Grouping

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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

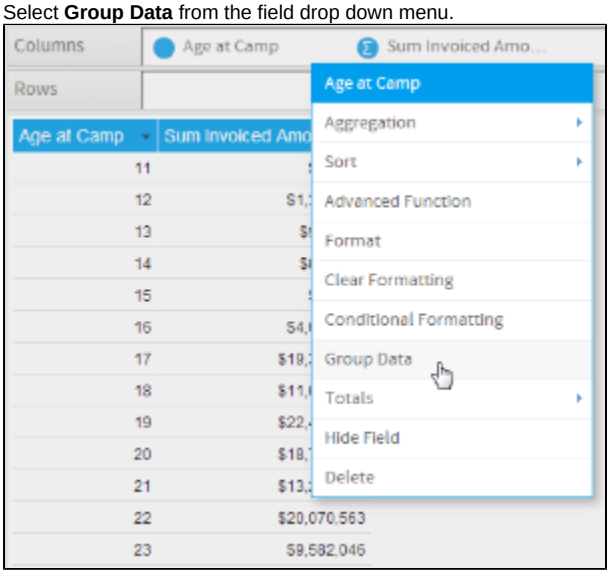
Update ages to group all between 13 and 18 into a **Teen** bucket.

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

Creating a Grouped Variable

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When setting up your report view your administrator will determine if grouping a particular column is permitted. If grouping is permitted, you will see the option in the column menu drop down.

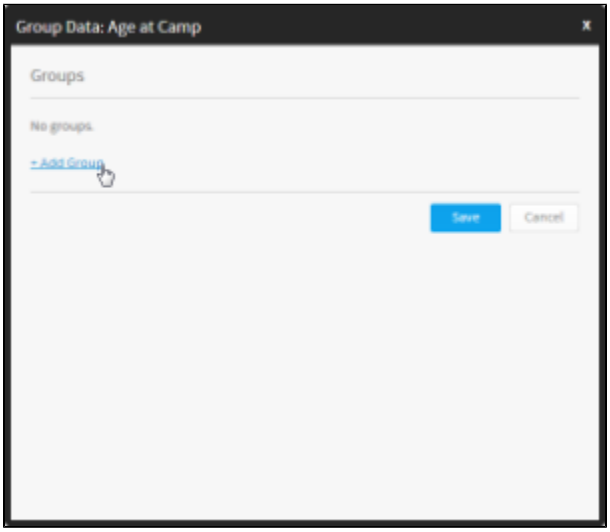
1. Select **Group Data** from the field drop down menu.



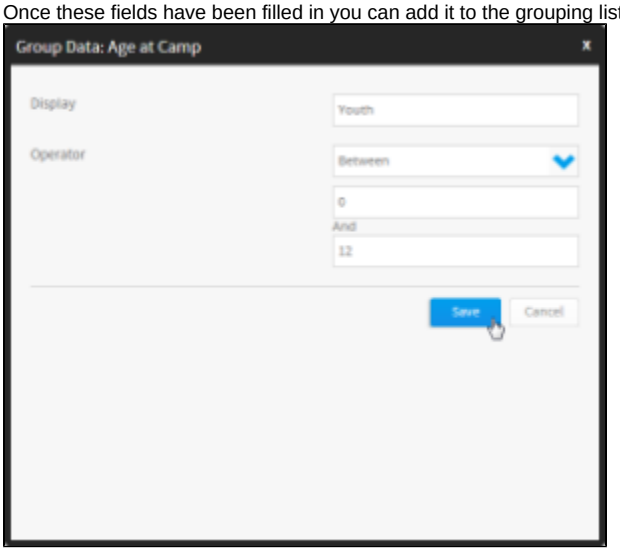
2. You will now have a list of groups currently applied to the field, which you can click on to edit or delete, and an **Add Group** option to define a new group.

3. The grouping form on your menu will open will vary based on the type of column you are grouping. The different types of columns are numeric /date or text. The key fields for these are:

Display	This is the text that will replace the value in the report based on the condition.
Operator	This is the condition in which the variable name will apply to if the value in the report meets the condition. For more details see below.
Values	The value in the report or number in which the operator is being applied to.



4. Once these fields have been filled in you can add it to the grouping list by pressing **Save**. The grouping will appear in a list.



5. To delete a grouping from the report simply click the delete button located next to the group name.
6. To edit a grouping from the list, select the grouping by clicking the group name hyperlink. This will open the edit form where you can make your changes.
7. When you have finished with the groupings press **save** and the report will refresh with the new groupings applied.

Age at Camp	Sum Invoiced Amount
Adult	$410,833,721
Teen	$58,717,406
Youth	$1,392,719

Note: groups cannot be defined for a field that has an aggregation applied to it. Remove any aggregation settings to make the **Group Data** option available.

Group Operators

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The operators available when your column is a text or numeric will differ. Possible values for the operator include:

Operator	Description
Text Based Operators	
In List	One or more alphanumeric or string values
Not In List	Two or more alphanumeric or string values
Numeric Based Operators	
Equal to	Equal to a single alphanumeric or string value
Greater than	Greater than a single alphanumeric or string value
Greater than or equal to	Greater than or equal to a single alphanumeric or string value
Less than	Less than a single alphanumeric or string value
Less than or equal to	Less than or equal to a single alphanumeric or string value
Different from	Not equal to or different from a single alphanumeric or string value
Between	Between variable 1 and variable 2 these will need to be legitimate parameters such as date, age etc.
Not Between	Not between variable 1 and variable 2 these will need to be legitimate parameters such as date, age etc.
Is Null	Record contains no value for selected attribute. No Parameter can be set
Is Not Null	Record contains a value for selected attribute. No Parameter can be set
Like	Records that contain the same letter or letters.
Starts With	String starts with letter or letters
Ends With	String end with letter or letters.

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