORGAN	ACCOUNT	PROG	ACTIVITY	LOCATIO	TRANSACT	TRANSA
Group Footer #1:								

Adding a sum total for a grouping of records

1. In the **Preview tab**, click on the field for which you want to display a “total/subtotal” value - a blue border will appear around it/the field will be highlighted. For example, if you want to display the sum total of the Actuals for each group of Account codes, click on the data in the Actuals field – do not click on the column heading.
2. Click on the **Insert Summary icon** on the toolbar.



3. The Insert Summary dialog box will open.
4. Choose a **Summary location** – where to display this sum total. By default, Grant Total (Report Footer) is selected. For example, to display the sum total for each Account code, select the grouping from the pull down menu which corresponds to this.

Insert Summary

Choose the field to summarize:
FG_TRANSACTION_DET_OPERATING.ACTUALS

Calculate this summary:
Sum

Summary location
Group #1: FG_TRANSACTION_DET_OPERATING.A

Add to all group levels Insert Group...

Options
 Show as a percentage of
Grand Total: Sum of ACTUALS
 Summarize across hierarchy

OK Cancel Help

5. Click on OK to save your changes and close the window.

CRYSTAL REPORTS

Grouping Data

- This Sum total for the Actuals field has been added to the report in a group footer. For example, a sum total now appears under the Actuals column in the Group Footer for the Account code field selected above (Summary location). GF1 appears to the left of the field denoting Group Footer 1 and each different Account code has a sum displayed at the end of the set of records, under the Actuals column, in bold.

D	ces Pollack Hal	03	F0094544		0.00	-270.95	0.00
D	ces Redpath Ha	03	F0094691		0.00	-102.57	0.00
GF1						-2,940.18	
GH1							
D	udget (non-sal)	01	FZ738746	B0458339	-20,000.00	0.00	0.00

To move this Sum total from the Group Footer to the Group Header

- Click on the **Design tab**.
- Drag and drop** the selected object (a blue border will be around it) from the Group Footer into the Group Header.
- Click on the **Preview tab** to see the change.