

Grouped Filter Results (by sumUp)

The **Grouped Filter Results (by sumUp)** gadget calculates sums of multiple fields while the source issues are **grouped** by one custom field.

Grouped Filter Results (by sumUp)					
Project	Time Spent	Story Points	Issues	Issues	
Android App	2 days	306	30	30	
Blue Leaf Mobile App	3 hours, 45 minutes	0	14	14	
Catworkx Demo	0	0	1	1	
Create awesome software	1 week, 3 days, 6 hours	37	12	12	
Decadis Customer Service	4 weeks, 3 days, 6 hours, 45 minutes	0	51	51	
Demo Project	2 hours	0	4	4	
Employee Onboarding	0	0	12	12	
Financial Month End	0	0	2	2	
HR Candidate Tracking	1 day, 1 hour, 45 minutes	0	15	15	
Human resources	0	0	13	13	
Σ	1 year, 18 weeks, 4 days, 1 hour, 3...	2.729	798	798	

Configuration

Which issues do you want to analyze?

Select whether you want to use a **predefined JQL Filter** or a **custom JQL** to get the issues.

No need to create hundreds of filters to be used in various gadgets - simply define the result set by adding a custom JQL!

Which fields would you like to display?

Add fields to be displayed as **columns** and reorder them using **drag** and **drop**.

Only certain fields can actually be summed up (e.g numeric fields, text fields with numeric values etc.)

Which issues do you want to analyze? *

Filter for "Marketing Campaigns"

Which fields would you like to display? *

Budget



Costs



How do you want to group the results?

The main difference from our [Filter Results \(by sumUp\) gadget](#) is the **grouping feature**. With this feature, you can select the field by which to group (aggregate) the results. For example, you can group by **End Date** to see the quarterly costs. Additionally, when aggregating by date fields like **End Date**, you get more options to further refine the results. How to configure these settings can be seen in the [Additional Options](#).

Select a field that will be used to **group** the **results** on the **y-Axis**.

Example:

grouped by End Date		grouped by Fix version	
Marketing Campaign Cost analysis (Grouped Filter)		Story points per Fix version	
All-time	31/Jan/23-23/Dec/23	shown	Quarterly
End Date ^		Fix versions ^	Story Points ^
Q1/23	2.700	2.500	69
Q2/23	2.200	2.100	27
Q3/23	3.100	3.100	20
Q4/23	8.500	9.300	21
Σ	16.500	17.000	25
		Σ	49
			142

How many rows do you want to display per page?

Choose how many results you want to display on your dashboard.

Additional options

Configure your sumUp gadget with date-related settings such as the **default time period** and the **default date aggregation level**. Additional options include a 15-minute data refresh, grouping results by name, and adding links to the Issue Navigator.

Do you want to refresh your data every 15 minutes?

Check this option to refresh the results of the gadget every 15 minutes.

Enabling this option is useful when displaying information that needs a periodic refresh. For example, displaying the gadget on a wallboard.

Do you want to group the elements by name instead of their ID?

This option is helpful if you wish to group the results by fields that share the same name or the options. For example, if you have a **fix version** named "EAP_Q2" **across multiple projects**, checking this option will ensure the results will be **grouped under the same name** instead of showing them as separate entries.

- By **default**, all values will be **grouped by their ID**, meaning that fields or options that share a common name will be treated as two different values, since they don't have the same ID in the database.
When **checking the checkbox**, options with the **same option name** will be treated as one option, even though they are saved as different values in the database.
- This option is **not available** for all the fields. It is only available on selecting the certain fields in "Group by" section that could share same name or options. Some of the fields where this option is applicable are:
 - **Versions**
 - **Components**
 - **Issue type**
 - **Severity**
 - **Sprint**
 - **Status**
 - **Option-based fields**

Do you want to include links to show results in the issue navigator?

If you are someone who likes seeing the issues behind numeric entries on the gadget, this option is your match. **With this option checked**, you are taken to the Issue navigator page every time you click on a numeric entry on the sumUp gadget. Once you are on the Issue navigator page, you can see the JQL (and subsequently the issues) that accounts for the numeric entry displayed on gadget.

