

The background of the slide is a dark blue, semi-transparent digital interface. It features a hand on the left side, with the index finger pointing towards the center. Overlaid on the interface are several icons and charts: a laptop icon, a cloud with up and down arrows, a smartphone, a classical building icon, a Wi-Fi symbol, and a bar chart with a '78%' label. There are also two large, curved arrows pointing upwards and to the right, and a line graph with data points. On the right side, there is a small table with numerical data and a mail icon.

# Deep-dive into Tableau Part 3

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# Revision

1. What is BI, Explain with example
2. What is Tableau
3. Products of tableau
4. Features of tableau
5. What are different connection used in tableau
6. Difference between Live and Extract Connection
7. What are Dimension and Measure
8. What are different Data Types in Tableau
9. What are different File Extension in Tableau
10. What are the different shelves used in Tableau
11. How to sort the data in tableau
12. Explain Blend, Join and relationship



# Groups

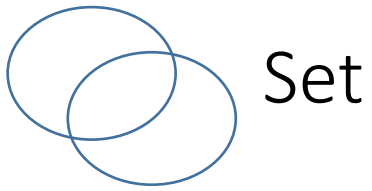
- Create a group to combine related members in a field
- Single label can be used to organize different values
- Can be used for both dimension or measure
- Group always results in a Dimension
- E.g. Group of friends

## Create a group

1. By selecting data in the view
2. From a field in the Data pane

## Let's try ourselves

- Display sales for product group Refrigerator, Phone and clock
- Display sales value which is less than 5 for Category
- Display profit and sales per customer group arranged alphabetically.(e.g. A group, B group, etc.)



- Sets allows us to arrange the data and related dimension values together
- Create Set for dimension only
- Set automatically adjust the values either In/Out
- Sets are created based on some conditions
- E.g. set of books and set of pencils

