

Adding footers – Group Footers – Moving Columns

In this flash video we will go into more detail regarding programming and filtering your report to meet your particular need. We will also show you how to add group footers for further breakdown and customization of your reports.

For this example, we wish to sort our entire loan database and see what loan officer has produced what type of loans (i.e. Conventional, FHA, VA, etc). We will also want to add totals under appropriate columns for number of loans and dollar amount of these loans.

Once this report has been completed, we have decided we will want to export that data into Excel for further analysis and distribution to all loan officers.

See the other flash videos pertaining to Reports for more details. You can also view the WorkCenter 2.0 Quick Start Guide for detailed step-by-step processes.

For this example, we will start with the “All Loans Report”.

As you can see by the report, we already have the columns displayed for “Loan Type” and “Loan Officer”

Step #1: Right click on the heading “LoanType” and select “Group By This Field”. You can now see that all the loan types have been grouped together.

Step #2: Right click on the column heading “Loan Officer”. Again, select “Group By This Field” and you now notice you have your report with a second set of groups under each loan type.

Step #3: If you wish to re-arrange the columns in your report, that is done by a single left click on a column heading. While holding down your mouse, drag the column to the desired location and release the mouse when you see the two green arrows. For this example, we will move the column named “Borrower Name” to the left of the column named “Loan Number”.

Step #4: Adding group footers to your reports: right click on the heading to which you wish to add totals and select “Group Footers”. When the line is inserted, right click in the row under the column where you wish to add totals and select the calculation desired. For this example, we will select “Loan Amount” and “sum”. You will notice all groups and sub groups now have totals. Repeat the process for any other columns you wish to calculate.

Step #5: Saving your Report: Now that we have customized this report, we will want to save our edits. Right click on any line item in your report and select “Save Report As...”. You can simply overwrite the existing report or add a new name to this report. If you want to save this report with a new name, decide what group or heading name you wish the report to fall under and then name the individual report an appropriate name.