

METHODS TO CREATE A GROUP

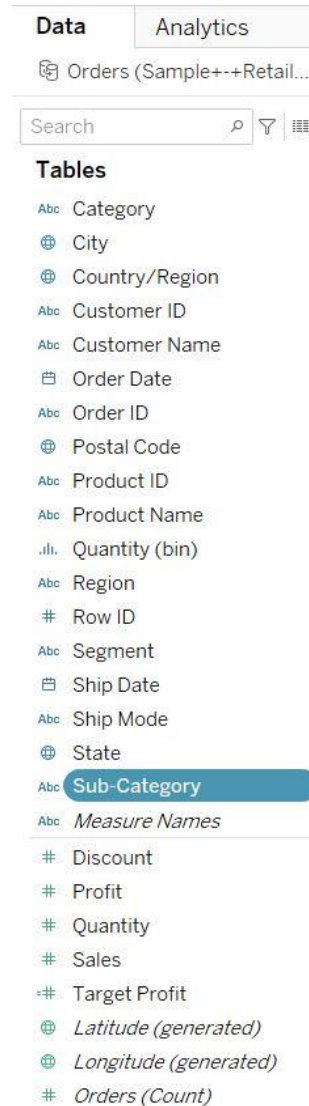
Method I: From the Data Pane

Method II: By using Marks (directly from the view/ visualization)

Method III: By using Headers (directly from the view/ visualization)

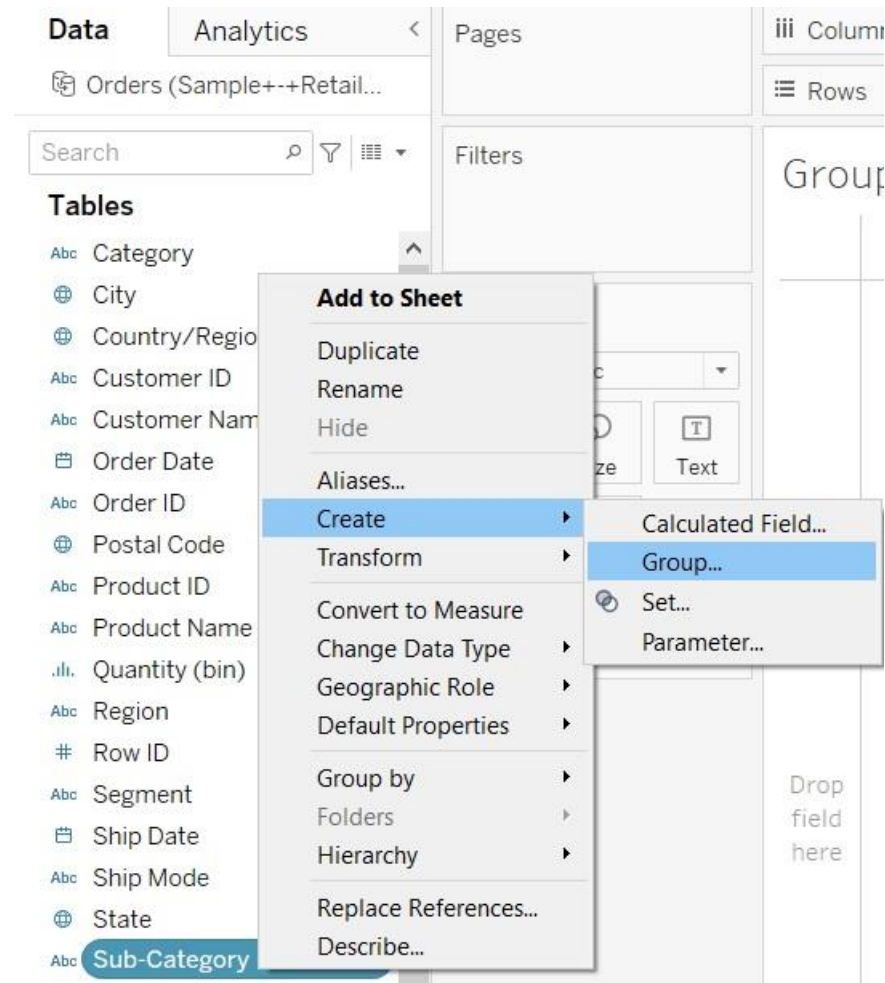
METHOD I - FROM THE DATA PANE

STEP 1: Click on the Dimension e.g.: **Sub-Category** that is to be used for creating the Group



METHOD I - FROM THE DATA PANE

STEP 2: Right-click and select **Create --> Group**



METHOD I - FROM THE DATA PANE

STEP 3: "Create Group [Sub-Category]" dialog box will appear

Create Group [Sub-Category] X

Field Name: Sub-Category (group)

Groups: Add to: ▼

- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper

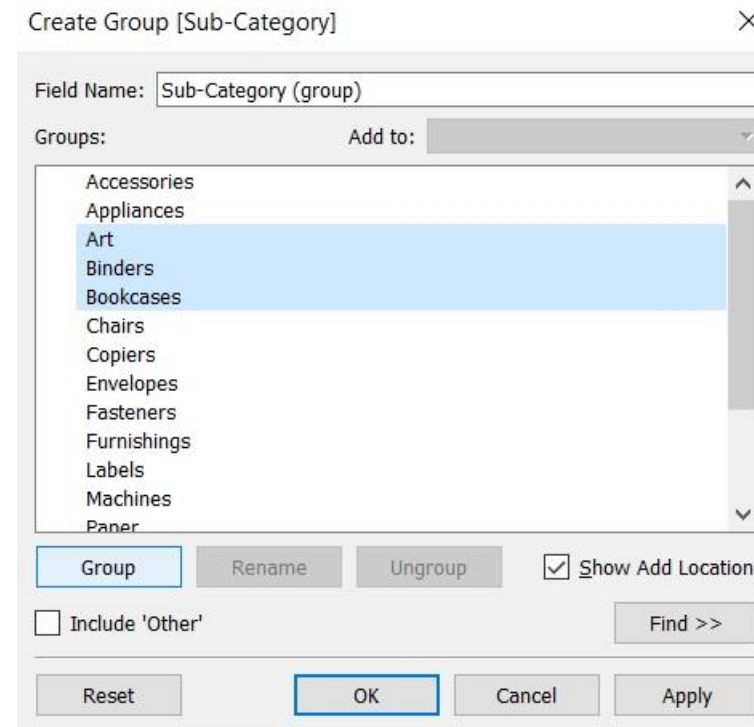
Group Rename Ungroup ☒ Show Add Location

☐ Include 'Other' Find >>

Reset OK Cancel Apply

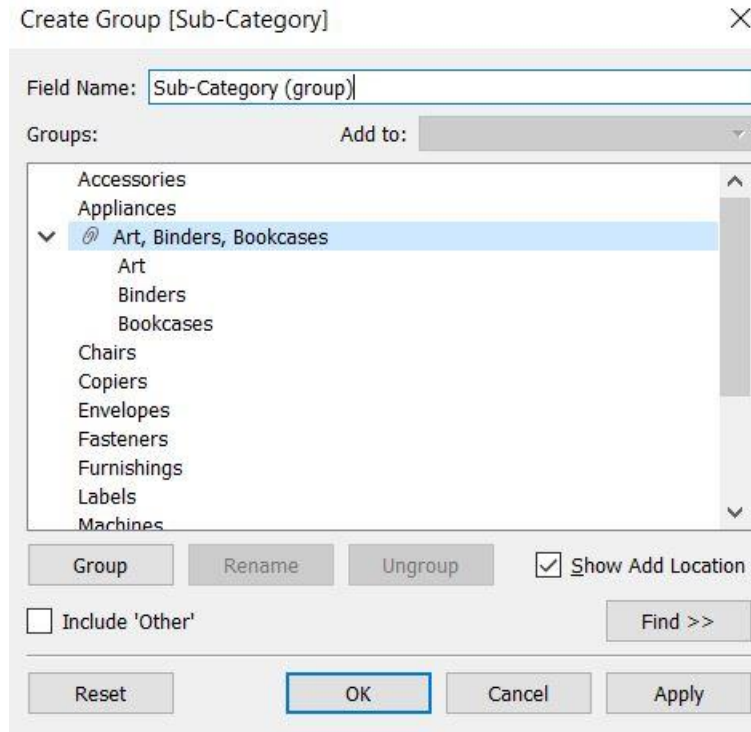
METHOD I - FROM THE DATA PANE

STEP 4: Select the required members. If multiple members are required, then press the Ctrl and select the members.
Select "**Group**".



