Manage Dynamic Groups

A group is a derived attribute created on an existing attribute. It may contain static Lists or Conditional Lists. In addition, it can also be composed of a subset of values or these values may be grouped into subgroups/ aggregates. Dynamic groups will be updated with each data refresh, as well as anytime the list/group are resaved.

You can create and manage a dynamic group using two options. When you create a dynamic group, both of these options are selected by default:

- **Link to List** - When selected, it will update the group when the list is updated.
- **Create List Based Subgroups** - When selected, the list(s) will be aggregated as a single value instead of a list of values.

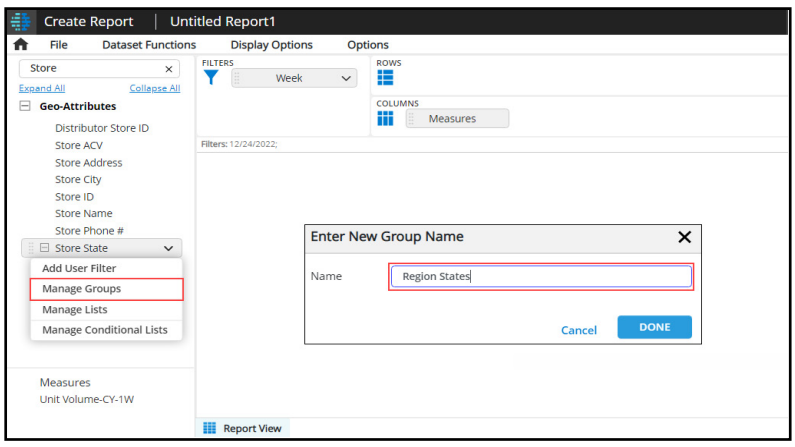
In this Quick Start Guide, you will learn to create dynamic groups pertaining to the following scenarios:

- Group containing a single list - Aggregate
- Group containing multiple lists - Aggregates
- Group containing a single list - List Values

***Note**: List Values are not available for multi-list groups.*

Group Containing a Single List - Aggregate

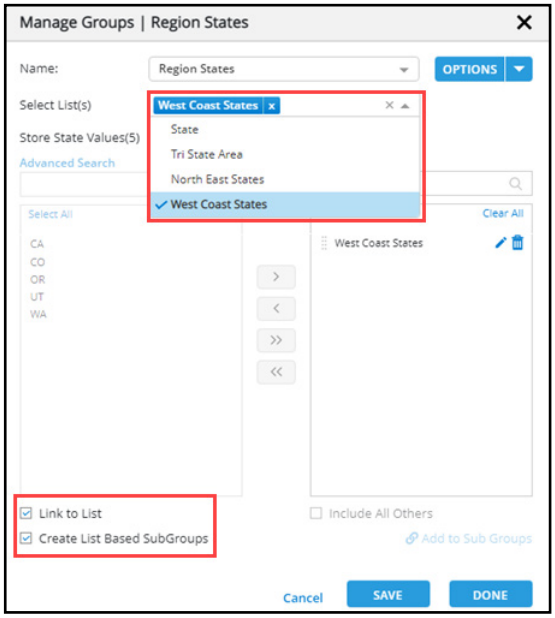
Step 1: From the **Home Page**, select the desired data domain on the right-hand side of the page to open the **New Report Template** screen.
Step 2: Select a desired attribute in the Attribute panel, click on it to select the **Manage Groups** option from the dropdown menu.
Step 3: Enter an appropriate group name in the **Enter New Group Name** dialog box and click **Done**.



In the new group, there will be a section under the group "**Name**" labeled "**Select List(s)**". This area opens a drop-down with all lists created on this attribute if the selected attribute has any. Selecting a list will populate the right panel with all values of that list, as shown below.

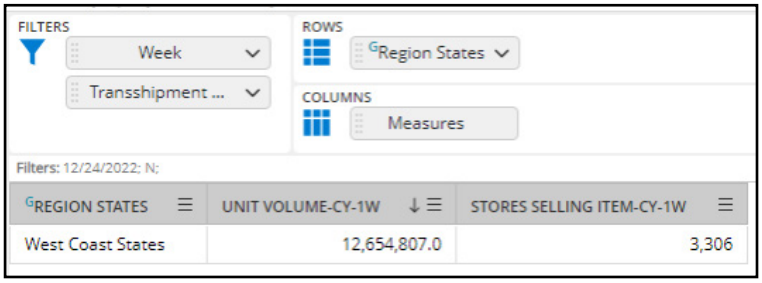
Step 4: Select the desired list name from the dropdown menu.
Step 5: Confirm that "**Link to List**" and "**Create List Based SubGroups**" checkboxes are selected. Again, these boxes should be checked by default.

