

METHODS TO CREATE A SET

Method I: From the Data Pane (Dynamic Sets)

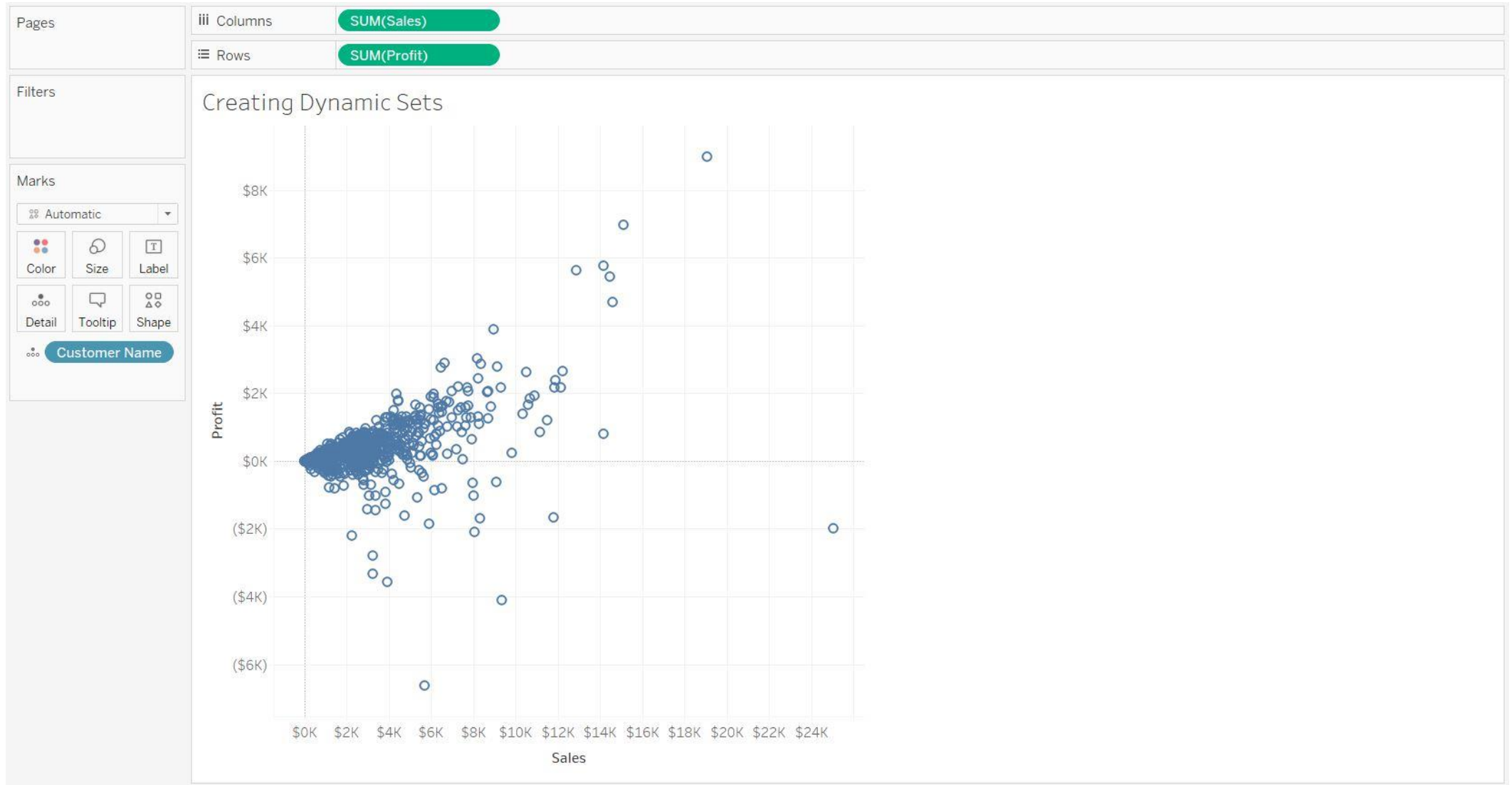
The members of a dynamic set change when the underlying data changes.

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

The members of a fixed set do not change, even if the underlying data changes.

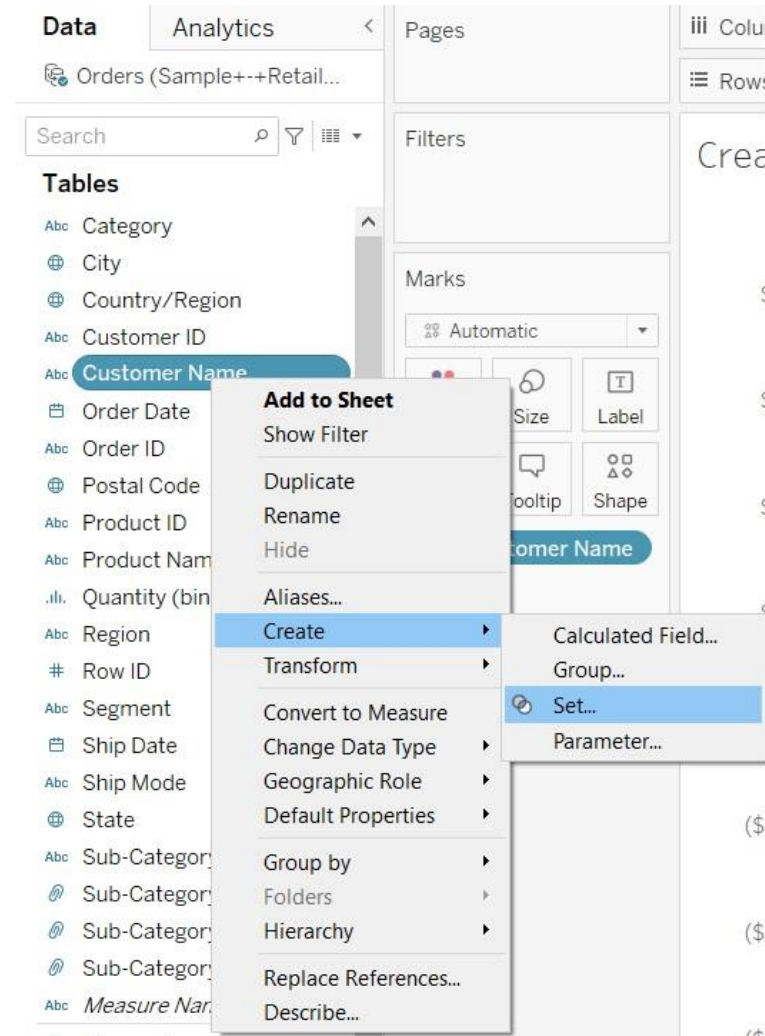
METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 1: Assume that we have a Scatter Plot between Sales and Profit with Customer Name in the Detail of Marks card