METHOD I - FROM THE DATA PANE

STEP 5: The grouped members appear along with a **paper clip** icon
Select **"OK"**



Create Group [Sub-Category] X

Field Name: Sub-Category (group)

Groups: Add to:

- Accessories
- Appliances
- ✓ @ Art, Binders, Bookcases
 - Art
 - Binders
 - Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines

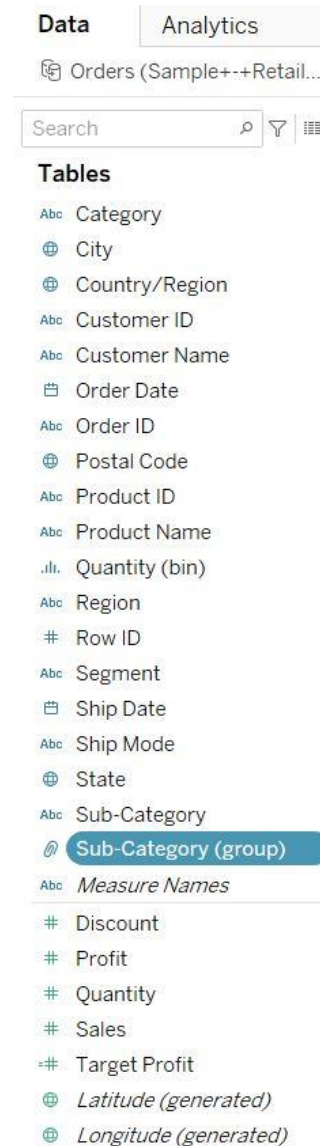
Group Rename Ungroup ☒ Show Add Location

☐ Include 'Other' Find >>

Reset OK Cancel Apply

METHOD I - FROM THE DATA PANE

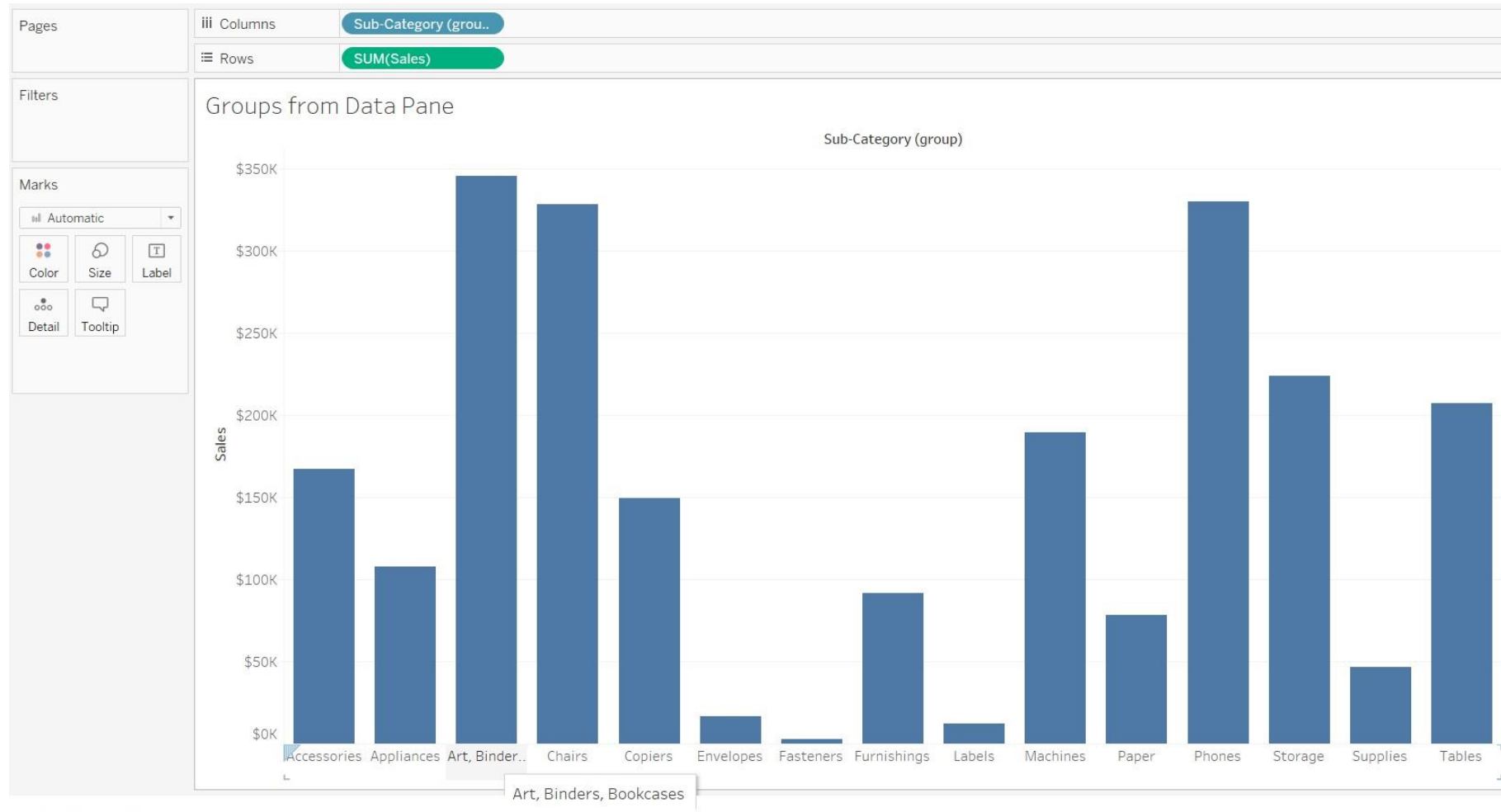
STEP 6: Observe that a new dimension **Sub-Category (group)** is now present in the **Data Pane**



METHOD I - FROM THE DATA PANE

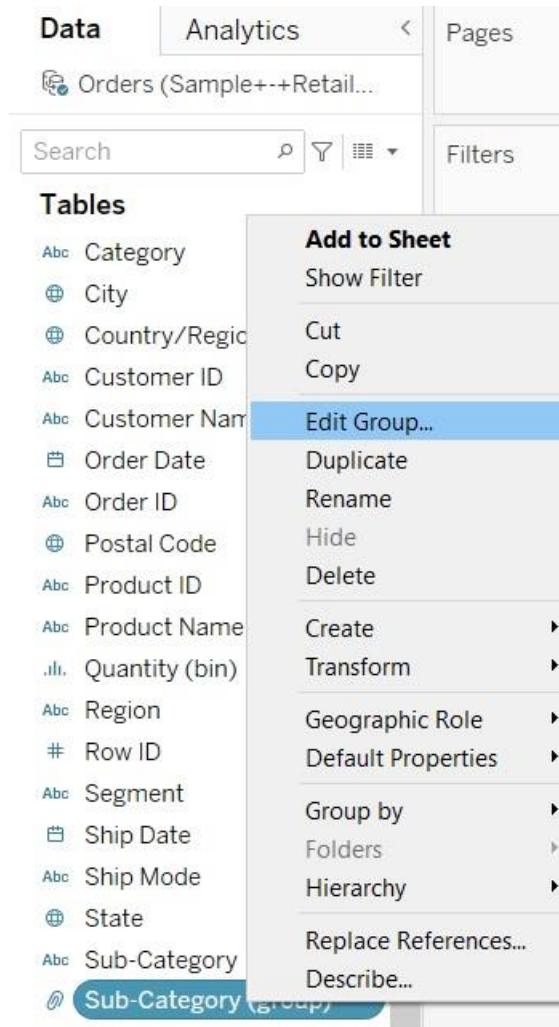
STEP 7: Just to confirm create a view with **Sub-Category (group)** in **Rows** shelf and **Sales** in **Columns** shelf

The grouped members are visible i.e., **Art, Binders, Bookcases** as a separate Mark



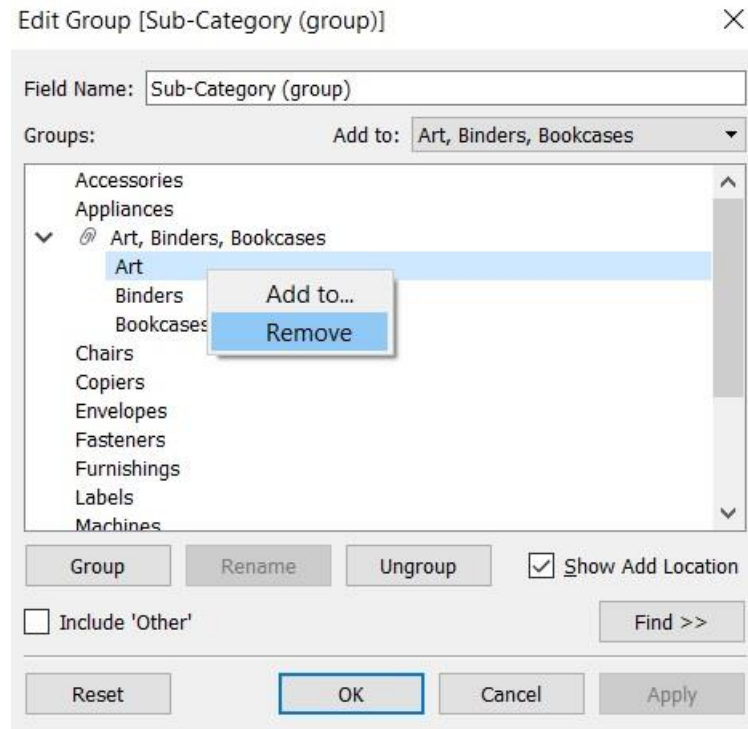
METHOD I - FROM THE DATA PANE

STEP 8: If any changes need to be done in the Group from the Data pane, right-click the **Sub-Category (group)** and select **Edit Group**