## Type of Set

1. Dynamic Set
2. Fixed Set

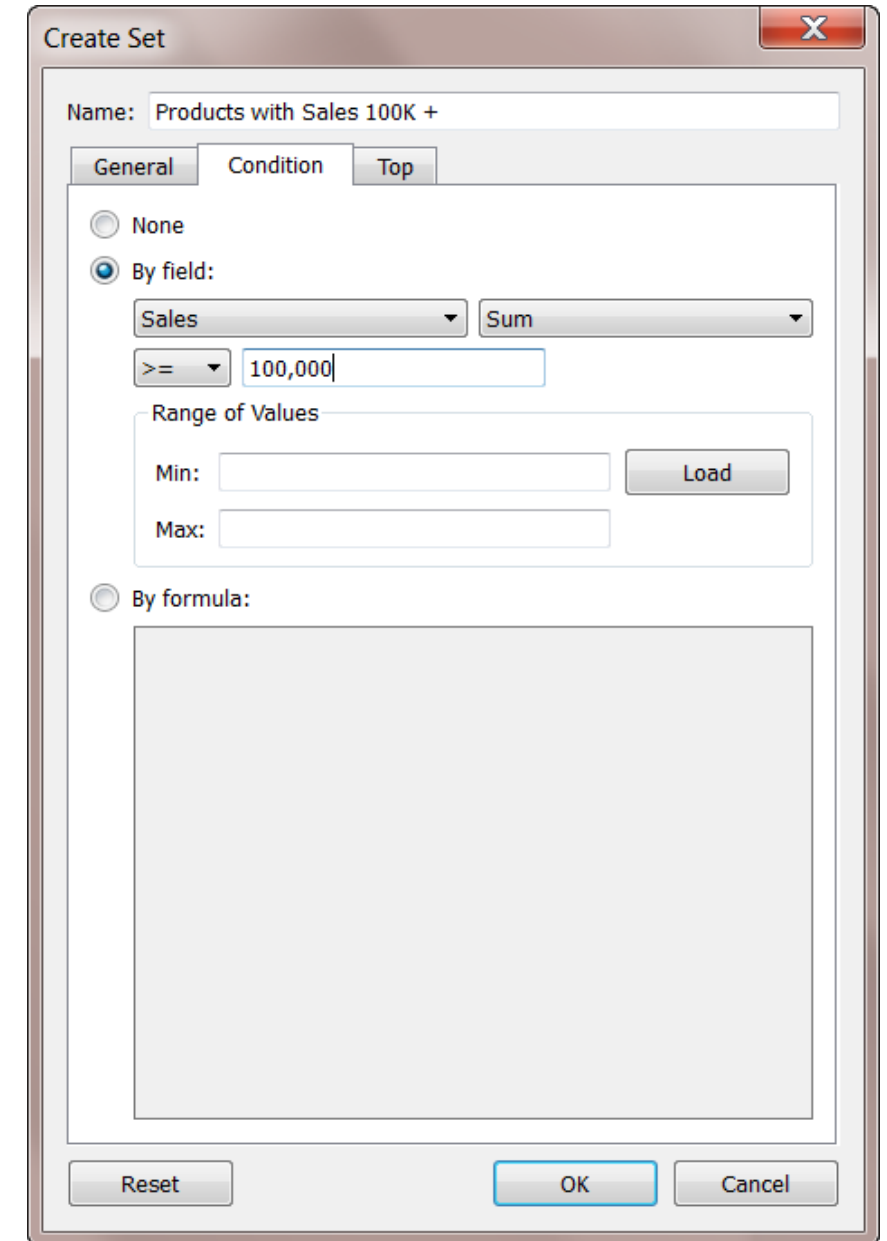
# Create a dynamic set

To create a dynamic set:

In the Data pane, right-click a dimension and select **Create > Set**.

In the Create Set dialog box, configure your set.

- **General:** Use the General tab to select one or more values that will be considered when computing the set
- **Condition:** Use the Condition tab to define rules that determine which members to include in the set



The screenshot shows the 'Create Set' dialog box with the following configuration:

- Name:** Products with Sales 100K +
- General tab:**
  - ☐ None
  - ☒ By field:
    - Field: Sales
    - Aggregation: Sum
    - Operator: >=
    - Value: 100,000
- Range of Values:**
  - Min: [empty field]
  - Max: [empty field]
  - Load button
- ☐ By formula:
  - [Large empty text area for formula]

Buttons at the bottom: Reset, OK, Cancel.

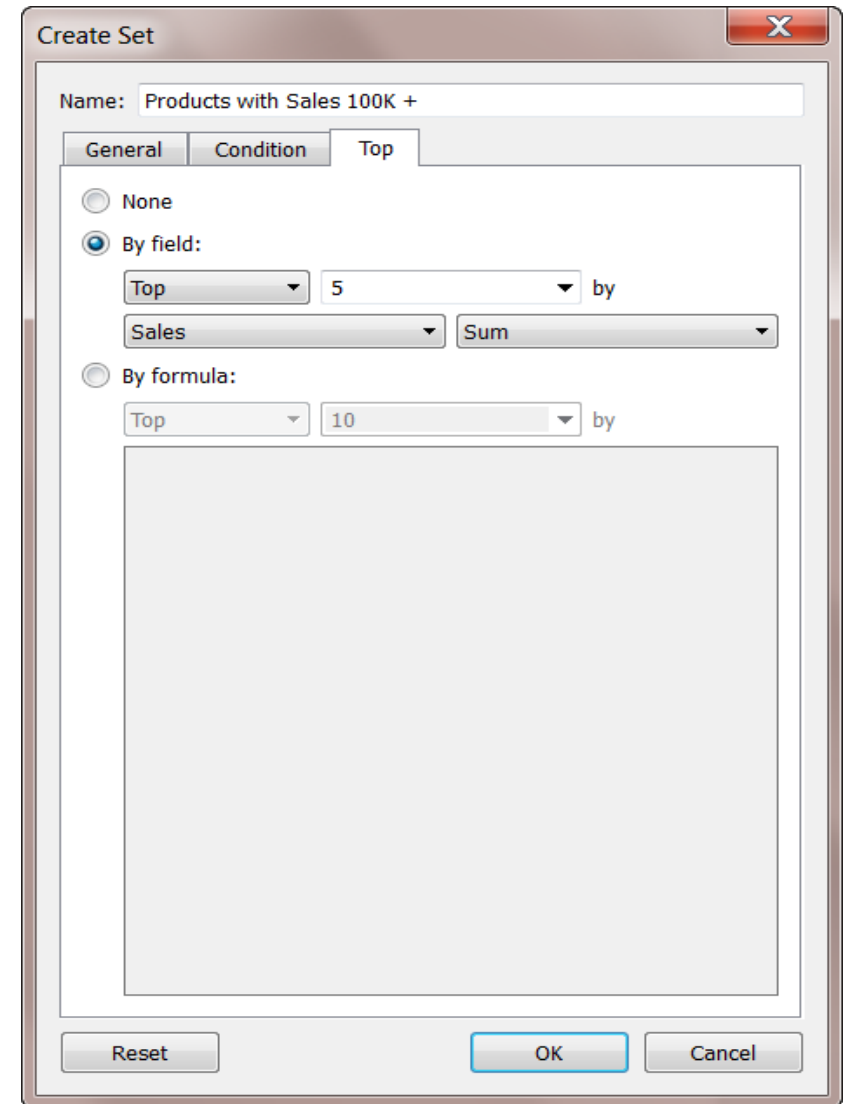
# Create a dynamic set (contd.)

