



Manage Dynamic Groups

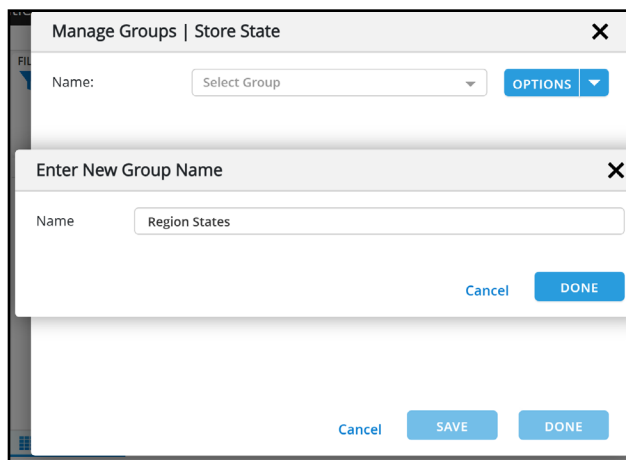
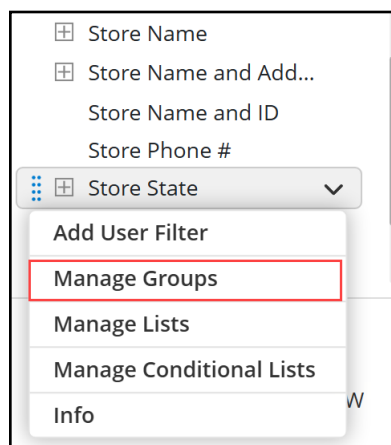
A Group is a derived Attribute created on an existing Attribute. It may contain static Lists or Conditional Lists. In addition, it can also be composed of a subset of values or these values may be combined into subgroups/aggregates. Dynamic Groups will be updated with each data refresh, as well as anytime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

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 - Aggregate

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.
2. Select a desired Attribute in the Attribute panel, click on it to select the **Manage Groups** option from the dropdown menu.
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.

4. Select the desired List name from the dropdown menu.
5. Confirm that the **Link to List** checkbox is selected. These boxes should be checked by default.

For example, the “East” List, which represents east coast states, would be an aggregate of all the values of the List titled “East”.

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

FILTERS

Week

ROWS

DG Region States

COLUMNS

Measures

Filters: Week: Relative (05/10/2025);

DG REGION STATES	UNIT VOLUME-CURR-1W	STORES SELLING ITEM-CURR-1W
East	41,102,651.0	17,985

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** options will be re-enabled as well.

If more than one List is selected from the dropdown, the left panel shows the union of the values of the selected Lists.

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 List definitions. The values of each List are aggregated (one aggregate per List) as shown in the Report.

Manage Groups | Region States

Name:

DG Region States

OPTIONS

Select List(s)

East x Central x

Store State Values(33)

Advanced Search

Select All

MA
NH
NY
CT
DC
DE

Set as Global

Link to List

Selected Values

Select Values

East
Central

Include All Others

Add to Sub Groups

Cancel

SAVE

DONE

FILTERS

Week

ROWS

DG Region States

COLUMNS

Measures

Filters: Week: Relative (05/10/2025);

DG REGION STATES	UNIT VOLUME-CURR-1W	STORES SELLING ITEM-CURR-1W
Central	114,382,617.7	33,178
East	41,102,651.0	17,985

Dynamic Groups can be used in filters and user filters; and they will be treated the same as static Groups.

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