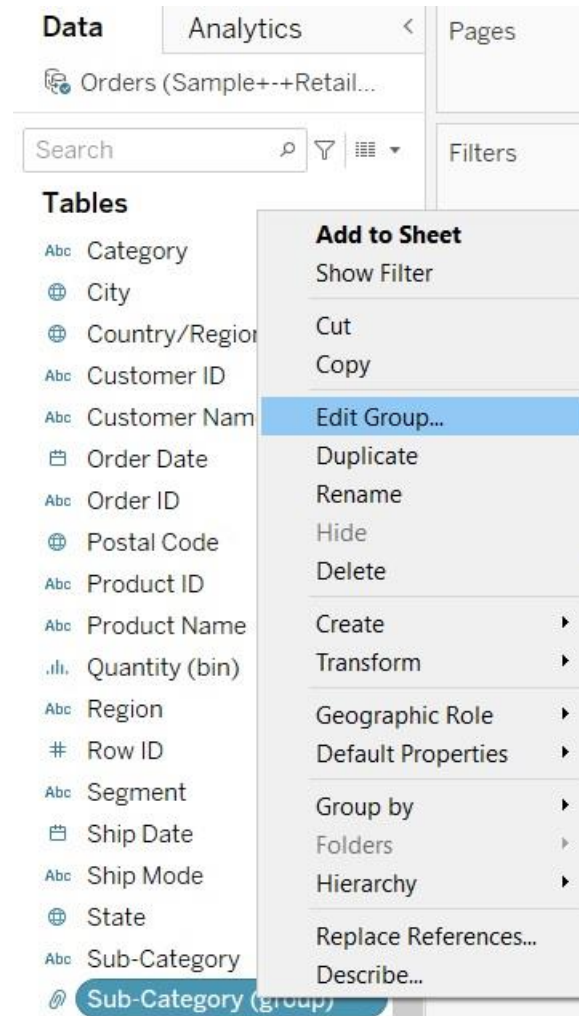
METHOD I - FROM THE DATA PANE

STEP 9: For removing any member, right-click the member under the Group
e.g.: Art and select **Remove**
Select "**OK**"



METHOD I - FROM THE DATA PANE

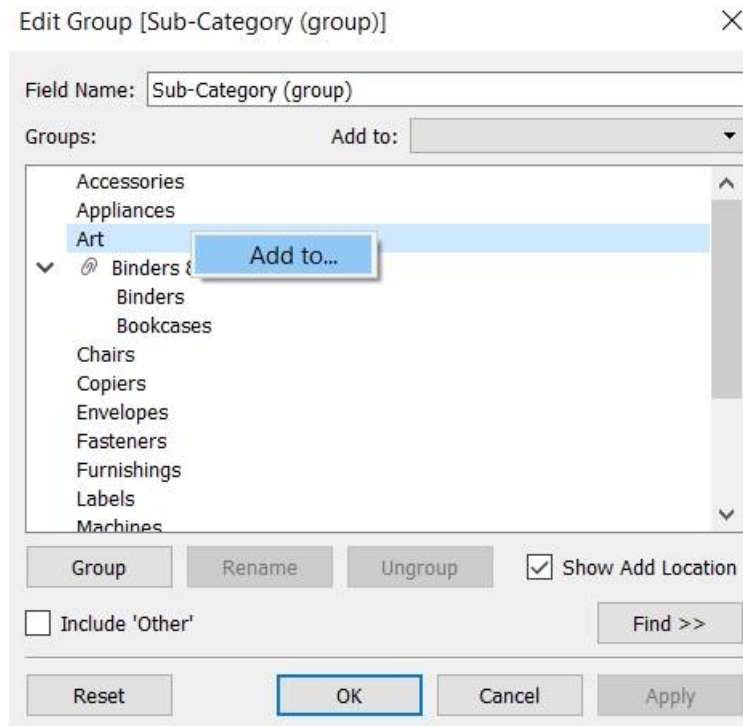
STEP 10: For adding any member, right-click the **Sub-Category (group)** and select **Edit Group**



METHOD I - FROM THE DATA PANE

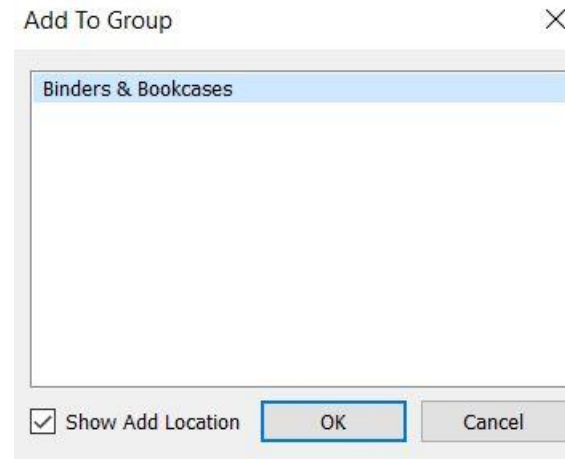
STEP 11: Right-click the member to be added to the Group e.g.: Art and select **Add to..**

Select the **Group** and select **OK**



METHOD I - FROM THE DATA PANE

STEP 12: Select the Group and select **OK**



METHOD I - FROM THE DATA PANE

STEP 13: Select OK

Edit Group [Sub-Category (group)] ✕

Field Name:

Groups: Add to:

- Accessories
- Appliances
- ▼ ☒ Art, Binders, Bookcases
 - Art
 - Binders
 - Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines

☒ Show Add Location

☐ Include 'Other'

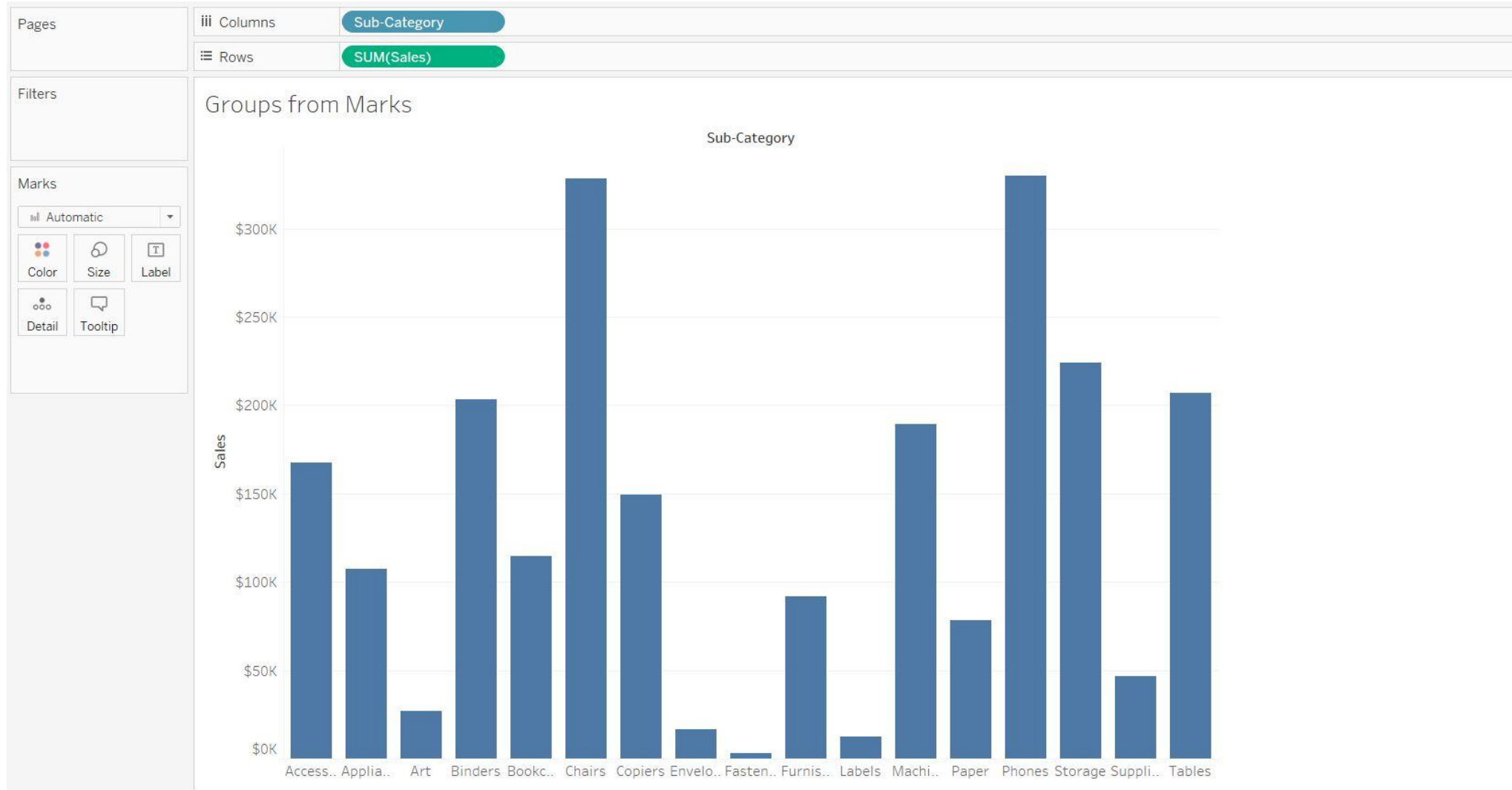
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 1: Drag and drop the Dimension e.g.: **Sub-Category**, that is to be used for creating the Group, to the **Columns** shelf