**Top:** Use the Top tab to define limits on what members to include in the set.

For example, you might specify a limit that is based on total sales that only includes the top 5 products based on their sales.

When finished, click **OK**.

The new set is added to the bottom of the Data pane, under the Sets section. A set icon indicates the field is a set.



The screenshot shows a 'Create Set' dialog box with a title bar containing a close button (X). The dialog has three tabs: 'General', 'Condition', and 'Top'. The 'Top' tab is selected. The 'Name' field contains the text 'Products with Sales 100K +'. Under the 'Top' tab, there are two radio button options: 'None' and 'By field:'. The 'By field:' option is selected. Below it, there are two dropdown menus: the first is set to 'Top' and the second is set to '5'. To the right of these is a 'by' label followed by another dropdown menu set to 'Sum'. Below this, there is a third radio button option 'By formula:'. Below it, there are two dropdown menus: the first is set to 'Top' and the second is set to '10'. To the right of these is a 'by' label. Below the 'By formula:' section is a large, empty rectangular area. At the bottom of the dialog, there are three buttons: 'Reset', 'OK', and 'Cancel'.



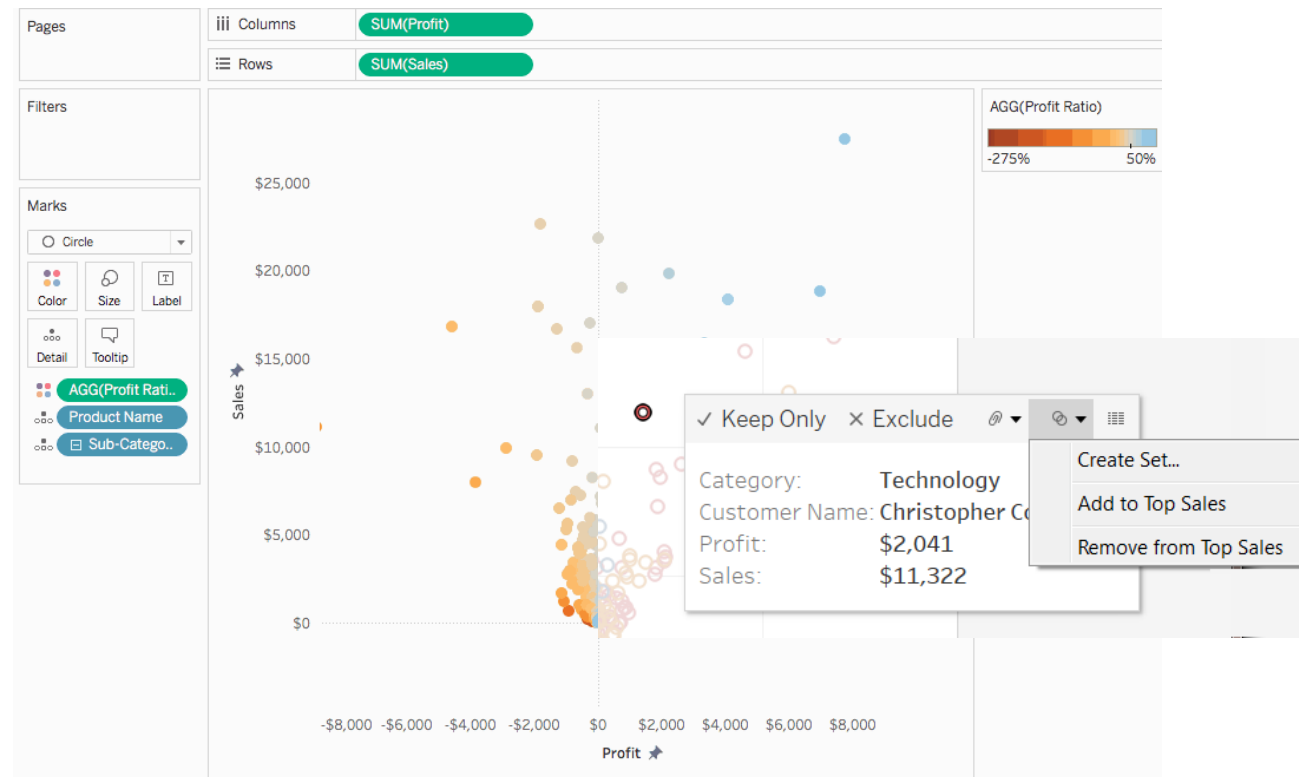
# Create a fixed set

The members of a fixed set do not change, even if the underlying data changes. A fixed set can be based on a single dimension or multiple dimensions.

To create a fixed set:

In the visualization, select one or more marks (or headers) in the view.

Right-click the mark(s) and select **Create Set**.