For example, the "West Coast States" created on the right would be an aggregate of all the values of the list titled "West Coast States".



***Note**: Dynamic groups do not have the option to add an All Others aggregate, so currently, "**Include All Others**" checkbox will be greyed out.*

Step 6: Click **Save** and then **Done** in the **Manage Groups** window.
Step 7: Drag new group onto Rows in the report grid then, click the **Generate** button.
Step 8: As pictured below, this group yields one dynamic aggregate/subgroup.



With "**Link to List**" selected, the list will be dynamic and will update whenever the related list changes.

If the user unchecks "**Link to List**", the list will be static and will not change even if the list is modified. Unselecting "**Link to List**" can be used as a tool to select all or a subset of the Lists values and/or to create subgroup(s) of all or a subset of values. By unchecking the "**Link to List**", the "**Include All Others**" and "**Add to Sub Group**" will be re-enabled as well.

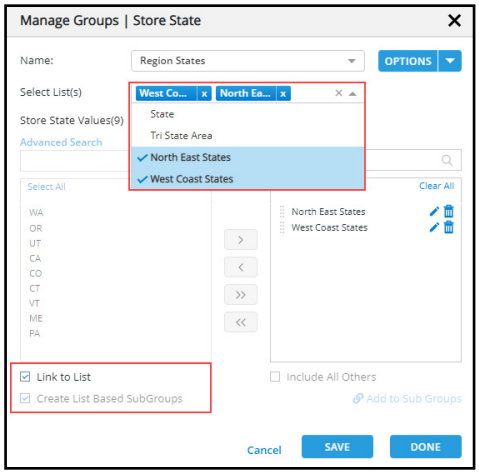
If more than one list is selected from the drop down, the left panel shows the union of the values of the selected lists.

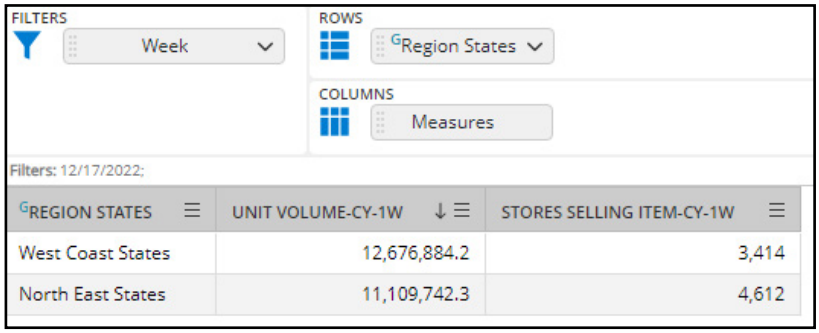
The check box "**Create List Based Subgroups**" converts each list into a subgroup (aggregate) value. Similarly, the report will output an aggregate for each list in the group.

Group Containing Multiple Lists - Aggregates

In the example below, a group was created using more than one list. Notice that there are two subgroups in the right panel. When placed in a report, this group yields two subgroups based on the group definition. The values of each list are aggregated and shown in the report.

When more than one list is selected in a group, the "**Create List Based Subgroups**" option will be selected and greyed out meaning that the user will not be able to change from a dynamic aggregate to a dynamic list of values. This means that List Values are not available for multi-list groups.
Workaround: Create one list containing all desired values (i.e. "North and West Coast States") as a way to create a group of this type.