[illegible]

METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 2: Drag and drop a Measure e.g.: **Sales** to the Rows shelf

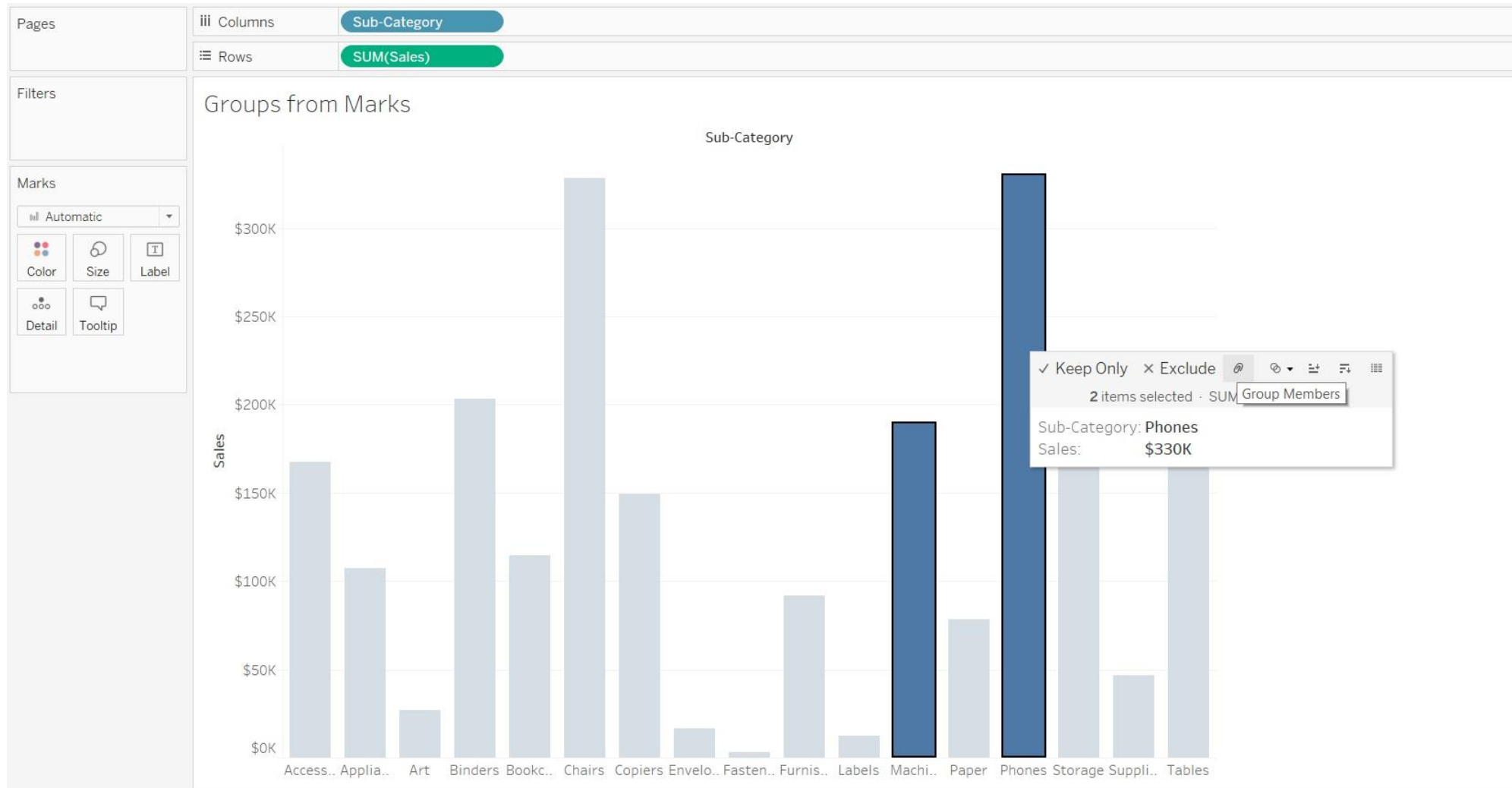


METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 3: Select the required members by using the marks directly from the view.

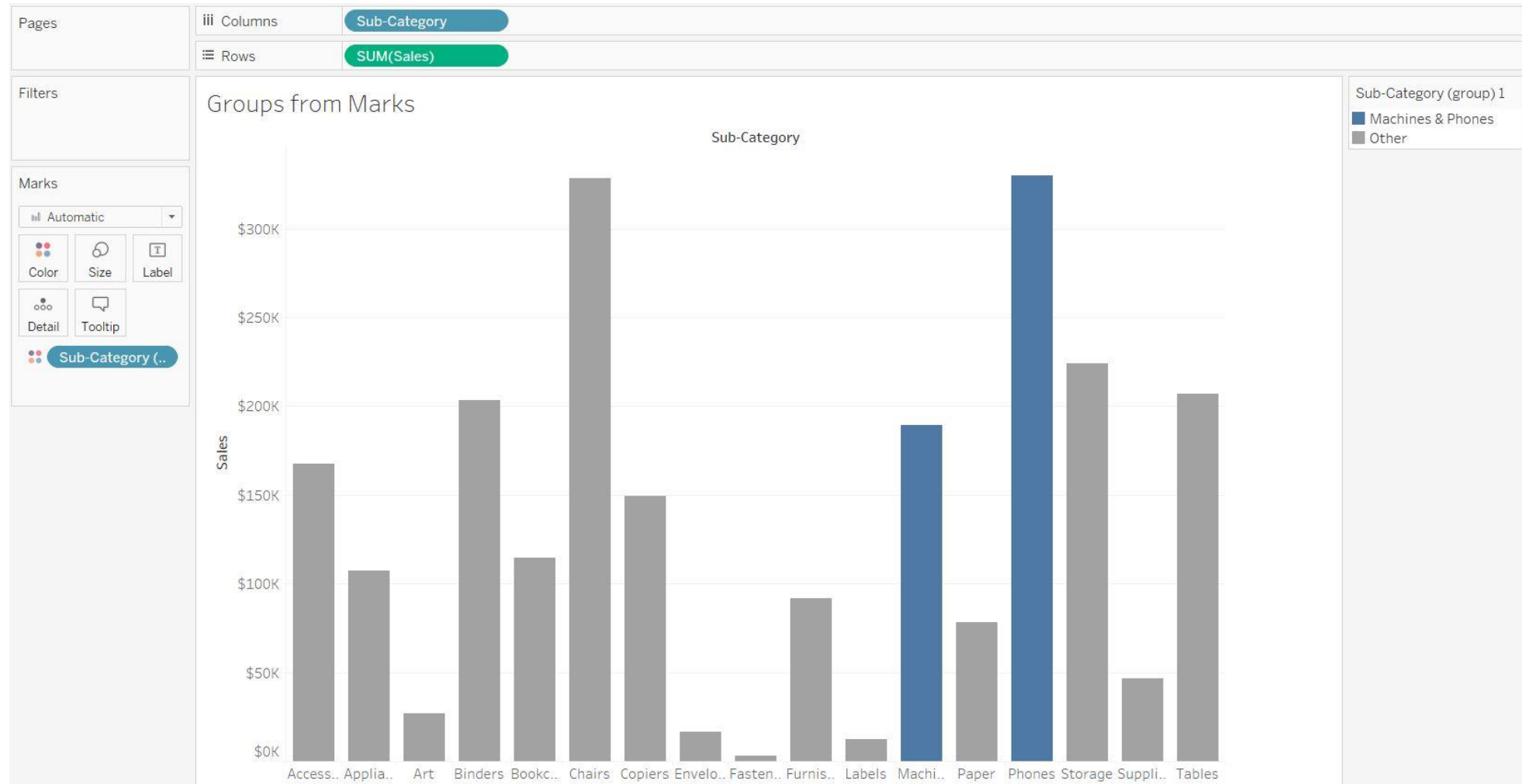
If multiple members are required, then press the Ctrl and select the members.

