**Lesson 6 Demo 01**

**Grouping, Alias, and Sets**

**Business Scenario:**

The sales manager of a leading retail company wants to launch an end-of-season sales initiative to encourage the sale of the products. As a part of this initiative, the manager wants to examine the combined sales of envelopes, labels, and papers. In addition to this, the manager wants to view the combined top two and bottom two subcategories based on sales. Create a view showing the accumulated sales for paper products and answer the following questions:

* Which are the bottom two products?
* What is the profit ratio for supplies?

**Overview:**

* Create a view with subcategories and sales
* Create a group called paper products, including envelopes, labels, and paper
* Create two sets to represent the top-two and bottom-two products
* Combine those sets and place them on color
* Label the view by profit ratio

The result should resemble the image given below:

Graphical user interface

Description automatically generated with medium confidence

**Detailed Instructions:**

1. On the home page, under **Connect**, under **To a file**, click **Microsoft Excel**

Chart

Description automatically generated with medium confidence

1. Browse and connect to the **Sample - Superstore** Excel file (NOTE: Provided in assisted practice)

Graphical user interface, text

Description automatically generated

1. Drag and drop **Orders** table on the canvas area

Graphical user interface, application

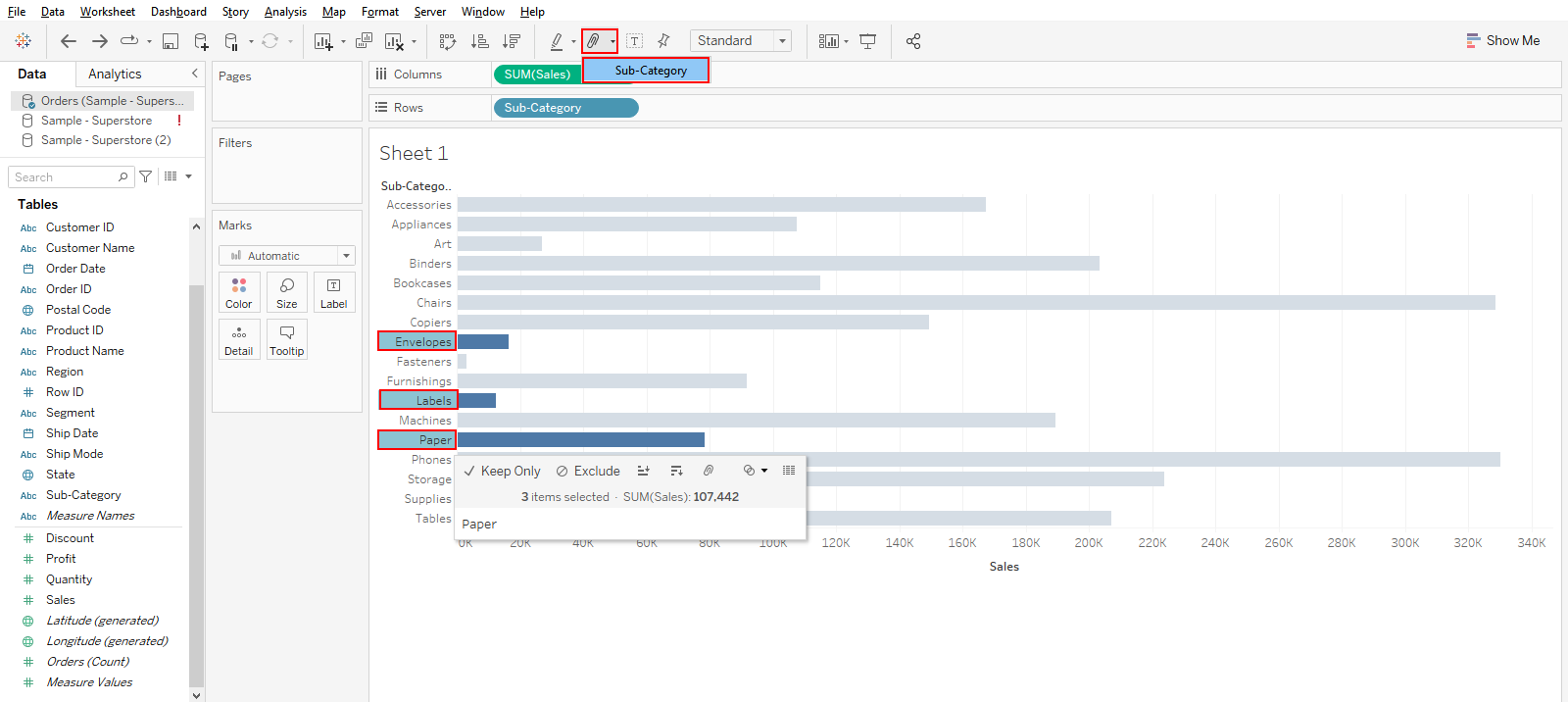
Description automatically generated

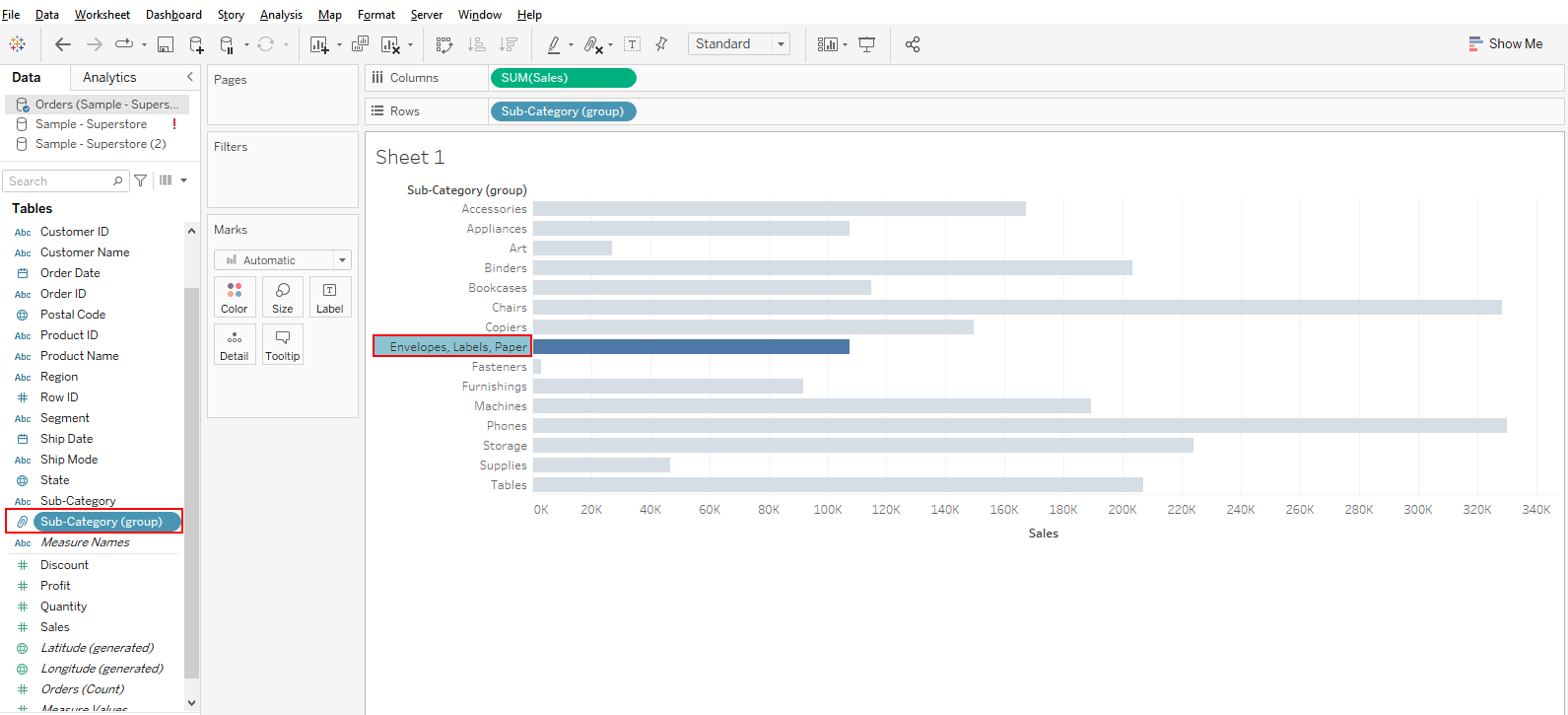
1. To create a view, in **Sheet 1**, drag **Sub-Category** to the **Rows** shelf and **Sales** to the **Columns** shelf

Chart, bar chart

Description automatically generated

1. Holding the control key, select **Envelopes**, **Labels**, and **Paper** to **Sub-Categories**





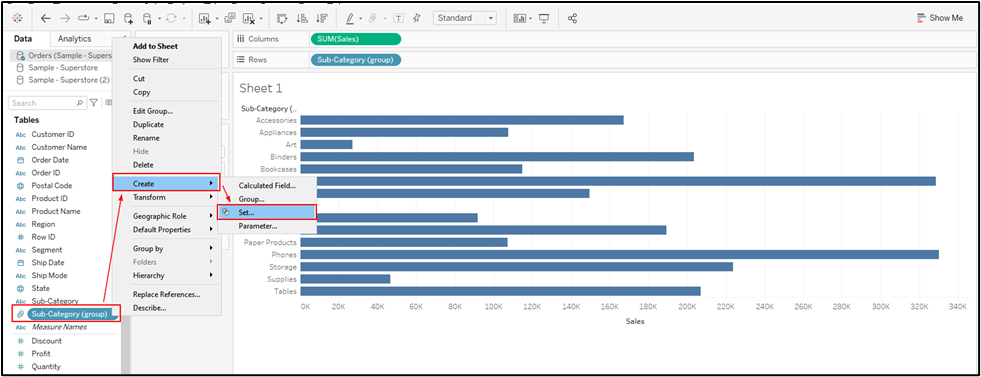
1. Right-click on the **Envelopes**, **Labels**, **Paper** field in the view, and select **Edit Alias**A picture containing chart

