# METHODS TO CREATE A GROUP
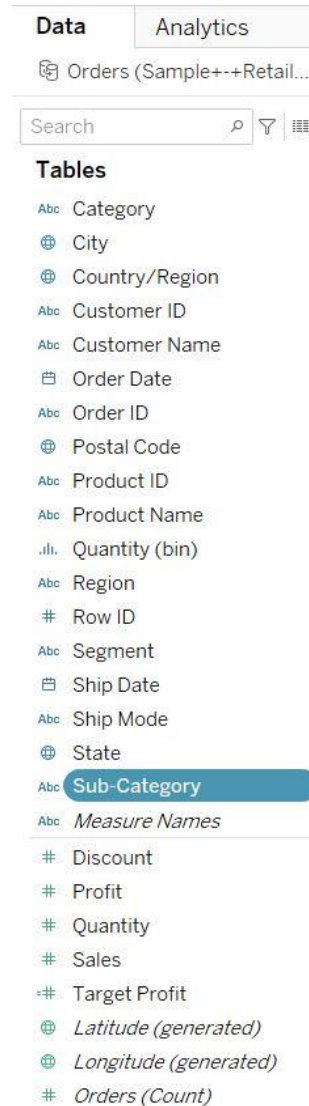
**Method I:** From the Data Pane

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

**Method III:** By using Headers (directly from the view/ visualization)
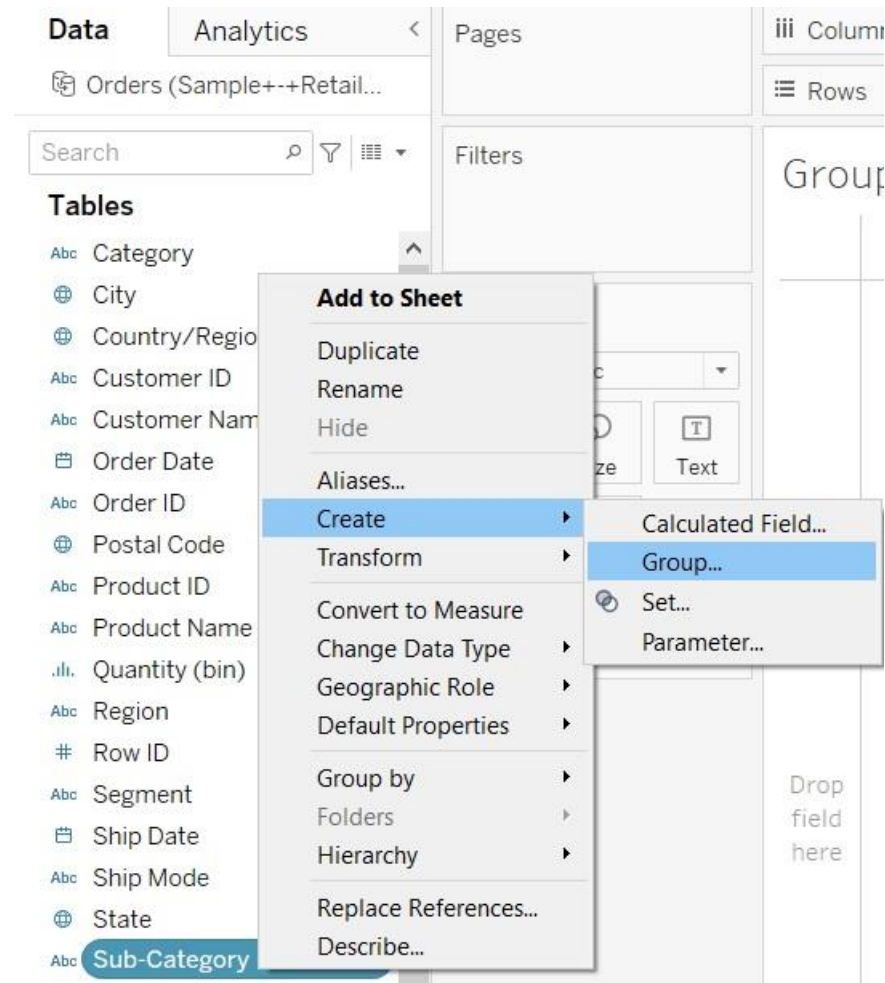
# METHOD I - FROM THE DATA PANE

**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**

## STEP 3: "**Create Group [Sub-Category]**" dialog box will appear
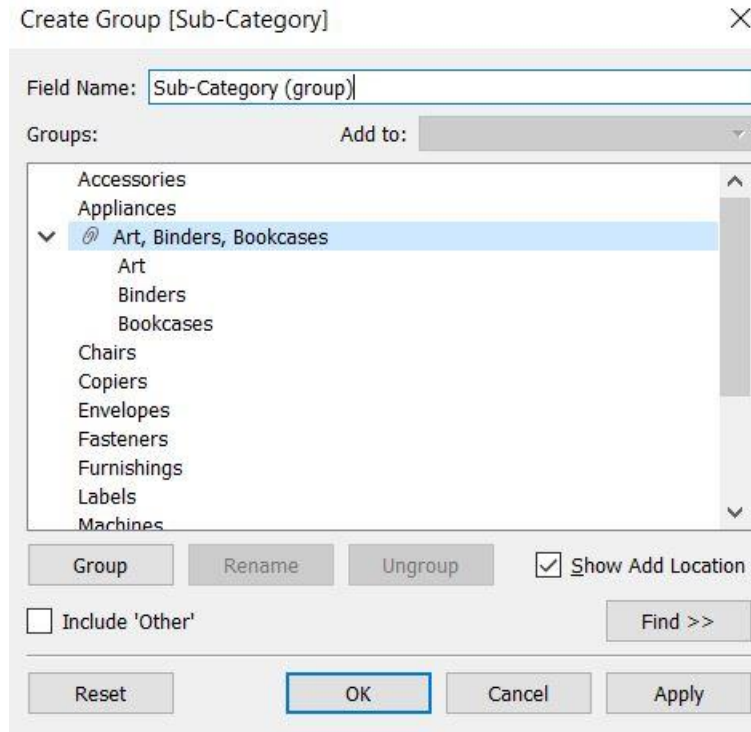
**STEP 4:** Select the required members. If multiple members are required, then press the Ctrl and select the members.
Select "**Group**".
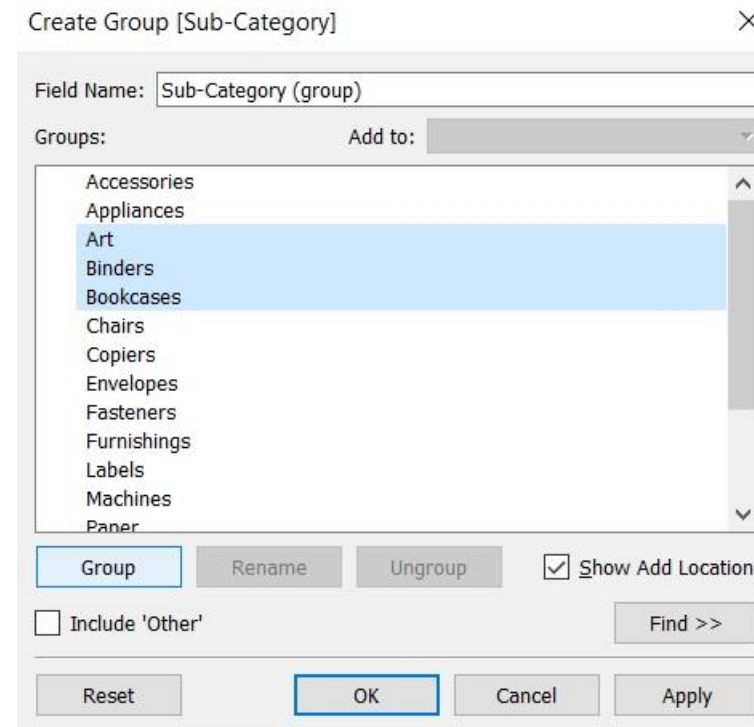
# METHOD I - FROM THE DATA PANE

