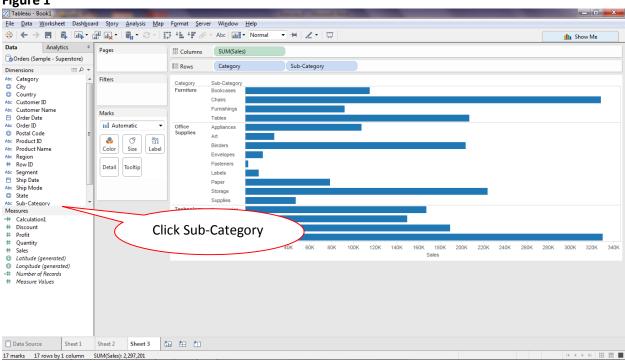
Objective: This exercise will demonstrate how to create a hierarchy

Create a report shown in Figure 1, which is based on the following selections:

Columns: Sales

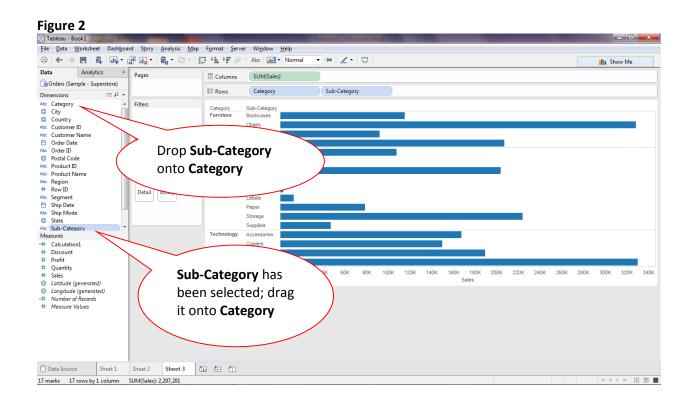
• Rows: Category and Sub-Category

Figure 1



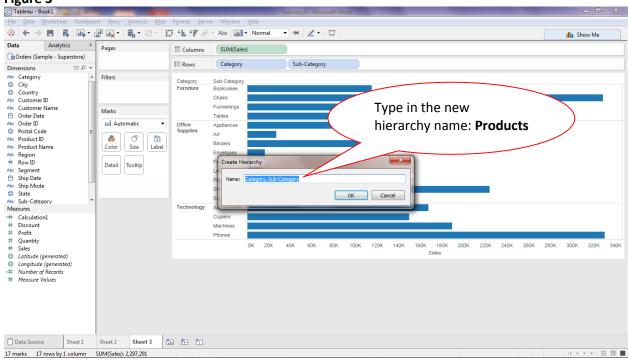
To create a **Product** hierarchy:

• Click **Sub-Category** in the **Data Window** as shown on Figure 1, which will lead to the display on Figure 2 (where the **Sub-Category** dimension has been highlighted)



Drag Sub-Category, the highlighted dimension, onto the Category dimension as shown on Figure
 2, which will lead to the Create Hierarchy popup window displayed on Figure 3

Figure 3



We will now rename the default hierarchy name that is provided by Tableau. In the Figure 3 popup window **Name** field:

• Type in **Products** as shown on Figure 3, which will lead to the display on Figure 4

Figure 4 Tableau - Book1 III Show Me Pages SUM(Sales) III Columns Orders (Sample - Superstore) **Ⅲ** Rows Category Sub-Category Dimensions

Abc Category

Category

Country

Cou Filters Sub-Category Bookcases Click **OK** after hierarchy Furnishings Tables has been renamed III Automatic Color Size Abc 123 Label Create Hierarchy Detail Tooltip OK Cancel New hierarchy name, **Products,** has been typed in

