Enabling Interactive Viewer

Before you begin, ensure you turn on the **Interactive Viewer**:

1. First, ensure you select **New Version** from the **Report Version** dropdown, add in your report parameters, then click **Fetch Report.**

2. *Optional:* Once your report opens, you may wish to select the **Raw data view** option. This may not be available for all reports.

3. **Enable Interactivity** by opening the **Main Menu** (hamburger icon in the top-left of your screen).

4. Click **Enable Interactivity**.

Adding Groups

In this section, we'll cover how to use groups to organize your report. Before you begin, ensure you've followed the steps [to turn on the interactive viewer](#):

To add a group:

1. Select a column; in this example, we are choosing **Account**.
2. Click the **ellipsis** icon (**…**) from the interactive viewer menu.
3. Open the **Group** dropdown.
4. Select **Add Group**.
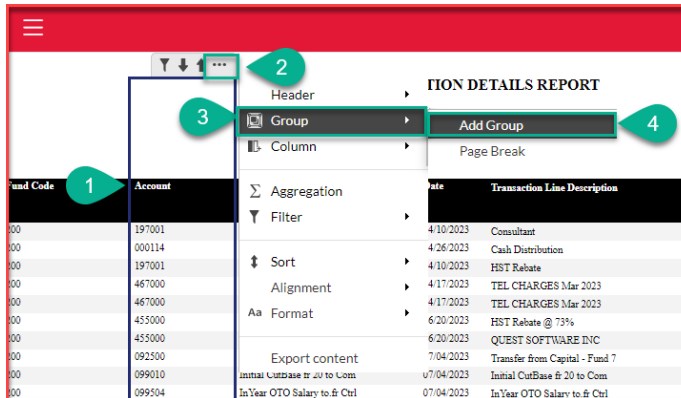
This will move your selected column (**Account** in this example) to the far-left, and group your report accordingly:

Adding Subgroups

The interactive viewer allows you to add additional groups to a report, enabling you to view subgroups.

To add a subgroup:

1. Select a column on a report that already has a group applied; in this example, we are choosing **Cost Centre**.
2. Click the **ellipsis** icon (**…**) from the interactive viewer menu.
3. Open the **Group** dropdown.
4. Select **Add Group**.
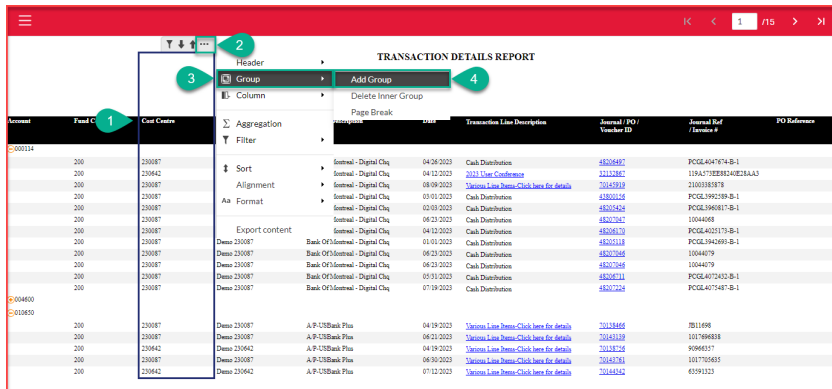
This will move your selected column (**Cost Centre** in this example) to the right of your primary group and group your report accordingly:
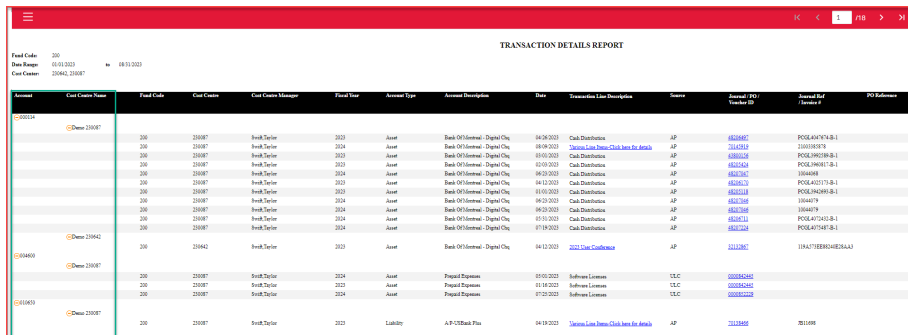
You can use the plus ⊕ and minus ⊖ icons to quickly **Show/Hide** group and sub-group contents.
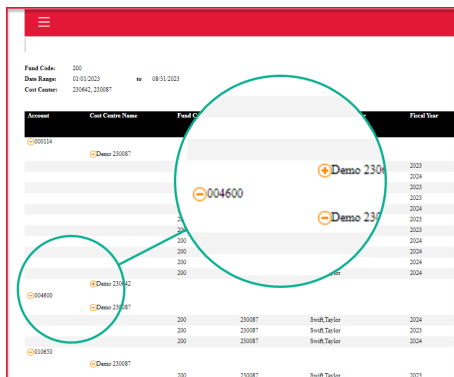
Aggregating Data

