**Basic Report Grouping Tutorial**

1. **Expected Output**

**Graphical user interface, application, table

Description automatically generated**

1. **Grouping report**
   1. **What is grouping report?**
      1. Grouping report is a report where you want to group the data in a group and display it in a readable informative table.
      2. As you can see from the figure above, the table show summary of customer name, the number of accounts, summation of total outstanding amount and the summation assigned total arrears. All the detail then is group by MIA from MIA 0 – MIA 4. By doing grouping, the data can be easily to understand as at first, we can see the detail for MIA 0 followed by MIA 2 until 4 and at the end we can see the summary for all the columns.
      3. You may be thinking that why must you group like this, because you can just easily create one column to display all the MIA for each detail. Yes, I don’t say it is wrong, perhaps we should practise a method where the data can be easily understood by the user. A report should be easily understood, not a place where the user needs to have a time to understand it.
2. **Step-by-Step**
   1. **Query**
      1. When you want to create a grouping report, you need to have a query that already grouped by. Otherwise, it will be quite difficult to create the report.

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* + 1. After you insert your query inside the Dataset and Query Dialog, you can preview the data first by click the Data Preview at the left button of the dialog box. Once you click the button, press Refresh Preview Data for the Dialog box to display the data.
    2. As I mention before, a report should give user much easy understanding of the data. As you can see, the data previewed was not bad but when we have same month\_in\_arrears, the value is repeating. In order to avoid this issue, we solved it using Table Grouping.
  1. **Create Grouping for the report outline**
     1. For this kind of report, you need to add new band for the grouping purpose.
     2. As before, you can just use, column header, detail and summary to create a simple table report.
     3. For grouping band, you need to right click on the title of the report at the outline tab.
     4. Then you click ‘Create Group’.

Graphical user interface, application

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* + 1. Group band dialog will pop out.

Graphical user interface, text, application, Word

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* + 1. From this dialog box, you need to choose the field that you want to group by. In this case, months\_in\_arrears will be chosen.
    2. Then you need to click for both ‘Add to Group Header’ and ‘Add to Group Footer’
    3. After all finished, you will see the white canvas layout with the created group band.
  1. **White canvas layout**

Table

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* + 1. Noted that months\_in\_arrears grouping have been named mia\_group
    2. As you can see, there are new band which are mia\_group Group Header and mia\_group Group Footer.
    3. The function of this band is the same as Column Header (Group Header) and Summary (Group Footer).
  1. **Insert element in the band**

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Summary Band

mia\_group Group Footer Band

Detail Band

Title Band

Page Header Band

mia\_group Group Header Band

* 1. **Band used:**
     1. Title – Insert the title of the report
     2. Page Header – Insert anything you want to be printed in each page
     3. Group Header Band – insert the column header of the table
     4. Detail Band – Insert the field of data that you want to display
     5. Group Footer- Insert the field as the summary of the table. Such variable of sum for the group
     6. Summary – Insert the field as summary for the whole table
  2. **Detail explanation**
     1. **Group Header Band**
        1. Is the band where you place out the field for the grouping field. Let say the grouping for this report is month\_in\_arrears. So you can place the field here in order for the report to be generated in grouping

Table

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* + - 1. As here you can see that when months\_in\_arrears is placed inside the Group Header band, it will display accordingly to the group of MIA – 0.
    1. **Detail**
       1. For the detail band is the same as usual band. It is the place where you place the field you want to display data
    2. **Group Footer Band**
       1. As we see now, once the data have been group, it should have summary for the grouping so by having a group footer band, you can easily locate all the field that you want to be summarised here.
       2. Same as before, in other to have a calculation function, you can create variable for the related field.
       3. Please noted that this configuration also should be made in order to have a correct data.

Table

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* + - 1. As you can see here at the total row for each group, the number of summations is by group. This configuration should be made in order to have this result.

Graphical user interface, text, application, email

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* + - 1. At the variable properties, u need to select Reset Type - > Group related. In this case is the reset type -> (Group) mia\_group.
      2. By default, the reset type -> Report where the value will not be reset until the last row of the result.

Table

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* + - 1. As you can see here, this will happen when you did not set the Reset Type -> Group.
    1. **Summary Band**
       1. Summary band is the place where you want to summarise all the column.

Table

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* + - 1. As you can see at the Group Total column all the Number of Account have sum all together.
  1. **Preview the Report**
     1. Lastly you can preview the report in order to see the result of the design before. The result should be same expected output on the top of this documentation.