

# ORGANIZE DATA INTO FOLDERS

We can organize data in Data pane in the below mentioned options:

Group by Folder

Group by Data Source Table (default)

To make data sources with many fields easier to work with, we can organize the Data pane items into folders. Items like fields, parameters, and sets can be grouped into folders

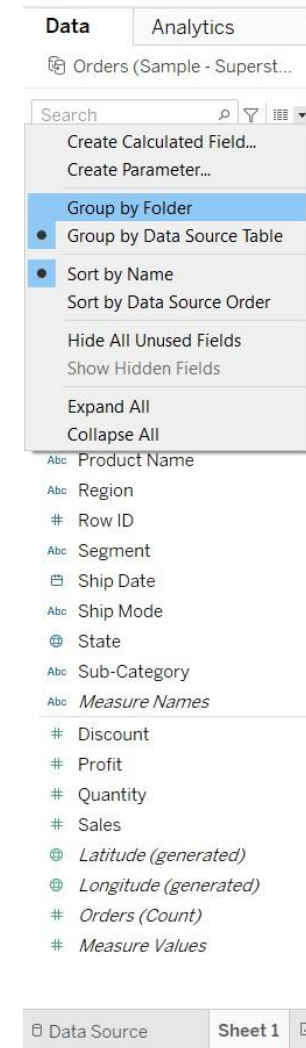
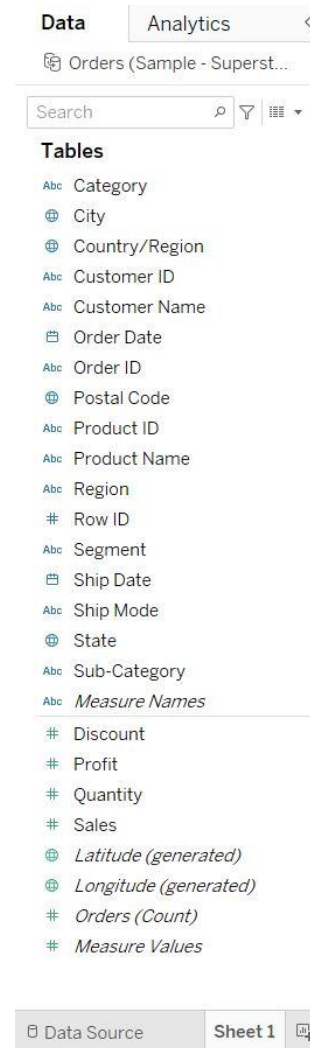
Before organizing the data into folders, we need to group by folder by using any one of the below mentioned methods:

**Method-I:** In the dropdown carrot in Data pane, Select **Group by Folder** option

**Method-II:** In the field's context menu, Select **Group by > Folder**

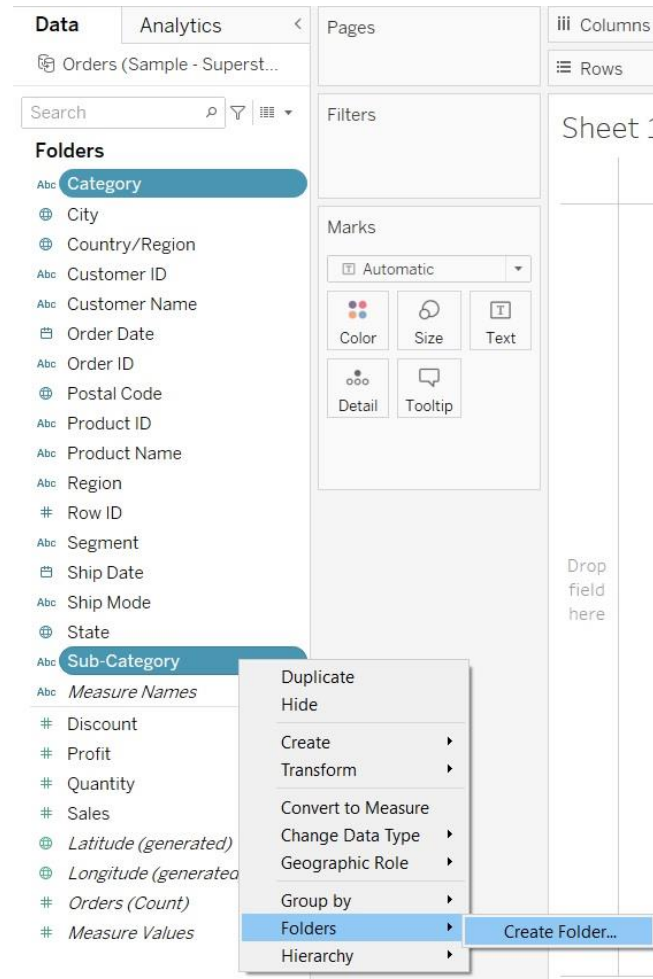
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**STEP 1:** Given below is the default option for Data pane view i.e., **Group by Data Source Table**  
Select the **Group by Folder** option



