

Grouped Data

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Overview

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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.

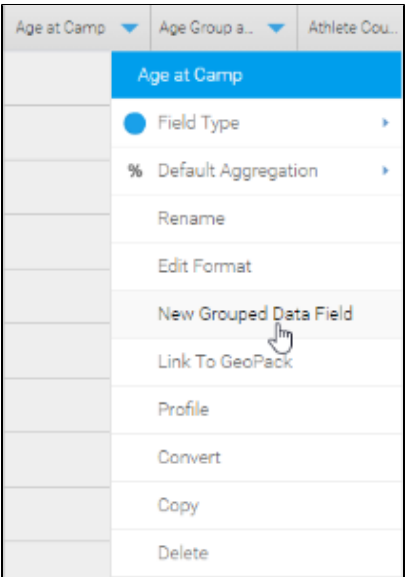
Age	Sales
Teen	\$2,250
25	\$1,300

Grouped Metrics

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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.

15 and below	≤ 15
15 to 20	15 to 20
20 to 25	20 to 25
25 to 30	25 to 30
30 to 35	30 to 35
35 to 40	35 to 40
40 to 45	40 to 45

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.

Group Data: Age at Camp

i
Set the number of groups to split the field values into, to automatically generate labels and grouping ranges. Labels can always be customised, but to customise value ranges you need to turn Auto Groups off.
Got It!

Groups
10
Auto Groups
☐

Group Label
15 and below
15 to 20
20 to 25
25 to 30
30 to 35

Group Ranges
≤ 15
> 15
≤ 20
> 20
≤ 25
> 25
≤ 30
> 30

Save

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

Group Data: Age at Camp

Groups
Define values to be grouped together, based on a selected field, under one value label.

Grouped Field Name
Age Groups
Original Field:
Age at Camp

15 and below	≤ 15
15 to 20	15 to 20
20 to 25	20 to 25
25 to 30	25 to 30
30 to 35	30 to 35
35 to 40	35 to 40
40 to 45	40 to 45

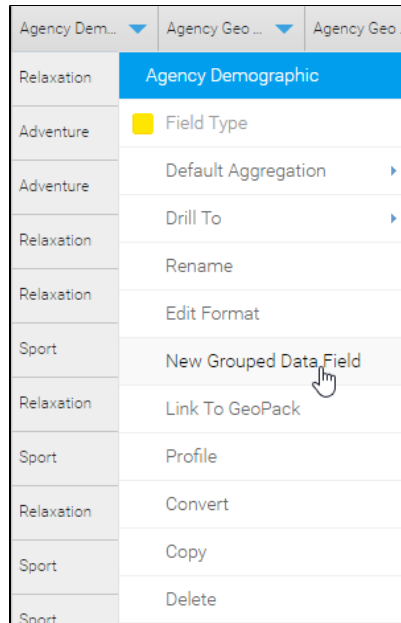
Edit Groups

Submit

Grouped Text

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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.

 A screenshot of the 'Group Data' lightbox. It has a title bar with a close button. Below the title, it says 'Groups' and 'Define values to be grouped together, based on a selected field, under one value label.' There are two input fields: 'Grouped Field Name' with the value 'Demographics' and 'Original Field' with a dropdown menu showing 'Agency Demographic'. Below these is an information icon and a message: 'Click continue to create groups from your selected variable. You will be able to edit these at any time.' with a 'Got It!' link. At the bottom is a large blue 'Continue' button with a mouse cursor over it.

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.

 A screenshot of the 'Group Data: Agency Demographic' lightbox. It has a title bar with a close button. Below the title, it says 'Group Label' with a text input field containing 'Family Friendly'. Below that is 'Operator' with a dropdown menu showing 'In List'. There are two lists of values: a left list containing 'Adventure', 'Luxury', and 'Relaxation', and a right list containing 'Culture', 'Family', 'General', and 'Sport'. Between the lists are two buttons: a right arrow and a left arrow. At the bottom is a large blue 'Save' button with a mouse cursor over it.

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

Group Data: Agency Demographic

Groups
Define values to be grouped together, based on a selected field, under one value label.

Grouped Field Name: Demographics Original Field: Agency Demogra...

Sort

Family Friendly	4 Items
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+ Add Group

Submit

9. Define and save your additional groups.

Group Data: Agency Demographic

Group Label: Adult

Operator: In List

No values available

Adventure
Luxury
Relaxation

>>
<<

Save

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.

Group Data: Agency Demographic

Groups
Define values to be grouped together, based on a selected field, under one value label.

Grouped Field Name: Demographics Original Field: Agency Demogra...

Sort

Family Friendly	4 Items
Adult	3 Items

+ Add Group

Submit

Grouped Dates

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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**.

YEARDATE	Year (Dim)	Quarter (Dim)
01/01/2009	YEARDATE	
01/01/2010	Field Type	
01/01/2010	Default Aggregation	
01/01/2009	Drill To	
01/01/2009	Rename	
01/01/2009	Edit Format	
01/01/2009	New Grouped Data Field	
01/01/2010	Link To GeoPack	
01/01/2009	Profile	
01/01/2009	Convert	
01/01/2009	Copy	
01/01/2010	Delete	

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.

Group Data

Groups

Define values to be grouped together, based on a selected field, under one value label.

Grouped Field Name
Years

Original Field
YEARDATE

Click continue to create groups from your selected variable. You will be able to edit these at any time.
Got It!

Continue

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.

Group Data: YEARDATE

Group Label
Early Years

Operator
Between

Dynamic Date
And
Dynamic Date
01/01/2000
01/01/2010

Save

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

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.

Group Data: YEARDATE

Group Label
Later Years

Operator
Between

Dynamic Date
01/01/2010

And

Dynamic Date
Current Date
+
0
Days

Save

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

Group Data: YEARDATE

Groups
Define values to be grouped together, based on a selected field, under one value label.

Grouped Field Name
Years
Original Field: YEARDATE

Early Years
2 Items

Later Years
2 Items

+ Add Group

Submit

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