Lesson 03 Demo 05
Groups and Sets

Objective: To demonstrate how to create and apply groups and sets, enhancing the clarity and depth of data visualizations.

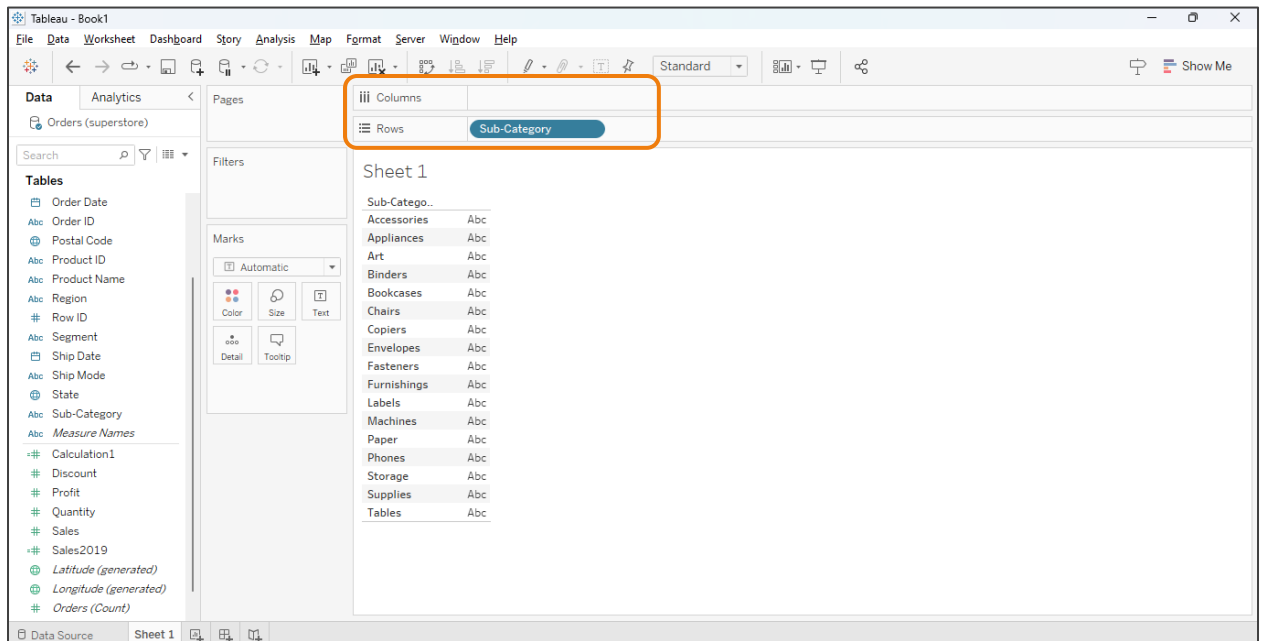**Tools required:** Tableau Desktop

Prerequisites: None

Note: Download the **superstore.xlsx** datasets from the Reference Material of the LMS
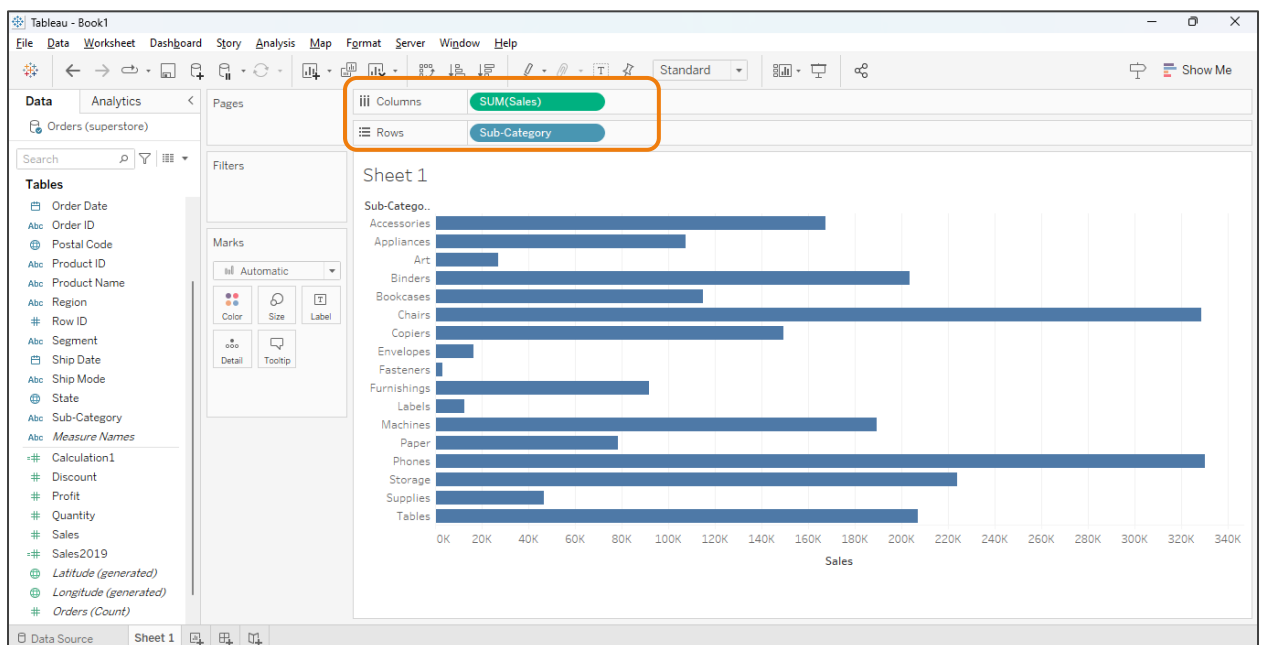
Steps to Perform

