



Manage Groups

A Group is a virtual attribute that can include a list and/or aggregates of the members of the selected attribute. It is denoted with a 'G' pre-fix in the Attribute panel.

Under the Manage Groups option, you can perform the following tasks:

- [Create New Group](#)
- [Copy Group, Edit Group Name, Delete Group](#)

Create New Group

The following are the two scenarios for Group creation:

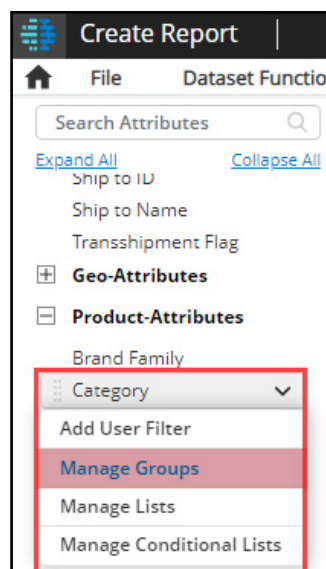
1. [Create Group with No Sub Groups](#)
2. [Create Group with Sub Groups](#)

Create Group with No Sub Groups

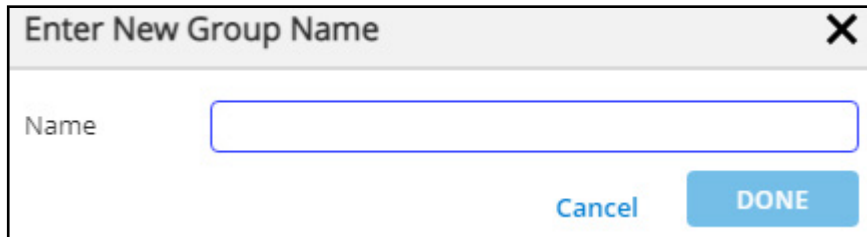
You can place multiple items in an attribute and create a group. For example, under the Category attribute, you may create a group called 'Confectionary' and place the items such as Alternate Snacks and Candy under it. The same example is demonstrated below:

Step 1: Select the desired attribute (for example, Category) in the Attribute panel.

Step 2: Click the down arrow and select the Manage Groups option.



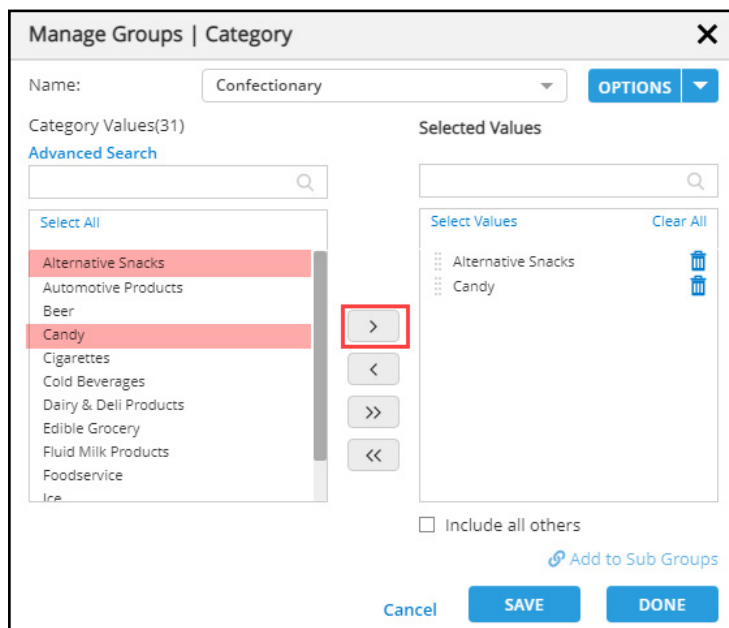
Step 3: Enter an appropriate Group Name (for example, Confectionary) in the **Enter New Group Name** dialog box and click **Done**.



