



THE BUSINESS OF EDUCATION

Creating a Report with a User Defined Group

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Contact us via the ICT Service Desk at:

 01438 844777
 help@sd.hertsforlearning.co.uk
 <https://support.hertsforlearning.co.uk>

Herts for Learning
01438 845111
hertsforlearning.co.uk



Creating a Report with a User Defined Group

This is useful if you have a pupils/students from different years or classes that need to be pulled together into a report. If you use **Preview**, you can pick out those pupils, but you cannot save the list. For example, if you had a school trip and letters needed to where you had to send out letters at intervals asking for deposits, you could create a user defined group first, then use this group in the report. (The following assumes you have some experience in report design.)

1. Go to **Focus > Groups > User Defined Groups**. Click **New** and enter a description e.g. School Trip and a short name e.g. ST. Click **Save** (automatically enters **Active** as **Active State**).
2. Click the **Action** button and choose **Add Member**. Choose either **Registration Group** or **Year Group** as the **Group type** then click **Search**. You can now sort by whichever you chose. You can also pick out a particular group.
3. Pick out the children who need to be in the group – use **Ctrl** or **Shift** to select them then click **OK**.
4. Click **Save** and close the **User defined groups** area.
5. In **Report design**, open the report and go to the **Data Fields** step.
6. Add the **Group membership** subreport and the **Group description** field. Then highlight **Group membership** and add a subreport filter for **Group code equals** and tick **Prompt at runtime** and then add a second filter for **Group type is one of** and tick **User**. You will then need to take the tick off **Include records with no such members**.

The screenshot shows the 'Group membership (filtered)' subreport in a report design tool. The subreport is expanded to show its filters. The first filter is 'Group code of the group is "[?]"' and the second filter is 'Group type of the group is User'. Below the filters, there are two checkboxes: 'Include records with no such members' (which is unchecked) and 'Display first record only' (which is also unchecked). A callout box with an arrow points to the 'Include records with no such members' checkbox, containing the text: 'Ensure tick is removed from 'include records with no such members''.

7. **Save** the report design and run in the usual way. When running, you will be prompted for the Group code.

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help@sd.hertsforlearning.co.uk

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Registered in England and Wales No. 8419581
Registered office: Robertson House, Six Hills Way,
Stevenage, Hertfordshire, SG1 2FQ
www.hertsforlearning.co.uk



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Postal Point SROB201, Robertson House, Six Hills Way, Stevenage, SG1 2FQ

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