1. Create a chart
2. Create a Miscellaneous Group
3. Create a Fixed Set
4. Apply the Fixed Set as a filter
5. Construct a Dynamic Set
6. Employ the Dynamic Set for enhanced analysis
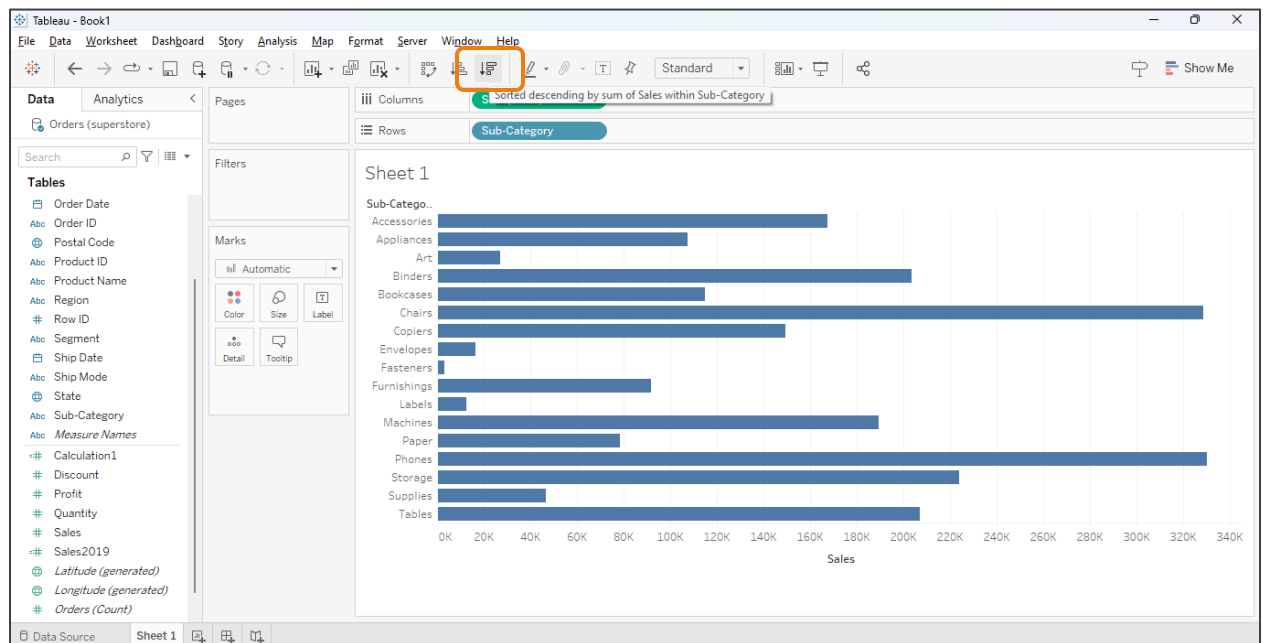
Step 1: Create a Chart