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 2: Right-click on the Dimension e.g.: Customer Name that is to be used for creating the Set and select **Create --> Group**



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 3: "Create Set" dialog box will appear

Create Set

Name: Customer Name Set

General Condition Top

☐ Select from list ☒ Custom value list ☐ Use all

Enter Text to Search or Add

Clear List ☒ Include all values when empty ☐ Exclude

Summary

Field: [Customer Name]
Selection: Selected all values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 4: Enter a meaningful Set Name in **Name:** field

Create Group [Sub-Category] ✕

Field Name:

Groups: Add to:

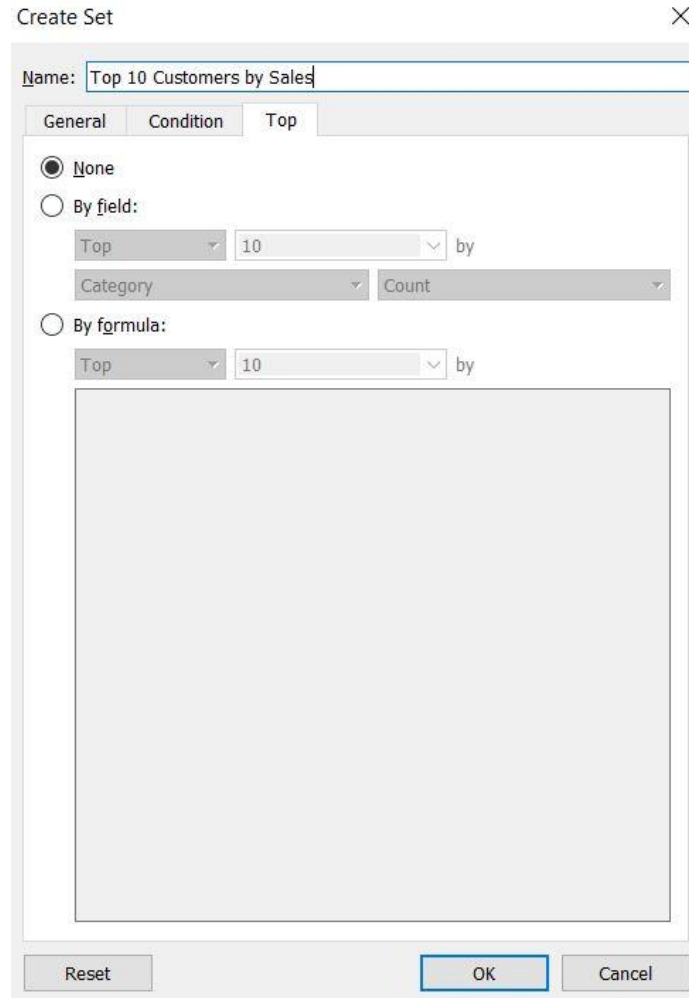
- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper

☒ Show Add Location

☐ Include 'Other'

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 5: There are multiple ways to create sets i.e., General, Condition and Top
In this example we will make use of Top option
Click on **Top**



The screenshot shows a 'Create Set' dialog box with a close button (X) in the top right corner. The 'Name' field contains 'Top 10 Customers by Sales'. There are three tabs: 'General', 'Condition', and 'Top'. The 'Top' tab is selected. Under the 'Top' tab, there are three radio button options: 'None' (selected), 'By field:', and 'By formula:'. The 'By field:' option is expanded, showing a dropdown menu set to 'Top', a text input field with '10', and a 'by' label. Below this, there are two more dropdown menus: 'Category' and 'Count'. The 'By formula:' option is also expanded, showing a dropdown menu set to 'Top', a text input field with '10', and a 'by' label. At the bottom of the dialog, there are three buttons: 'Reset', 'OK', and 'Cancel'.

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 6: Choose **By Field** option

Create Set ×

Name:

☐ None

☒ By field:

by

☐ By formula:

by

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 7: Enter the required number in Field next to Top. In this example we will enter 10

Create Set ×

Name: Top 10 Customers by Sales

General Condition Top

☐ None

☒ By field:

Top by

Category Count

☐ By formula:

Top by

Reset OK Cancel

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 8: Select the required field e.g.: **Sales** from the drop-down list

Create Set

Name: Top 10 Customers by Sales

General Condition Top

☐ None

☒ By field:

Top 10 by

Category Count

☐ Search

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Discount
- Order Date
- Order ID
- Orders
- Postal Code
- Product ID
- Product Name
- Profit
- Quantity
- Region
- Row ID
- Sales
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Sub-Category (group)
- Sub-Category (group) 1
- Sub-Category (group) 2
- Target Profit

OK Cancel

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 9: Ensure that the correct aggregation is selected e.g.: **Sum**
Click **OK**

Create Set

Name: Top 10 Customers by Sales

General Condition Top

☐ None

☒ By field:

Top 10 by

Sales Sum

☐ By formula:

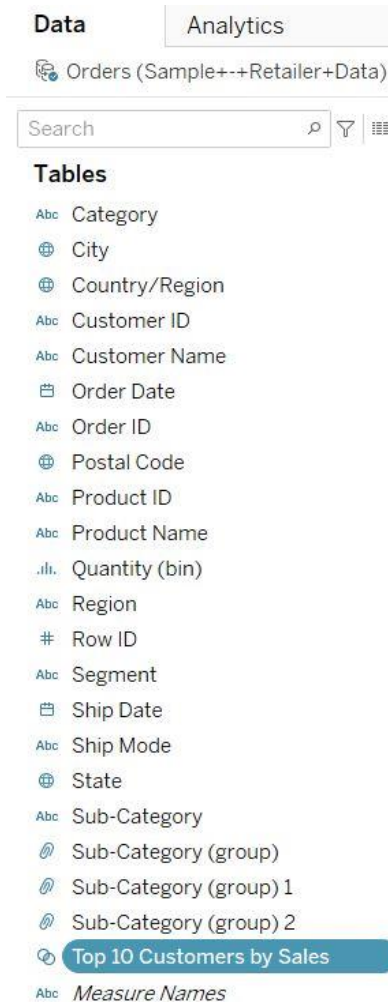
Top 10 by

Reset OK Cancel

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

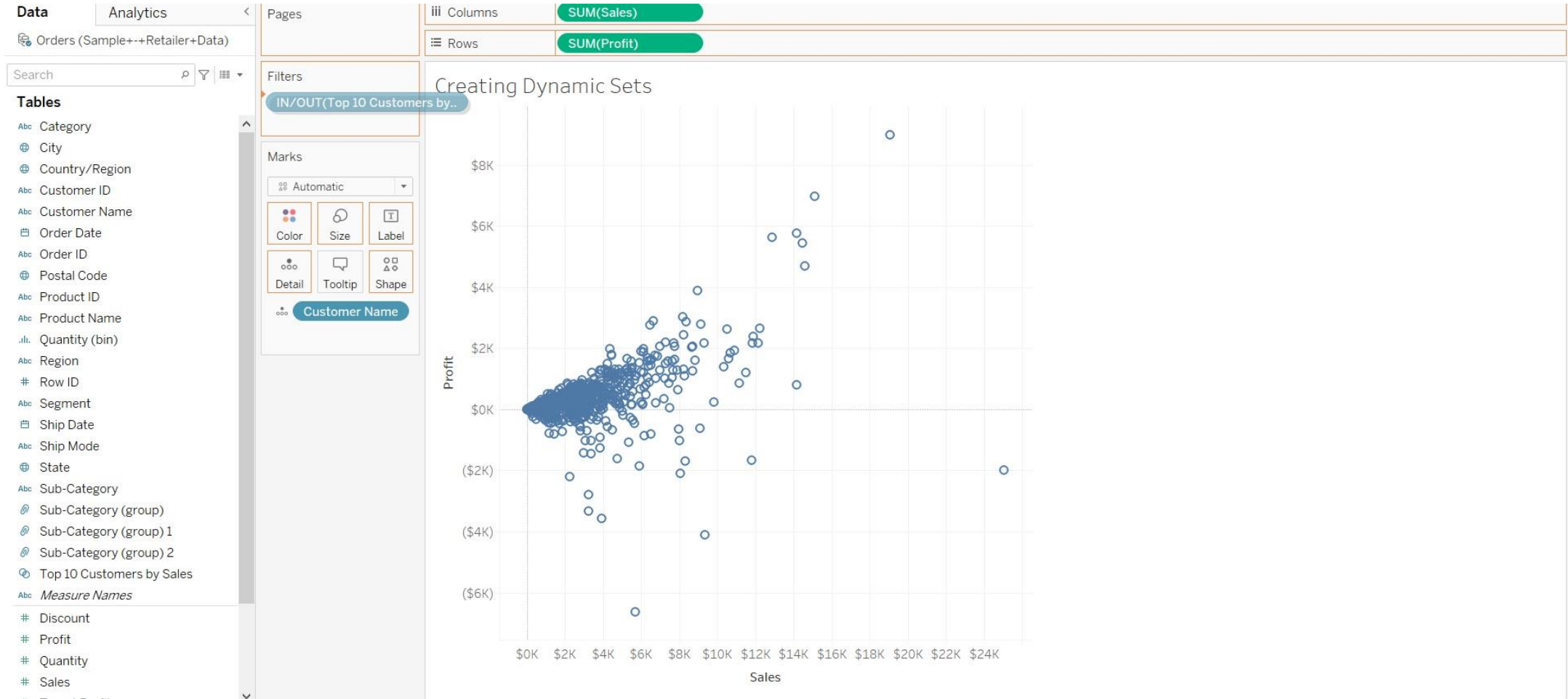
STEP 10: Observe that a new dimension **Top 10 Customers by Sales** is now present in the Data Pane