The dialog box titled "Enter New Group Name" has a close button (X) in the top right corner. It contains a text input field labeled "Name" with a blue border. Below the input field are two buttons: "Cancel" and "DONE".

Note: If the selected attribute has saved groups, click the **Options** menu and select the **New** option to display the **Enter New Group Name** dialog box.

Step 4: Select the desired items (for example, Alternate Snacks and Candy) from the left side of the Selection Panel and click the right-pointing arrow to move them to the right side of the panel.



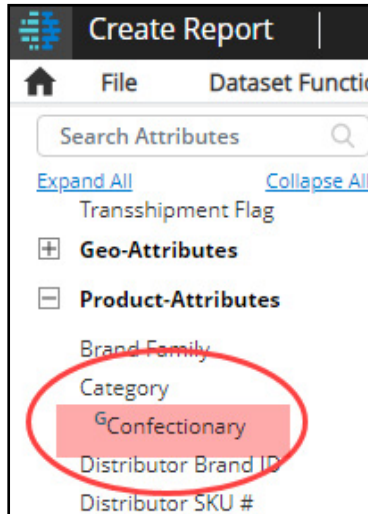
The "Manage Groups | Category" dialog box shows the "Confectionary" group selected in the "Name" dropdown. The "Category Values(31)" list on the left includes "Alternative Snacks" and "Candy", both highlighted in red. A red box highlights the right-pointing arrow button between the two lists. The "Selected Values" list on the right contains "Alternative Snacks" and "Candy". At the bottom, there are "Cancel", "SAVE", and "DONE" buttons, along with an "Add to Sub Groups" link and an "Include all others" checkbox.

Note: Press the **Shift** key to select multiple adjacent items in an attribute, while press the **Ctrl** key to select multiple non-adjacent items in the attribute. Use the left-pointing arrow to remove selections from the list.

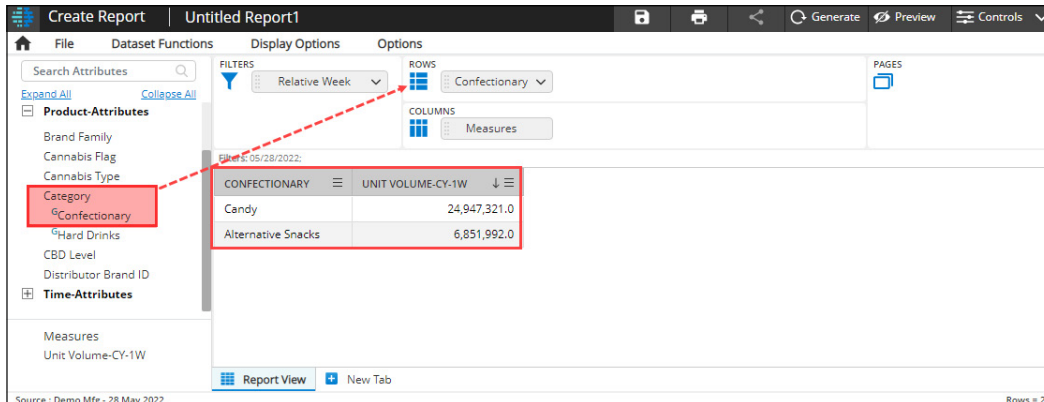
Step 5: Click **Save**. The system displays the message 'Group saved successfully.'

Step 6: Click **Done**.

You will find the group denoted with a prefix G in the Attribute panel as shown in the screenshot.



Running a report with a Grouped variable (for example, Confectionary) will provide sum total of each item included in a group as shown in the below screenshot.