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

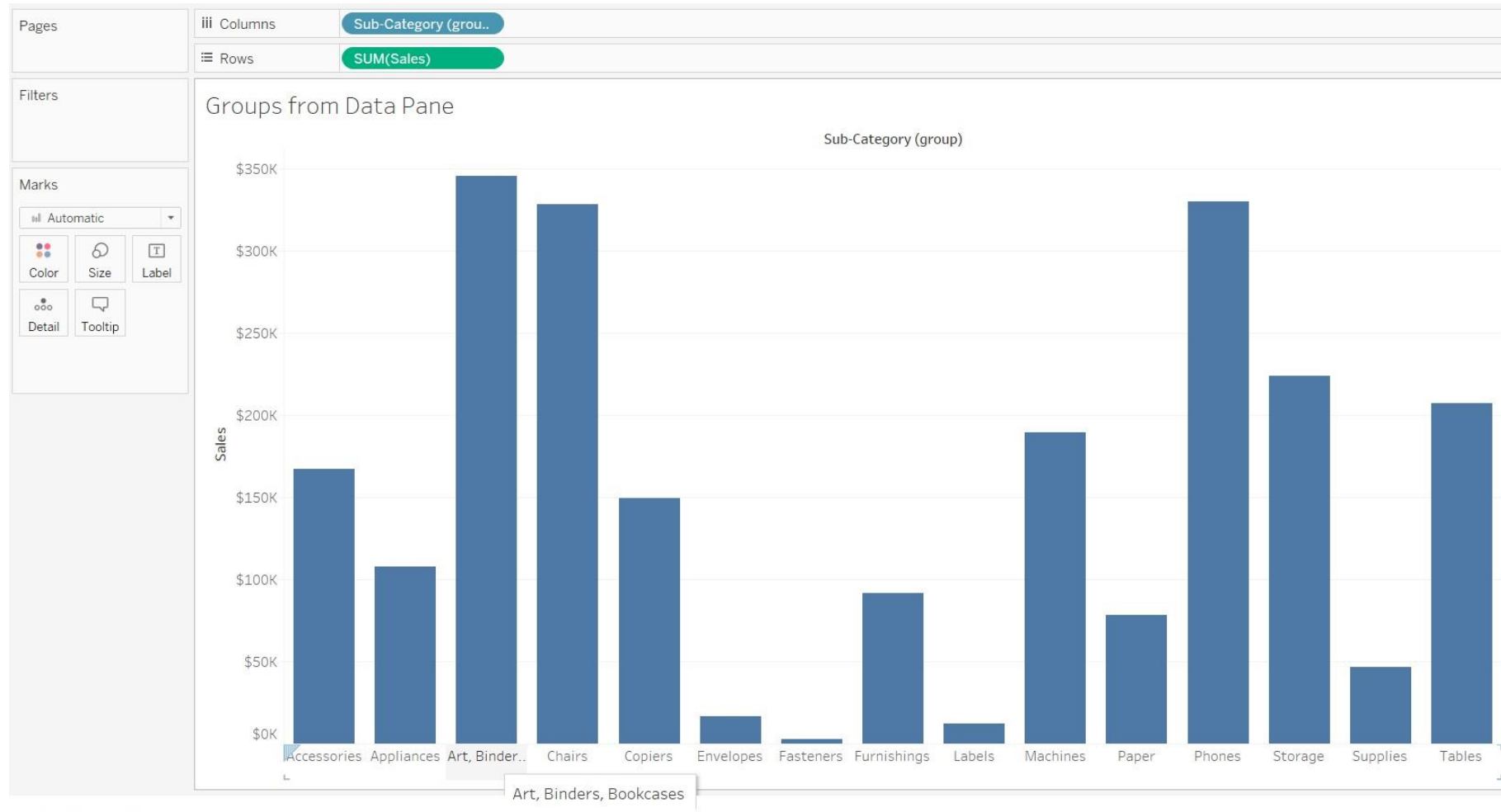**STEP 6:** Observe that a new dimension **Sub-Category (group)** is now present in the **Data Pane**
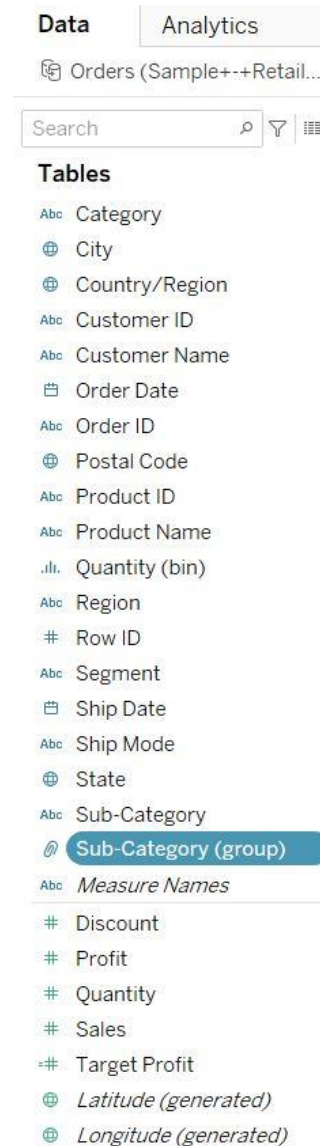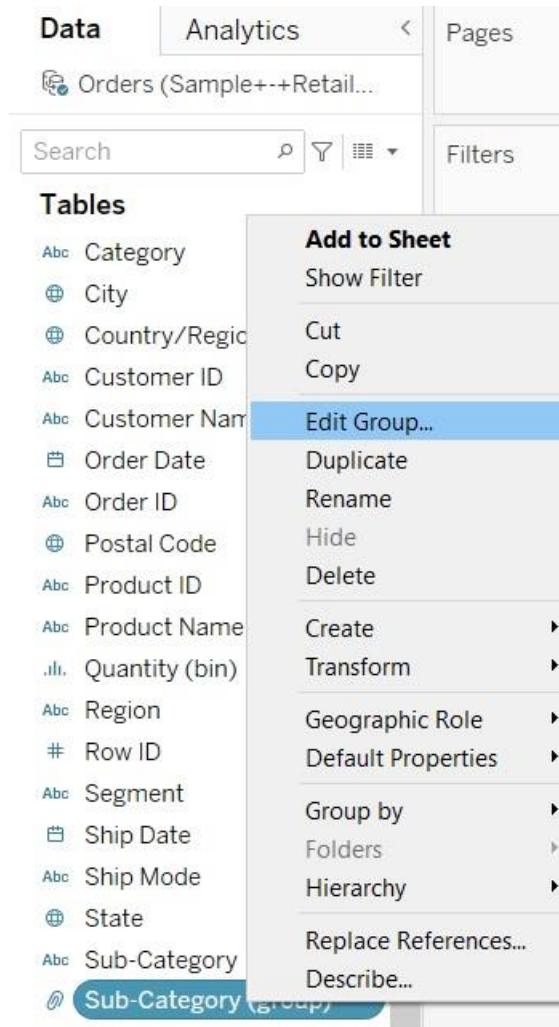
# METHOD I - FROM THE DATA PANE

