

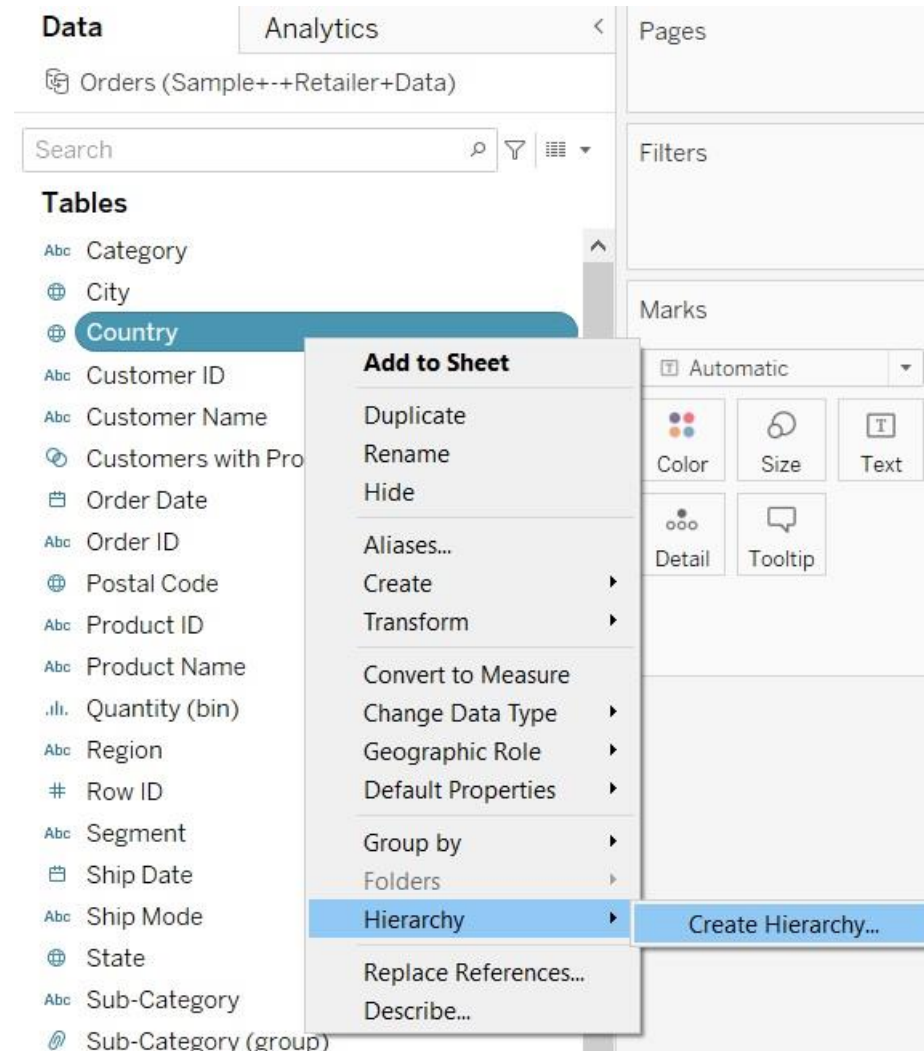
METHODS TO CREATE HIERARCHIES

Method I: Right-click the Dimension from the Data Pane and click Hierarchy --> Select Hierarchy

Method II: By dropping the Dimension on to another Dimension in the Data Pane

METHOD I

STEP 1: Right-click on the Dimension e.g.: Country that is to be used for creating the Hierarchy and click **Hierarchy --> Select Hierarchy**



METHOD I

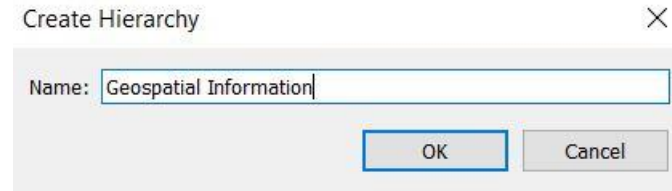
STEP 2: "Create Hierarchy" dialog box will appear



A screenshot of a software dialog box titled "Create Hierarchy". The dialog box has a light gray background and a thin border. In the top right corner, there is a small "X" icon for closing the window. Below the title bar, there is a text input field with the label "Name:" to its left. The input field contains the word "Country" and has a blue border. At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a blue border.