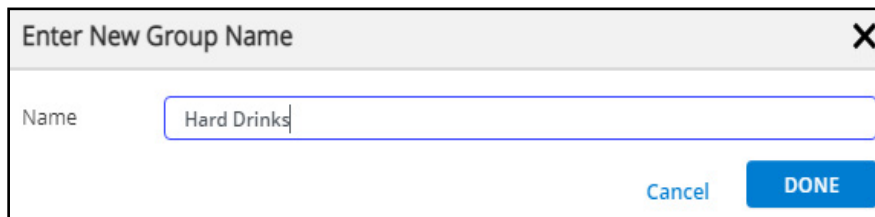
Create Group with Sub Groups

You can create multiple sub groups in a group. It is an aggregate of the selected attribute members. For example, the group called 'Hard Drinks' can have 'Liquor & Beer' and 'Wine & Cold Beverages' as sub groups. The same example is demonstrated below:

Step 1: Select the desired attribute (for example, Category) in the Attribute panel.

Step 2: Click the down arrow and select the **Manage Groups** option.

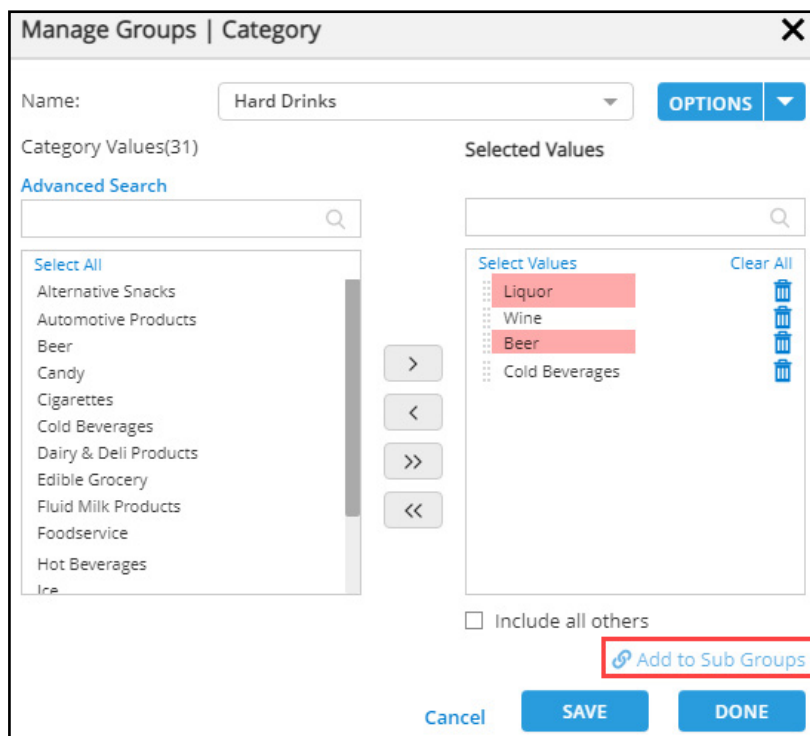
Step 3: Enter an appropriate Group Name (for example, Hard Drinks) in the **Enter New Group Name** dialog box and click **Done**.



The dialog box titled "Enter New Group Name" has a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "Hard Drinks" entered. At the bottom right, there are two buttons: "Cancel" and "DONE".

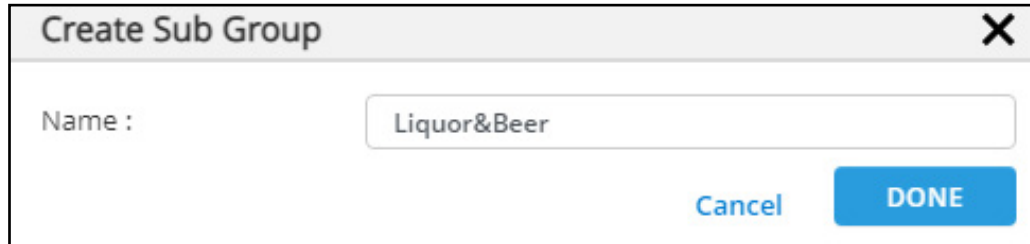
Step 4: Select the desired items from the left side of the Selection Panel and click the right-pointing arrow to move them to the right side of the panel.