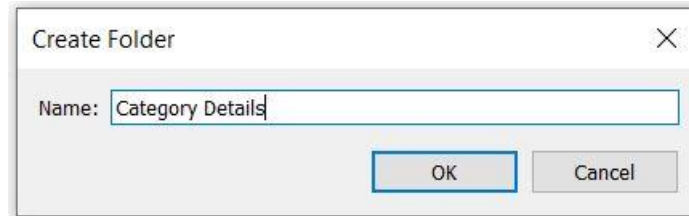
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**STEP 2:** Select the 1<sup>st</sup> field e.g: **Category** next press Ctrl key (Command in Mac) and select 2<sup>nd</sup> field e.g: **Sub-Category**, Right-click, Select **Folders** > **Create Folder**



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**STEP 3:** In the **Create Folder box**, enter the folder name e.g: **Category Details**



A screenshot of a 'Create Folder' dialog box. The dialog has a title bar with the text 'Create Folder' and a close button (X). Inside the dialog, there is a label 'Name:' followed by a text input field containing the text 'Category Details'. Below the input field are two buttons: 'OK' and 'Cancel'.

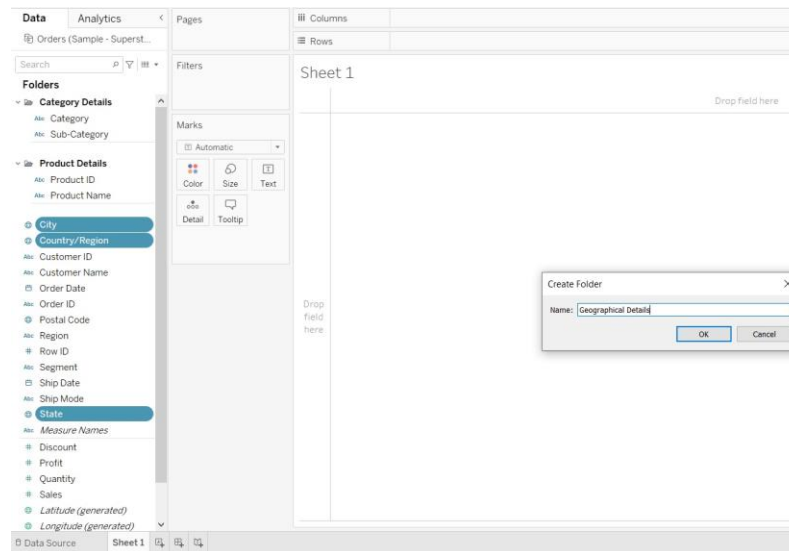
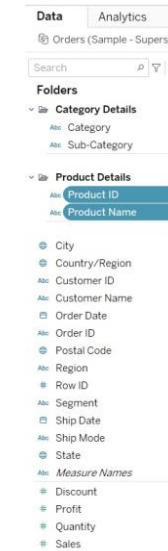
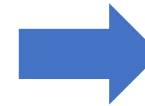
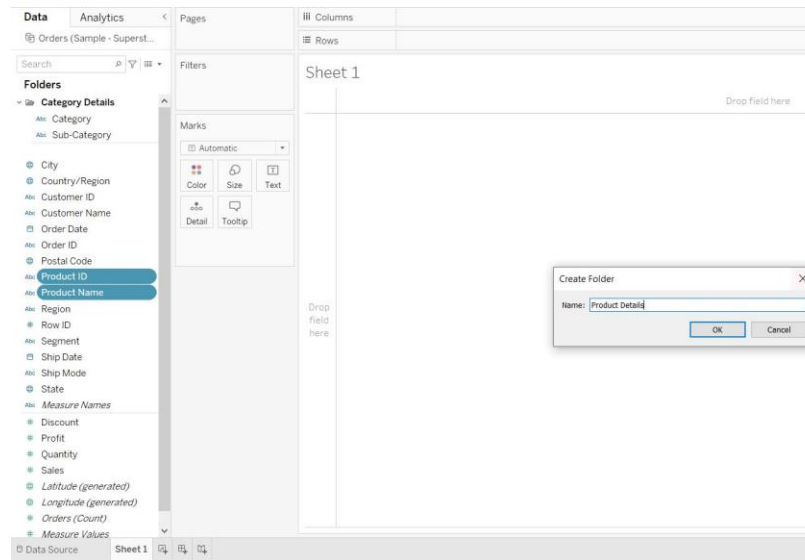
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**STEP 4:** The **Data** pane will now show the **Category Details** folder