METHOD I

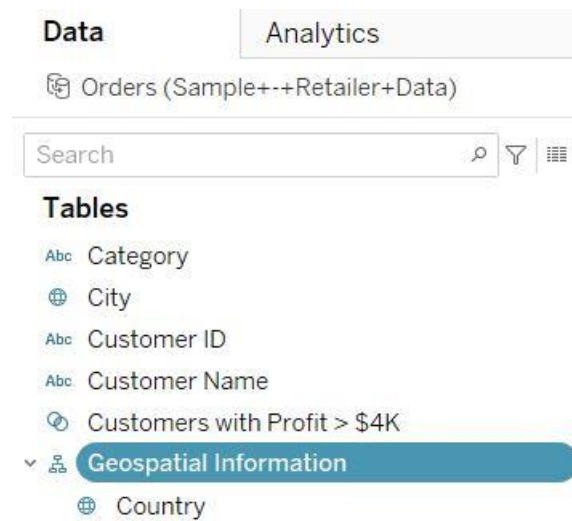
STEP 3: Enter a meaningful Hierarchy Name in Name: field
Click **OK**



The image shows a screenshot of a software dialog box titled "Create Hierarchy". The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a label "Name:" followed by a text input field. The text "Geospatial Information" is entered into this field. Below the input field, there are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a blue border.

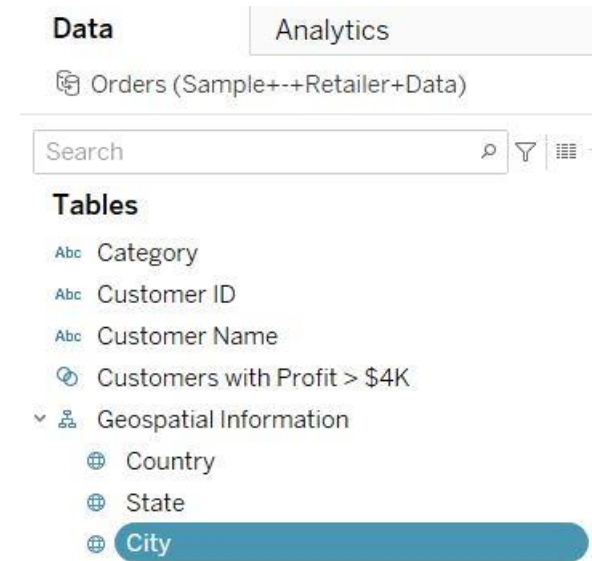
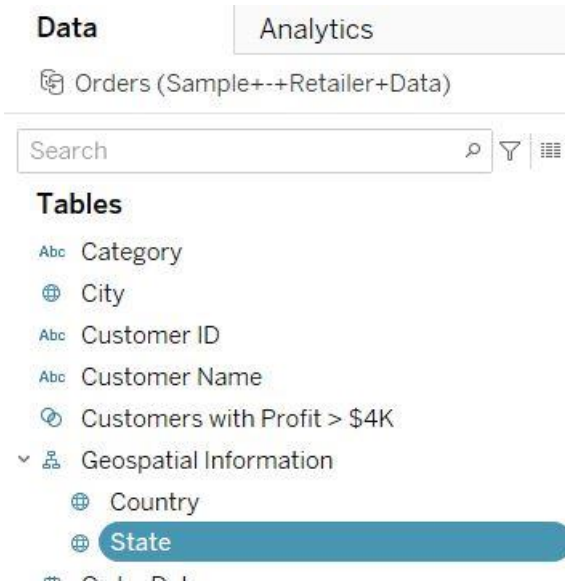
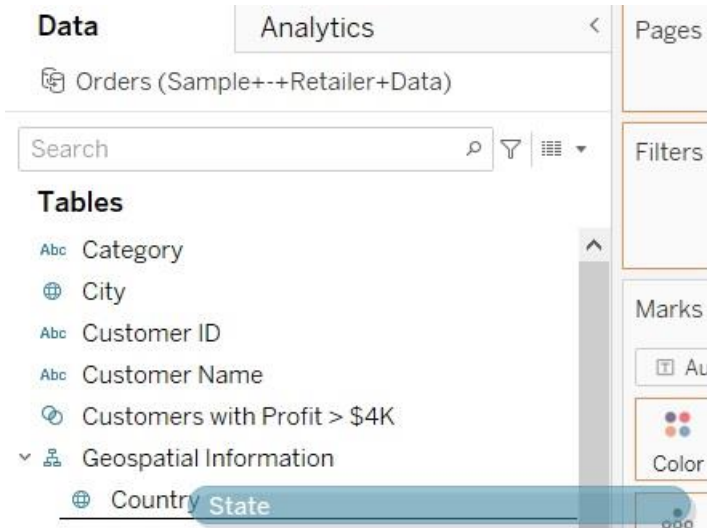
METHOD I