Step 5: To create a sub group within a group, select the desired items from the right side of the panel (for example, Liquor and Beer) and click the **Add to Sub Groups** button.



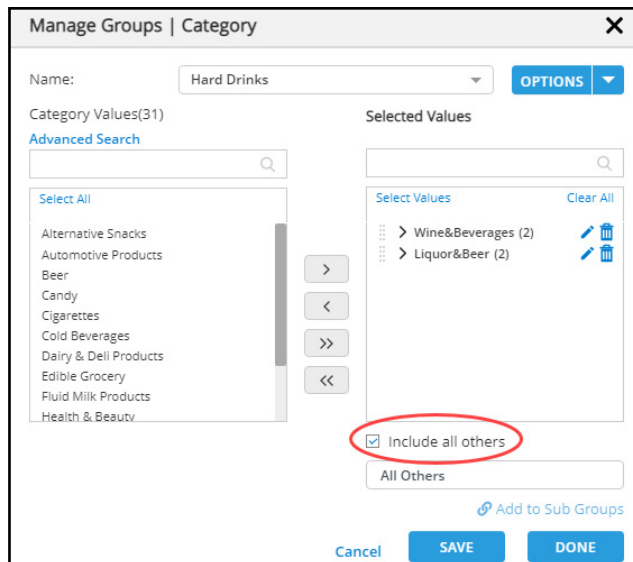
The dialog box titled "Manage Groups | Category" has a close button (X) in the top right corner. It features a "Name:" dropdown menu set to "Hard Drinks" and an "OPTIONS" button. Below this, it shows "Category Values(31)" on the left and "Selected Values" on the right. The left panel has an "Advanced Search" bar and a list of categories including Alternative Snacks, Automotive Products, Beer, Candy, Cigarettes, Cold Beverages, Dairy & Deli Products, Edible Grocery, Fluid Milk Products, Foodservice, Hot Beverages, and Ice. The right panel has a "Select Values" list with "Liquor", "Wine", "Beer", and "Cold Beverages", each with a trash icon to its right. A "Clear All" button is also present. Between the panels are four arrow buttons: ">", "<", ">>", and "<<". At the bottom, there is an unchecked checkbox labeled "Include all others" and a button labeled "Add to Sub Groups" which is highlighted with a red box. Other buttons at the bottom include "Cancel", "SAVE", and "DONE".

Step 6: Enter the name of the sub group in the **Create Sub Group** dialog box and click **Done**.

A dialog box titled "Create Sub Group" with a close button (X) in the top right corner. It contains a text field labeled "Name :" with the text "Liquor&Beer" entered. Below the text field are two buttons: "Cancel" and "DONE".

Optional: Repeat steps 4 to 6 to create another sub group (for example, Wine&Cold Beverages) in a similar way.

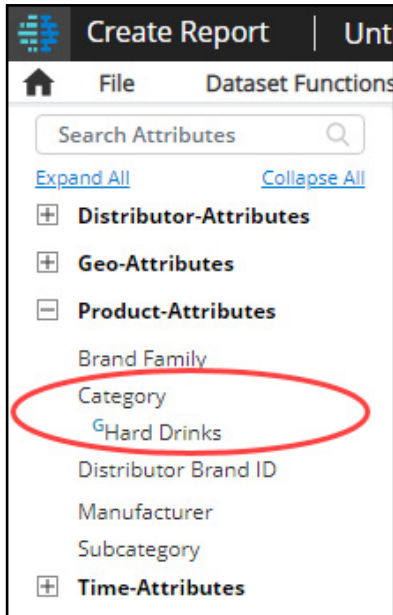
Note: You can also create a sub group of the remaining items in the selected attribute by simply selecting the 'Include all others' checkbox. It will enable you to compare one sub group against the rest of the items in the attribute. You also have the option to rename this sub-group if desired by clicking and typing in the text field that currently reads "All Others".

