Report Narrative/Requirements Versions: 9/10/11/2008/2011/2013

REPORT NARRATIVE

This report shows how to:

- group by two data fields,
- sort record information,
- set the appropriate options needed to utilize Drill Down reporting when needed,
- stack data in a column by creating new sections
- using the Insert Summary feature

1. MENU OPTION - File/Options

Click on Reporting tab

• Check Show All Headers on Drill Down - Allows report user to isolate (drill-down) on group level information.

Options				×	
Fonts	Smart Ta	g & HTML Preview	Dependenc	y Checker	
Layout	Database	Formula Editor	Reporting	Fields	
Enterprise Se	ttings				
Update En	nterprise Report Pr	operties on Save			
Update Co	onnected Reposito	ory Objects on Open			
Reading Data	8				
Convert D	atabase NULL Va	lues to Default			
Convert Of	Convert Other NULL Values to Default				
Always So	Always Sort Locally				
Save Data	With Report				
Discard Sa	aved Data on Ope	n			
Re-import	Subreport on Ope	n			
Suppress	Suppress Printing if No Records Selected				
Show All H	Show All Headers on Drill Down				
Autosave	Reports After	5	Minutes		
Display Ale	erts on Refresh				
Save Prev	Save Preview Picture				
Retain Orig	ginal Image Color I	Depth			
		ОК	Cancel	Help	

Click OK

Report Narrative/Requirements Versions: 9/10/11/2008/2011/2013

2. MENU OPTION - File/Report Options

For Drill Down reporting, the Show All Headers on Drill Down should be checked. If not, check the Show All Headers on Drill Down below:

Report Options	×
General Settings	
Convert Database NULL Values to Default	Save Data With Report
Convert Other NULL Values to Default	Suppress Printing If No Records
Show All Headers On Drill Down	Perform Query Asynchronously
Always Sort Locally	Show Preview Panel
Database Server is Case-Insensitive	Display Alerts on Refresh
Perform Grouping On Server	Read-only
Use Indexes Or Server For Speed	Select Distinct Records
Verify on First Refresh	Select Distinct Data for Browsing
Verify Stored Procedures on First Refresh	Retain Original Image Color Depth
Respect Keep Group Together On First Page	Prompt For Hyperlinks
Save Lock Report Design	Legacy XML Expert
Initial Report Part Settings	
Paste the Report Part link:	💼 Easte Link 🚩
Object Name:	
Data Context:	
Preview Pages Start With : Full Size	~
	OK Cancel Help

Click OK

3. DATABASE TABLE

Customer

4. PAGE HEADER SECTION

Special Fields (via Field Explorer) Print Date and Page Number Report Title - using a text object (via menu option - Insert/Text Object)

5. GROUP HEADER 1 SECTION

Group Report by Customer. Country Set Group Options - Options tab - Repeat Group Header on each page

6. GROUP HEADER 2 SECTION

Group Report by Customer. Region Set Group Options - Options tab - Repeat Group Header on each page

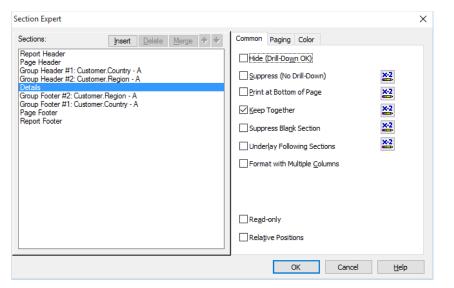
Report Narrative/Requirements Versions: 9/10/11/2008/2011/2013

7. DETAIL SECTION

Data Fields: Customer.Customer ID, Customer.Customer Name and Customer.Last Year Sales

8. MENU OPTION - Report/Section Expert

• Insert two sections by highlighting Detail Section and click on Insert button.



• When completed, the Section Expert screen should have three detail sections, Details A, Details B and Details C

Section Expert	×
Sections: Insert Delete Merge 🛧 🌩	Common Paging Color
Report Header Page Header Group Header #1: Customer.Country - A Group Header #2: Customer.Region - A Details a Details c Group Footer #2: Customer.Region - A Group Footer #1: Customer.Country - A Page Footer Report Footer	Hide (Drill-Down OK) Suppress (No Drill-Down) Print at Bottom of Page Keep Together Suppress Blank Section Underlay Following Sections Read-only Relative Positions
	OK Cancel Help



Report Narrative/Requirements Versions: 9/10/11/2008/2011/2013

9. DETAIL SECTION B

Text Object with concatenated Customer. Contact First Name with a space and Contact Last Name inside

10. DETAIL SECTION B

Customer. Phone

11. MENU OPTION - Report/Record Sort Expert

a) Sorted by:

• Customer.Country - Ascending

擾 Record Sort Expert	×
A <u>v</u> ailable Fields:	Sort Fields:
Report Fields Customer.Country Customer.Customer ID Customer.Customer Na Customer.Last Year's S Customer.Region C:\CRDatabase\xtreme.md Customer	> ☐ Group #1: Customer.Country - A ☐ Group #2: Customer.Region - A □ A - Customer.Customer Name
Customer ID Customer Credit ID	Sort Direction: Ascending Descending
	OK Cancel <u>H</u> elp

Click OK

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Versions: 9/10/11/2008/2011/2013

12. MENU OPTION - Insert Summary

• Sum Customer.Last Year Sales for all Groups (1 and 2) and a grand total

Insert Summary	×				
Choose the field to summarize:					
🚥 Customer.Last Year's Sales					
Calculate this summary:					
Sum	~				
Summary location					
Grand Total (Report Footer)	\sim				
Add to all group levels	Insert Group				
Options					
Show as a percentage of					
	\sim				
Summarize across hierarchy					
OK	Cancel Help				

Click OK

13. GROUP FOOTER 2

Insert Summary for Customer.Region Text Object with concatenated free-form text "Total Region - " and data field Customer.Region

14. GROUP FOOTER 1

Insert Summary for Customer.Country Text Object with concatenated free-form text "Total Country - " and data field Customer.Country

15. REPORT FOOTER

Insert Summary Grand Total Customer.Last Year Sales Text Object with concatenated free-form text "Grand Total Country to the left of the summary count.