Groups

ANALYZING DATA IN TABLEAU

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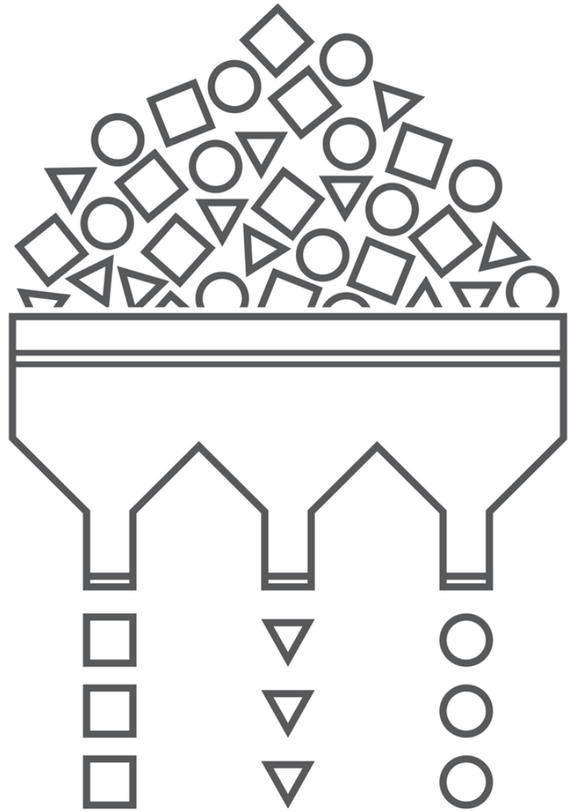
datacamp

What are groups?

- Group related rows in a field
- Example:
  - **Field:** `Country`
  - **Rows:** Afghanistan, Albania, Algeria, Andorra, Angola, Antigua and Barbuda, Argentina...
  - **Group into continents:** `Africa`, `Asia`, `Europe`, `North America`, `South America`, `Antarctica`, `Australia`
- Create custom groups not available in the source data

When to use groups?

- Create consistency in the data
  - Combine "USA", "US", "United States", "United States of America" into one group
- Provided a new level of aggregation
  - Group different products into categories like accessory, furniture, clothing, etc



Let's practice!

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Groups for regions

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Creating seasonal groups

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Parameters and sets

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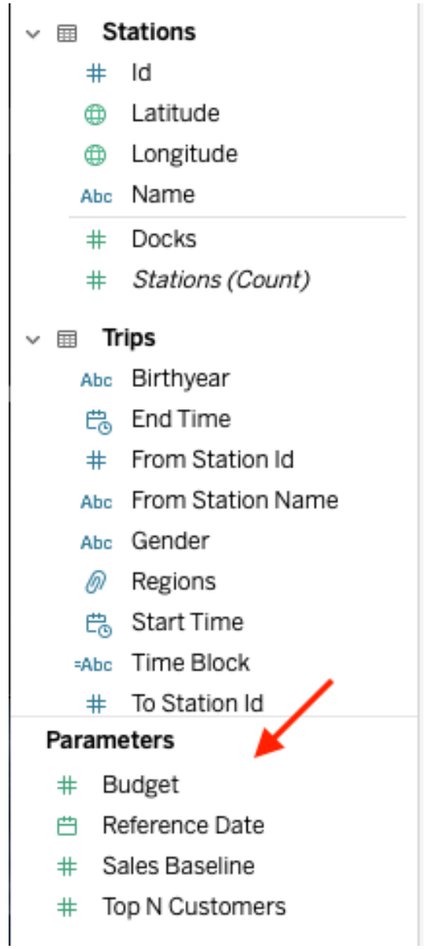
Parameters

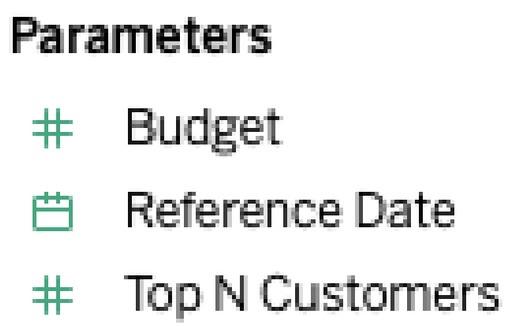
A parameter is a global placeholder value such as a number, date, or string that can replace a constant value in a calculation, filter, or reference line.

- Submit values to change the viz
- A parameter can partner up with a Calculated Field or a filter
- Reside in its own section of the *Data pane* after creation



[1] https://help.tableau.com/current/pro/desktop/en-us/parameters_create.htm

Examples



- Test out different budget amounts
- Specify which dates are displayed
- Change number of top customers shown

Sets

- Define a subset of the data
- Show a division between two parts of a whole
- Select members of a data column to be "IN", the others are "OUT"

Sets

- Examples:
  - Subset of products with more than X in sales
  - Subset of dates that are public holidays
- More than two groups -> Groups or Calculated Fields

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Parameters

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