How to create a group in OBIEE using the 'Bins' Function

There are various ways to create a group in OBIEE. The OBIEE method most similar to creating a group in Hyperion is the 'Bins' function. Below are some basic instructions on how to get started.

How to use the 'Bins' function in OBIEE within an Analysis:

1. Start by going to the Criteria section of the Analysis. Add the select field that you want to group.
   a. Normally, an additional (duplicate) field is added to your criteria, becoming the new group. For example, to group 'GL Acct', add 'GL acct' as usual. Then, add a second duplicate 'GL acct' to be used by the 'Bin' function.

2. To create the group, click the wheel icon of the select field. Then, click 'Edit formula'.

3. Customize the 'Column Heading' to include the new name of the grouped field (e.g., 'Group of GL Acct').
   a. The Folder Heading title does not matter in this case.
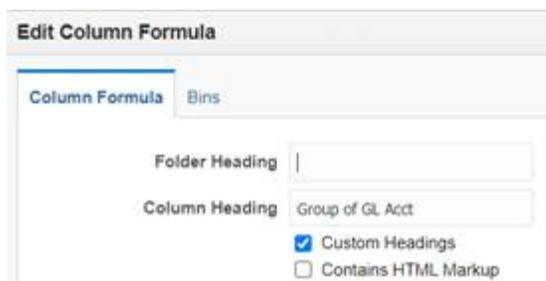
4. Click 'Bins' tab. Then click 'Add Bin' button.

5. Update the filter window to add selected value(s) for the bin. (e.g., GL Acct = 3100).
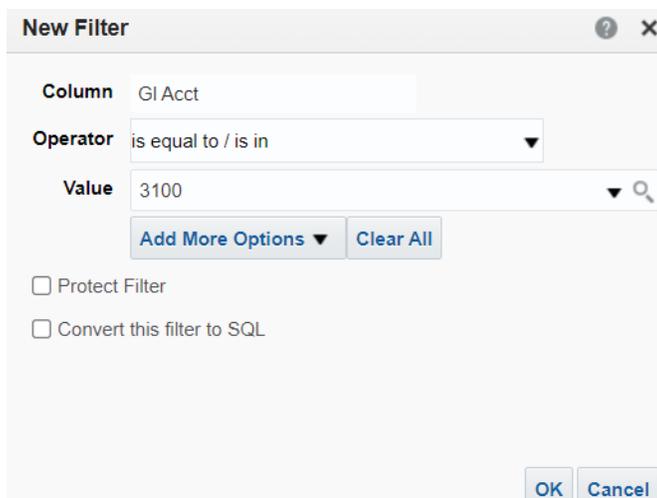
6. Update Bin Name (e.g., Revenue).
    a. This process will create a bin of GL Acct equaling 3100; called 'Revenue'.

    b. Repeat process to add another bin (e.g., GL acct = 3500; called 'Expense').

7. Overall, this process creates a new field called 'Group of GL Acct'. Any GL Acct equaling 3100 or 3500 will be labeled Revenue and Expense, respectively.

8. Continue to add as many bins as needed. This is similar to creating groups in Hyperion.
    a. More complex groupings can be done as well.
        i. For example, GL Acct begins with 006 or 007, and titled 'Cash'.

9. Once all the selected values are in various bins, create the 'all other values' bin to catch everything else.
    a. Check the box on the 'Create a bin for all other values' option.

    b. Input new Bin Name.

10. The Bin field (e.g., Group of GL Acct) will show in the 'Criteria' section of OBIEE. This can then be used in multiple views.

Note 1: Using the instructions shown above, computed fields in Hyperion (under the Results section and containing grouped formula) can be recreated in the 'criteria' section of OBIEE.

Note 2: OBIEE allows a bin to be created off another bin. Instructions are similar to those shown above through step 3. However, you will add a step 3.5 that includes choosing a field from the 'column' drop-down option, as seen below. Within the column drop-down menu, select the previously created bin (e.g. Group of GL Acct) then continue to step 4 above.