Grouped Data (Report)

Overview

 You can change the data returned for selected fields on your report by grouping the values. This provides you with the ability to add additional layers of analysis to your reports.

Grouping Age Example

The example below groups the results of the age column into a segment group. People with an age 13 and 18 (inclusive) are grouped as teenagers. For example:

Age	Sales
16	$1,500
17	$750
25	$1,300

Update ages to group all between 13 and 18 into a Teen bucket.

Age	Sales
Teen	$2,250
25	$1,300

Grouped Metrics

Grouped Metric setup has a different behaviour to other types of grouped fields, as Yellowfin will automatically create groupings for you, which you can then adjust.

1. Click the drop down list on a view field and select the **New Grouped Data Field** option. Alternatively, click on the **Create** button at the bottom of the View Fields list and select **Grouped Data.**
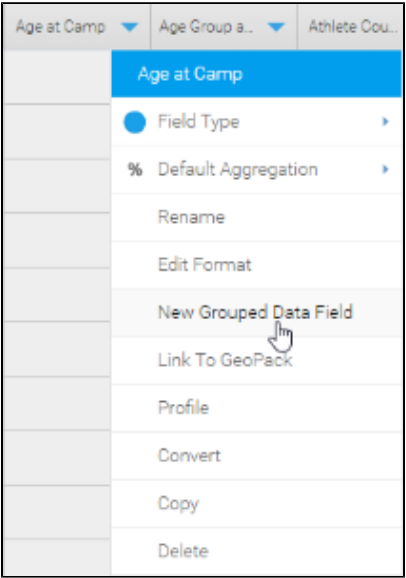
You will now see the Group Data lightbox.

2. Provide a **name** for the field, and specify which view field it should be based on.

3. Click **Continue** to begin designing groups.

When it comes to metrics, Yellowfin will automatically provide groupings, which you can then adjust.

4. Click **Edit Groups** to make adjustments to the auto groups.

5. You can now specify the **number of groups** Yellowfin divides your data into.

6. If you want to further edit the groups, disable **Auto Groups**.

7. You can now change the **labels** and **value ranges** for the groups.

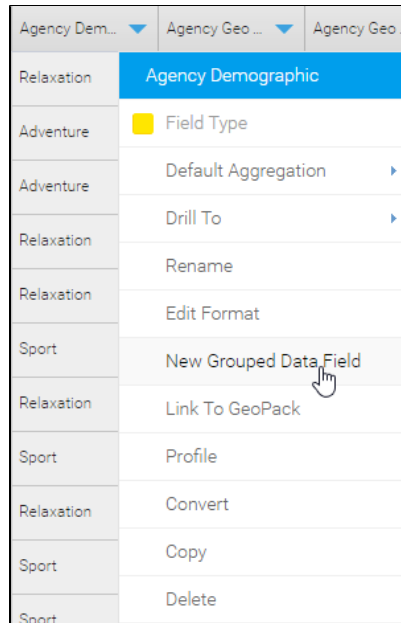8. Click **Save** to complete your changes.

9. Click **Submit** to complete your grouped data field.

Grouped Text

1. Click the drop down list on a view field and select the **New Grouped Data Field** option. Alternatively, click on the **Create** button at the bottom of the View Fields list and select **Grouped Data**.

You will now see the **Group Data** lightbox.

2. Provide a **name** for the field, and specify which view field it should be based on.

3. Click **Continue** to begin designing groups.

4. Provide a **label** for your first grouping. This will be what's displayed instead of the grouped values.

5. Pick an **operator** for your grouping logic:

Operator	Description
In List	One or more alphanumeric or string values
Not In List	Two or more alphanumeric or string values

6. Select which values should be used in this group, moving them from the list on the right to the list on the left.

7. Click **Save** to complete this group.

8. To add additional groups, click on the **+ Add Group** link.

9. Define and save your additional groups.

10. You can reorder your groups by clicking and dragging the ≡ icon.

11. Edit a group by clicking on its label.

12. Click **Submit** to complete your grouped data field.

Grouped Dates

1. Click the drop down list on a view field and select the **New Grouped Data Field** option. Alternatively, click on the **Create** button at the bottom of the View Fields list and select **Grouped Data**.

You will now see the **Group Data** lightbox.

2. Provide a **name** for the field, and specify which view field it should be based on.

3. Click **Continue** to begin designing groups.

4. Provide a **label** for your first grouping. This will be what's displayed instead of the grouped values.

5. Pick an **operator** for your grouping logic:

Operator	Description
Equal To	The same as the specified date.
Different From	Different to the specified date.
Greater Than	A date later than the specified date.
Greater Than or Equal To	A date the same or later than the specified date.
Less Than	A date before the specified date.
Less Than or Equal To	A date the same or before the specified date.
Between	A date in between the two specified dates.
Not Between	A date outside of the two specified dates.
In List	A date the same as one in the list of specified dates.

Not In List	A date not found in the list of specified dates.
Is Null	A null date.
Is Not Null	A date.

6. Specify the date or time period for the group, either by using the date picker, or selecting Dynamic Dates.

7. Click **Save** to complete this group.

8. Click **Submit** to complete your grouped data field.

Sort by Grouped Data

You can also sort your chart data according to the order of the grouped data. Learn how to do this here.

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