In the new dialog box click on the **Paper Clip** icon to **Group Members**



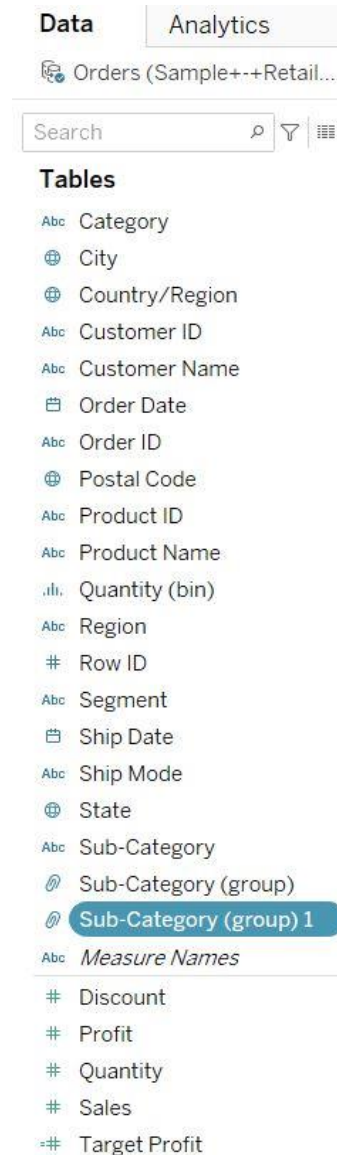
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 4: The grouped members alone will be highlighted in a different color
A color legend will appear in the Top Right side of the viewing area for **Sub-Category (group)1**



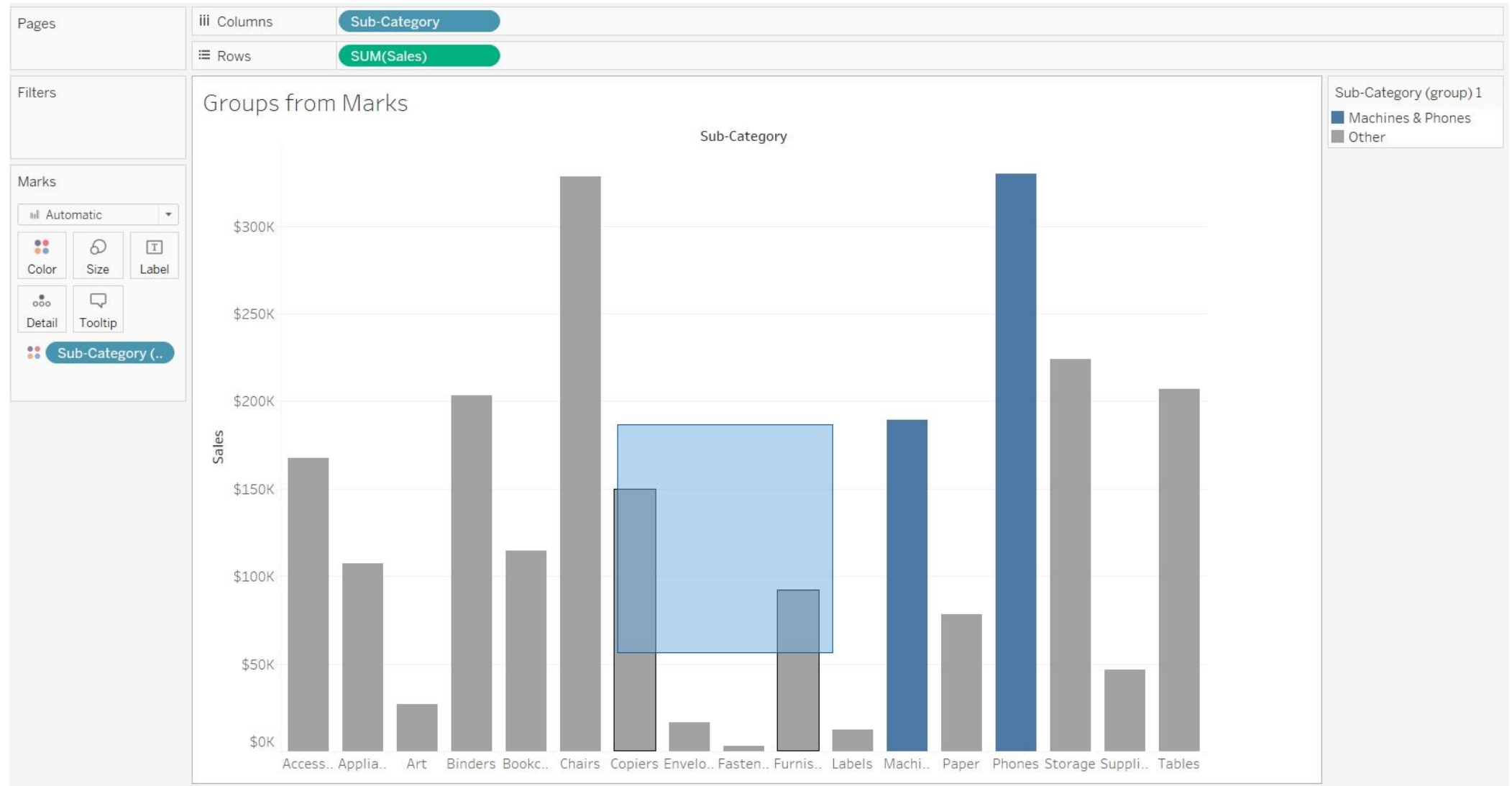
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 5: Observe that a new dimension **Sub-Category (group)1** is now present in the Data Pane



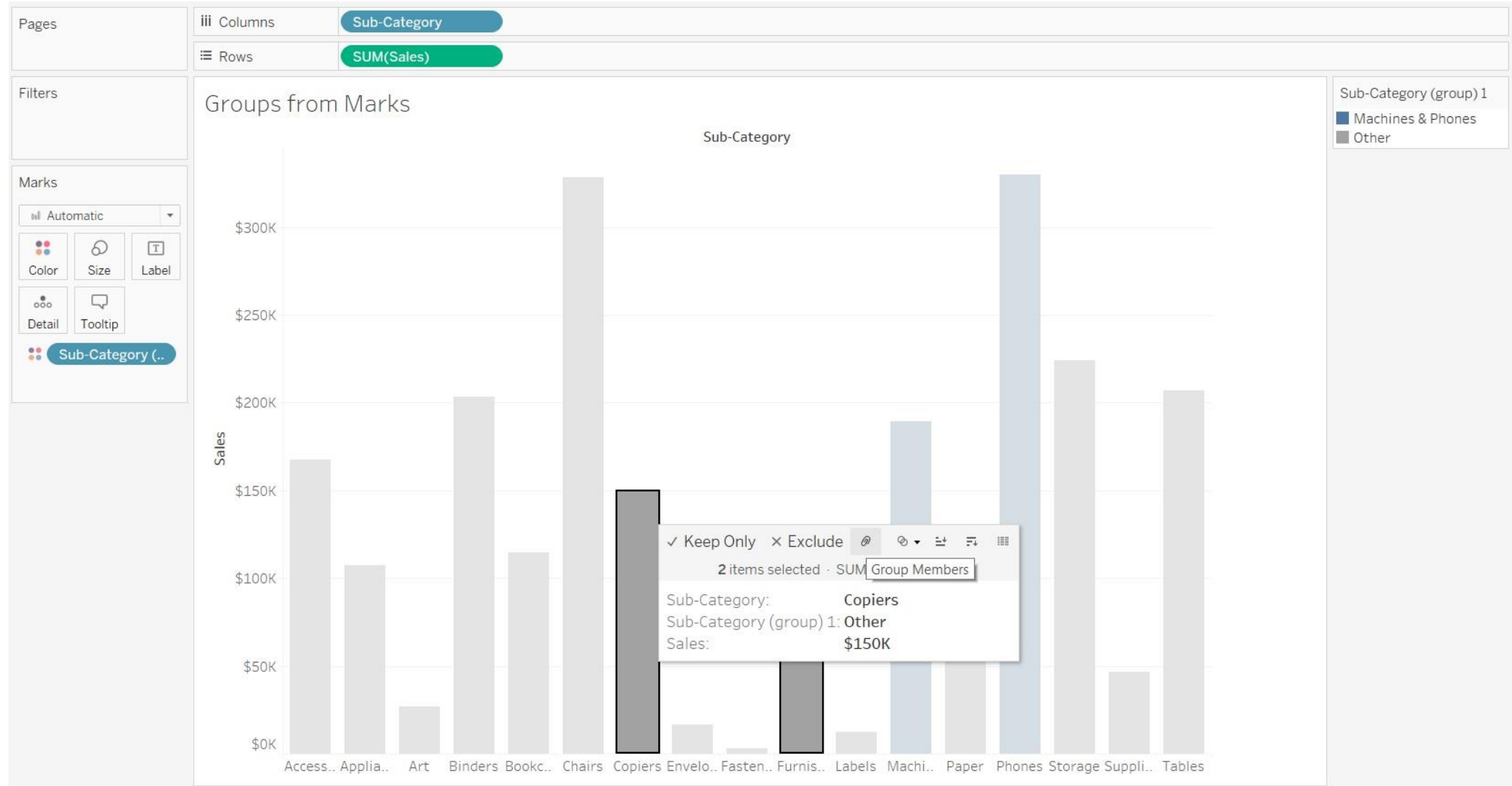
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 6: We can also select the required members by using the cursor and covering a particular area