1.1 Drag **Sub-Categories** to the Rows

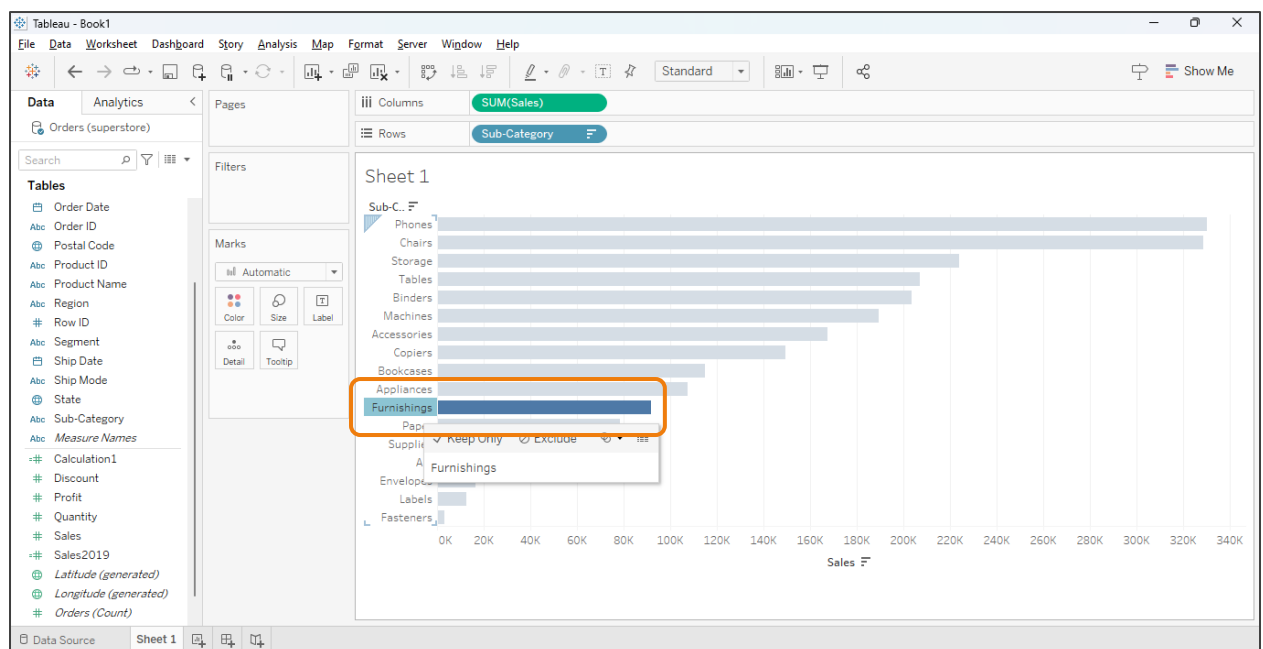## 1.2 Drag **Sales** to the Columns

1.3   Use the **Sort icon** to arrange the chart in descending order by sales
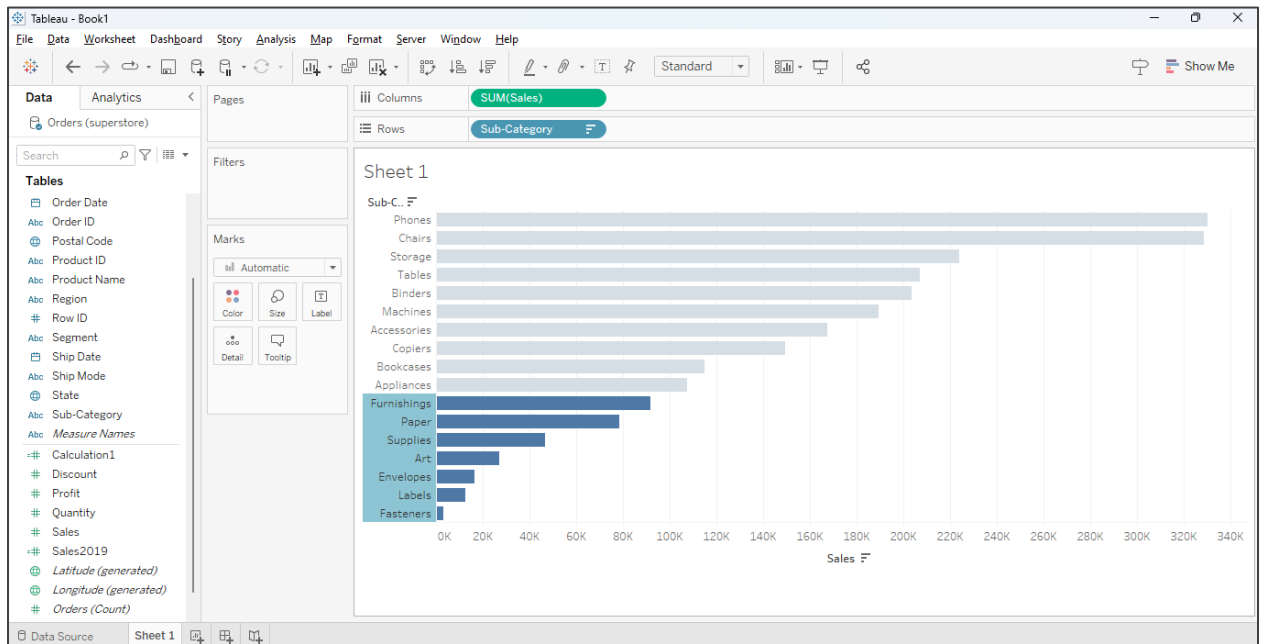

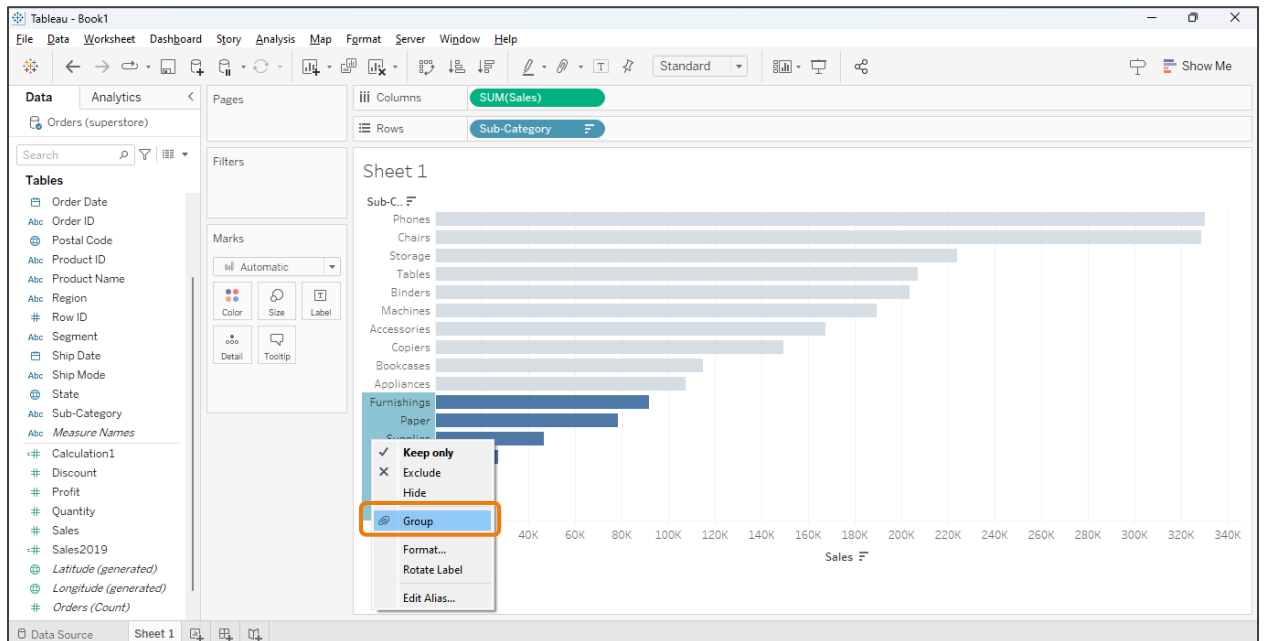