The Set will be present in a separate section in Tableau Professional edition



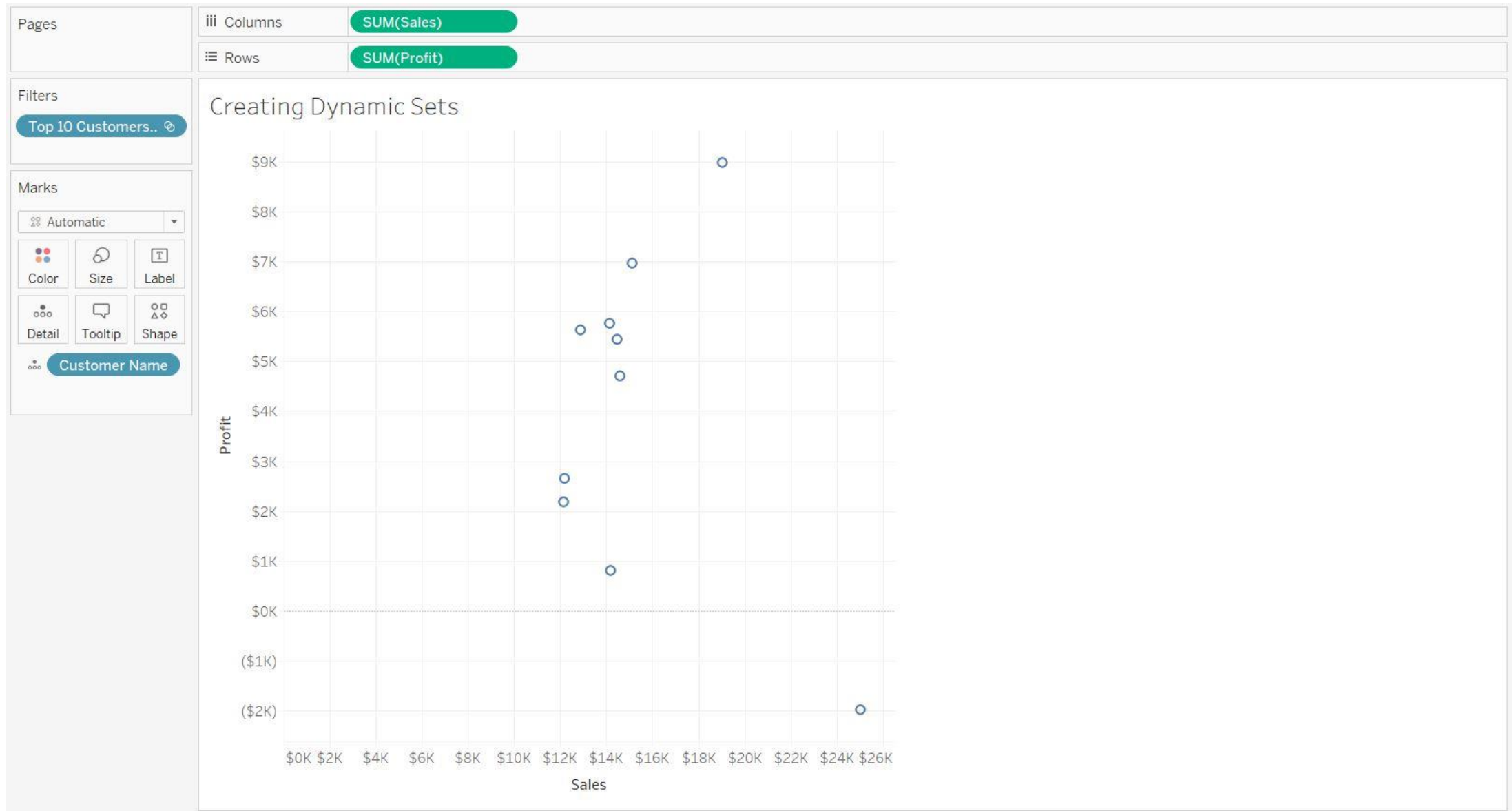
METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 11: Drag and drop the Set to the **Filters** shelf



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 12: Now the view will have only the Top 10 Customers by Sales



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 13: Similarly, we can create a Set called **Top 10 Customers by Profit**

Create Set

Name: Top 10 Customers by Profit

General Condition Top

☐ None

☒ By field:

Top 10 by

Profit Sum

☐ By formula:

Top 10 by

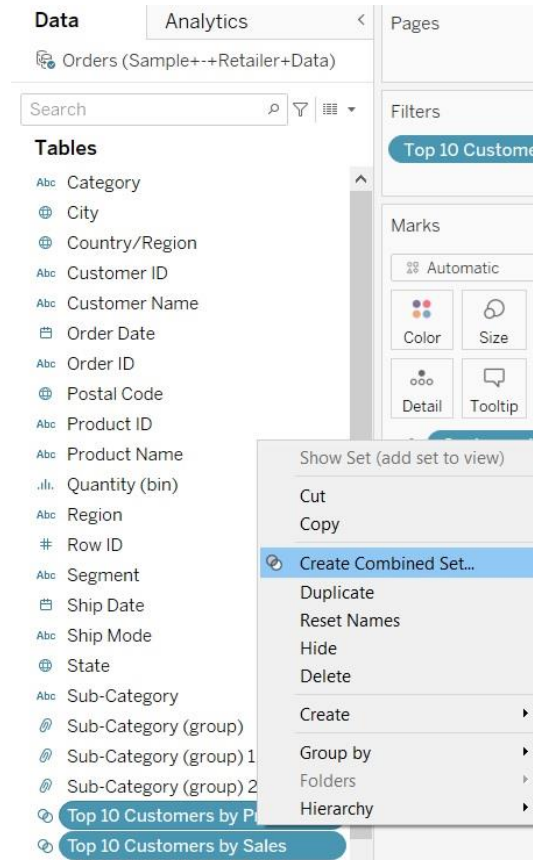
Reset OK Cancel

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 14: If we need to find Top 10 Customers by Sales and Profit, we can Create a Combined Set

Select both the Sets, Right-click and select **Create Combined Set**

NOTE: Pre-condition for creating a Combined Set is that both Sets need to be created from the same Dimension




METHOD I - FROM THE DATA PANE (DYNAMIC SETS)


STEP 15: "Create Set[Set1]" dialog box will appear


Create Set [Set 1] ✕


Name:


How would you like to combine the two sets?

Sets: 

☒  All members in both sets

☐  Shared members in both sets

☐  "Top 10 Customers by Profit" except shared members

☐  "Top 10 Customers by Sales" except shared members

Separate members by East, Green Tea, 2012


METHOD I - FROM THE DATA PANE (DYNAMIC SETS)


STEP 16: Enter a meaningful Set Name in **Name:** field


Create Set [Set 1] ✕


Name:


How would you like to combine the two sets?