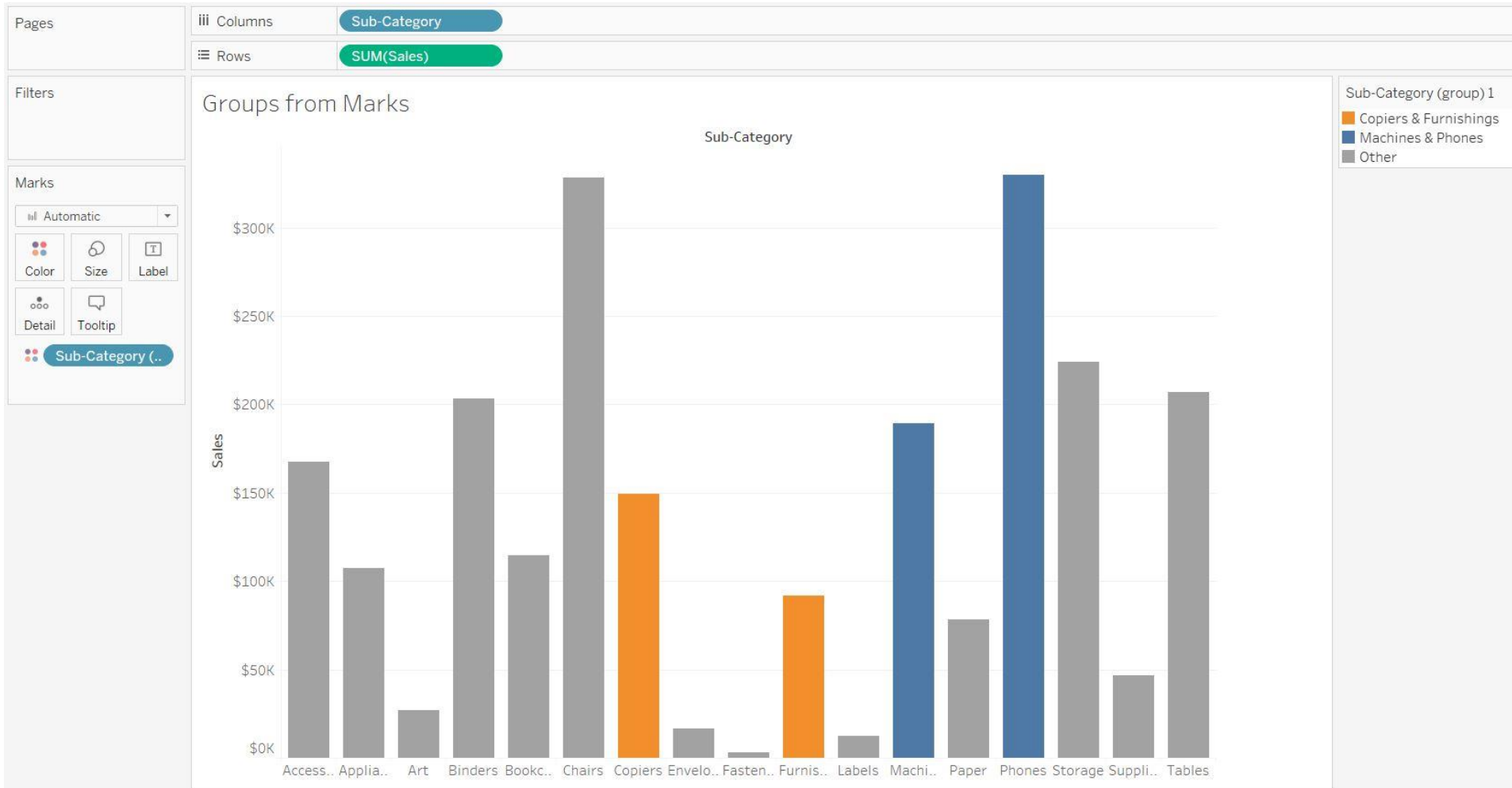
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 7: In the new dialog box click on the **Paper Clip** icon to **Group Members**



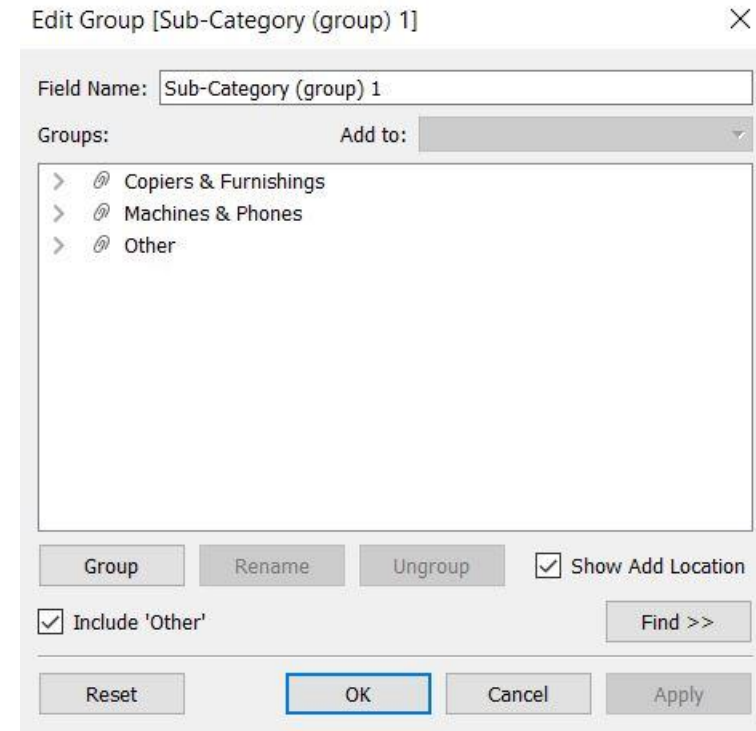
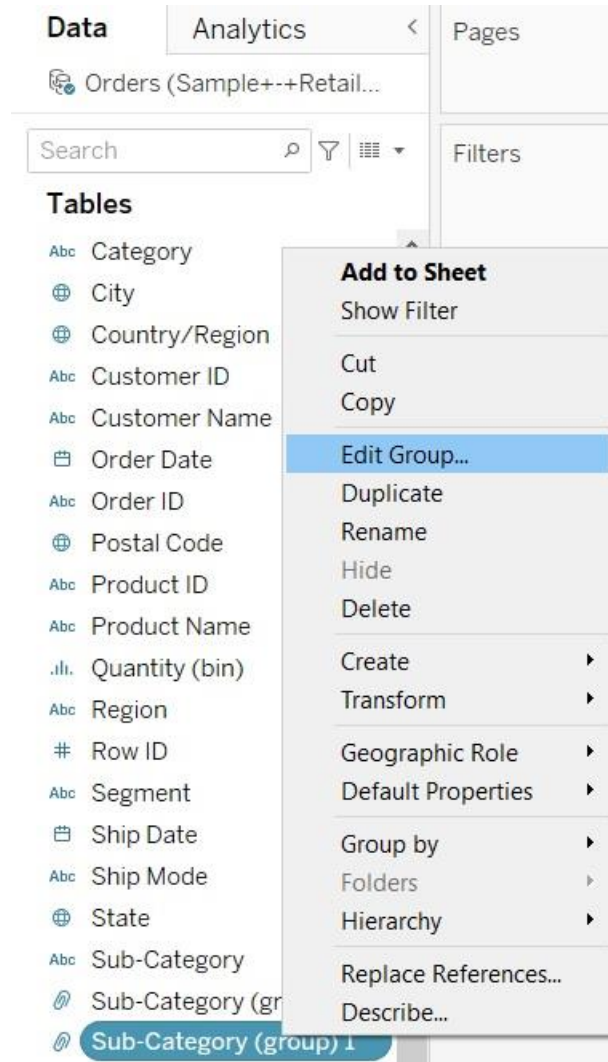
METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 8: The newly grouped members will be highlighted in a different color
This change will be reflected in the color legend for **Sub-Category (group)1**



METHOD II – BY USING MARKS (FROM THE VIEW)

STEP 9: Like the Data Pane method if any changes need to be done in the Group we can right-click the **Sub-Category (group)1** and select **Edit Group**



METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 1: Drag and drop the Dimension e.g.: **Sub-Category**, that is to be used for creating the Group, to the **Columns** shelf