Step 2: Create a Miscellaneous Group

2.1   Click on the **Furnishing** Sub-Category in the vertical axis
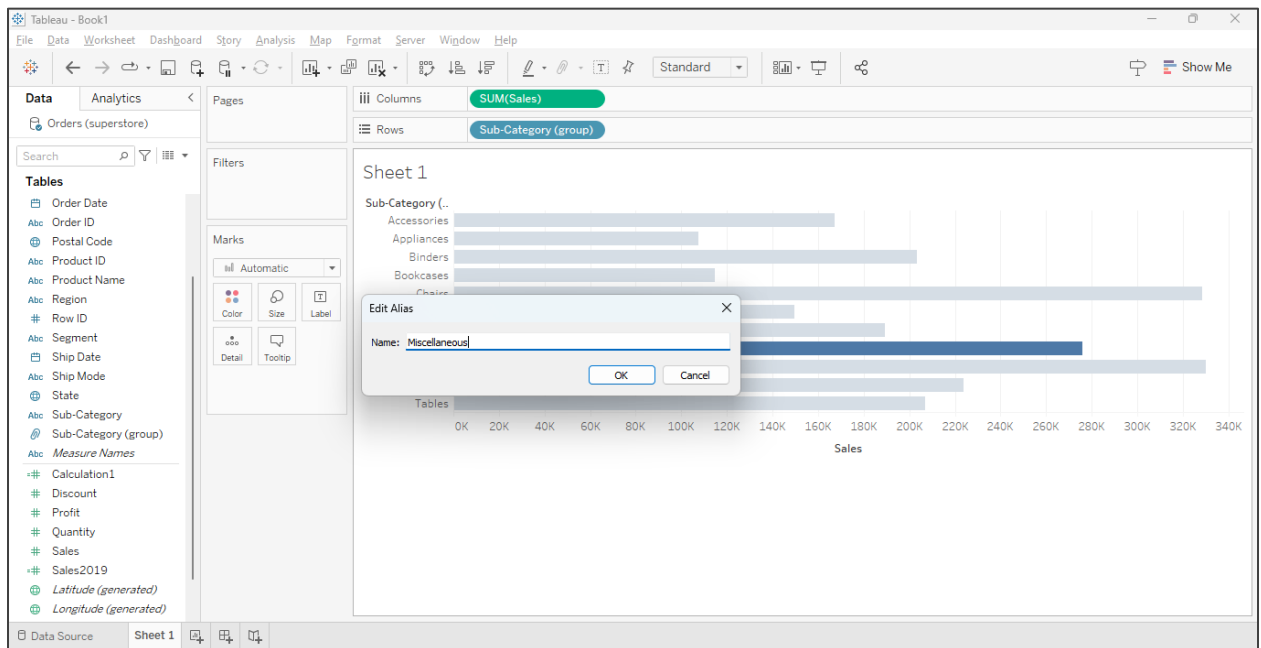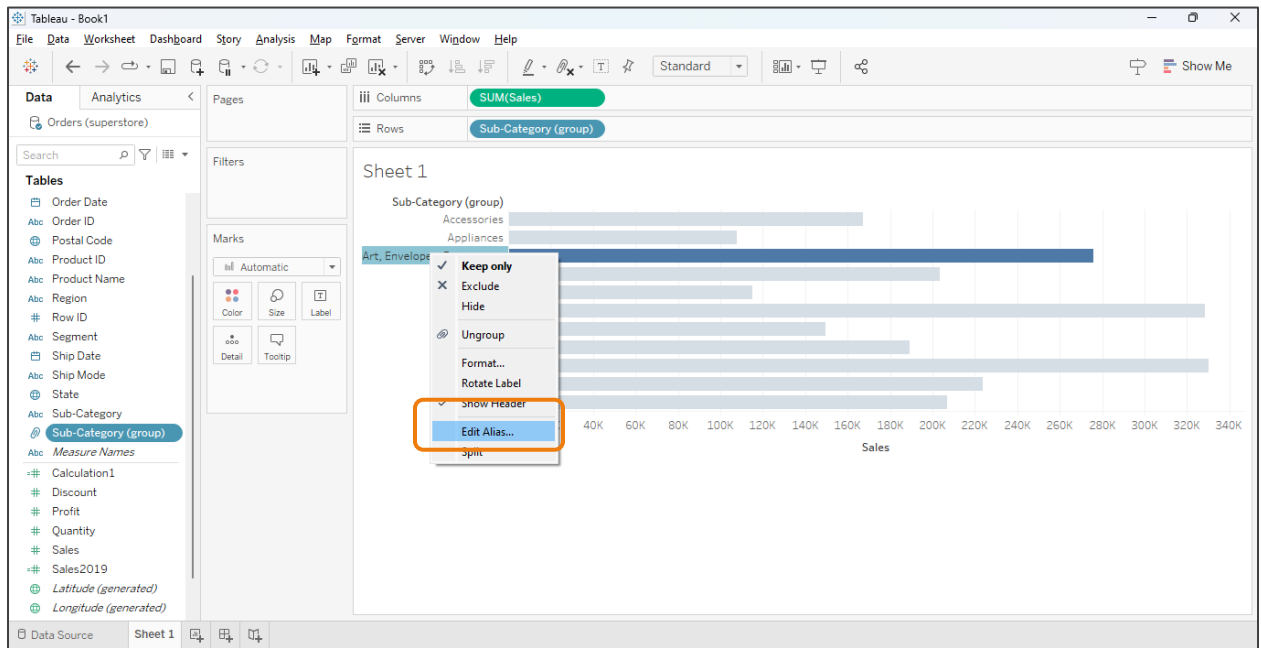
2.2   While holding the Shift key, click on **Fasteners** to include the last 7
       Sub-Categories in your selection