STEP 4: Observe that the Hierarchy will be present as a separate field in the Data Pane
The Tree or Organization Chart icon/symbol denotes a Hierarchy in Tableau



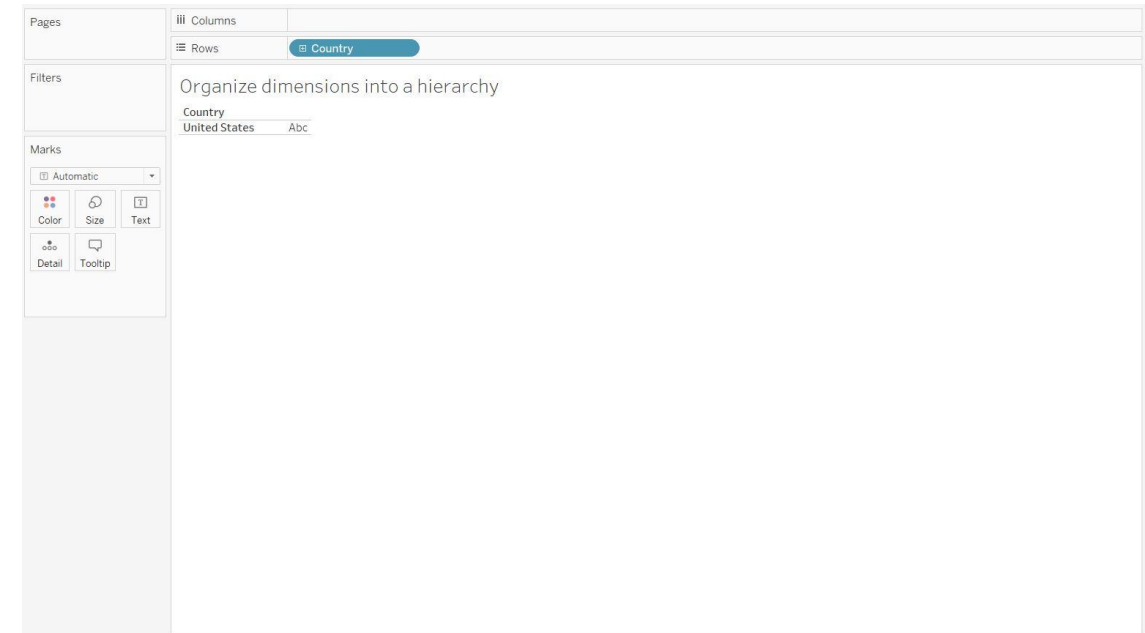
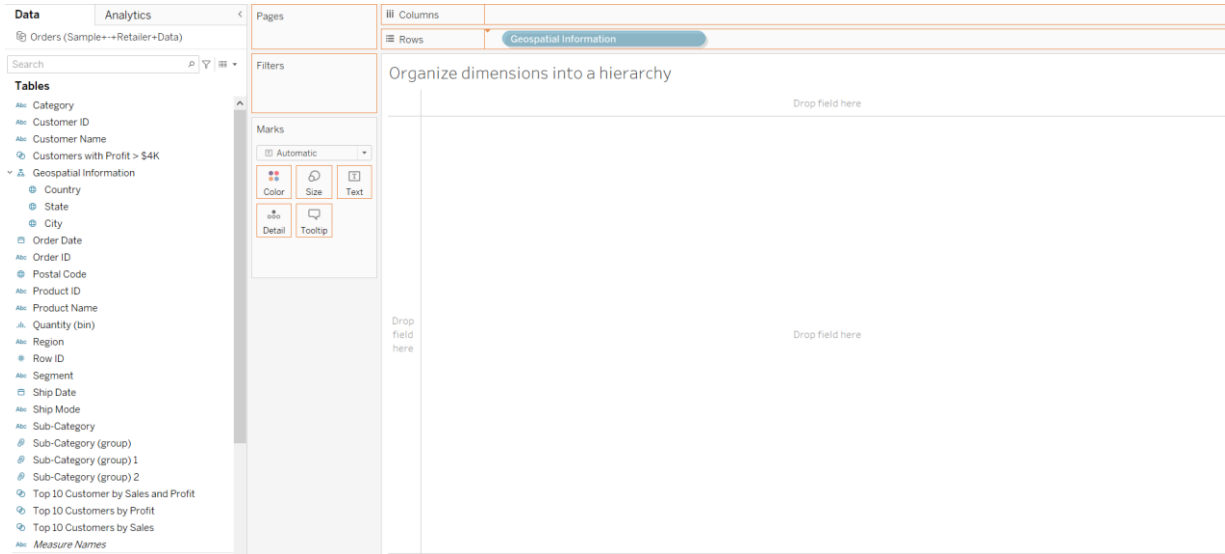
METHOD I