The interactive viewer allows you to aggregate data for an entire report for groups within a report.

To Aggregate data:

1. Select a column.
2. Click the **ellipsis** icon (**…**) from the interactive viewer menu.
3. Select **Aggregation**.

There are many **Aggregation** options, but in this section, we will be covering the three most oft-used options:

- Sum
- Counts
- Distinct Counts

Sum

Sum allows you to quickly generate sums of your transaction amounts for your groups or the entire table.

To Aggregate sums:

1. Choose the **Transaction Detail** column and open the Aggregation menu. From there, Select the **Sum** option from the **Select Function** dropdown.
2. Select **None** from the **Sort Direction.** Alternatively, you can select **Ascending** or **Descending** to sort your column as desired.
3. Check the **Table Level** aggregate option to generate a sum of your entire report.
   a. The header and footer options specify where this sum will appear on your report—we chose **Header** to see the sum at the top of each page.
4. Check the **Group Level** aggregate option to generate a sum of your group(s). If you have multiple groups, you can specify which groups to generate sum for, or select **All Groups** to generate a sum for each of them.
   a. The header and footer options specify where this sum will appear on your report—we chose **Footer** to see them after each group and subgroup.

5. Enter a label for your sums. This label will appear before the sum value. Note: the same label will be applied to the table, group, and subgroup sums.
   a. We chose **"TOTAL:"** for our example.

6. The format option allows you to format your sum label to make the value(s) distinct.
7. Click apply to complete the aggregation.

Here is what your **Sum** aggregation will look like:

Counts

Counts allows you to quickly generate counts of each value within a report. Note this option counts unique and duplicate values.

To aggregate **Counts**:

1. Choose the **Journal/PO/Voucher ID** column and open the Aggregation menu. From there, Select the **Count** option from the **Select Function** dropdown.
2. All our other selections will be the same as the **Sums** example, except we'll label our Count as **"Count:"**

Here is what your **Count** aggregation will look like:

You'll notice that each value has been counted, even if it is a duplicate value. This might return a result we don't want. If you want to only count *unique* values, you'll use the **Distinct Count** option.

Distinct Counts

Distinct Counts allows you to quickly generate counts of each *unique* value within a report. Note this option *won't* count duplicate values.

1. Choose the **Journal/PO/Voucher ID** column and open the Aggregation menu. From there, Select the **Distinct Count** option from the **Select Function** dropdown.
2. All our other selections will be the same as the **Sums** example, except we'll label our Count as **"Distinct Count:"**

Video Tutorial

Check out our video tutorial for a more detailed look into adding Groups and Aggregating Data:

Use the link if you have trouble accessing the video: https://www.youtube.com/watch?v=dbXmXmtvikA