Sets: 

☒  All members in both sets

☐  Shared members in both sets

☐  "Top 10 Customers by Profit" except shared members

☐  "Top 10 Customers by Sales" except shared members

Separate members by East, Green Tea, 2012

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 17: Since we want the Top 10 Customers by both Sales and Profit, we need to select the **Shared members in both sets**
Click **OK**

Create Set [Set 1] ×

Name:

How would you like to combine the two sets?

Sets: ☒

☐ ☒ All members in both sets

☒ ☐ Shared members in both sets

☐ ☒ "Top 10 Customers by Profit" except shared members

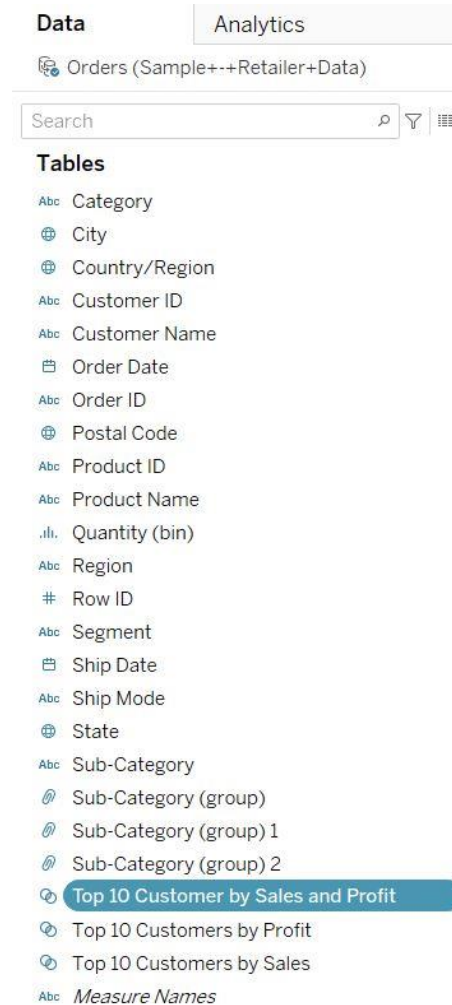
☐ ☒ "Top 10 Customers by Sales" except shared members

Separate members by East, Green Tea, 2012

METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

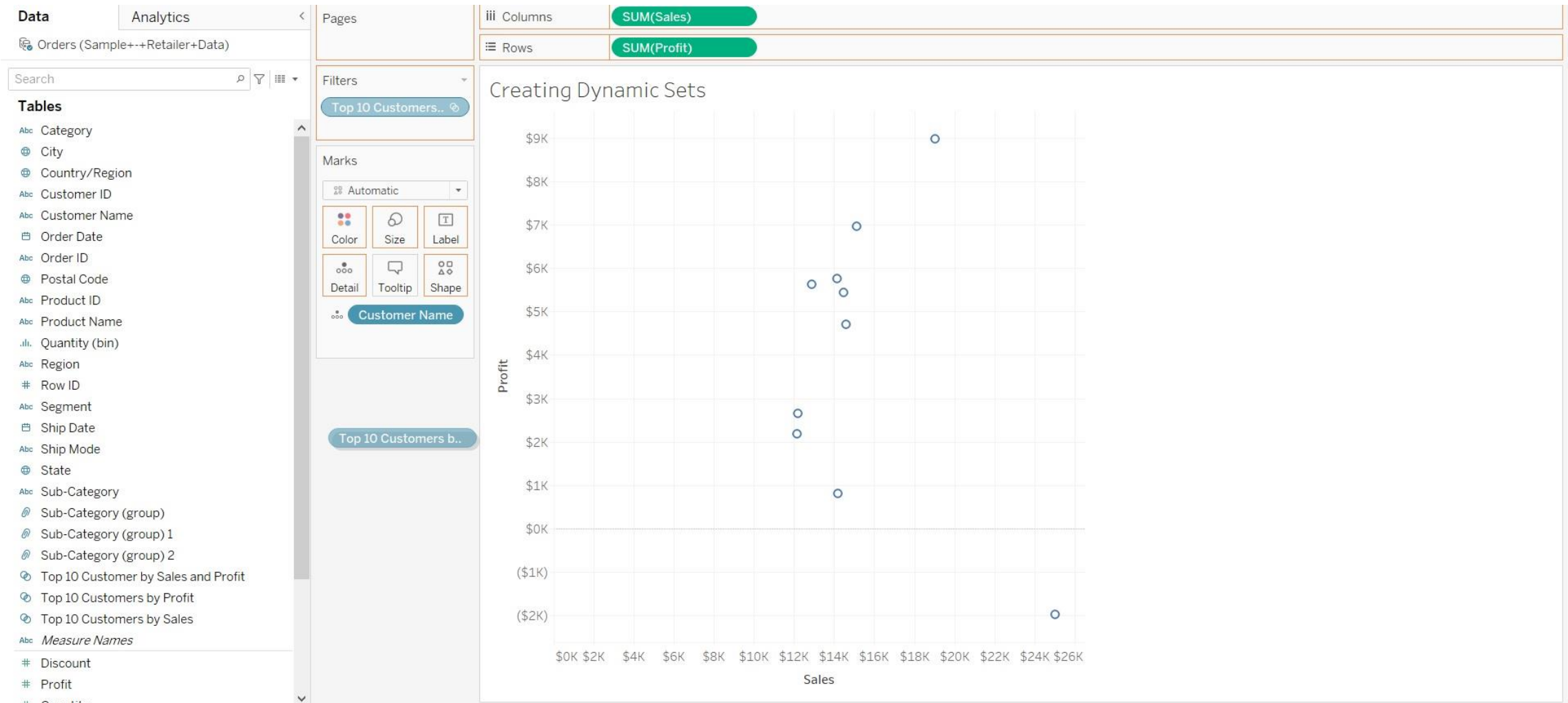
STEP 18: Observe that a new dimension **Top 10 Customer by Sales and Profit** is now present in the Data Pane