Pages

Filters

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Columns

Sub-Category

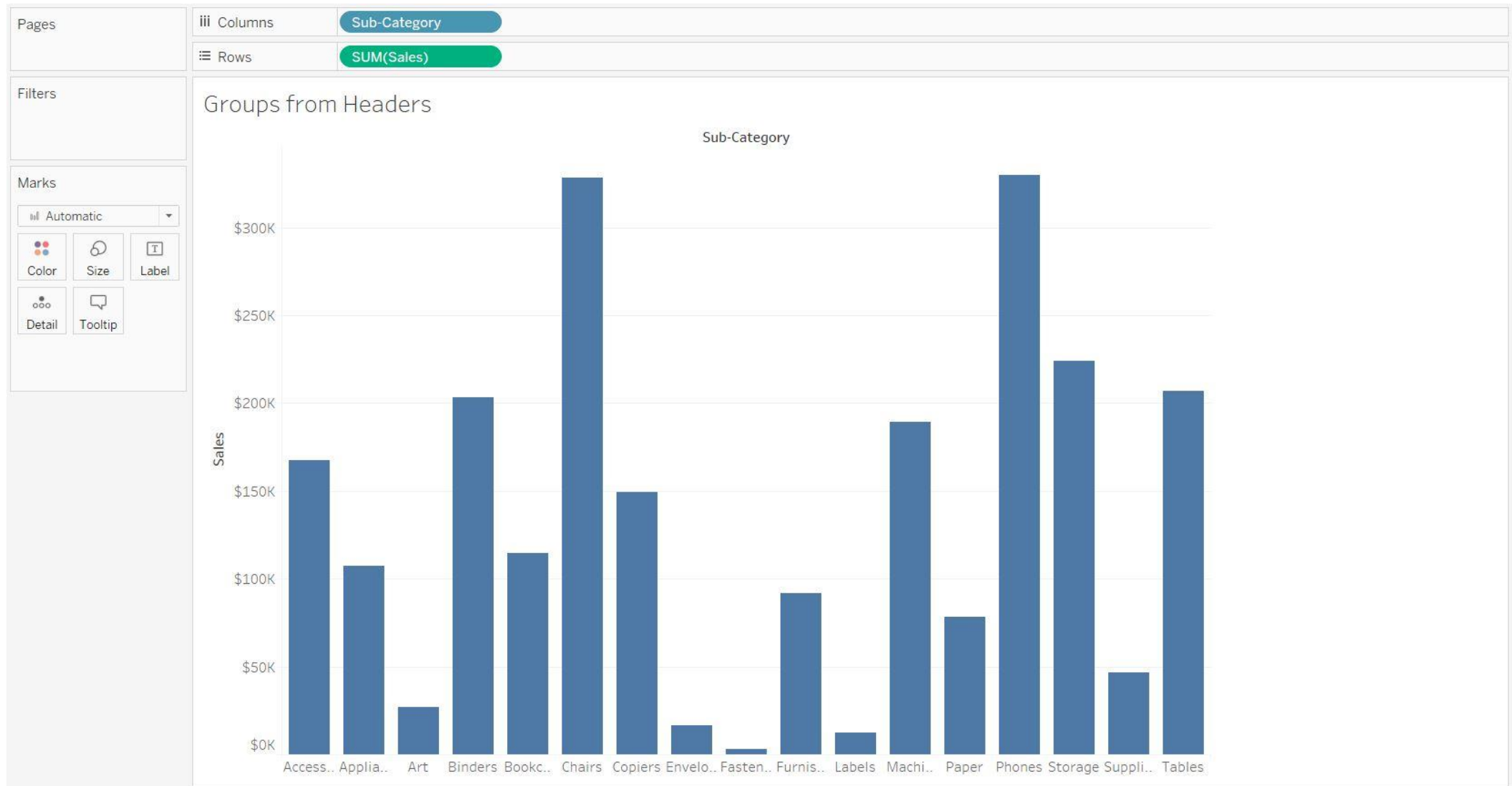
Rows

Groups from Headers

Sub-Category																
Acces..	Appli..	Art	Binde..	Bookc..	Chairs	Copie..	Envel..	Faste..	Furni..	Labels	Machi..	Paper	Phones	Stora..	Suppl..	Tables
Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc

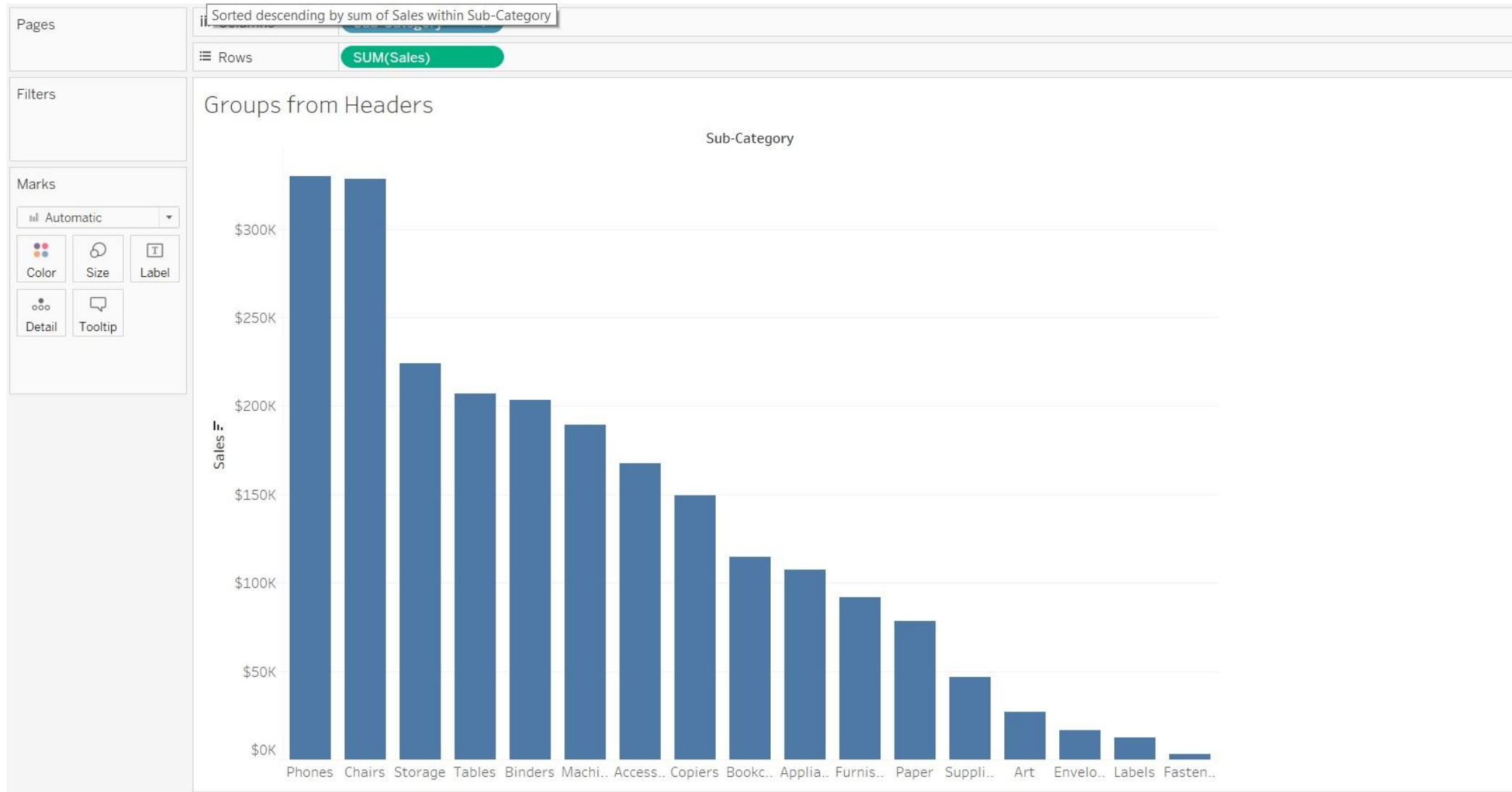
METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 2: Drag and drop a Measure e.g.: **Sales** to the **Rows** shelf