   Description automatically generated
2. Name the group as **Paper Products** and click **OK**

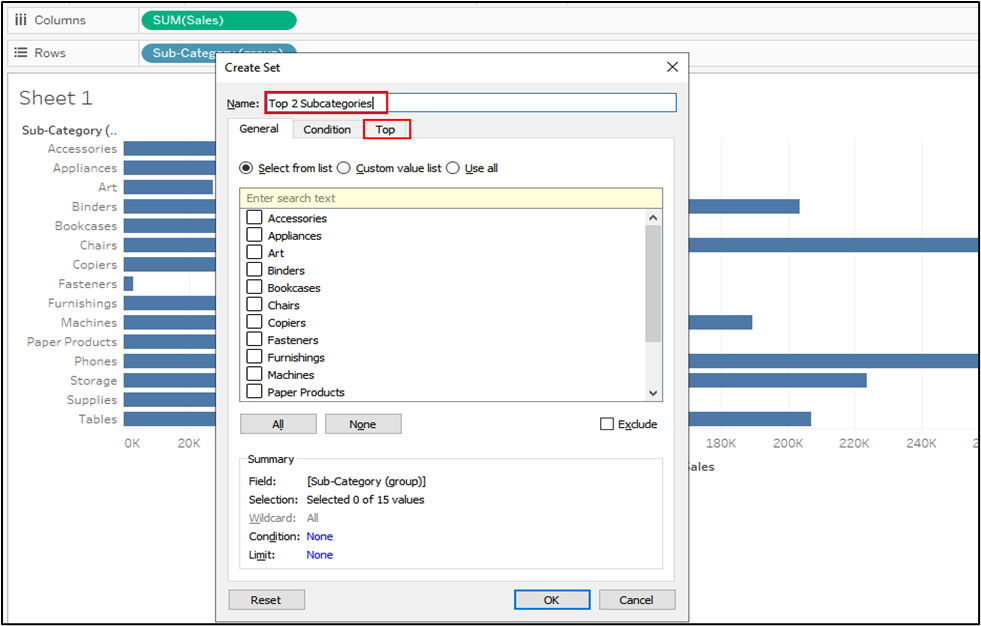
Graphical user interface, application

Description automatically generated

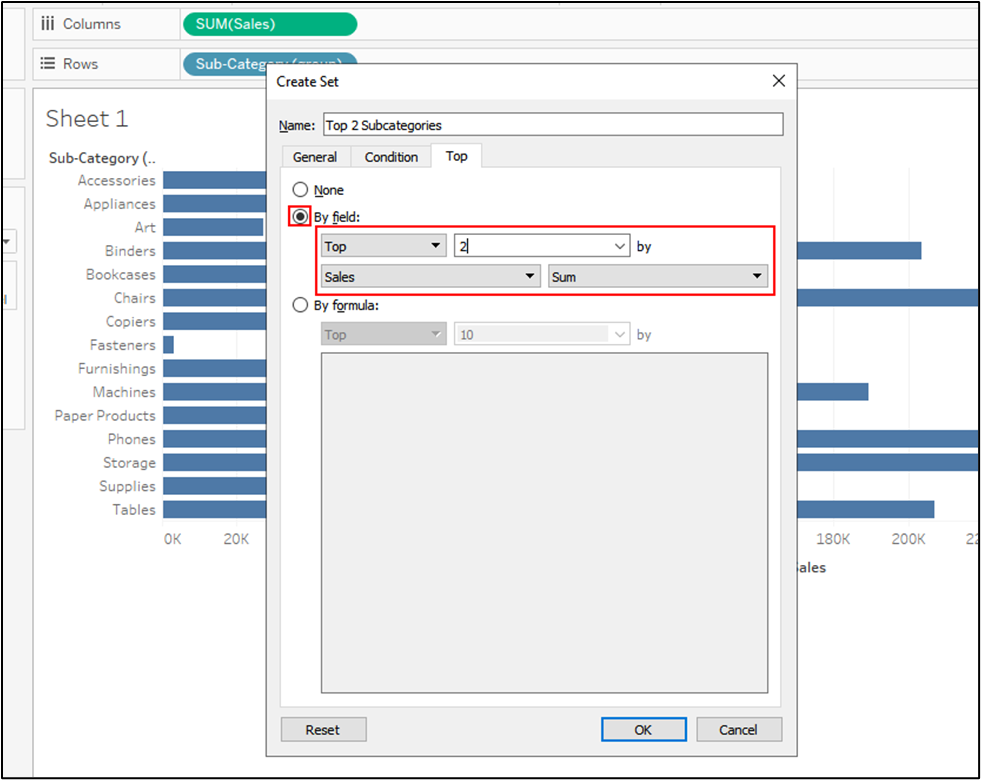
1. To create a set, right-click on the **Sub-Category (Group)** and select **Create** and **Set**