In case of text fields, it is not possible to perform an exact search due to limitations of Jira Cloud JQL, so it may happen that more issues are shown than expected. If the text field contains special characters ((") + . , ; ? !| * / % ^ \$ # @ []) <>), they will be ignored in the JQL search.

If you do not usually go to the Issue navigator or if the loading time for your gadget is too high, leave the option unchecked.

Which time period do you want to display as default?

If you have chosen to group the data by a **date** or **date time field** (e.g. **Due date** or **Created**), you can set a default time period for the displayed data when the gadget is loaded or refreshed.

You can choose between:

- Current week
- Current month
- Current quarter
- Current year
- All-time

Which default date aggregation level do you choose?

If you have chosen to group the data by a **date** or **date time field** (e.g. **Due date** or **Created**), you can set a default aggregation level for the displayed data when the gadget is loaded or refreshed.

You can choose between:

- Daily
- Weekly
- Monthly
- Quarterly
- Yearly

View mode

Sorting



Sorting

The columns can be sorted by clicking on the small arrows next to each column header.

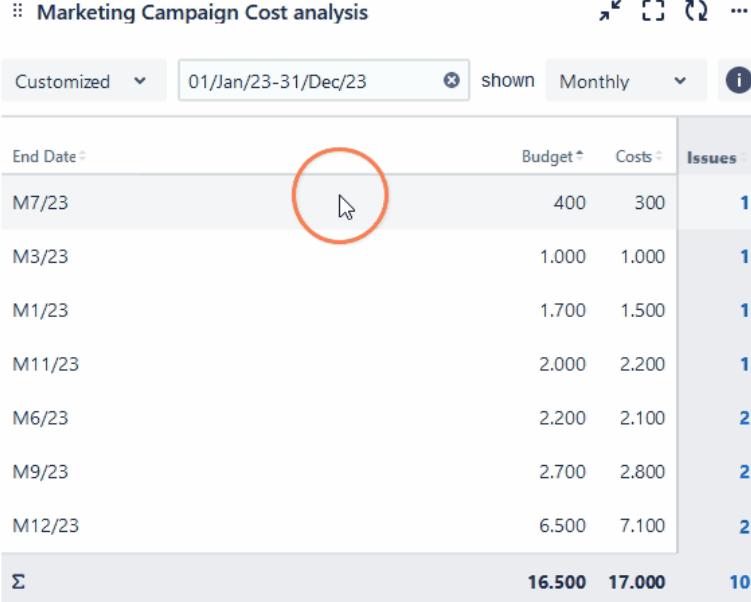
Date filter

The gadget displays an additional **filter** at the top when a date field is selected in the **configuration**.

Initially, it is pre-populated with the value set in the configuration and the data is displayed accordingly.

Current year ▾ 01/Jan/24-31/Dec/24 × shown Monthly ▾

Option	Description
Time period	The drop-down menu contains the options in the following order: <ul style="list-style-type: none">• Current week• Current month• Current quarter• Current year• All-time

Date picker	<p>The picker allows you to override the Time period selection.</p> <p>You can select the start and end dates of the aggregated data by clicking first on the start date and then on the end date.</p>  <p>To enter your chosen date, click next to the expanded calendar.</p> <p>If the date range is not customized, it reflects the chosen Time period. For example, the period selection would display 01/Jan/24-31/Dec/2024 if the Current year option is selected. If the date range is adjusted, the Date Filter View changes to Customized.</p>
Date grouping	<p>The selector determines how the data is grouped in the columns/rows of the table.</p> <p>The drop-down menu contains the following options:</p> <ul style="list-style-type: none"> • Daily shown as separate dates. • Weekly shown as W1, W2, W3,... • Monthly shown as M1, M2, M3,... • Quarterly shown as Q1, Q2, Q3, Q4 • Yearly shown as Y/22, Y/23, Y/24, ... <p>If the data spans more than one year, the Weekly, Monthly and Quarterly data are shown with the year as suffix, e.g. Q1/24.</p>
Info icon	The tooltip displays information about the data displayed in the gadget.



Use cases and examples

Use case	Description	Gadget

[Comparison of Budget and Total Costs](#)

Compare previous year's budgets and costs on a quarterly basis.

[Grouped Filter Results](#)

If you still have questions, feel free to refer to our [support](#) team.