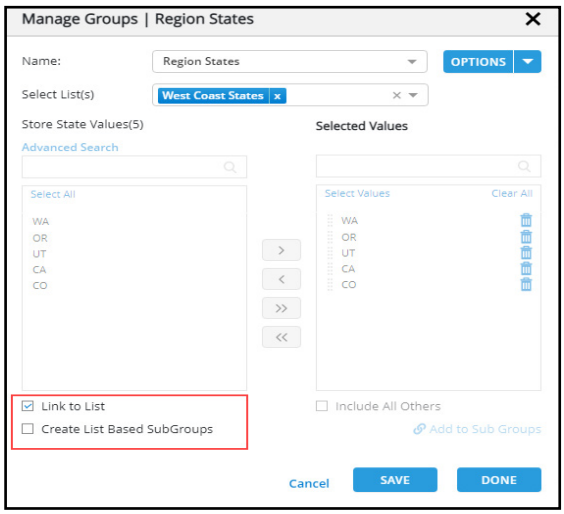


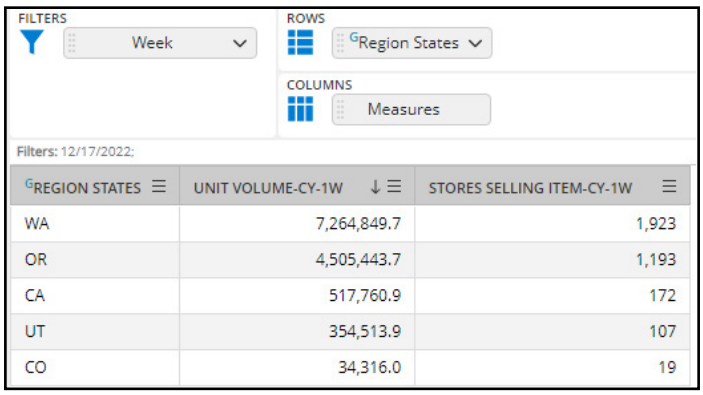
Group Containing a Single List - List Values

This last example demonstrates the behavior of not selecting a list-based subgroup in a group containing only one list.

By unchecking the "**Create List Based Subgroups**" box, the values of the list in the right panel will be listed individually, instead of as an aggregate. The values on the right panel cannot be modified. Again, if the "**Link to List**" is selected, these values will be updated as the corresponding lists are modified.

Similar to the example above, see the screenshots below for the behavior when unchecking "**Create List Based Subgroups**". Now each value in the "West Coast States" will be displayed separately.



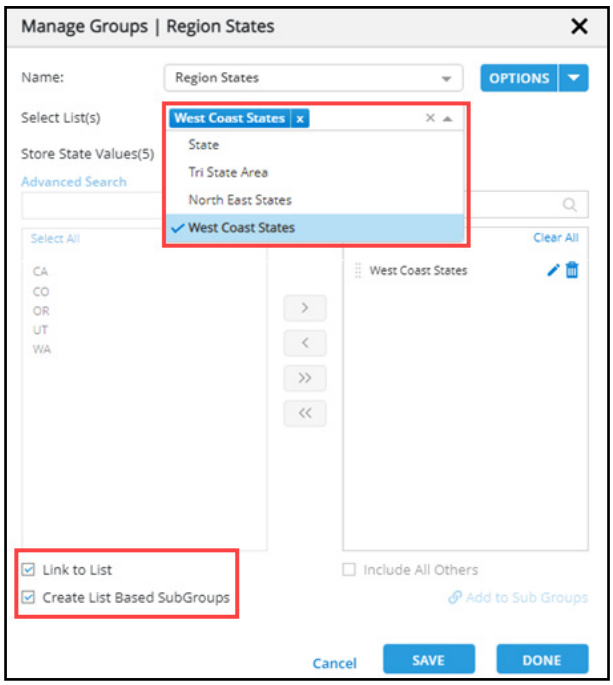


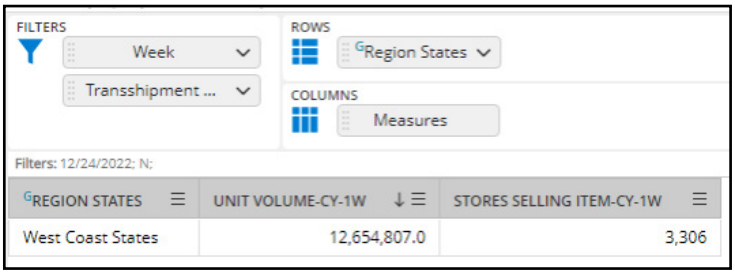
REGION STATES	UNIT VOLUME-CY-1W	STORES SELLING ITEM-CY-1W
WA	7,264,849.7	1,923
OR	4,505,443.7	1,193
CA	517,760.9	172
UT	354,513.9	107
CO	34,316.0	19

Dynamic groups can be used in filters and User filters; they will be treated the same as static groups. If "**Create List Based Subgroups**" is selected for a group (creating aggregate(s)), the subgroup would be shown as a filter value. For groups with "**Create List Based Subgroups**" unselected, the user will filter on individual values.

