

Helpful Hint #6: Using Bins to Group Data in Analysis

When creating a new analysis report, creating bins allow the user to group multiple sets of related data from a dimension into one pool. This is helpful if you wish to group data differently than the default values already provided.

How to create a bin:

In this example we will “bin” the Subobject Grouping>Object differently than the default values.

So you can follow along in analysis, choose the criteria and filters shown below from the Finance Data Warehouse subject area:

The screenshot displays a software interface for data analysis. It is divided into two main sections: "Selected Columns" and "Filters".

Selected Columns: This section has a title bar with a minus sign and the text "Selected Columns". Below the title bar is a descriptive text: "Double click on column names in the Subject Areas pane to add them to the analysis. Once". Below this text is a grid of column headers, each with a list icon on the left and a dropdown arrow on the right. The columns are: "Cost Center Time", "Charge Agency", "Subobject Grouping", and "Expenditures Fact". Below these headers is a second row of column values: "Fiscal Year", "Campus", "Object", and "Amount".

Filters: This section has a title bar with a minus sign and the text "Filters". Below the title bar is a descriptive text: "Add filters to the analysis criteria by clicking on Filter option for the specific column in the S". Below this text are two filter entries. The first entry consists of a grey square, a funnel icon, and the text "Fiscal Year is equal to / is in 16-17". The second entry starts with the word "AND" in blue, followed by a funnel icon and the text "Campus is equal to / is in Albany".

The results of this query before adding any Bins are as follows:

Title			
Table			
Fiscal Year	Campus	Object	Amount
16-17	Albany	PSR Instructional	56,389,771.37
		PSR Non-Instructional	108,621,982.06
		TS Instructional	14,199,452.32
		TS Non-Instructional	20,513,345.32
		OTPS	88,840,365.74
		Capital Projects	14,933.94
		Recharges	-33,397.81

1. In the Analysis Criteria tab: choose the attribute that will be grouped and select Edit formula from the menu on the right side of the attribute:

Over the button next to its name.

The screenshot shows the Analysis Criteria interface with three columns: 'Part of Accounts', 'Subobject Grouping', and 'Expenditures Fact'. The 'Object' attribute under 'Subobject Grouping' is selected. A context menu is open over the 'Object' attribute, with a red arrow pointing to the 'Edit formula' option. The menu options are: Sort, Edit formula, Column Properties, Filter, and Delete. A red arrow also points to the 'Object' attribute name in the table header.

Part of Accounts	Subobject Grouping	Expenditures Fact
Charge Agency Name	Object	Amount

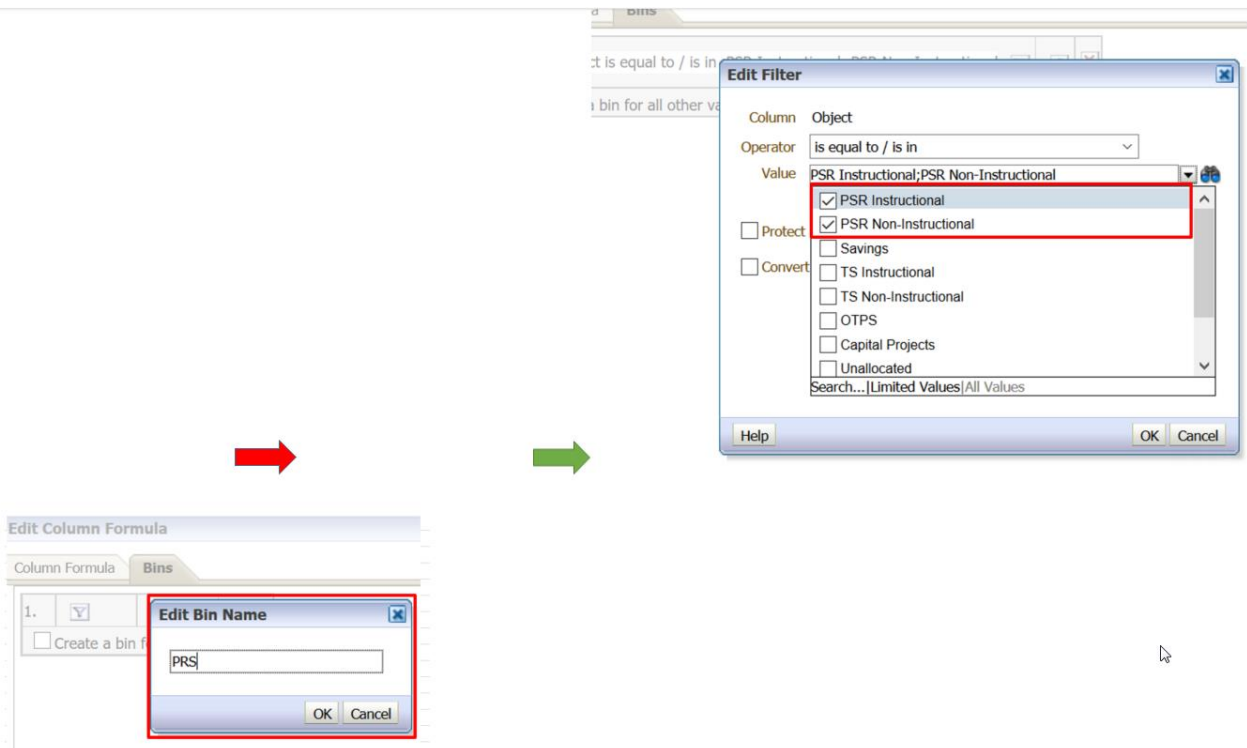
- Sort
- Edit formula
- Column Properties
- Filter
- Delete