2.3   Right-click on the selected **Sub-Categories** and choose **Group** from
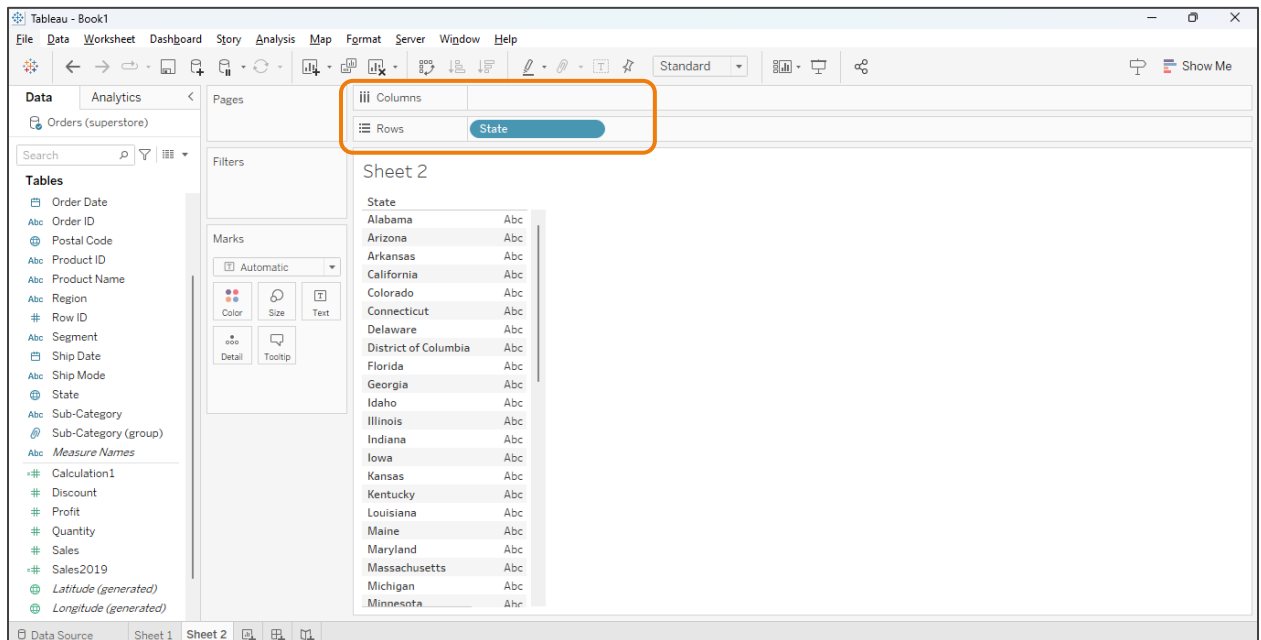   the context menu