• Click **OK** to save the hierarchy

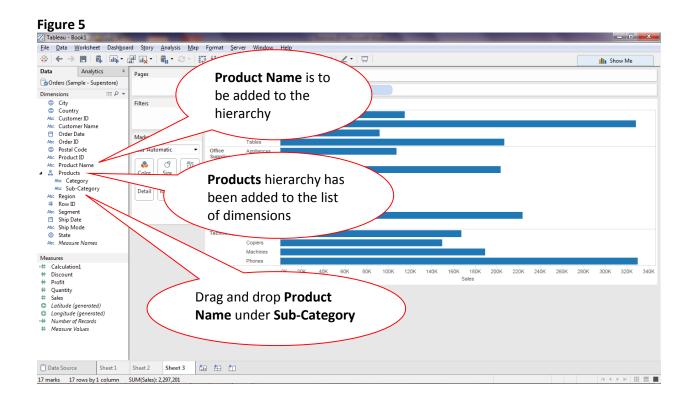
ta #a to

Data Source Sheet 1 Sheet 2 Sheet 3

17 marks 17 rows by 1 column SUM(Sales): 2,297,201

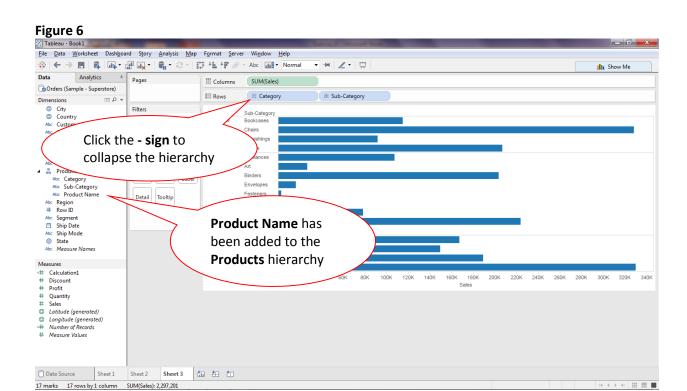
The hierarchy can now be viewed in the **Data Window**, as shown on Figure 5.

H + > H | | | | | |



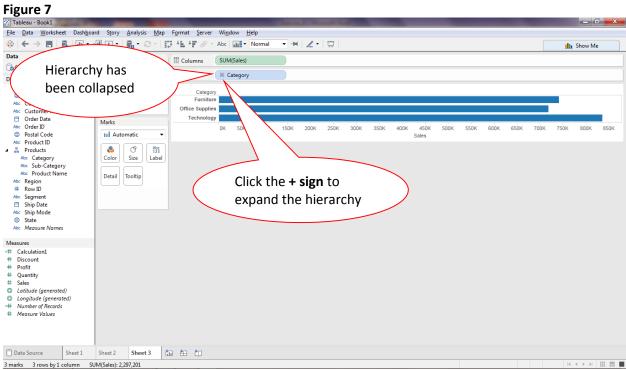
To add an additional item, **Product Name**, to the hierarchy:

• Drag and drop **Product Name** under the **Sub-Category** dimension as shown on Figure 5, which will lead to the display on Figure 6



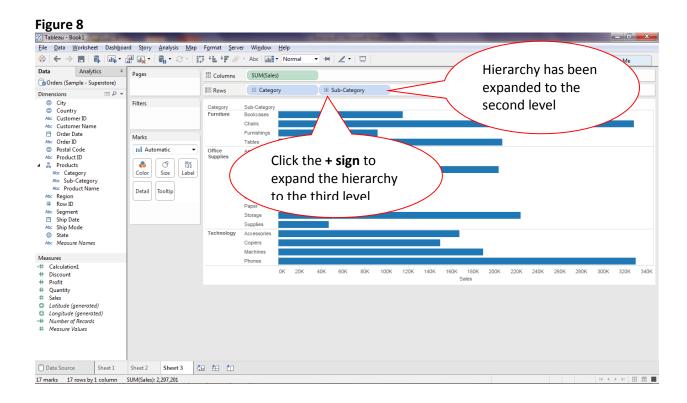
To collapse the hierarchy:

• Click the **–sign** next to **Category** (in Rows) as shown on Figure 6, which will collapse the hierarchy and lead to the display on Figure 7



To expand the hierarchy:

Click the +sign next to Category (in Rows) as shown in Figure 7, which will expand the hierarchy and lead to the display on Figure 8



To further expand the hierarchy by another level (3rd):

• Click the **+sign** next to **Sub-Category** (in Rows) as shown on Figure 8, which will expand the hierarchy and lead to the display on Figure 9

Figure 9