**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
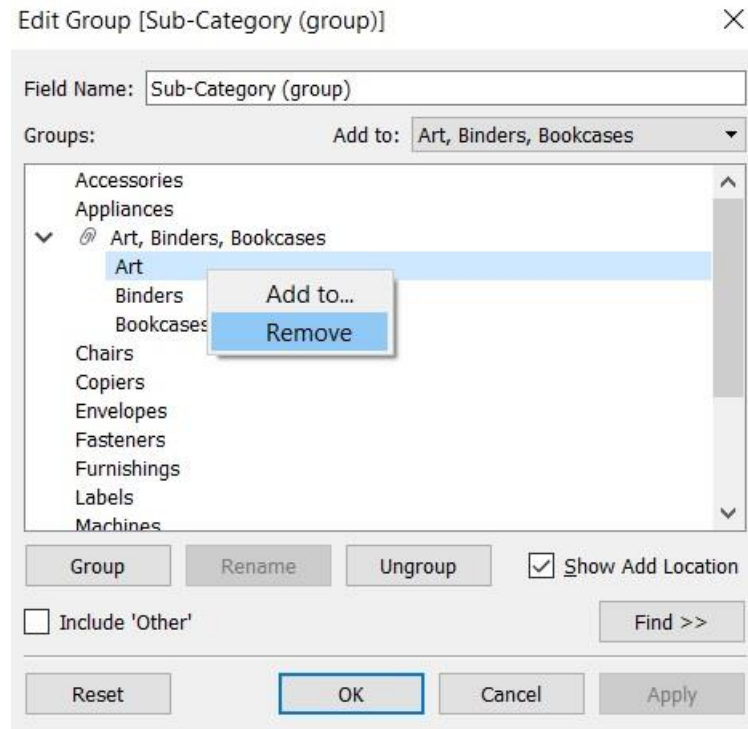
**STEP 8:** If any changes need to be done in the Group from the Data pane, right-click the **Sub-Category (group)** and select **Edit Group**
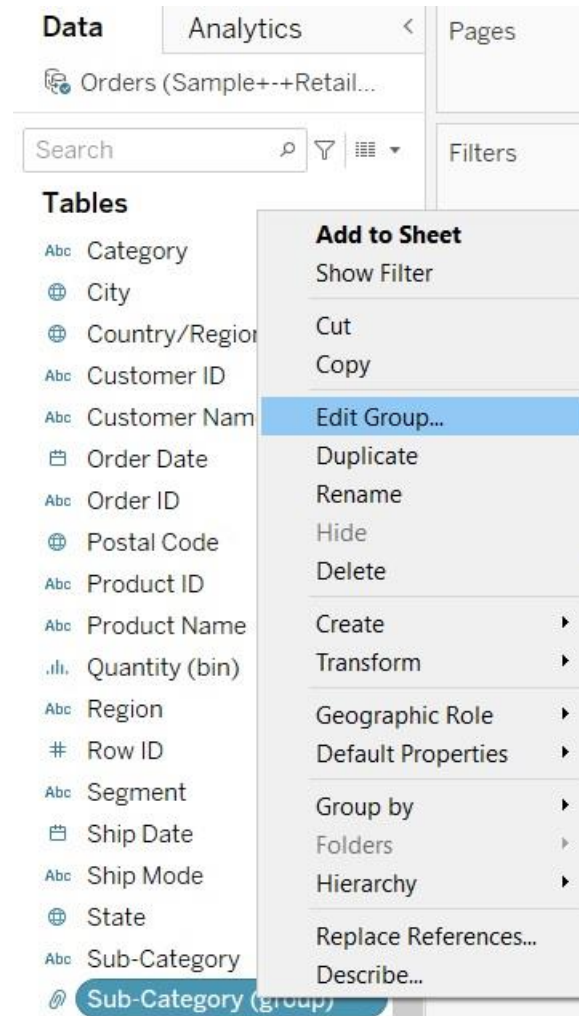
**STEP 9:** For removing any member, right-click the member under the Group
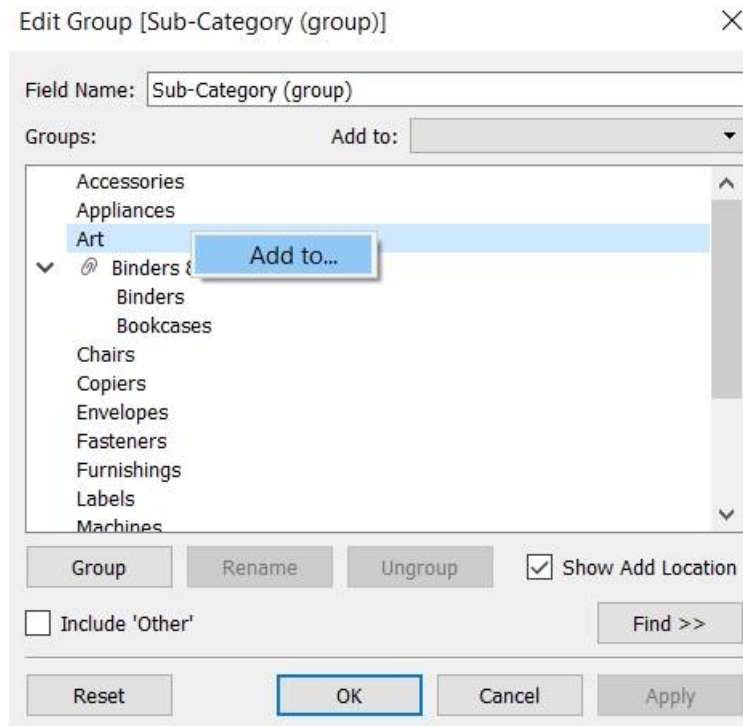e.g.: Art and select **Remove**
Select "**OK**"

**STEP 10:** For adding any member, right-click the **Sub-Category (group)** and select **Edit Group**
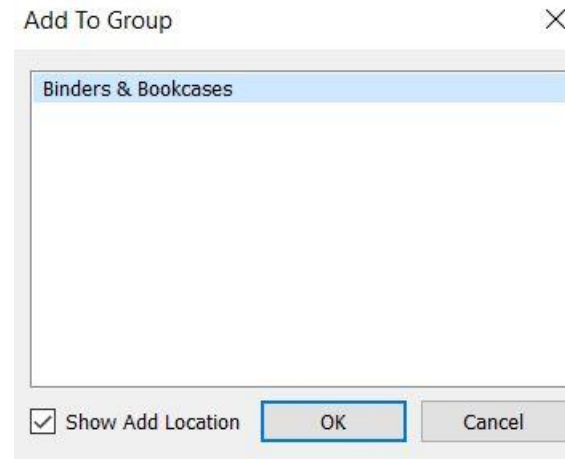
**STEP 11:** Right-click the member to be added to the Group e.g.: Art and select **Add to..**

