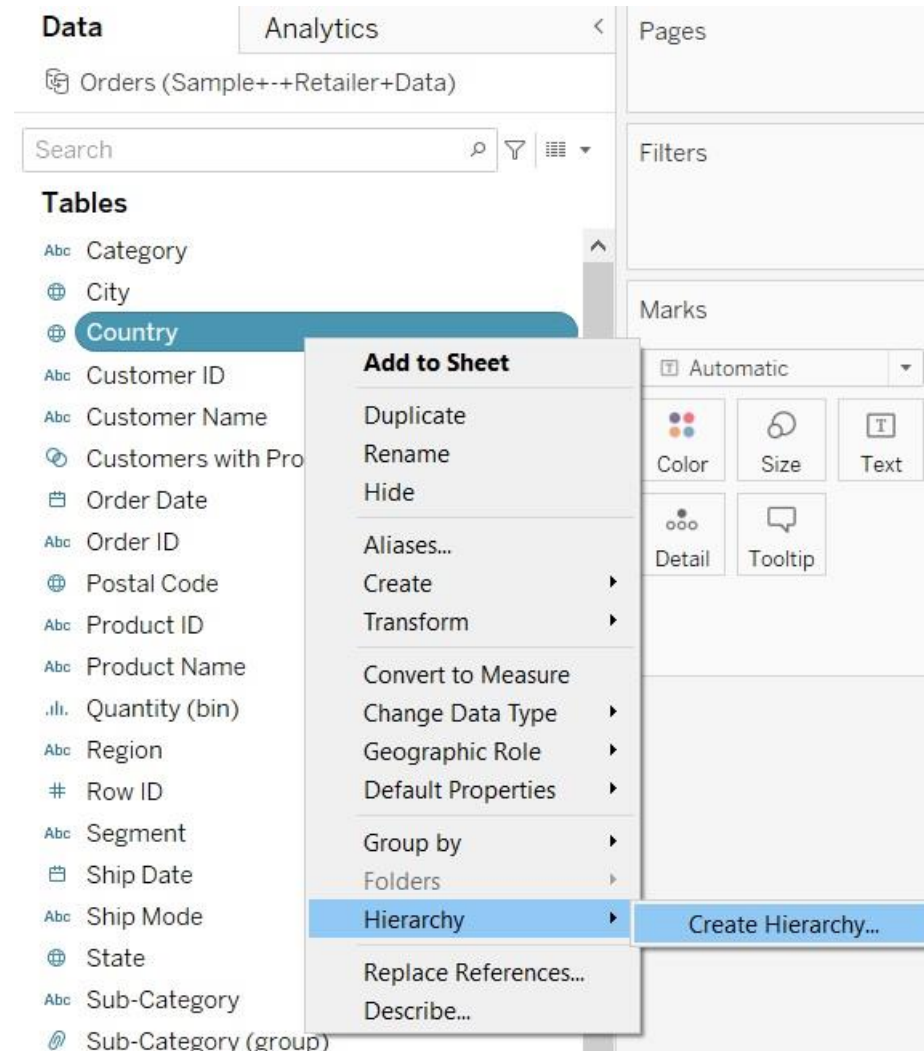# METHODS TO CREATE HIERARCHIES

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**
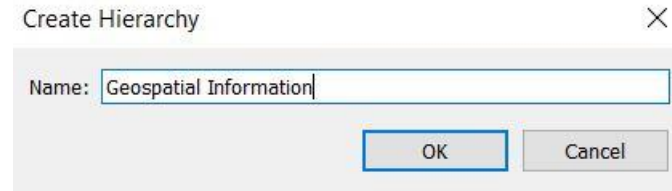
METHOD I