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**STEP 5:** Similarly, we can create other folders e.g: **Product Details** and **Geographical Details**



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**STEP 6:** We can add a field to a folder, Right-click the field e.g., **Postal Code**  
**Select Folders > Add to Folder > Geographical Details**

The image shows a two-step process for organizing data into folders. On the left, a right-click context menu is open over the 'Postal Code' field in the 'Data' pane. The menu path 'Folders > Add to Folder > Geographical Details' is highlighted. On the right, a large blue arrow points to the final state where 'Postal Code' is listed under the 'Geographical Details' folder in the 'Folders' pane.

**Left Panel (Initial State):**

- Data** | Analytics | Pages
- Orders (Sample - Superst...)
- Search
- Folders**
  - Category Details
    - Category
    - Sub-Category
  - Geographical Details
    - City
    - Country/Region
    - State
  - Product Details
    - Product ID
    - Product Name
  - Customer ID
  - Customer Name
  - Order Date
  - Order ID
  - Postal Code**
  - Region

**Right Panel (Final State):**

- Data** | Analytics
- Orders (Sample - Superst...)
- Search
- Folders**
  - Category Details
    - Category
    - Sub-Category
  - Geographical Details
    - City
    - Country/Region
    - Postal Code**
    - State
  - Product Details
    - Product ID
    - Product Name
  - Customer ID
  - Customer Name
  - Order Date
  - Order ID
  - Region
  - Row ID
  - Segment
  - Ship Date
  - Ship Mode
  - Measure Names
    - Discount
    - Profit
    - Quantity
    - Sales

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**STEP 7:** We can sort the fields using the below mentioned options

**Sort by Name** – lists the dimensions and measures in alphabetical order according to their field aliases

**Sort by Data Source Order** – lists the dimensions and measures in the order they are listed in the underlying data source

The diagram illustrates the process of organizing data into folders using two different sorting methods. It consists of four panels arranged in a sequence, connected by blue arrows indicating the flow of the process.

**Panel 1 (Leftmost):** Shows the 'Data' tab selected. A dropdown menu is open, displaying various options. The 'Sort by Name' option is highlighted with a blue selection bar.

**Panel 2:** Shows the 'Data' tab selected. The 'Folders' section is expanded, displaying a list of fields sorted alphabetically by their aliases. The fields are grouped into three categories: 'Category Details' (Category, Sub-Category), 'Geographical Details' (City, Country/Region, Postal Code, State), and 'Product Details' (Product ID, Product Name).

**Panel 3:** Shows the 'Data' tab selected. A dropdown menu is open, displaying various options. The 'Sort by Data Source Order' option is highlighted with a blue selection bar.

**Panel 4 (Rightmost):** Shows the 'Data' tab selected. The 'Folders' section is expanded, displaying a list of fields sorted according to their order in the underlying data source. The fields are grouped into three categories: 'Category Details' (Category, Sub-Category), 'Geographical Details' (Country/Region, City, State, Postal Code), and 'Product Details' (Product ID, Product Name).