2.4   Rename the group to **Miscellaneous** by right-clicking on the
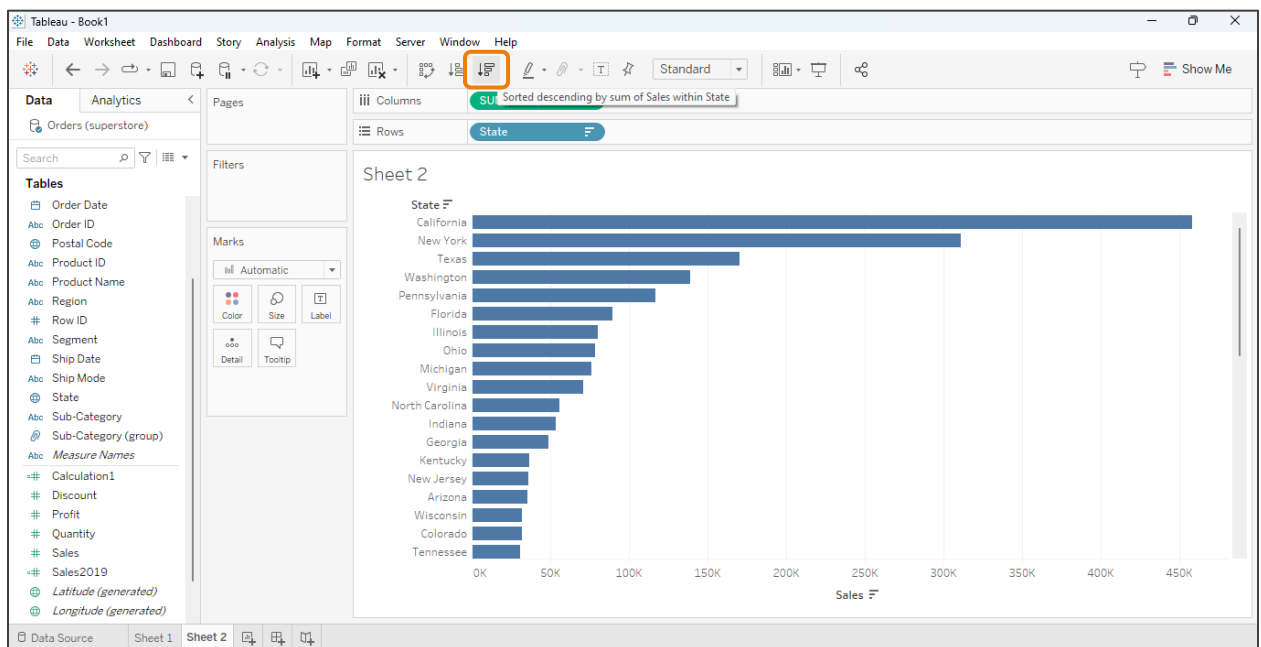   aggregated bar and selecting **Edit Alias**
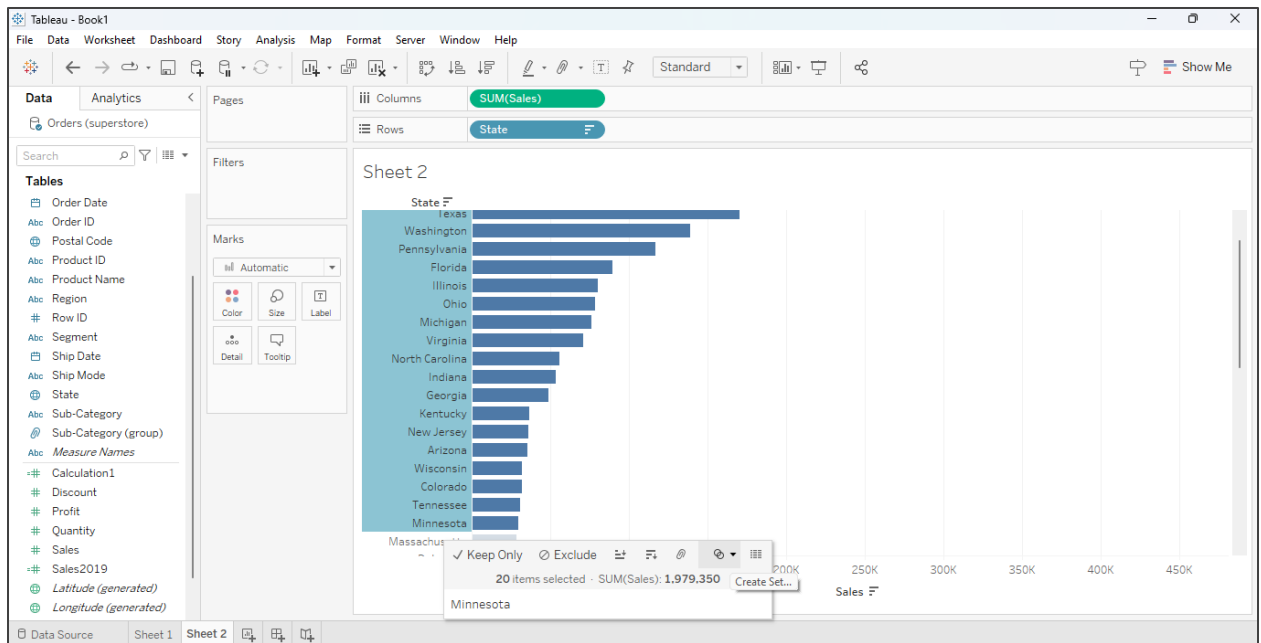