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

# METHOD I - FROM THE DATA PANE

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

**STEP 13:** Select OK

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

# METHOD II – BY USING MARKS (FROM THE VIEW)

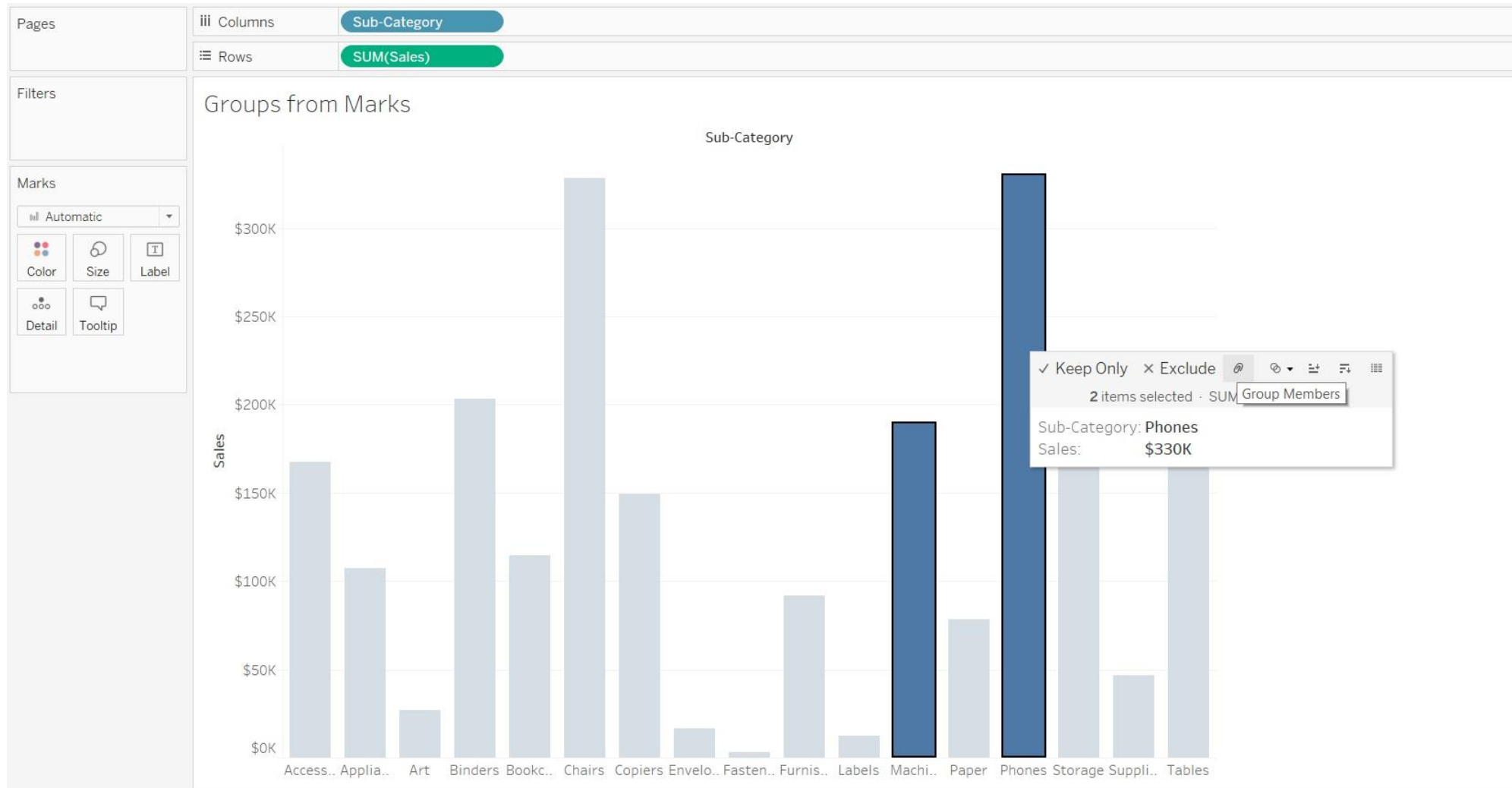**STEP 2:** Drag and drop a Measure e.g.: **Sales** to the Rows shelf

# METHOD II – BY USING MARKS (FROM THE VIEW)

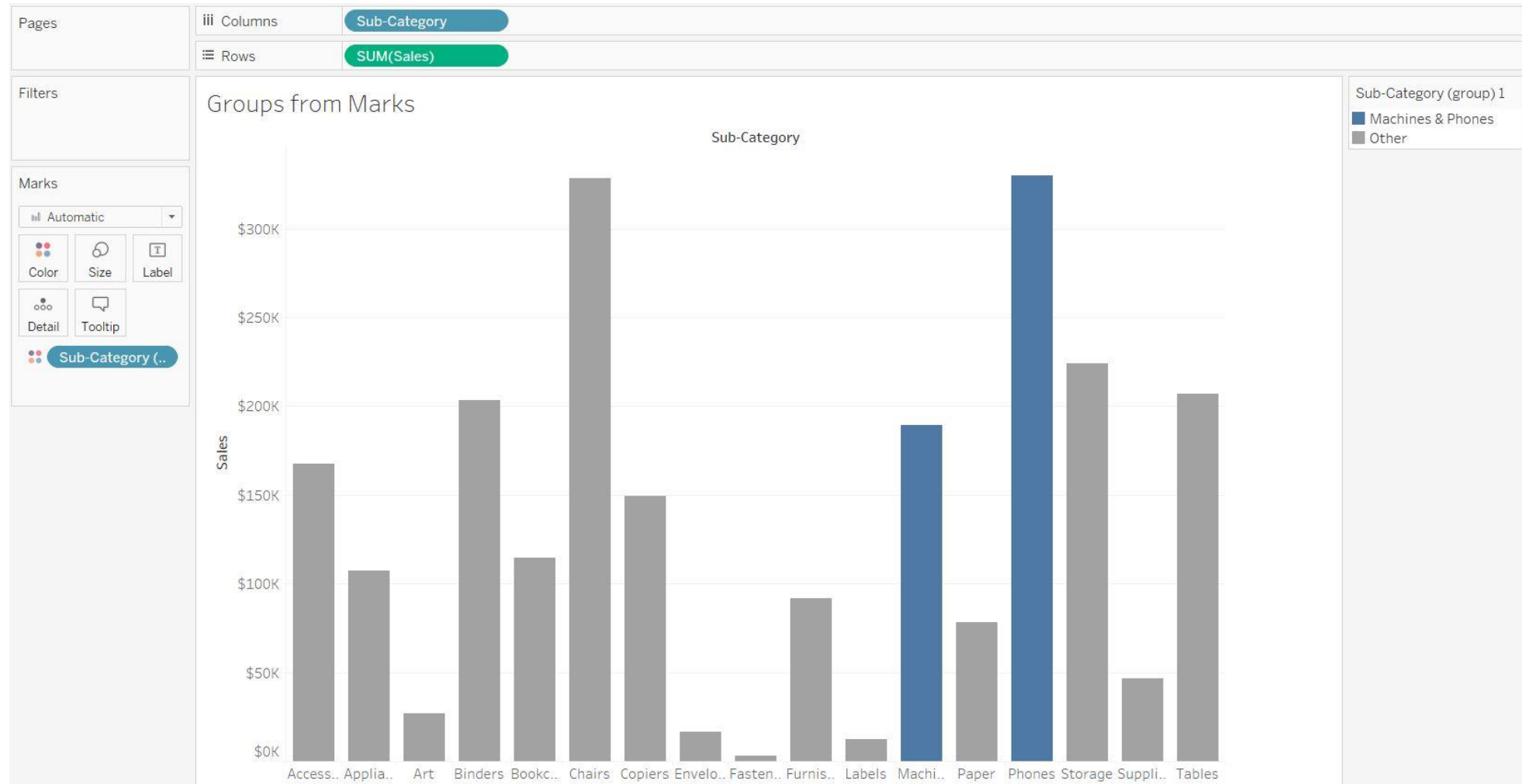**STEP 3:** Select the required members by using the marks directly from the view.
If multiple members are required, then press the Ctrl and select the members.
In the new dialog box click on the **Paper Clip** icon to **Group Members**
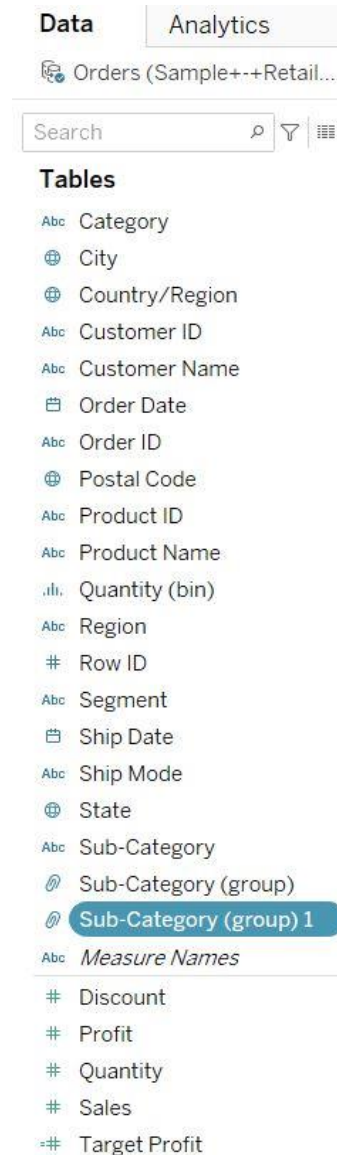
# METHOD II – BY USING MARKS (FROM THE VIEW)