STEP 2: "**Create Hierarchy**" dialog box will appear

METHOD I

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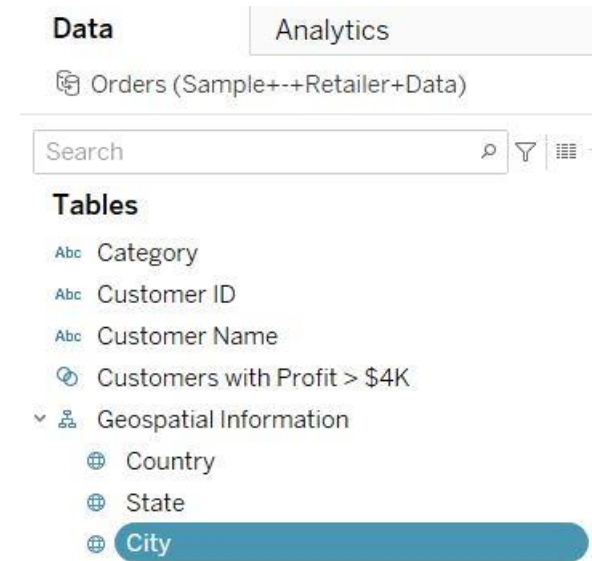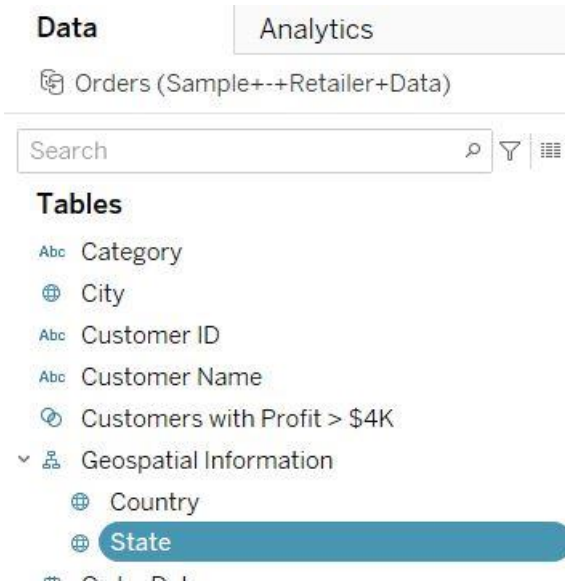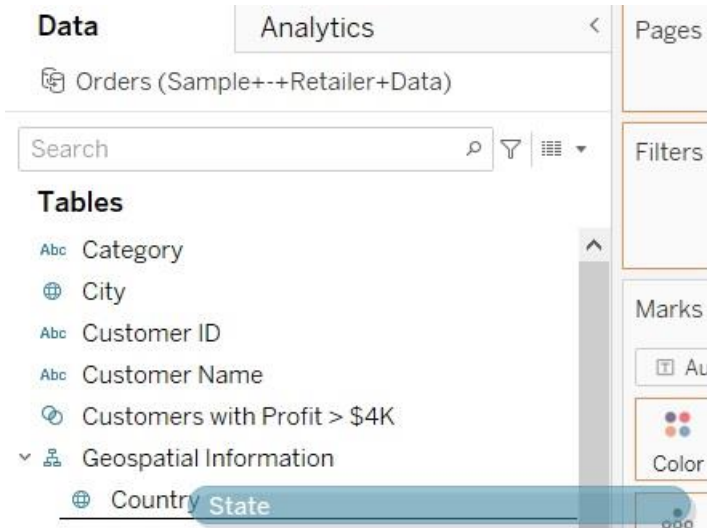Click **OK**