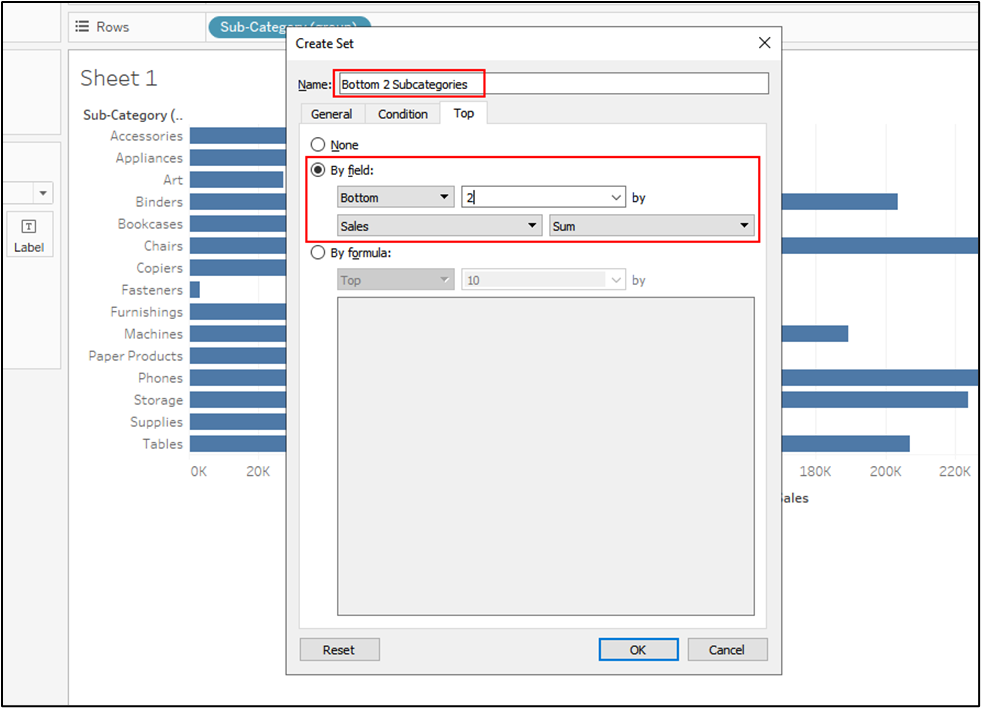
1. Enter the name **Top 2 Subcategories** and navigate to the **Top** tab



1. Select **By field**, select **Top**, and enter the value as **2**. Select **Sales** from the drop-down list and **Sum** as aggregation. Click **OK**



1. To create the bottom two set, repeat steps 9 to 11. Now, change from **Top** to **Bottom**



1. To combine these sets, under **Sets**, press CTRL and select these sets. Next, right-click and select **Create Combined Sets**

Chart, bar chart

Description automatically generated

1. Enter the name **Top and Bottom**. Select the radio button and click **OK**

Graphical user interface, text, application

Description automatically generated

1. Drag this newly created set to **Color**

Timeline

Description automatically generated

1. Create a **calculated field** by clicking the icon shown in the image. Write the name as **Profit Ratio** and formula:

**SUM([Profit])/SUM([Sales])**

Graphical user interface, text, application

Description automatically generated

1. Drag the **Profit Ratio** measure to the **Label** shelf

Chart

Description automatically generated with medium confidence

1. Rename the worksheet as **Sales by Sub-Category**

Graphical user interface, text

Description automatically generated

1. To do the formatting, right-click on **Profit Ratio**, and click on **Format**. Change it to a percentage in the pane

Timeline

Description automatically generated

1. To change the **Format** of the x-axis, double-click on the x-axis

Timeline

Description automatically generated

1. Select axis and go to Numbers. Select the currency and set the decimal places
2. Save the workbookA picture containing graphical user interface

   Description automatically generated

Graphical user interface

Description automatically generated with medium confidence

**Answers:**

Based on the view, these are the answers to the questions in the problem statement:

1. Which are the bottom two products based on Sales?

Answer: **Art and Fasteners**

1. What is the profit ratio for supplies?

Answer: **-3%**