STEP 5: We can add more members to this Hierarchy by dragging and dropping them on to the Hierarchy



METHOD I

STEP 6: We can easily create view where we can quickly drill-down or up levels in the viz
Drag and drop the **Geospatial Hierarchy** to the **Rows** shelf



METHOD I

STEP 7: We can click on the + on the left side of **Country** Pill
This will provide a **State** level view

The screenshot shows a Tableau interface with the following components:

- Columns Shelf:** Contains a pill for 'Country' and a pill for 'State'.
- Rows Shelf:** Is empty.
- Filters Shelf:** Is empty.
- Marks Shelf:** Set to 'Automatic'.
- Left Panel:** Contains icons for Color, Size, Text, Detail, and Tooltip.
- View:** A table titled 'Organize dimensions into a hierarchy' showing a drill-down from 'Country' to 'State'.

Country	State	
United States	Alabama	Abc
	Arizona	Abc
	Arkansas	Abc
	California	Abc
	Colorado	Abc
	Connecticut	Abc
	Delaware	Abc
	District of Columbia	Abc
	Florida	Abc
	Georgia	Abc
	Idaho	Abc
	Illinois	Abc
	Indiana	Abc
	Iowa	Abc
	Kansas	Abc
	Kentucky	Abc
	Louisiana	Abc
	Maine	Abc
	Maryland	Abc
	Massachusetts	Abc
	Michigan	Abc
	Minnesota	Abc
	Mississippi	Abc
	Missouri	Abc
	Montana	Abc
	Nebraska	Abc
	Nevada	Abc
	New Hampshire	Abc
	New Jersey	Abc
	New Mexico	Abc
	New York	Abc
	North Carolina	Abc
	North Dakota	Abc
	Ohio	Abc
	Oklahoma	Abc

METHOD I

STEP 8: We can click on the + on the left side of **State** Pill
This will provide a **City** level view

Pages

Filters

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Columns

Rows

Country

State

City

Organize dimensions into a hierarchy

Country	State	City	
United States	Alabama	Auburn	Abc
		Decatur	Abc
		Florence	Abc
		Hoover	Abc
		Huntsville	Abc
		Mobile	Abc
		Montgomery	Abc
		Tuscaloosa	Abc
	Arizona	Avondale	Abc
		Bullhead City	Abc
		Chandler	Abc
		Gilbert	Abc
		Glendale	Abc
		Mesa	Abc
		Peoria	Abc
		Phoenix	Abc
		Scottsdale	Abc
		Sierra Vista	Abc
		Tempe	Abc
		Tucson	Abc
		Yuma	Abc
	Arkansas	Conway	Abc
		Fayetteville	Abc
		Hot Springs	Abc
		Jonesboro	Abc
		Little Rock	Abc
		Pine Bluff	Abc
		Rogers	Abc
		Springdale	Abc
		Texarkana	Abc
	California	Anaheim	Abc
		Antioch	Abc
		Apple Valley	Abc
		Bakersfield	Abc
		Brentwood	Abc