The Set will be present in a separate section in Tableau Professional edition



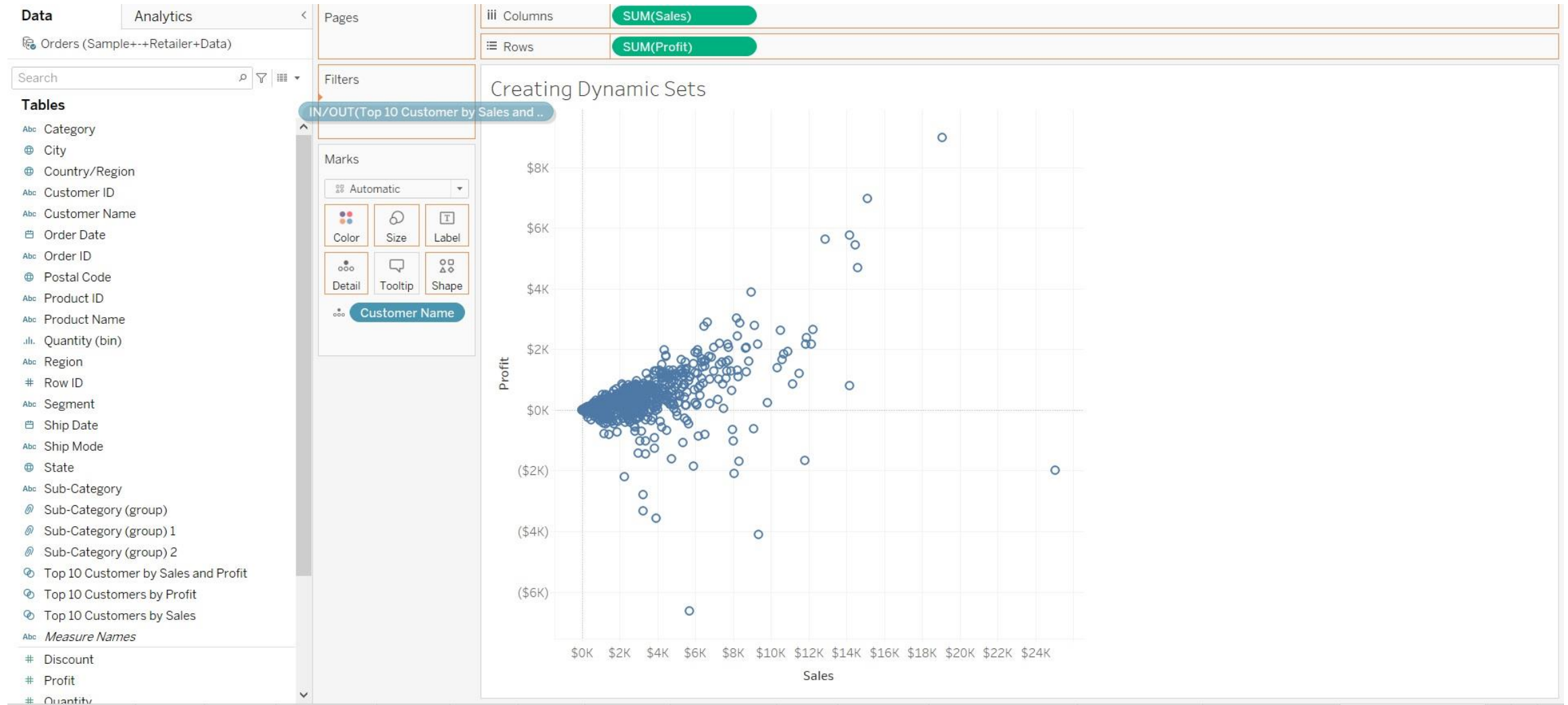
METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 19: Remove the existing Set in the Filters shelf



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 20: Drag and drop the **Top 10 Customer by Sales and Profit** set to the **Filters** shelf



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 21: Now the view will have only the shared members in both sets



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 22: If required we can the members "Show In/Out of Set"



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 23: In the Filter dialog box select the "In" option
Click **OK**

Filter [In / Out of Top 10 Customer by Sales and Profit] X

General Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

☒ In
☐ Out

All None ☐ Exclude

Summary

Field: [In / Out of Top 10 Customer by Sales and Profit]
Selection: Selected 1 of 2 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel

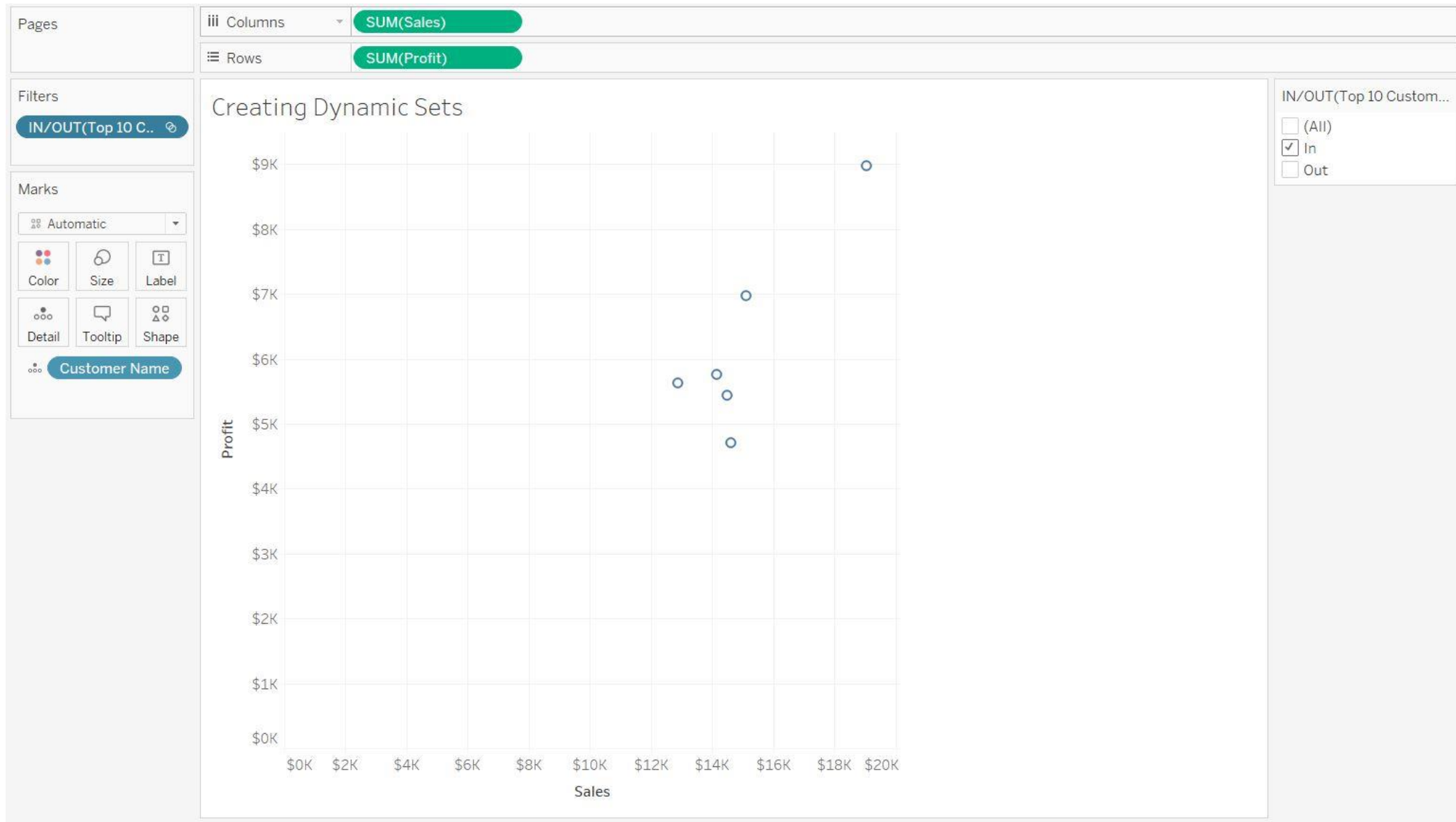
METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 24: If required we can "**Show Filter**"
Click **OK**



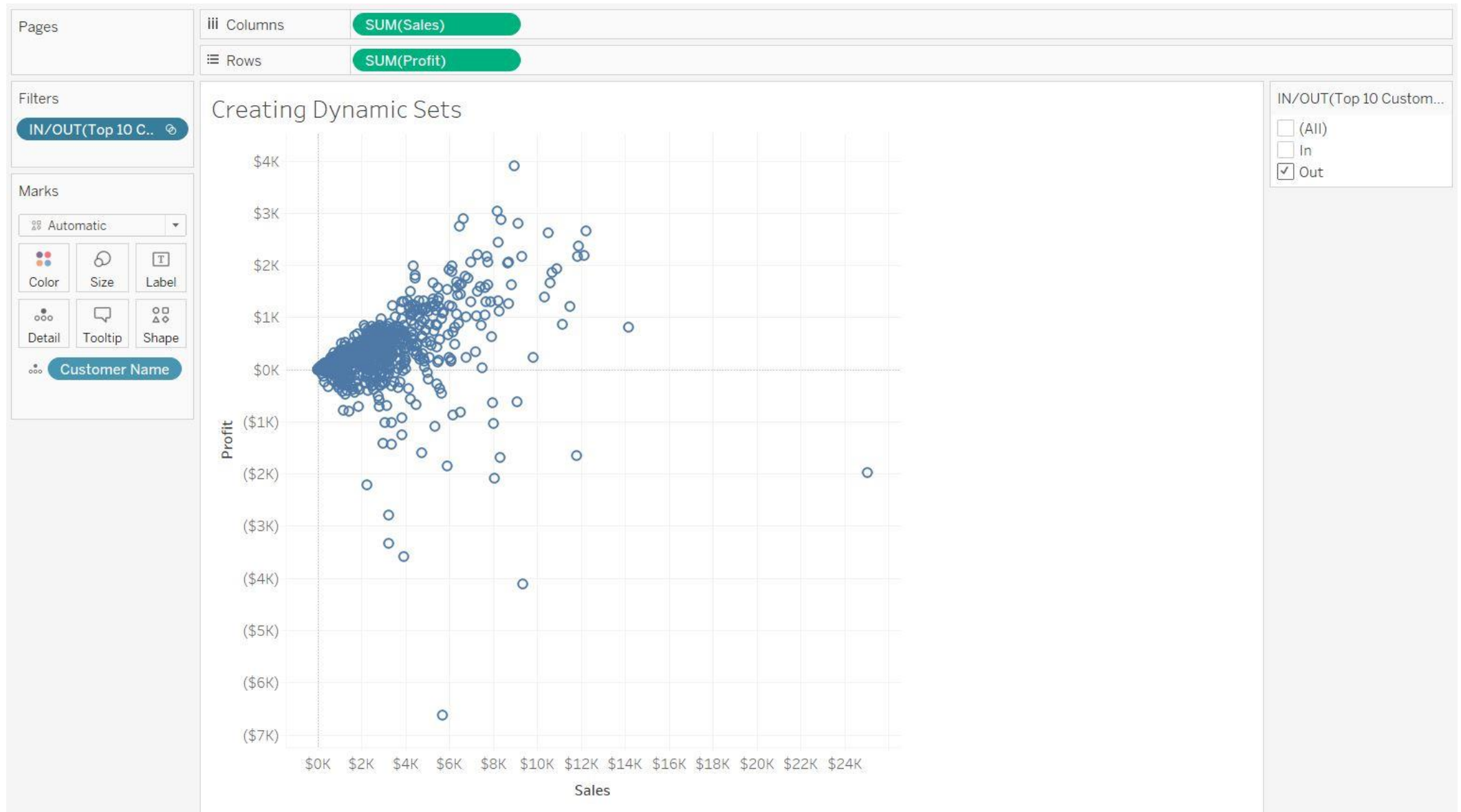
METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 25: Ensure that a **IN/OUT Filter** is observed on Top Right side of view Sales