**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
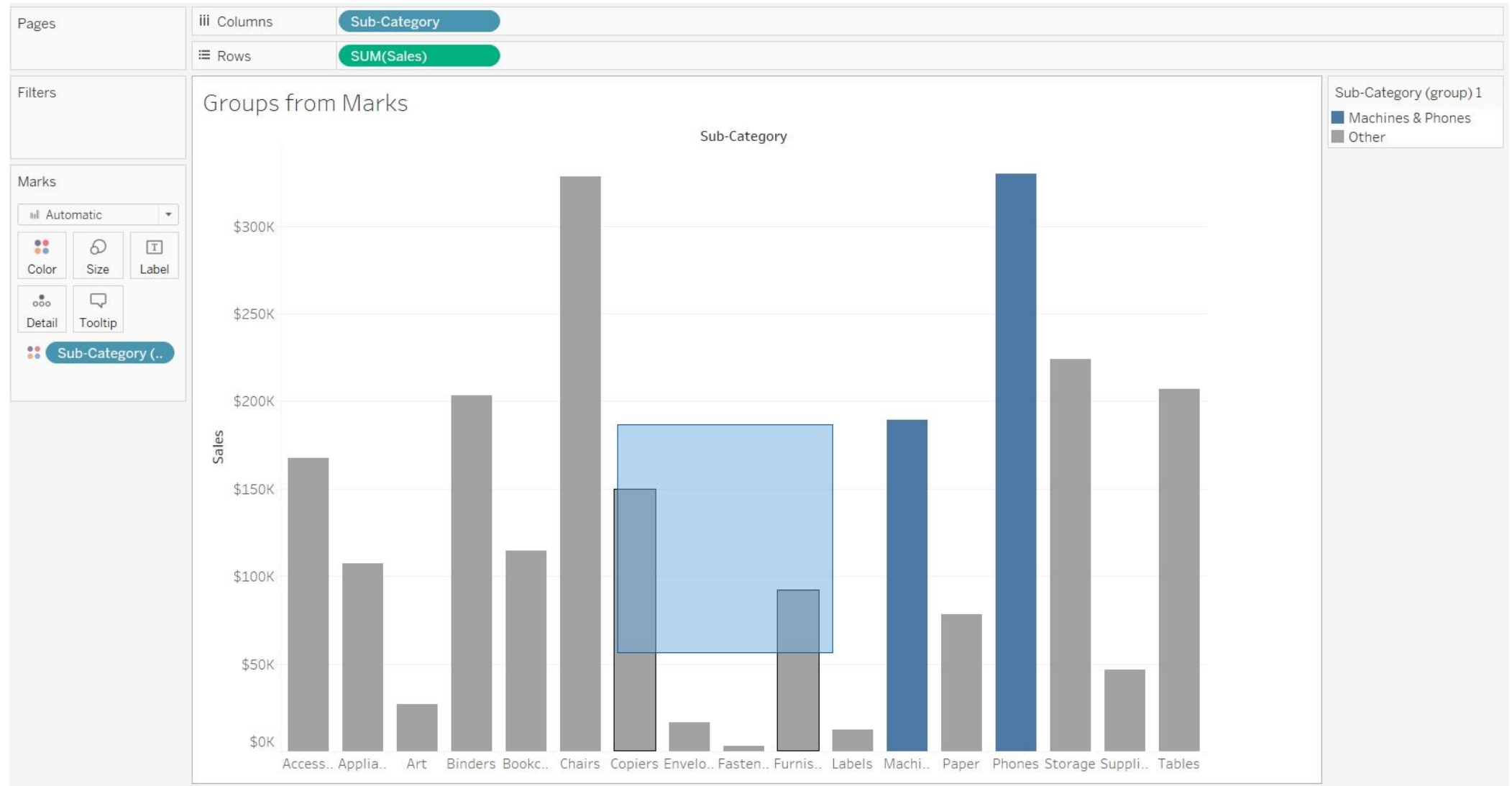**Sub-Category (group)1**