METHOD I

STEP 4: Observe that the Hierarchy will be present as a separate field in the Data Pane
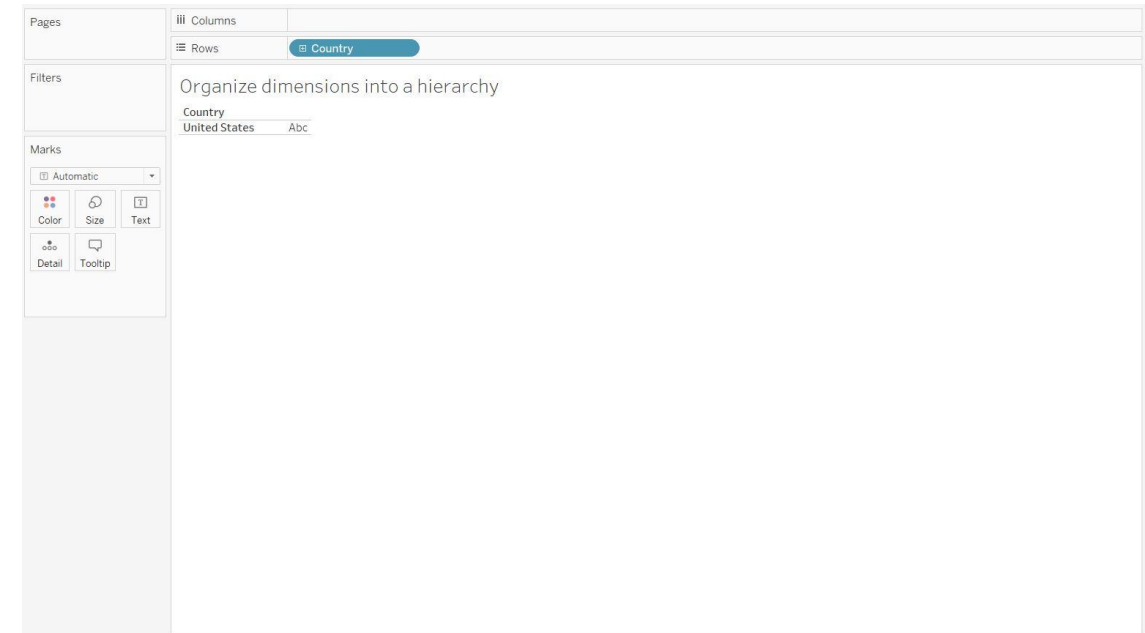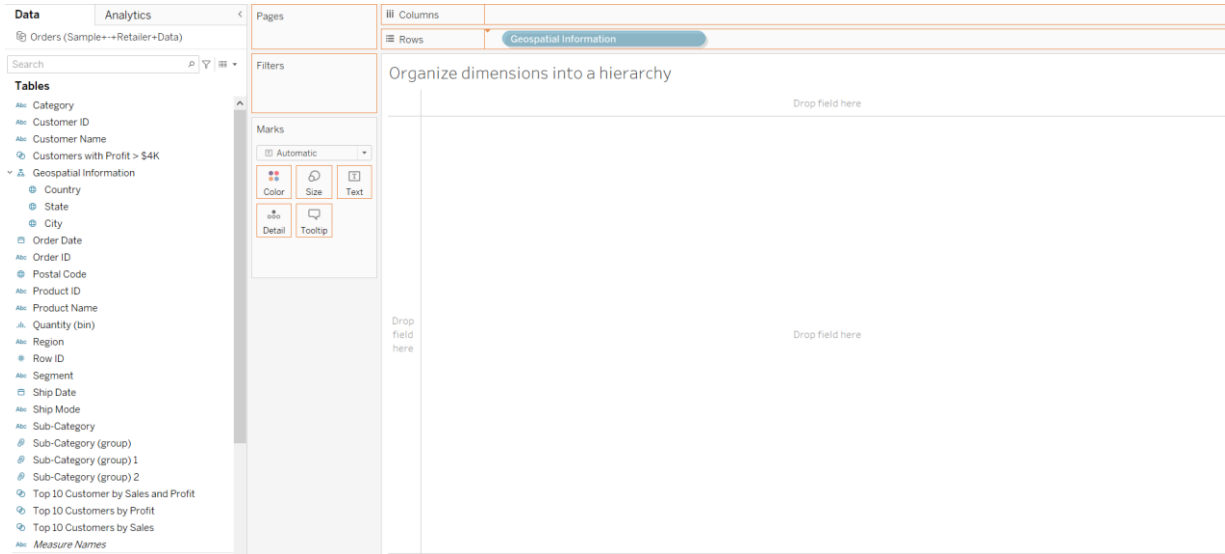The Tree or Organization Chart icon/symbol denotes a Hierarchy in Tableau
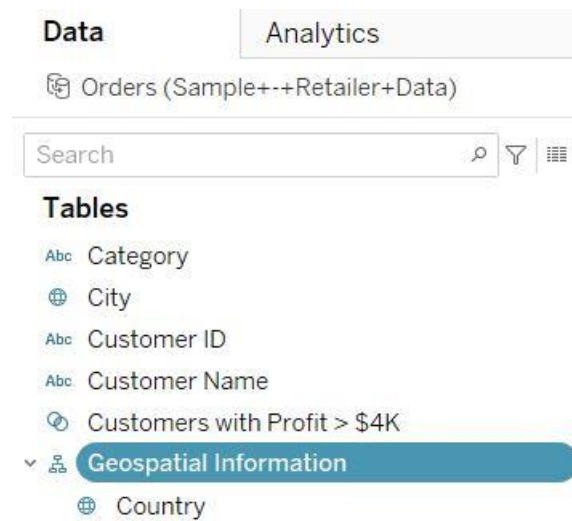
STEP 5: We can add more members to this Hierarchy by dragging and dropping them on to the Hierarchy

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

METHOD I

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

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

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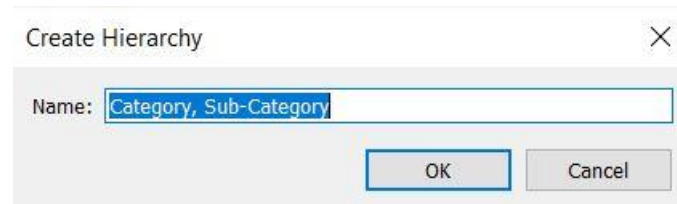
STEP 1: Assume that we need to create a **Hierarchy** of **Category** and **Sub-Category**
Drag and drop the **Sub-Category** on top of the **Category** dimension

METHOD II

STEP 2: "**Create Hierarchy**" dialog box will appear

METHOD II

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

Create Hierarchy ✕

Name: Category Hierarchy

[OK] [Cancel]

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
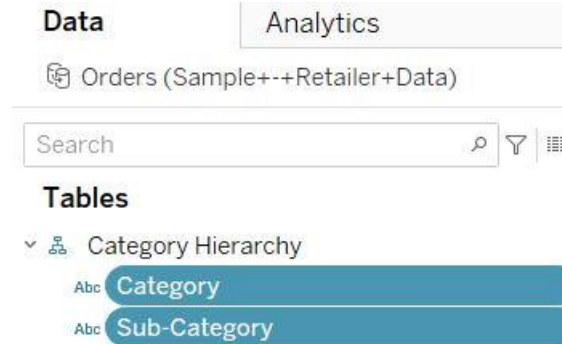
METHOD II

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

Pages	**iii** Columns	Measure Names	
	≡ Rows	⊟ Category	Sub-Category

Filters

Measure Names

Marks

T Automatic ▾

- Color
- Size
- Text
- Detail
- Tooltip

T Measure Values

Measure Values

SUM(Profit)

SUM(Sales)

Heirarchies

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	Accessories	$42K	$167K
	Copiers	$56K	$150K
	Machines	$3K	$189K
	Phones	$45K	$330K