# Combine sets

## To combine sets:

- select the two sets
- Right-click the sets and select **Create Combined Set**.
- Type a name for the new combined set.
  1. **All Members in Both Sets** - the combined set will contain all of the members from both sets.
  2. **Shared Members in Both Sets** - the combined set will only contain members that exist in both sets.
  3. **Except Shared Members** - the combined set will contain all members from the specified set that don't exist in the second set.
- Click Ok.

# Difference between Group and Set

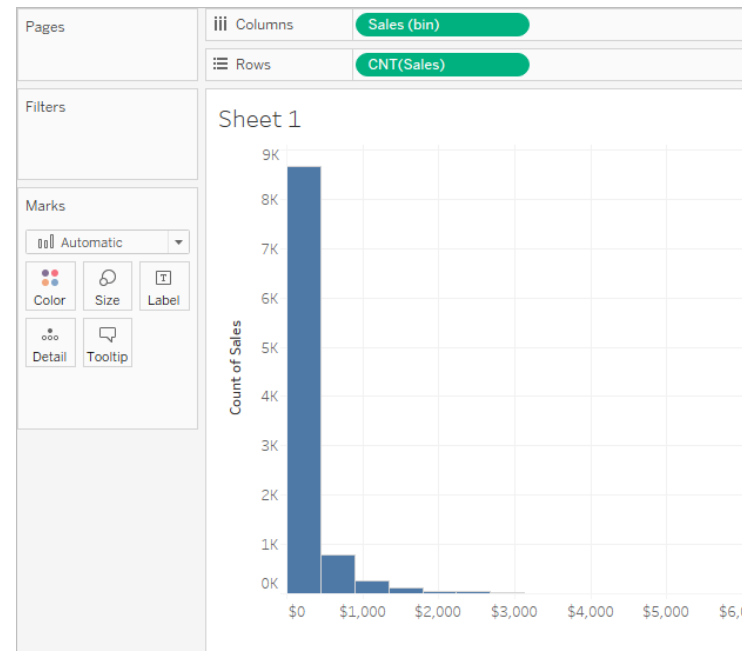
Group	Set
Fixed (Manual)	Fixed (Manual) or Dynamic
Single label	In/Out
Dimension/Measure	Dimension
Can be basis of other group	Can be basis of other set

# Bins

You can bin data only for relational data sources and binned fields cannot be used in calculations.

## Create a Histogram from a Binned Dimension

- Click the **Sales (bin)** dimension in the Data pane and choose **Convert to continuous**.
- Drag the **Sales (bin)** dimension from the Data pane and drop it on the **Columns** shelf.
- Drag the original **Sales** field from the Measures area of the Data pane and drop it on the **Rows** shelf.
- Click **SUM(Sales)** on **Rows** and change the aggregation from Sum to Count.



# Hierarchies

When you connect to a data source, Tableau automatically separates date fields into hierarchies

e.g. Region, State, and County, postal code

## Create a hierarchy

- In the **Data** pane, drag a field and drop it directly on top of another field.
- When prompted, enter a name for the hierarchy and click **OK**.
- Drag additional fields into the hierarchy as needed.

Thank You