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

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

**STEP 7:** In the new dialog box click on the **Paper Clip** icon to **Group Members**
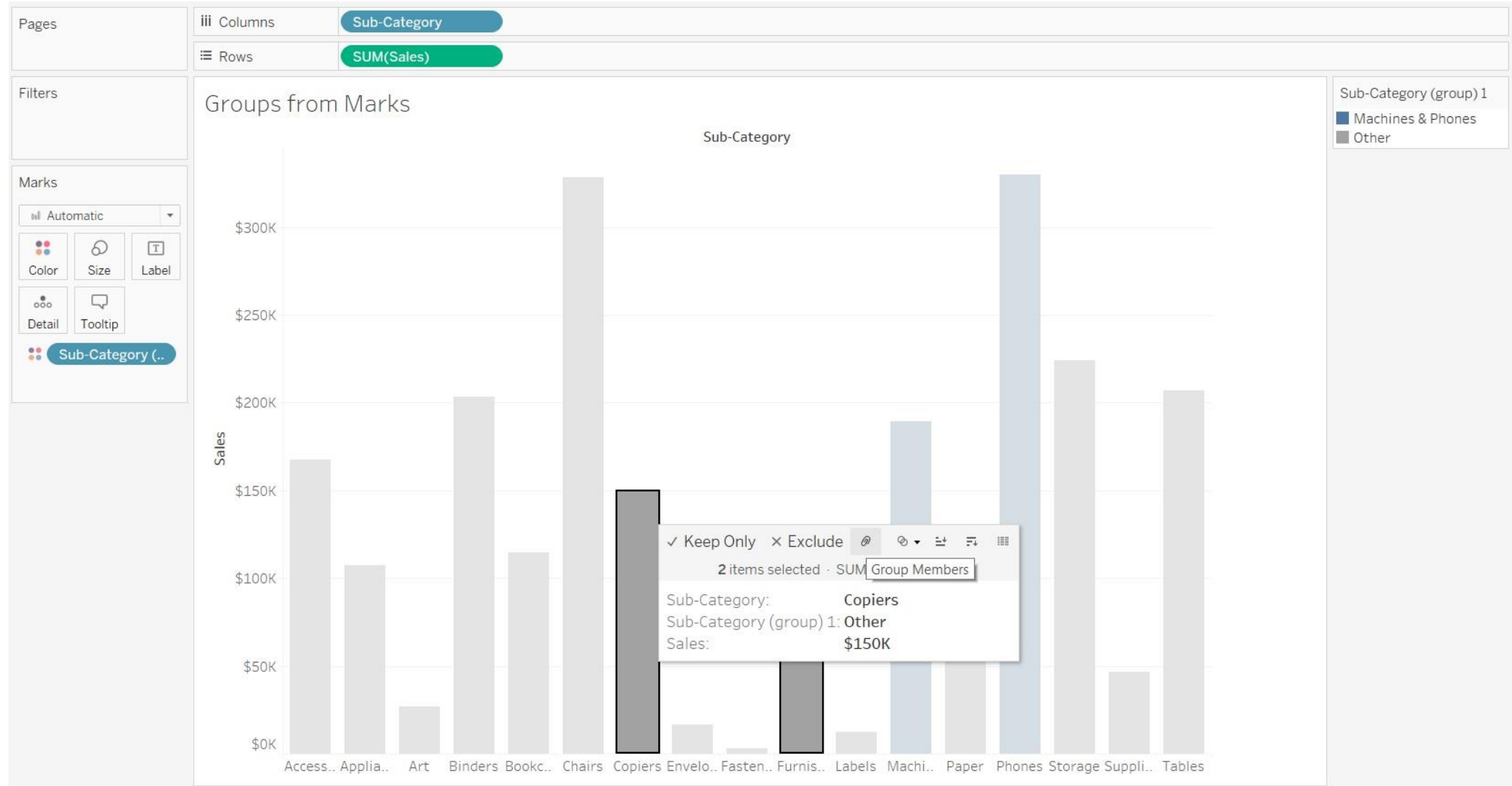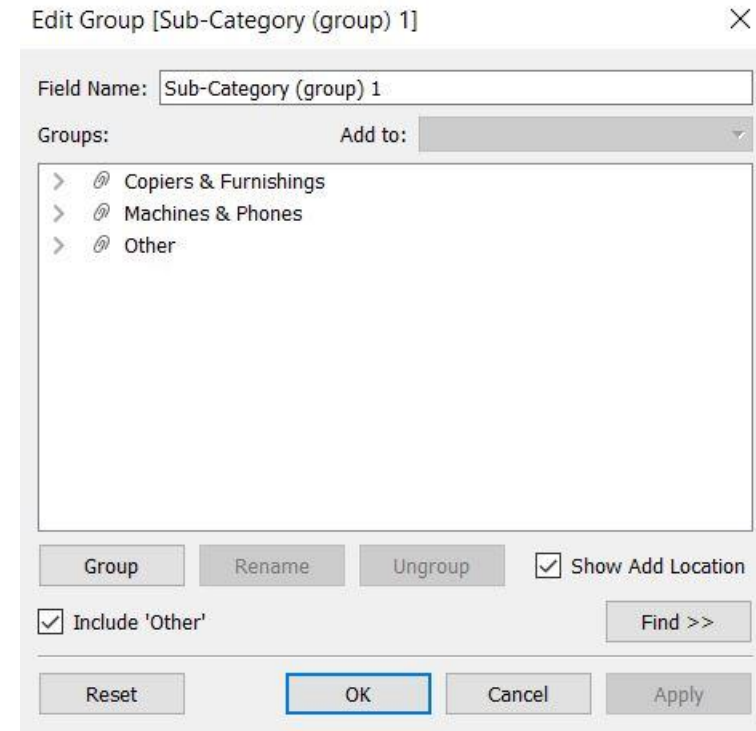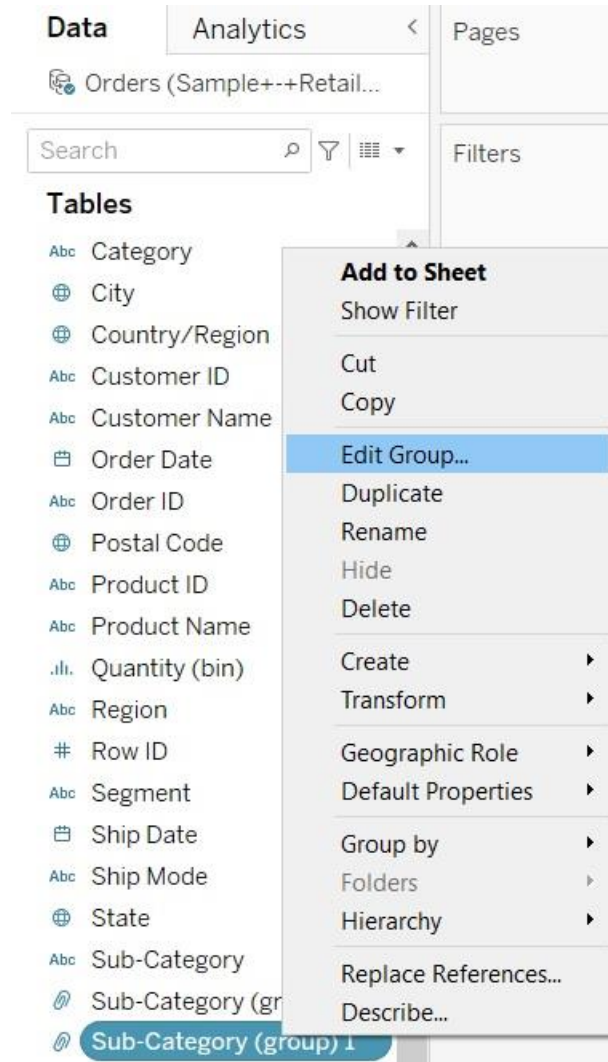
# METHOD II – BY USING MARKS (FROM THE VIEW)