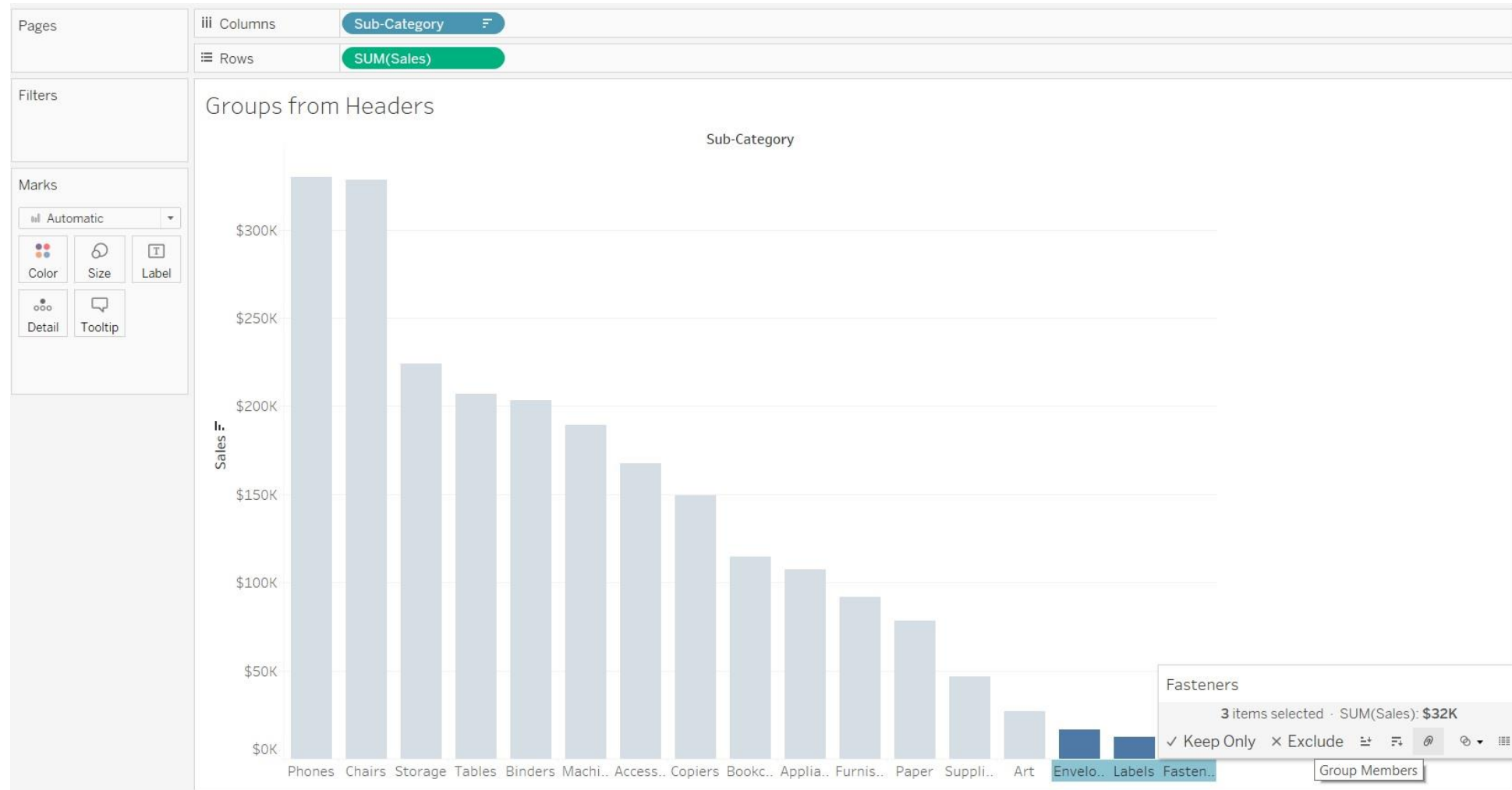
METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 3: If required we can sort the marks by descending order of sum of Sales



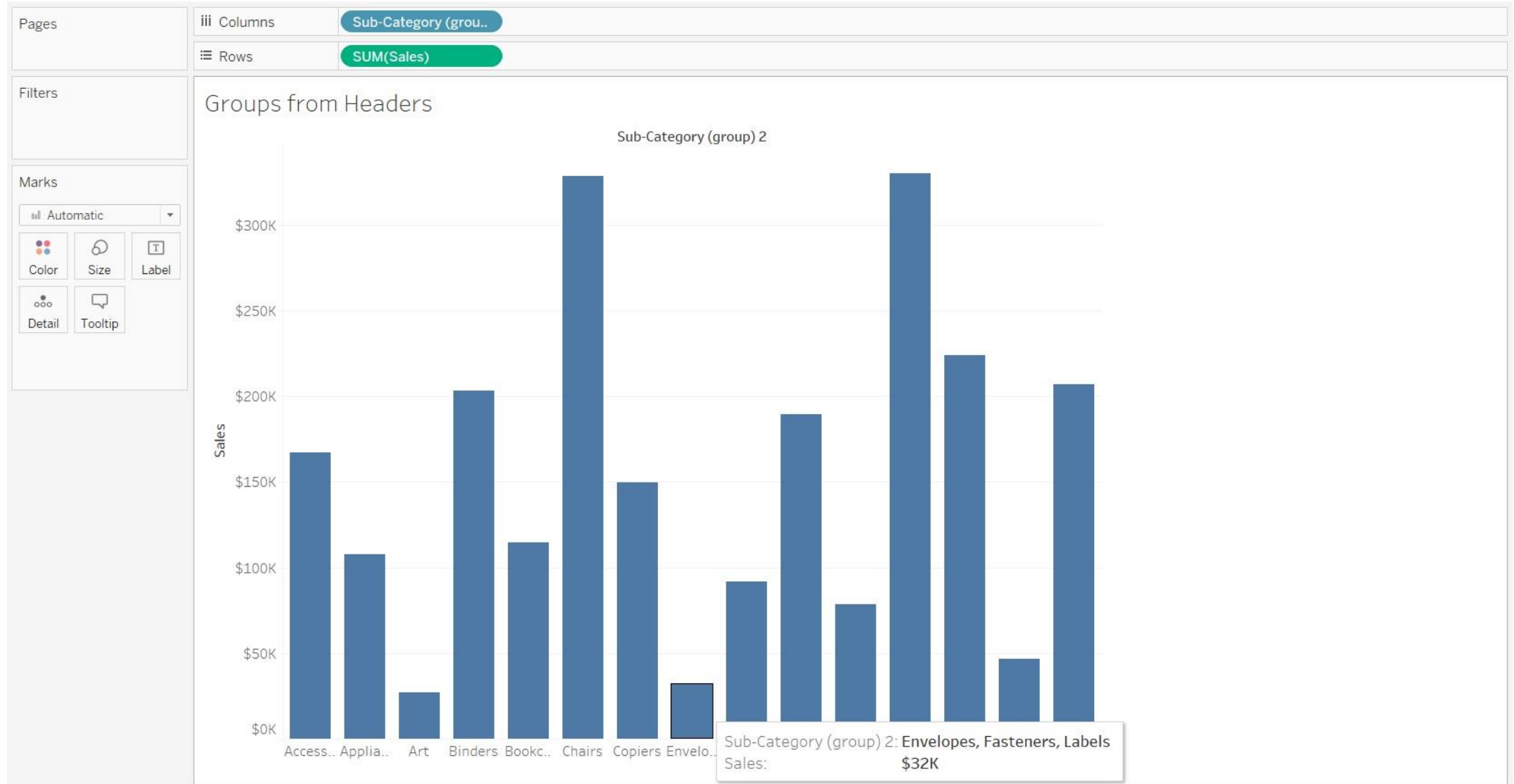
METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 4: Select the required members by using the headers/labels directly from the view.
If multiple members are required, then press the Ctrl and select the members.
In the new dialog box click on the **Paper Clip** icon to **Group Members**



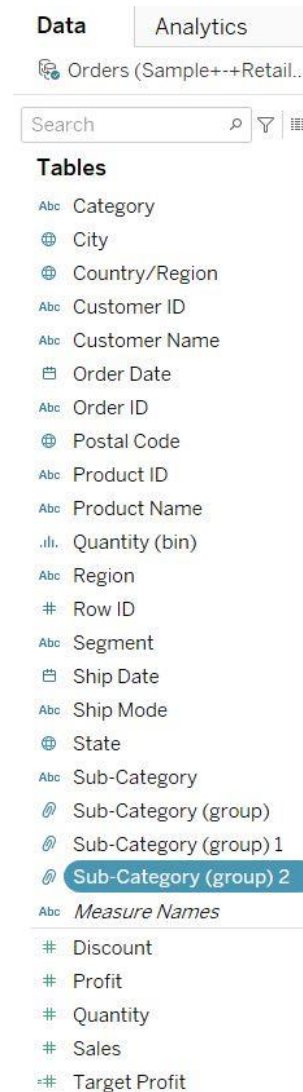
METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 5: The grouped members will appear together in a new group **Sub-Category (group)2**



METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 6: Observe that a new dimension **Sub-Category (group)2** is now present in the Data Pane



The screenshot shows the 'Data' pane of a BI tool. At the top, there are tabs for 'Data' and 'Analytics'. Below them is a search bar and a list of dimensions and measures. The dimensions are listed under the 'Tables' section, and the measures are listed under the 'Measure Names' section. The 'Sub-Category (group) 2' dimension is highlighted with a blue background.

Data	
Analytics	
Orders (Sample+++Retail...	
Search	
Tables	
Category	
City	
Country/Region	
Customer ID	
Customer Name	
Order Date	
Order ID	
Postal Code	
Product ID	
Product Name	
Quantity (bin)	
Region	
Row ID	
Segment	
Ship Date	
Ship Mode	
State	
Sub-Category	
Sub-Category (group)	
Sub-Category (group) 1	
Sub-Category (group) 2	
Measure Names	
Discount	
Profit	
Quantity	
Sales	
Target Profit	

METHOD III – BY USING HEADERS (FROM THE VIEW)

STEP 7: Like the Data Pane method if any changed need to be done in the Group we can right-click the **Sub-Category (group)2** and select **Edit Group**

