Report Grouping

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Learning Outcomes

- Using Sort Expert

- Using Sort Control

- Creating Groups

- Group and Sort Direction

- Modifying Groups

- Summarizing Groups

- Calculating Percentages

- Hiding Data Using the Drill-Down Option.

Report Grouping

- Very often, we need to sort data either Ascending or Descending.

- The Sort Expert Tool comes in very handy and is very easy to use.

- It can even creates nested sorts as we shall see in the following example.

- Using the Customer table in Xtreme select CustomerID, Customer Name, Region, and Country Fields.

Report Grouping

- Invoke the Sort Expert Tool

- Add Country , Region and Customer Name.

- Make sure all three are ascending.

What happens when you click OK?

Report Grouping

- The sort control allows the users to sort each individual columns. Right-click on the Customer Name Header and select Bind Sort Control. Then select Customer Name and click OK.

- Do the same with Country as well.

Customer ID	Customer Name	Region	Country
158	Bicicletas Buenos Aires	Mendoza	Argentina
157	Aruba Sport	St. George	Aruba
143	Down Under Bikes	New South Wales	Australia
144	Canberra Bikes	New South Wales	Australia
148	Koala Road Bikes	Queensland	Australia
149	Tasmanian Devil Bikes	Tasmania	Australia
145	Kangeroo Trikes	Victoria	Australia

Report Grouping

- Now sort Country in Descending Order. What happens on the other columns?

- Finally, downsort the Customer name as well, what happens?

- A group can be any collection of elements that have one or more attributes in common. Let's say that your boss wants to know customer orders total by state from a specific country sorted by Customer Name is ascending order.

Report Grouping

- Lets take the country to be Mexico.

- We will be using the Report Generation Wizard to get us going.

- Select <u>Customer</u> and <u>Orders</u> Tables. Choose Customer Name, Region and Order Amount fields respectively.

- In Grouping View, move Customer.Region to the Group by Pane.

- In Summaries View, Click on Sum of Orders.Order Amount and select Sum.

Report Grouping

- In the Record Selection Window, Select Customer.Country and add it to the Filter Fields Pane. Then equate it to Mexico. Click Finish. You should get something similar to this.

9/15/2009

Region	Customer Name	Order Amount
Distrito Federal		
Distrito Federal	Bicycles Alex	$764.85
Distrito Federal	Deportes Mexico City	$8,819.55
Distrito Federal		**$9,584.40**
Guerrero		
Guerrero	Tiempo Libre Monterrey	$845.55
Guerrero		**$845.55**
Jalisco		
Jalisco	Tiempo Libre Acapulco	$1,529.70
Jalisco		**$1,529.70**

Report Grouping

- Go in Design view and arrange the formating and add a Report Title. Do other changes as well so that your report look like the following:

Customer Report, grouped by Region (Mexico)

9/15/2009

	Customer Name	Order Amount
Distrito Federal		
	Bicycles Alex	$764.85
	Deportes Mexico City	$8,819.55
Distrito Federal		$9,584.40
Guerrero		
	Tiempo Libre Monterrey	$845.55
Guerrero		$845.55
Jalisco		
	Tiempo Libre Acapulco	$1,529.70
Jalisco		$1,529.70

Report Grouping

- Let say you want to have a Percentage view of each region instead of the Total. This can easily be done. Right-click on the order amount field in the GF1 Section and Choose Edit Summary. Check Show as a Percentage

Customer Report, grouped by Region (Mexico)

9/15/2009

	Customer Name	Order Amount
Distrito Federal		
	Bicycles Alex	$764.85
	Deportes Mexico City	$8,819.55
Distrito Federal		57.65 %
Guerrero		
	Tiempo Libre Monterrey	$845.55
Guerrero		5.09 %

Report Grouping

- Now Change the orders from Mexico to USA. Go in Select Expert and do the changes and Refresh Data.

- A single region has orders that spans for more than one pages. Not a really good summaries view is it? Can be overcome by using a drill-down option to hide extra data.

- This can be done easily. In design mode, right-click on the D to the left of the Details band and click Hide (Drill0Down OK).

Report Grouping

Task 5a

- Create a report as faithfully as this one.

- Database is Northwind2008.mdb.

- Table is Orders

- Save your report as 5a.rpt