Summary:

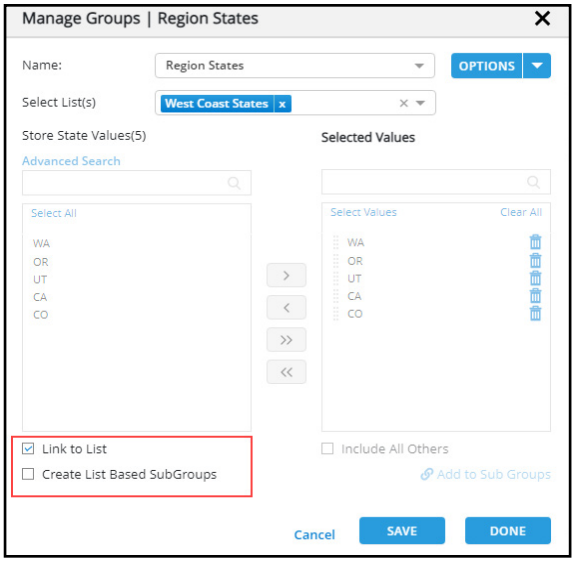
Group containing a single list - Aggregate

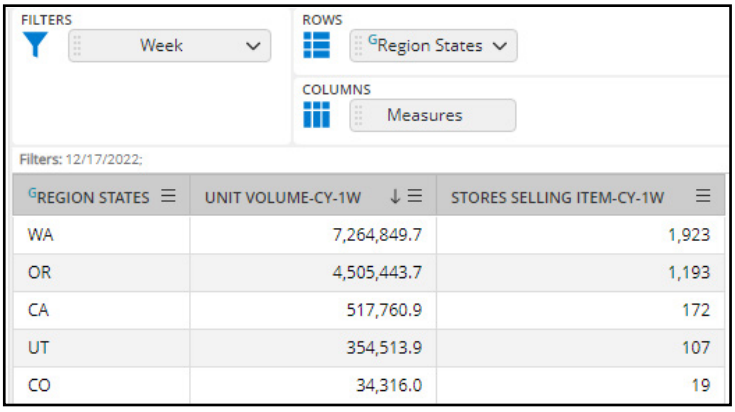




REGION STATES	UNIT VOLUME-CY-1W	STORES SELLING ITEM-CY-1W
West Coast States	12,654,807.0	3,306

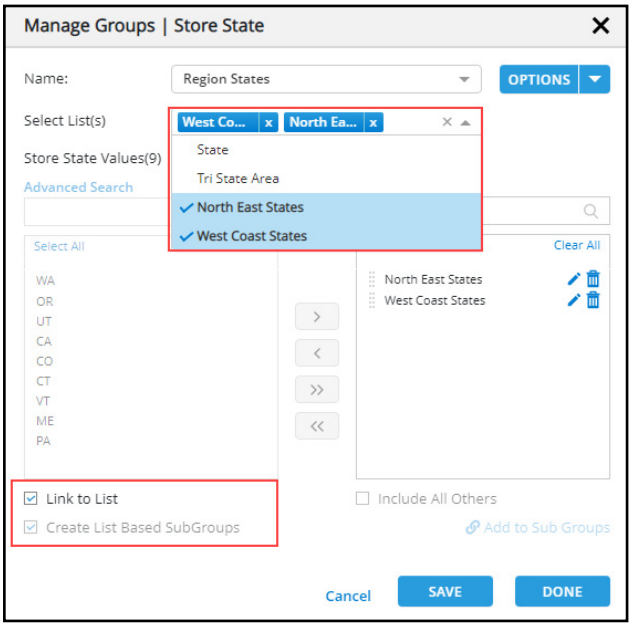
List Values

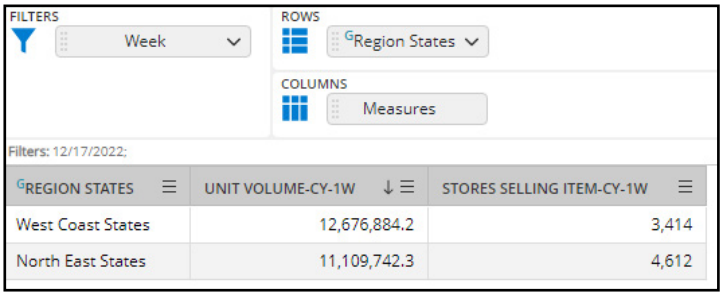




REGION STATES	UNIT VOLUME-CY-1W	STORES SELLING ITEM-CY-1W
WA	7,264,849.7	1,923
OR	4,505,443.7	1,193
CA	517,760.9	172
UT	354,513.9	107
CO	34,316.0	19

Group containing multiple lists - Aggregates





***Note**:*

- *See the Manage Lists and Manage Groups Quick Start Guides for more information.*

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