**GROUPING** & **BINNING**

Grouping is a mechanism to identify the field values and "**GROUP**" them as a single unit.

We group field values to help us for more clear view and easy data analysis.

Modes of Grouping in Power BI:

1. **List** **Grouping** : To group unique values of a report field. Applicable for static lists & character data. Example: Group Months into Quarters

2. **Binning** : To group range based values and dynamicvalues of report fields.

Example: To group Product Sales based on given **range: Low, Mid, High**

HOW TO IMPLEMENT GROUPING [LIST GROUPING] ?

Launch Power BI > Get Data > Sales **csv** File > Load.

From Fields Pane : Right Click Month > New Group. Specify Group Name

Select Jan, Feb, March. Select ADD > This creates a group. Name it, **Q1**

Select April, May, June. Select ADD > This creates a group. Name it, **Q2**

Select July, August, September. Select ADD > This creates a group. Name it, **Q3**

Select October, November, December. Select ADD > This creates a group. Name it, **Q4** > ok.

HOW TO USE GROUPING FILEDS?

SELECT **TREE MAP** OR ANY OTHER VISUAL > SELECT QUARTER AND SALES 2016. SET FONT SIZES

HOW TO IMPLEMENT BINNING ? APPLICABLE FOR NUMERIC & DATE / TIME VISUAL FIELDS ?

From Fields Pane: Right Click a Summary Column [Ex: Sales 2016] > New Group.

**Group Type** = BIN. **Bin Type** = Number of Bins. Bin Count = 3 > OK.

RIGHT CLICK ABOVE BINNED FIELD > NEW GROUP > BIN TYPE = LIST

SELECT EACH VALUE(LEFT) > "GROUP" (BOTTOM) > DEFINE A LABEL (EX: LOW, MID, HIGH) > OK.

**HOW TO USE BINNED FILEDS?**

INCLUDE SLICER VISUAL > SELECT ABOVE BINNGED FIELD > VALUE TYPE = LIST.

FORMAT : GENERAL : ORIENTATION = HORIZONTAL

ITEMS : SET FONT COLOR, BACKGROUND COLOR, TEXT SIZE.

INCLUDE TABLE VISUAL > SELECT COUNTRY, COMPANY, QUARTER, SALE 2016 FIELDS.

TEST SLICER AND VISUAL INTERACTION.

**HOW TO EDIT OR MODIFY GROUPED OR BINNED FIELD?**

RIGHT CLICK ABOVE DEFINED GROUP FILED > EDIT GROUP.

**HIERARCHIES**

HIERARCHIES ARE ORDERED COLLECTION (GROUP) OF REPORT FIELDS.

USED FOR EASY DATA ACCESS BY END USERS. AVOIDS DRAG n DROP OF MULTIPLE FIELDS MANUALLY.

**HOW TO DEFINE NEW HIERARCHIES?**

STEP 1: RIGHT CLICK THE FIRST LEVEL ATTRIBUTE (COUNTRY) > NEW HIERARCHY

STEP 2: RIGHT CLICK EACH OF THE OTHER COLUMNS > ADD TO ABOVE HIERARCHY.

**HOW TO USE HIERARCHIES?**

CLICK ANYWHERE IN POWER BI CANVAS > THEN SELECT **MATRIX** [OR ANY OTHER VISUAL]

CHECK THE BOX AGAINST ABOVE DEFINED HIERARCHY AND SALES FIELD.

WE GET ONE **DRILL-DOWN** SET OF ARROWS OVER TOP / BOTTOM RIGHT OF VISUAL.

ADJUST THE FONT SIZE AND VISUAL HEIGHT, WIDTH.

**HOW TO PEFORM DRILL-DOWN ?**

**1ST ARROW : DRILL UP**

**2ND ARROW : CONDITIONAL, FILTERED DRILL DOWN BASED ON CLICK @ DATAPOINT**

**3RD ARROW : INDEPEDENT, ISOLATED DRILLDOWN [COUNTY] , [COMPANY]**

**4TH ARROW : DEPENDANT, COMBINED DRILLDOWN [COUNTRY, COMPANY]**

**HOW TO VERIFY DATA VISUALIZED IN DRILLDOWNS?**

**RIGHT CLICK ANY DATA POINT > SHOW AS TABLE**

**OR CLICK MORE OPTIONS IN TOP RIGHT / BOTTOM RIGHT CORNER OF VISUAL > SHOW DATA.**

**HOW TO PERFORM INDEPEDENT, ISOLATED DRILLDOWN NAVIGATION?**

**RIGHT CLICK ANY DATA POINT > SHOW NEXT LEVEL**

**HOW TO PERFORM DEPENDANT, COMBINED DRILLDOWN NAVIGATION?**

**RIGHT CLICK ANY DATA POINT > EXPAND TO NEXT LEVEL**