**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**
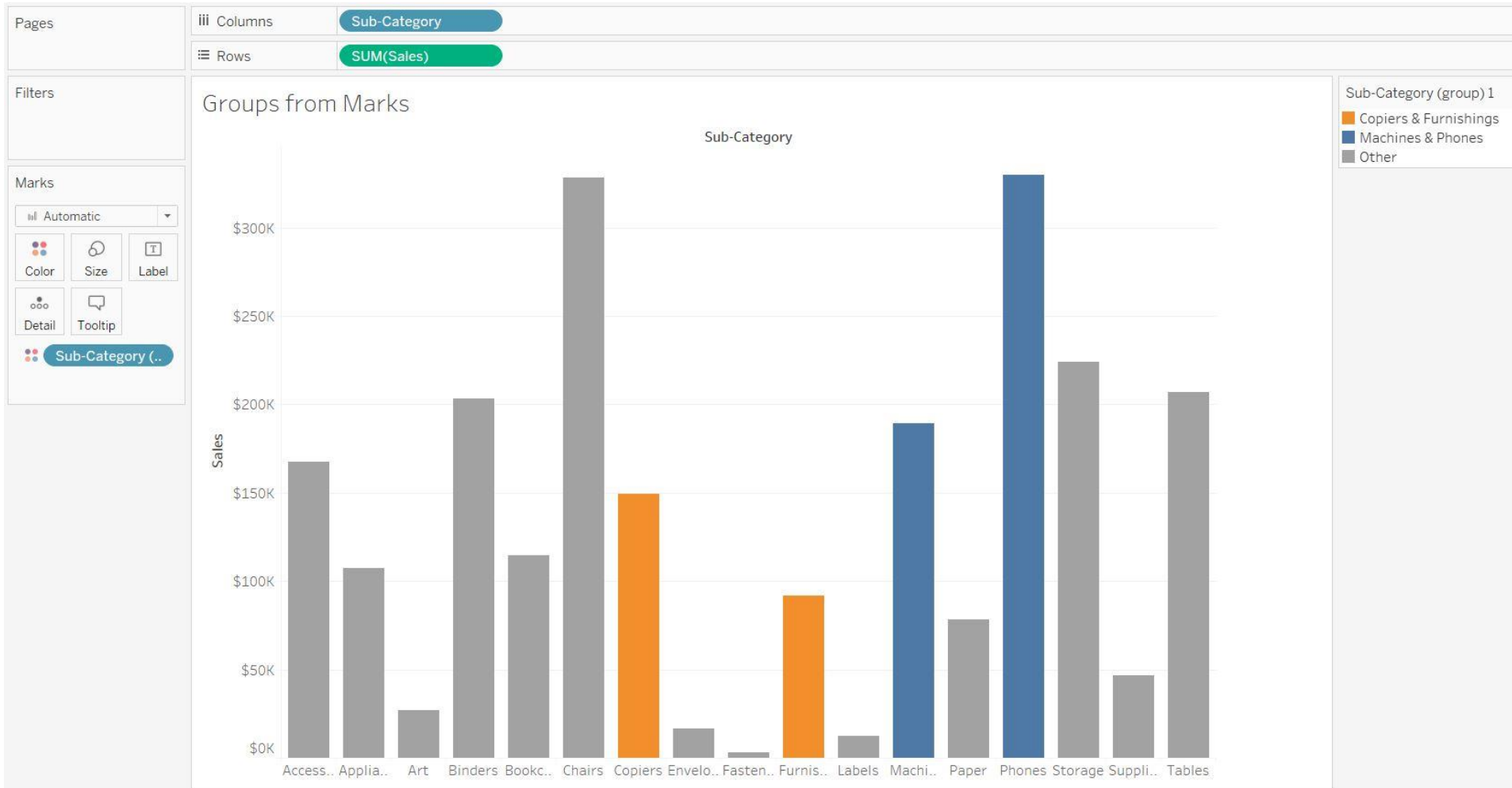
# METHOD II – BY USING MARKS (FROM THE VIEW)

**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
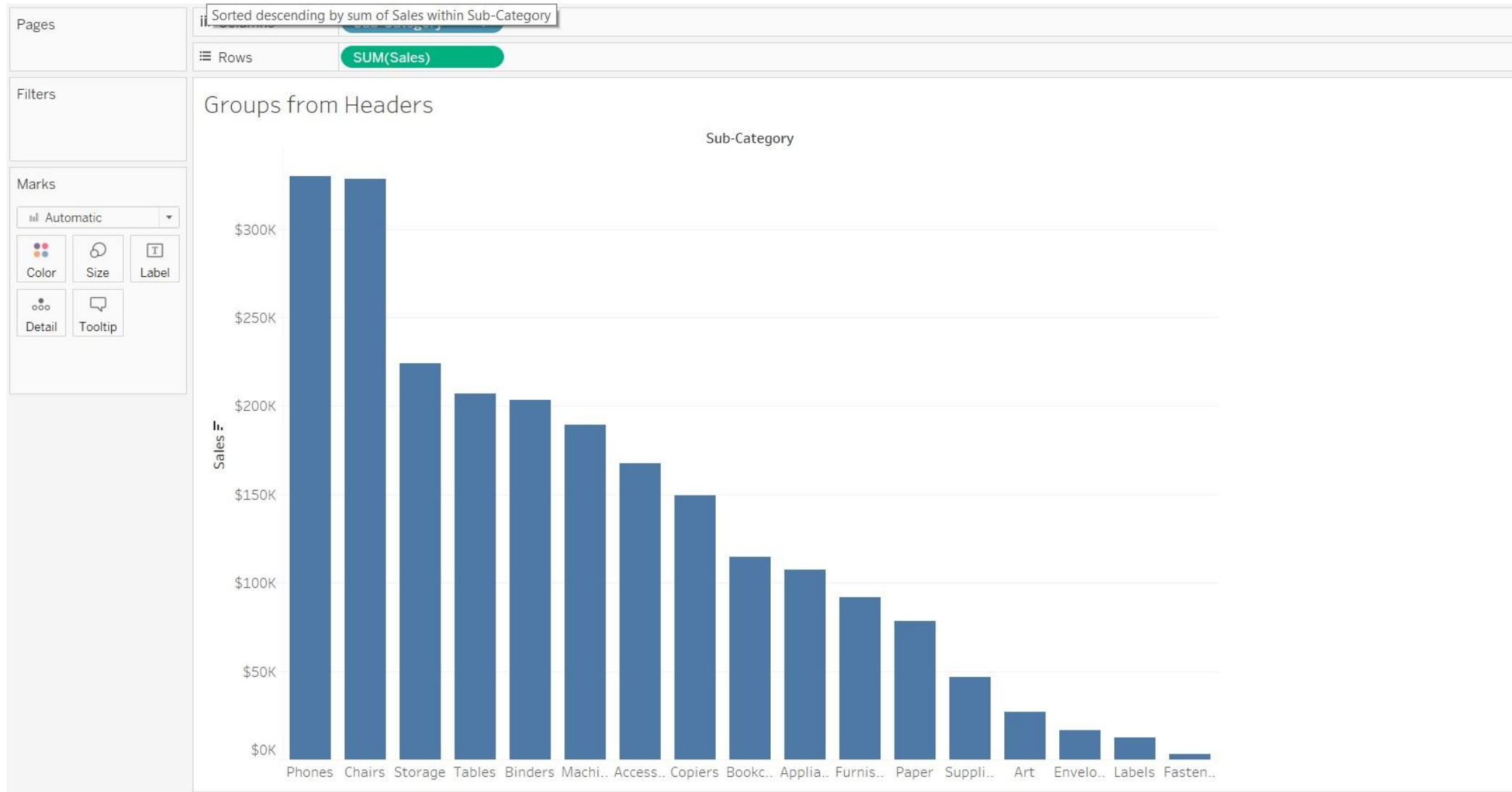
# METHOD III – BY USING HEADERS (FROM THE VIEW)