METHOD I

STEP 9: Drag and drop the **Sales** and **Profit** measures to the view
This will provide the Sales and Profit details at a City level

Pages

Filters

Marks

Measure Values

Columns

Rows

Measure Names

Country

State

City

Organize dimensions into a hierarchy

Country	State	City	Profit	Sales
United States	Alabama	Auburn	\$0K	\$2K
		Decatur	\$1K	\$3K
		Florence	\$0K	\$2K
		Hoover	\$0K	\$1K
		Huntsville	\$1K	\$2K
		Mobile	\$2K	\$5K
		Montgomery	\$1K	\$4K
		Tuscaloosa	\$0K	\$0K
	Arizona	Avondale	\$0K	\$1K
		Bullhead City	\$0K	\$0K
		Chandler	\$0K	\$1K
		Gilbert	\$0K	\$4K
		Glendale	\$0K	\$3K
		Mesa	(\$1K)	\$4K
		Peoria	\$0K	\$1K
		Phoenix	(\$3K)	\$11K
		Scottsdale	\$0K	\$1K
		Sierra Vista	\$0K	\$0K
		Tempe	\$0K	\$1K
		Tucson	\$0K	\$6K
		Yuma	\$0K	\$1K
	Arkansas	Conway	\$0K	\$0K
		Fayetteville	\$2K	\$4K
		Hot Springs	\$0K	\$0K
		Jonesboro	\$1K	\$3K
		Little Rock	\$1K	\$4K
		Pine Bluff	\$0K	\$0K
		Rogers	\$0K	\$0K
		Springdale	\$0K	\$0K
		Texarkana	\$0K	\$1K
	California	Anaheim	\$1K	\$8K
		Antioch	\$0K	\$0K
		Apple Valley	\$0K	\$2K

METHOD I

STEP 10: If required we can go back to original view by clicking on - of the **Pill** up to which the view is required

The screenshot shows a Tableau interface with the following components:

- Columns Shelf:** Contains a pill labeled "Measure Names".
- Rows Shelf:** Contains a pill labeled "Country".
- Filters:** A pill labeled "Measure Names" is present.
- Marks:** The mark type is set to "Automatic". The mark card shows "Color", "Size", and "Text" properties. Below these, there are "Detail" and "Tooltip" options. A pill labeled "Measure Values" is also present.
- Measure Values:** A list containing "SUM(Profit)" and "SUM(Sales)".

The main view displays a table with the following data:

Country	Profit	Sales
United States	\$286K	\$2,297K

METHOD II

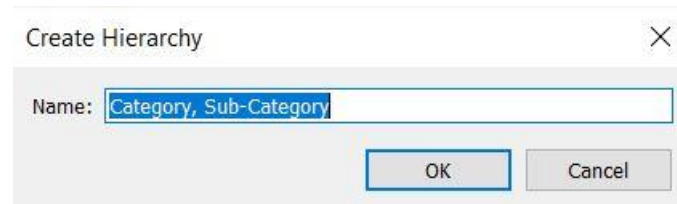
STEP 1: Assume that we need to create a **Hierarchy** of **Category** and **Sub-Category**
Drag and drop the **Sub-Category** on top of the **Category** dimension

The screenshot displays a data visualization tool interface with the following components:

