

Groups

ANALYZING DATA IN TABLEAU



Lis Sulmont

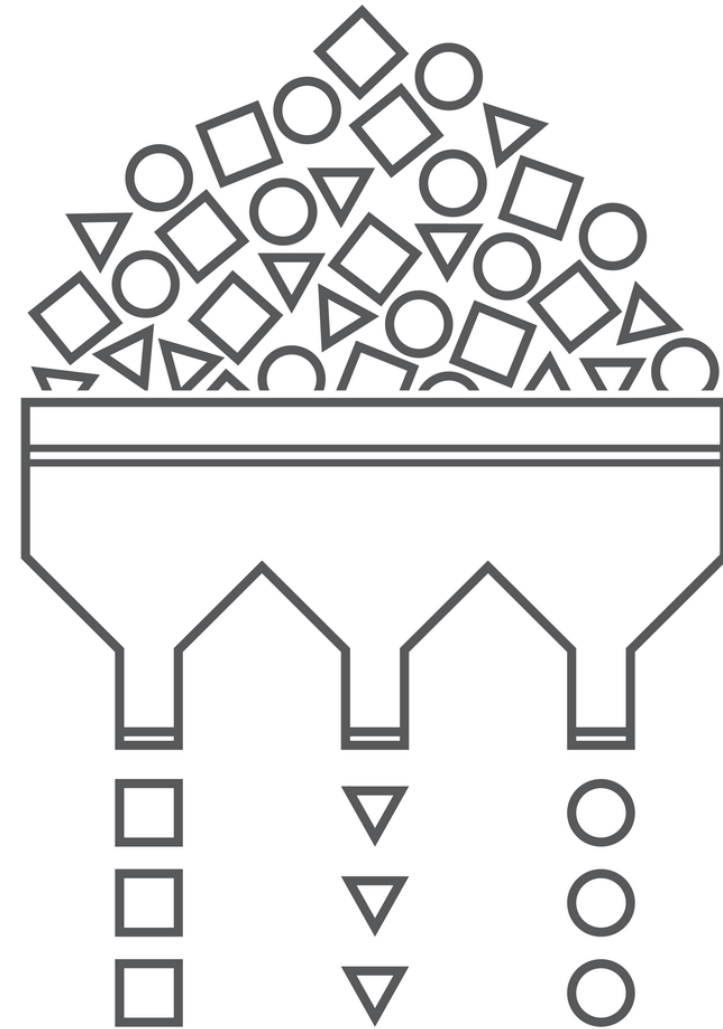
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What are groups?

- 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?

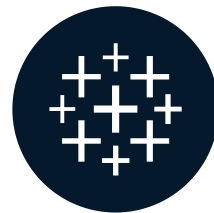
- Create consistency in the data
 - Combine "USA", "US", "United States", "United States of America" into one group
- Provide a new level of aggregation
 - Group different products into categories like accessory, furniture, clothing, etc



Let's practice!
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Groups for regions

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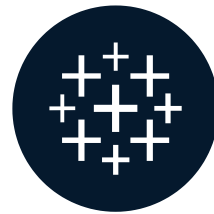
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Creating seasonal groups

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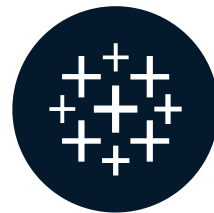
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Parameters and sets

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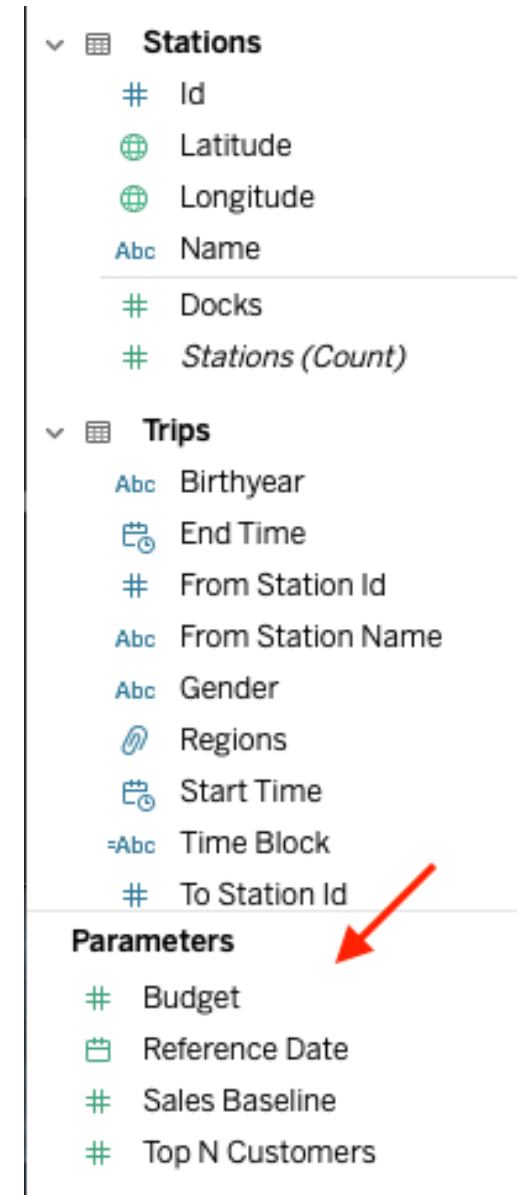
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Parameters

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

Parameters

- # Budget
- 📅 Reference Date
- # Top N Customers

- 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

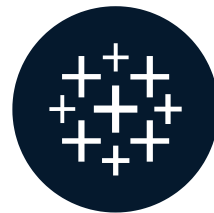
- Examples:
 - Subset of products with more than X in sales
 - Subset of dates that are public holidays
- More than two groups -> Groups or Calculated Fields

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Parameters

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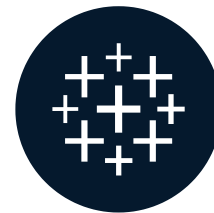
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Sets

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