

Crystal Reports for LANSA/Client: Customized Grouping

Bill's Territory			
DC	Washington	Redskin Software	15,560
DC	Washington	Butler Computers	25,531
DC	Washington	Empire Data	20,861
NC	Charlotte	Visual Solutions	18,725
SC	Charleston	Hamilton Hard Drives	20,452
SC	Clemson	Clemson Computer Systems	25,529
SC	Charleston	Magnetic Data Storage	16,319
VA	Arlington	Overbyte Data	8,418
			151,395

Janet's Territory			
AR	Little Rock	Optical Drives Inter	4,043
NV	Las Vegas	Complex Computers	22,343
			26,386

Customized Grouping is a facility that allows you to group on a field which is not actually available in your database file.

For instance, you might have the names of countries or states in your sales data, but you would actually like to summarize by larger regions, for example, North, South, East and West or Europe, Asia, USA, etc. Customized grouping allows you to indicate which states belong together and under which group name you would like to print them.

The states that you did not select under any of the groups will by default be grouped under the group name 'Others'. You may also choose to

- change the text 'Others' to something else
- discard all remaining states
- print all states in their individual groups

The same facilities that are available to 'normal' group sections are also available for customized groups. These facilities allow you, among others, to print Summary totals only, Drill Down and print Top-N or Bottom-N reports.

You can indicate the print sequence for customized groups. This means that your groups do not have to be printed in alphabetical order by group name. You can print them in any sequence you like.

You could achieve the customized grouping functionality by using formula fields as well, but it would be much more work. If you use formula fields to create, for instance, regions, the formula for the region field would contain rows of 'If state = ... thenelse...' logic.

To use Customized grouping (in the above states belonging to a representative example):

1. Specify Customized Grouping for the State field:
 - Select to Insert a Group Section.
 - Select the State field from the fields browse list and select the 'in Specified Order' from the order browse list. Two new buttons will appear.
2. Specify your first group, e.g. 'Bill's Territory', and select the states belonging in this group:
 - Push the 'New Named Group' button, and enter a name (e.g. "Bill's Territory").
 - Select the 'One of' condition, and select the states one by one from the list.
 - Press the OK button when you have selected all of Bill's countries.

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3. Specify subsequent groups:

- Press the 'New Named Group' button again, and enter a name for the next group of countries (e.g. Janet's Territory).
- Repeat the same steps for selecting states as mentioned in point 2 .

4. Specify how you want to print the states that you have not selected for any of your groups.

- Press the 'Others' button to specify how you want to print the states that you did not select for any of your groups.
- You can print these states as one group with a specific description (for example 'Others'), discard them or give each state its own group.

5. Press OK to close the Grouping button. This will take you back to your report.

You will see groups in your report, but not yet with their name.

6. Select where you want to print the Group Name field (the name you gave to a group, for example 'Bill's territory':

- Select the Group Name Field command from the Insert menu. Place the group name field in the group header or footer.(this is easier in design mode, than in preview mode).

Your report with customized groups is finished. You may want to add sub-totals as you usually do in your reports with groups.