A dialog box titled "Manage Groups | Category" with a close button (X) in the top right corner. It has a "Name:" dropdown menu set to "Hard Drinks" and an "OPTIONS" button. Below this, there are two main sections: "Category Values(31)" on the left and "Selected Values" on the right. The "Category Values" section has a search bar and a list of categories including Alternative Snacks, Automotive Products, Beer, Candy, Cigarettes, Cold Beverages, Dairy & Deli Products, Edible Grocery, Fluid Milk Products, and Health & Beauty. The "Selected Values" section has a search bar and a list of selected values: "Wine&Beverages (2)" and "Liquor&Beer (2)". Below the "Selected Values" list is a checkbox labeled "Include all others" which is checked and circled in red. Below the checkbox is a text field labeled "All Others". At the bottom of the dialog are three buttons: "Cancel", "SAVE", and "DONE".

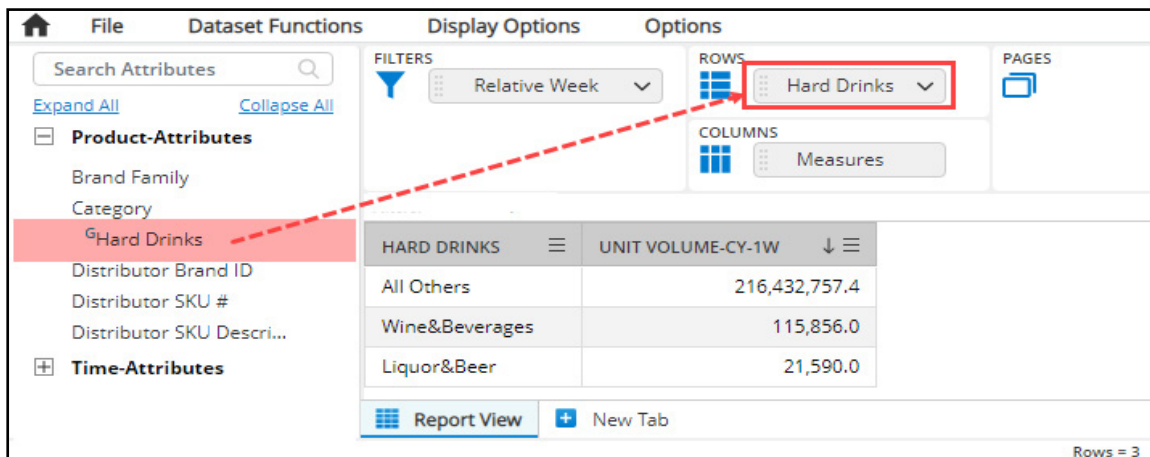
Step 7: Click **Save**. The system displays the success message 'Groups saved successfully.'

Step 8: Click **Done**.

You will find the group (for example, Hard Drinks) denoted with a prefix G in the Attribute panel as shown in the screenshot.



Running a report with a Grouped variable (for example, Hard Drinks) will provide sum total for each specified sub groups (for example, All Others, Wine&Beverages, Liquor&Beer) separately as shown in the below screenshot.



Copy Group / Edit Group Name / Delete Group

You can make a copy of a Group, edit a Group name, or delete a saved Group by following the below mentioned procedure:

Step 1: Select the desired Group attribute in the **Attribute** panel.

Step 2: Click the down arrow and select the **Manage Groups** option.

Step 3: Select the appropriate Group name from the **Name** dropdown list.

Step 4: Click the **Options** dropdown menu and select the **Copy**, **Edit Name** or **Delete** option.

Manage Groups | Category

Name: Hard Drinks

Category Values(32)

Advanced Search

Select All

- All Other
- Alternative Snacks
- Automotive Products
- Beer
- Candy
- Cigarettes
- Cold Beverages
- Dairy & Deli Products
- Edible Grocery
- General Merchandise

Selected Values

Select Values

- > Wine&Beverages (2)
- > Liquor&Beer (2)

☒ Include all others

All Others

[Add to Sub Groups](#)

Cancel SAVE DONE