**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**
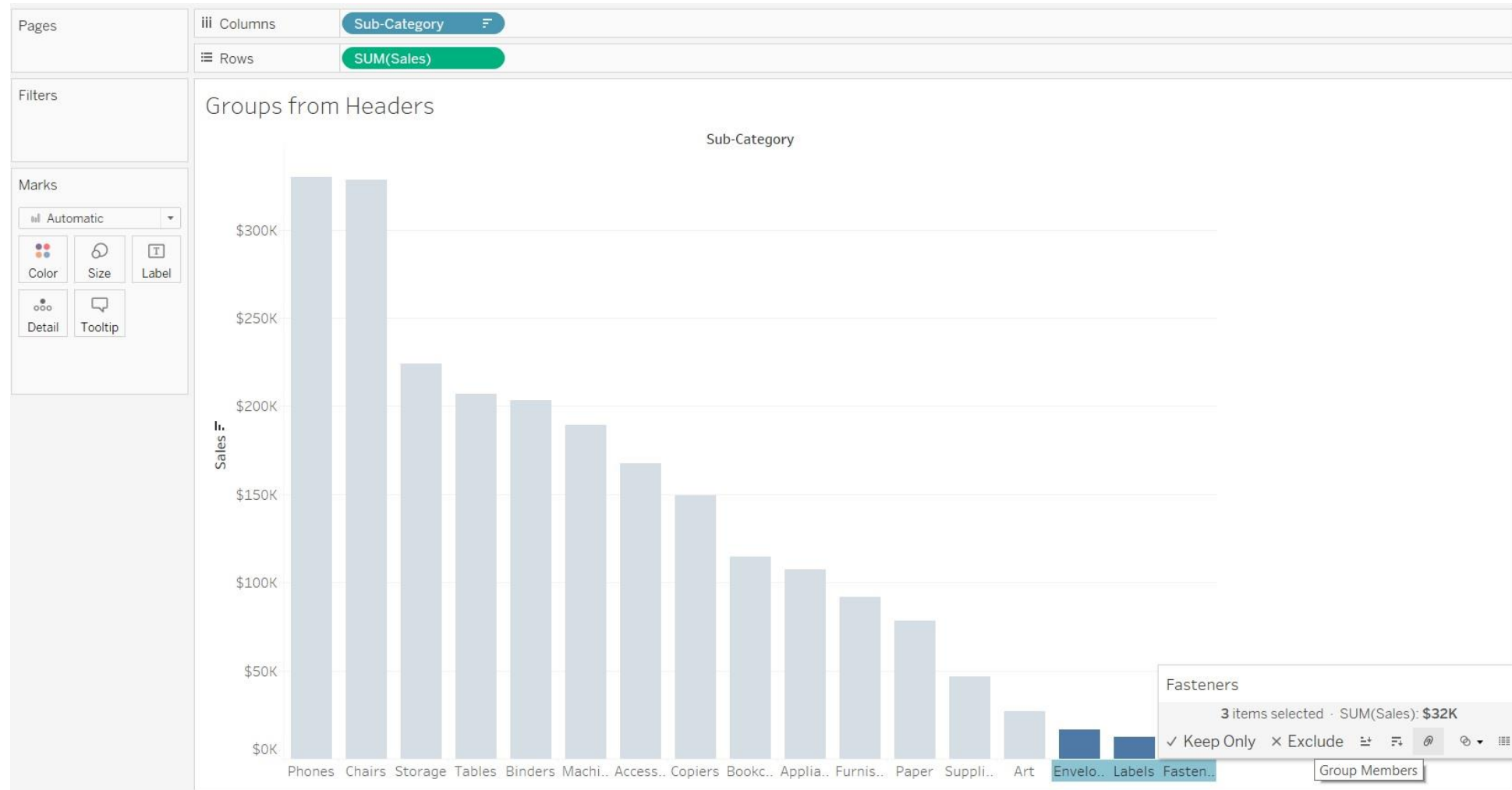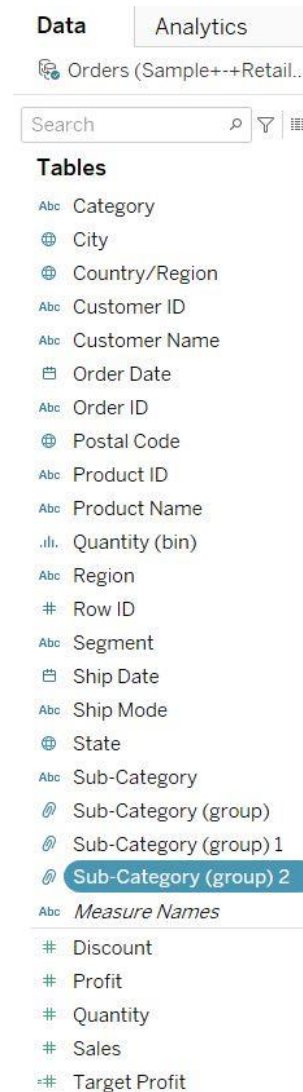
# METHOD III – BY USING HEADERS (FROM THE VIEW)

**STEP 5:** The grouped members will appear together in a new group **Sub-Category (group)2**
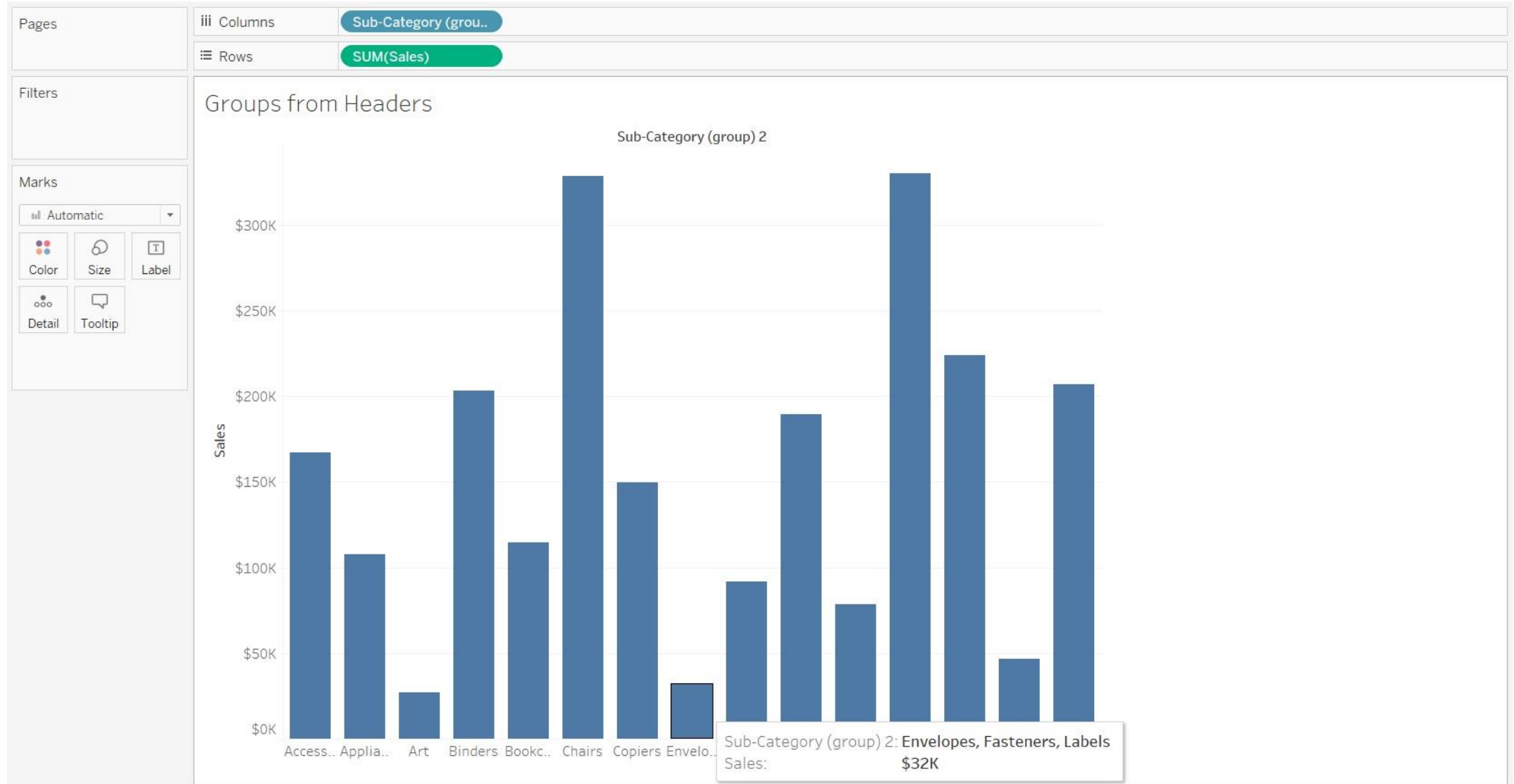
# METHOD III – BY USING HEADERS (FROM THE VIEW)

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

**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**