Step 3: Create a Fixed Set

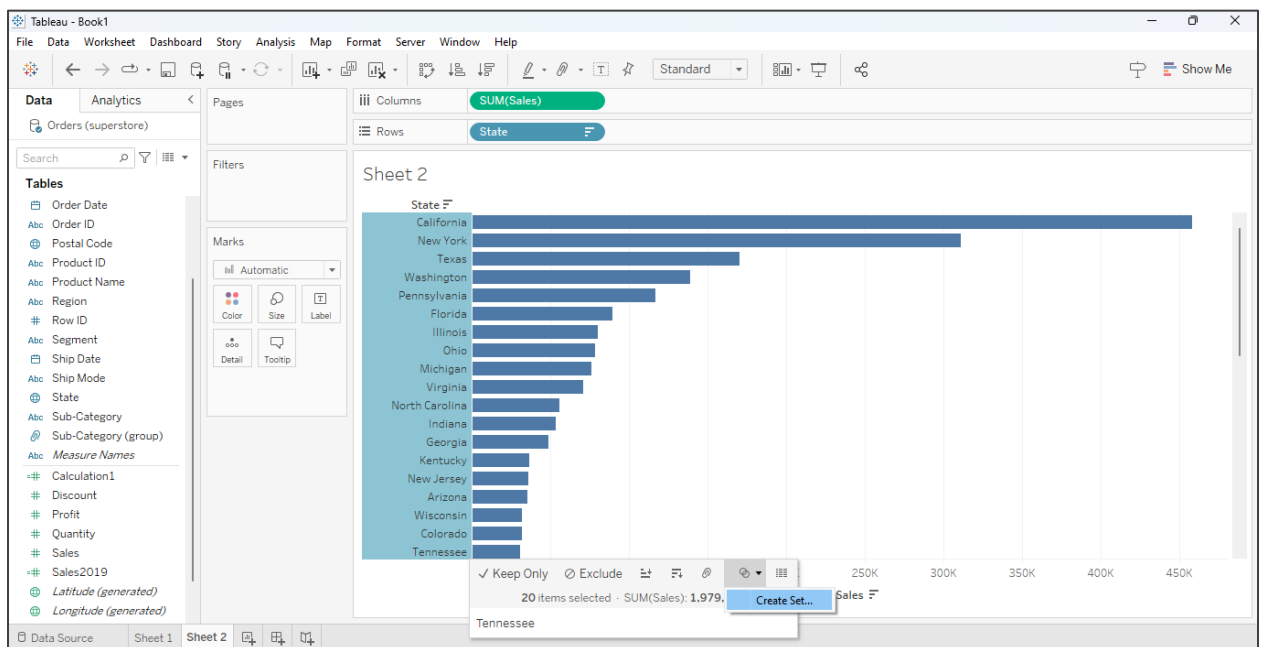3.1   Navigate to New sheet Drag **State** to Rows

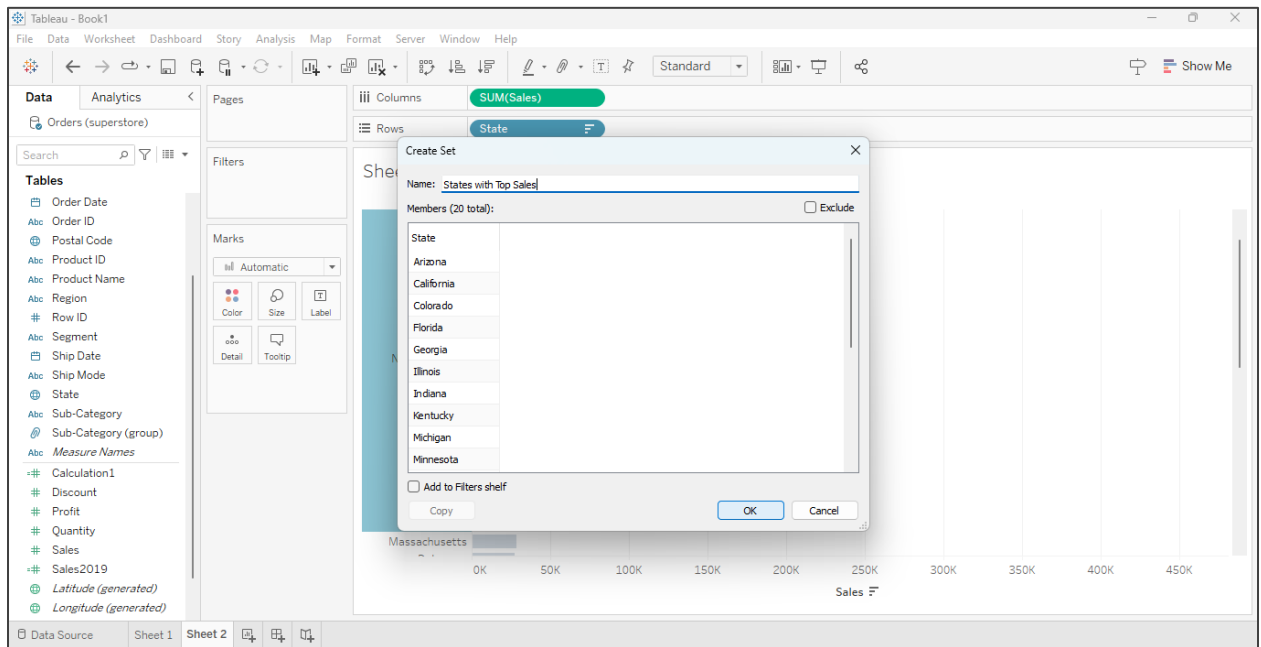**3.2** Drag **Sales** to Columns and **sort** the chart by **descending sales**