METHOD I - FROM THE DATA PANE (DYNAMIC SETS)

STEP 26: To see the members that are not in the set select the "**Out**" option



METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 1: Assume that we have a Scatter Plot between Sales and Profit with Customer Name in the Detail of Marks card



METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 2: As an example, we may want to show the members having Profit \$4K
Select the required members using the cursor



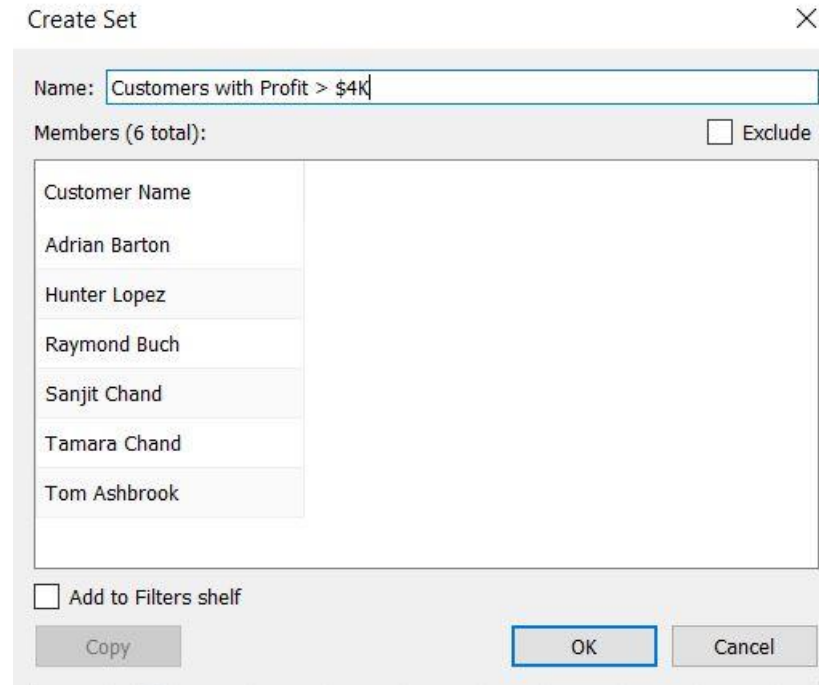
METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 3: Click on the Venn Diagram icon and Select **Create Set** on the Tooltip



METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 4: Enter a meaningful Set Name in **Name:** field
Click **OK**



The screenshot shows a 'Create Set' dialog box with a close button (X) in the top right corner. The 'Name:' field contains the text 'Customers with Profit > \$4k'. Below this, the 'Members (6 total):' section shows a list of six customer names: Adrian Barton, Hunter Lopez, Raymond Buch, Sanjit Chand, Tamara Chand, and Tom Ashbrook. To the right of this list is an empty rectangular area. At the bottom left, there is a checkbox labeled 'Add to Filters shelf'. At the bottom right, there are three buttons: 'Copy', 'OK', and 'Cancel'. The 'OK' button is highlighted with a blue border. A small 'Exclude' checkbox is also visible next to the 'Members (6 total):' label.

Create Set

Name: Customers with Profit > \$4k

Members (6 total): ☐ Exclude

Customer Name
Adrian Barton
Hunter Lopez
Raymond Buch
Sanjit Chand
Tamara Chand
Tom Ashbrook

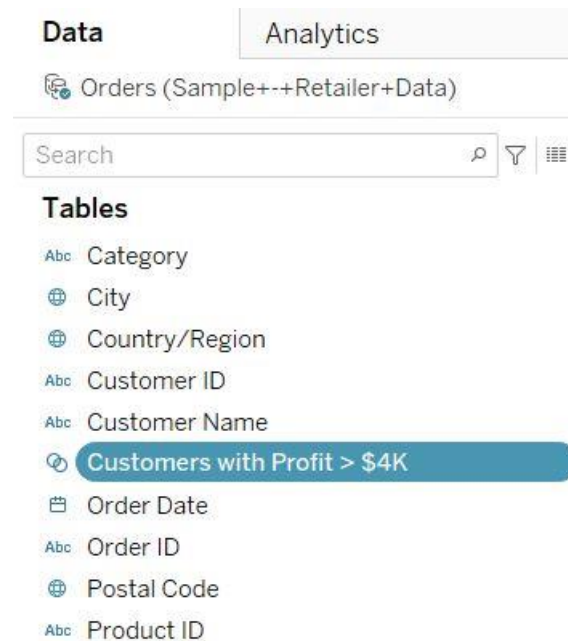
☐ Add to Filters shelf

Copy OK Cancel

METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 5: Observe that a new dimension Customers with Profit > \$4K is now present in the Data Pane

The Set will be present in a separate section in Tableau Professional edition



METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 6: Drag and drop the **Customers with Profit > \$4K** Set to the **Filters** shelf



METHOD II – BY USING MARKS (FROM THE VIEW) (FIXED SETS)

STEP 7: Now the view will have only the Customers with Profit > \$4K