criteria by clicking on Filter option for the sp

- In the Edit Column Formula dialog box, click on the Bins tab then “add bins” at the bottom left of the tab to begin creating bin filters:

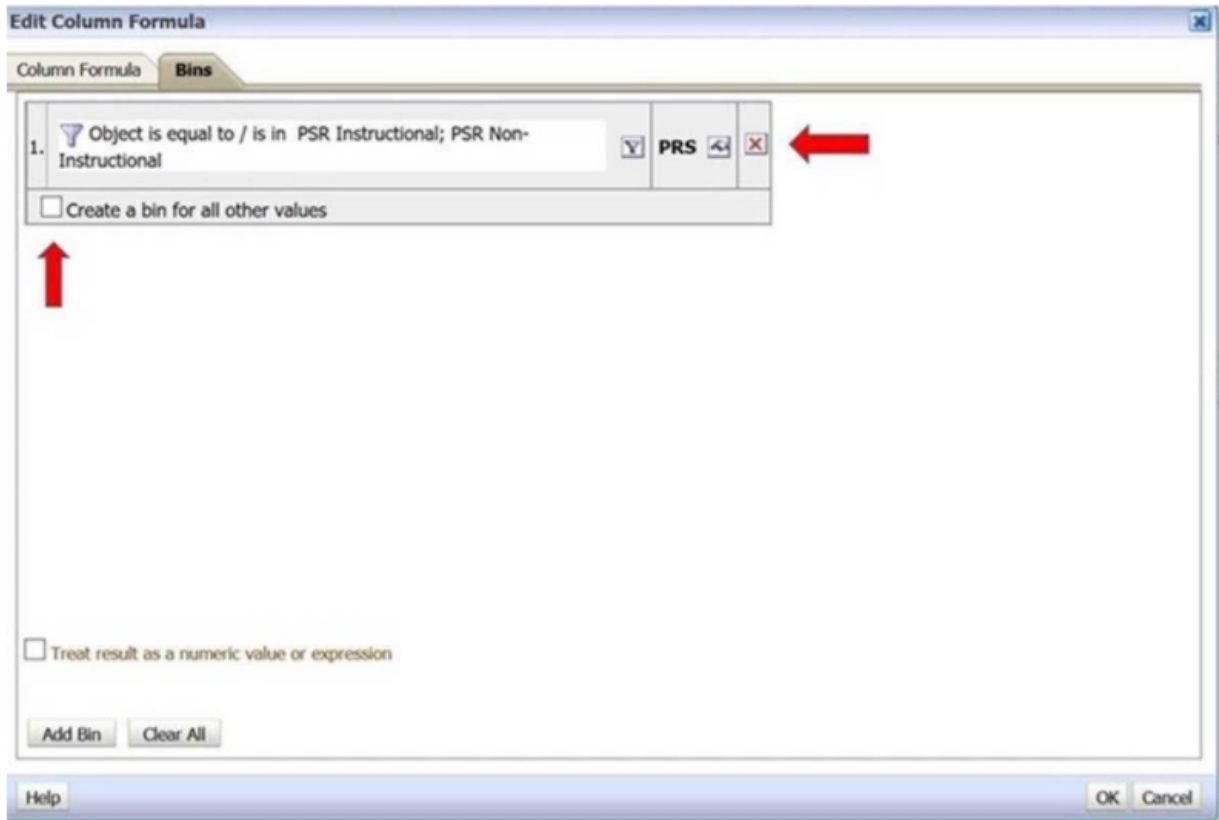


- Similar to the filters in the Criteria selection tab, the user can group the individual sets of data and set the parameters in this filter. There are many operators available to bin by, be sure to check all options when creating your bins. The check values will be group together into a bin (for this example PSR will be grouped together), after selection click OK and then you will be prompted to “Edit Bin Name” .



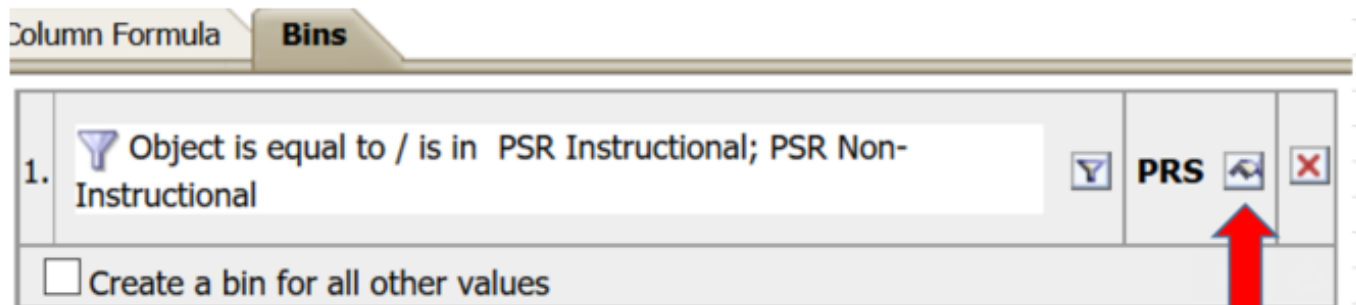
(note: the error on the bin name PRS not PSR, was intentional, I will show how to fix it later).

4. You can continue to Add Bins through the same process, create a singular bin for all unchecked values by checking “Create a bin for all other values” below the created bins, or leave all unchecked values separate by clicking OK in the lower right corner of the dialog box.



You may also remove bins by clicking the red X next to the bin row.

5. If you have a typo (as this example does) or want to change the name of the Bin, click the edit button to the right of the bin name. In this edit tab you will be able to change the name of the Bin without having to recreate it.



6. When in the analysis results tab, the Bins created will appear. For this example I have shown what the results would look like without bins to compare to the results with a Bin for PSR.

View before Binning

The screenshot shows a software interface with a 'Title' field and a 'Table' field. The table contains the following data:

Fiscal Year	Campus	Object	Amount
16-17	Albany	PSR Instructional	56,389,771.37
		PSR Non-Instructional	108,621,982.06
		TS Instructional	14,199,452.32
		TS Non-Instructional	20,513,345.32
		OTPS	88,840,365.74
		Capital Projects	14,933.94
		Recharges	-33,397.81

View after Binning

The screenshot shows a software interface with a 'Title' field and a 'Table' field. The table contains the following data:

Fiscal Year	Campus	Object	Amount
16-17	Albany	Capital Projects	14,933.94
		OTPS	88,840,365.74
		PSR	165,011,753.43
		Recharges	-33,397.81
		TS Instructional	14,199,452.32
		TS Non-Instructional	20,513,345.32

A further example of how the Bins can be grouped is shown below:

Compound Layout








Title   

Table    

Fiscal Year	Campus	Object	Amount
16-17	Albany	Instructional	70,589,223.69
		Non-Instructional	129,135,327.38
		OTPS and Transfers	88,821,901.87