- Data** tab: Shows the data source as "Orders (Sample+++Retailer+Data)".
- Search** bar: Located below the data source.
- Tables** list: A list of available fields on the left side, including:
 - Sub-Category (highlighted)
 - Category
 - Customer ID
 - Customer Name
 - Customers with Profit > \$4K
 - Geospatial Information
 - Country
 - State
 - City
 - Order Date
 - Order ID
 - Postal Code
 - Product ID
 - Product Name
 - Quantity (bin)
 - Region
 - Row ID
 - Segment
 - Ship Date
 - Ship Mode
 - Sub-Category
 - Sub-Category (group)
 - Sub-Category (group) 1
 - Sub-Category (group) 2
 - Top 10 Customer by Sales and Profit
 - Top 10 Customers by Profit
 - Top 10 Customers by Sales
 - Measure Names
- Filters** panel: Empty.
- Marks** panel: Shows "Automatic" as the mark type, with options for Color, Size, Text, Detail, and Tooltip.
- Columns** and **Rows** shelves: Empty.
- Heirarchies** panel: A large area for defining hierarchies, currently empty with "Drop field here" prompts.

METHOD II

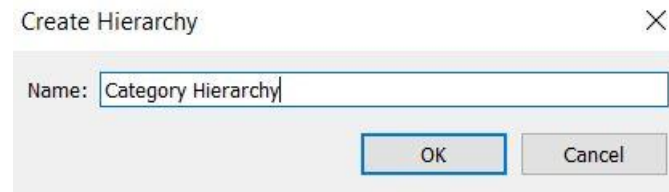
STEP 2: "Create Hierarchy" dialog box will appear



A screenshot of a software dialog box titled "Create Hierarchy". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner. Below the title bar, there is a label "Name:" followed by a text input field. The input field contains the text "Category, Sub-Category". At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

METHOD II

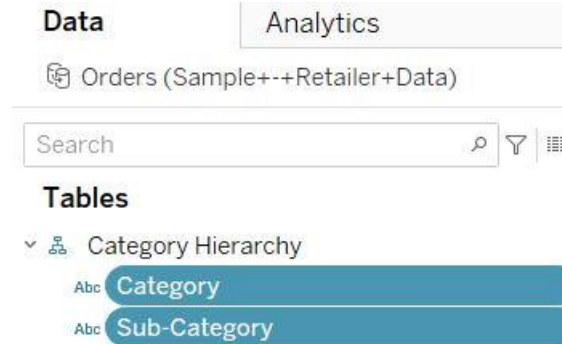
STEP 3: Enter a meaningful Hierarchy Name in Name: field
Click **OK**



A screenshot of a software dialog box titled "Create Hierarchy" with a close button (X) in the top right corner. The dialog contains a label "Name:" followed by a text input field. The input field contains the text "Category Hierarchy". Below the input field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a blue border.

METHOD II

STEP 4: Observe that the Hierarchy will be present as a separate field in the Data Pane
The Tree or Organization Chart icon/symbol denotes a Hierarchy in Tableau



METHOD II

STEP 5: Like Method-I we can easily create view where we can quickly drill-down or up levels in the viz

The screenshot displays a Tableau interface with a hierarchy view. The left sidebar contains the following sections:

- Pages:** Empty.
- Filters:** A button labeled "Measure Names".
- Marks:** A dropdown menu set to "Automatic". Below it are buttons for "Color", "Size", and "Text". Further down are buttons for "Detail" and "Tooltip". At the bottom is a button labeled "Measure Values".
- Measure Values:** Two buttons labeled "SUM(Profit)" and "SUM(Sales)".

The main view area is titled "Heirarchies" (note the typo) and displays a table with the following data:

Category	Sub-Catego..	Profit	Sales
Furniture	Bookcases	(\$3K)	\$115K
	Chairs	\$27K	\$328K
	Furnishings	\$13K	\$92K
	Tables	(\$18K)	\$207K
Office Supplies	Appliances	\$18K	\$108K
	Art	\$7K	\$27K
	Binders	\$30K	\$203K
	Envelopes	\$7K	\$16K
	Fasteners	\$1K	\$3K
	Labels	\$6K	\$12K
	Paper	\$34K	\$78K
	Storage	\$21K	\$224K
	Supplies	(\$1K)	\$47K
	Technology	\$42K	\$167K
Technology	Copiers	\$56K	\$150K
	Machines	\$3K	\$189K
	Phones	\$45K	\$330K