Creating Column Sets

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Create and Use Column Sets in Dashboard

When you're working with complex datasets in **Alchemer Dashboard**, it's often helpful to group related values together for easier analysis and reuse. That's where **column sets** come in.

Column sets allow you to define meaningful groupings—like regions, customer segments, or product tiers—that can be applied across multiple charts without having to recreate the logic each time. Unlike charts, formulas, or parameters that are only available within the chart they're built in, column sets are reusable and can be shared when included in a shared chart or dashboard.

This article walks you through how to create a column set, from defining your business question to configuring your group logic, so you can build smarter, more scalable analyses.

You can create sets, which can be used to classify values in a list that you can then reuse across multiple analyses. Charts, formulas and parameters are generally available only when in use in an Chart, and must be remade if you navigate away from the Chart without saving. Sets are reusable across many Charts with a single point of definition.

A set is built from a Worksheet however it does not belong to the Worksheet. When a set is initially created it is only available to the creator. When a set is used in an Chart or Dashboard and this Chart or Dashboard is shared with specific users or groups of users, the set is then available for use as a community object.

To create a column set, first define the business question you wish to chart. For example, you can use column set to define regions with specific countries included or excluded. To create a column set showcasing this defined list of values, follow these steps:

1. Navigate to the New Chart page by clicking the New **Chart** button.

2. Click **Add** and select **Column set**.
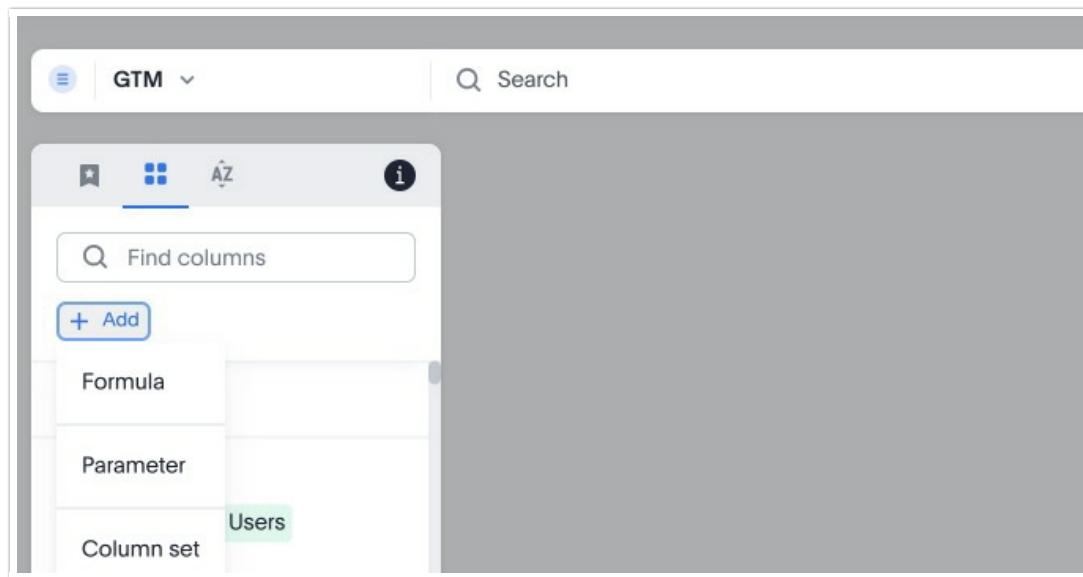
3. Select a **Base column** from the dropdown.

It is important that for each base column value there is only a single return column value. If this is not true, then the query generation will result in a many-to-many join. This may be desired. This should be reviewed as this will likely lead to incorrect values as result of overcounting.

4. Select either **Conditions** or **Bins** under **Define groups**.

Conditions allow you to create groups using operators.

Bins allow you to create groups based on bins of specified sizes with a minimum and maximum values.

5. Enter your desired values for the conditions or bin
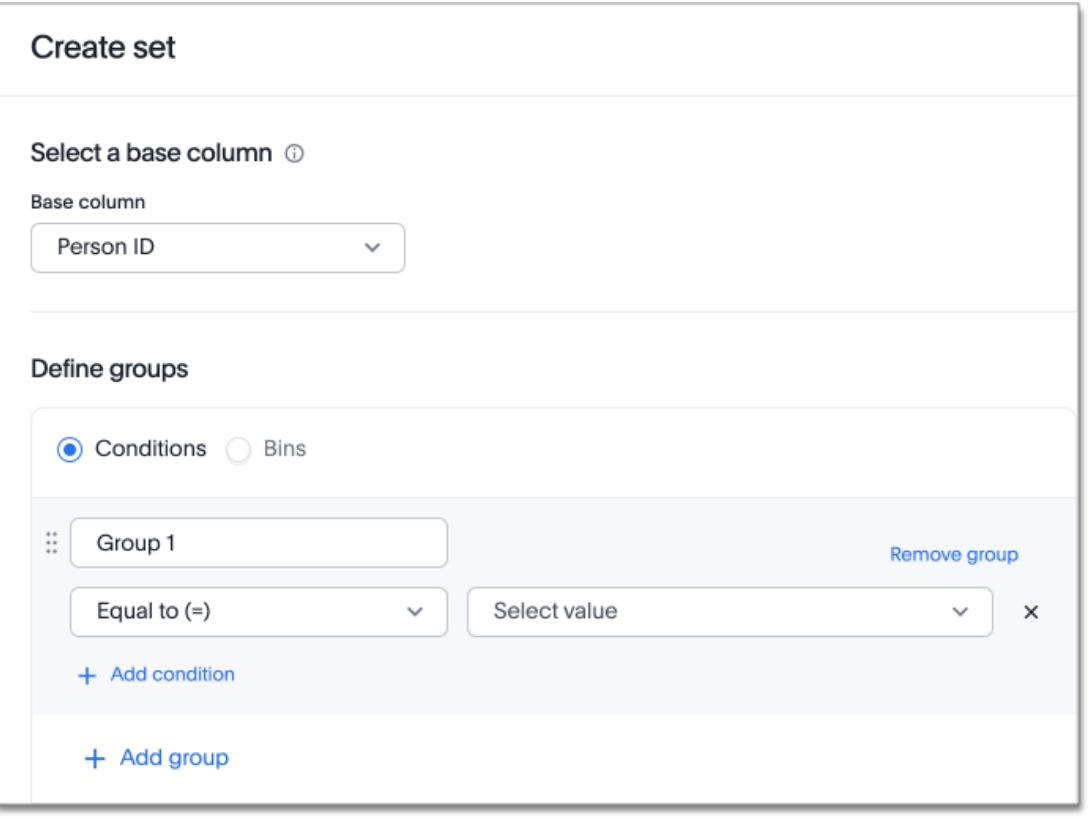
6. To add multiple conditions click **Add condition**.

> Multiple conditions can be combined with so that all conditions should be true or alternatively only a single condition as true.

7. To add multiple groups click **Add group**.

> If multiple group conditions return true for an anchor column value then the order of the groups takes precedence. That is for each value only one condition will return true.

8. For conditions, you can choose to show remaining values as either **Individual values** or as a **Group**. If you choose to group the remaining values, you can enter a name for the group.

9. Enter a **Set name**.

The name appears to identify the set for future use.

10. Optionally, enter a **Set description**.

11. Click **Create**.

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