3.3 Use the **Shift key** to select the top 20 States from the list for inclusion in the set

3.4   Click on the **Set** icon that appears upon hovering over the selected
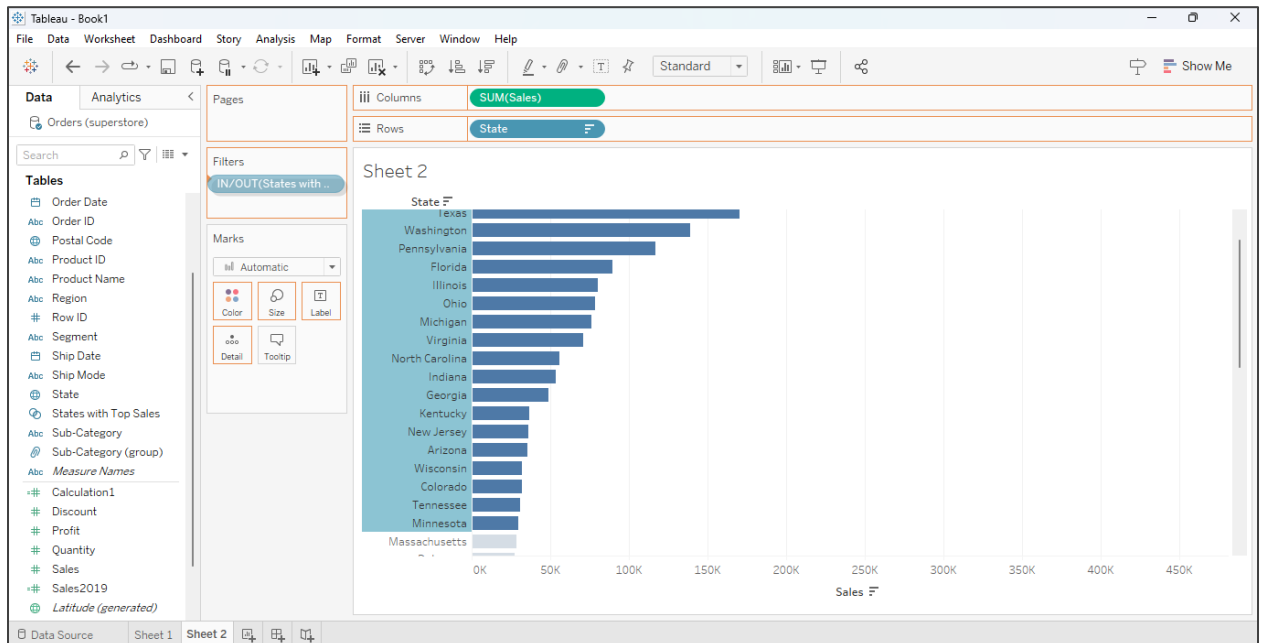States to initiate set creation

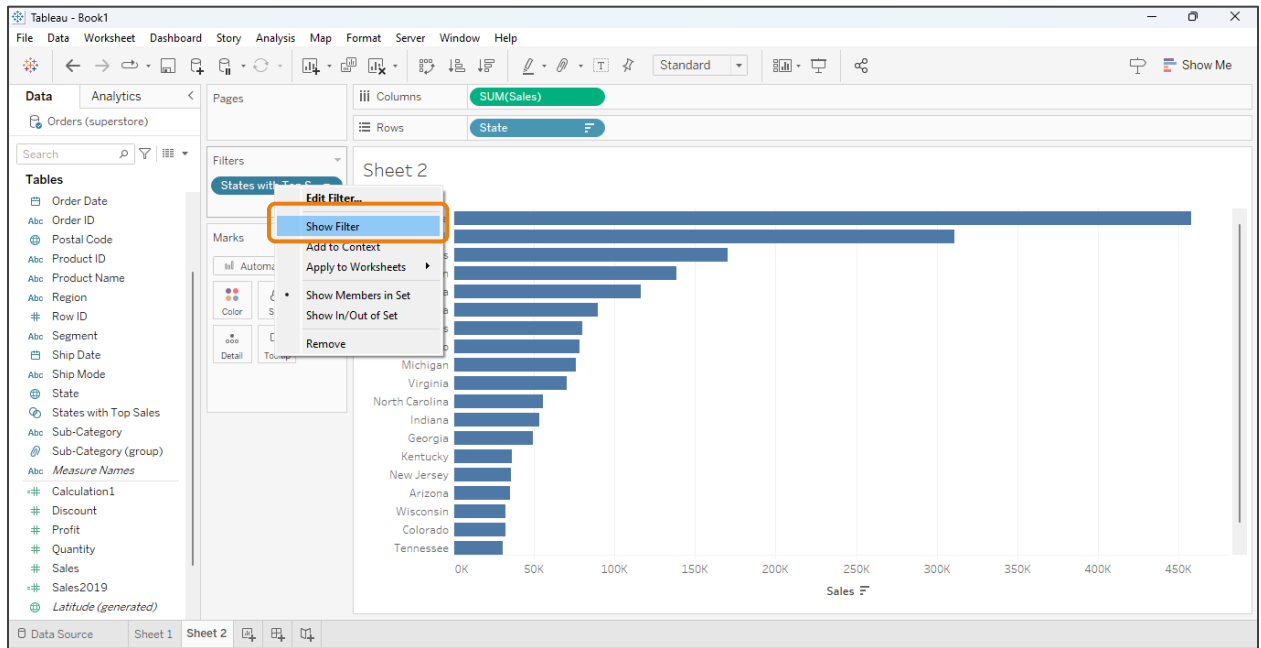3.5   Name the **Set States with Top Sales** and click **OK**

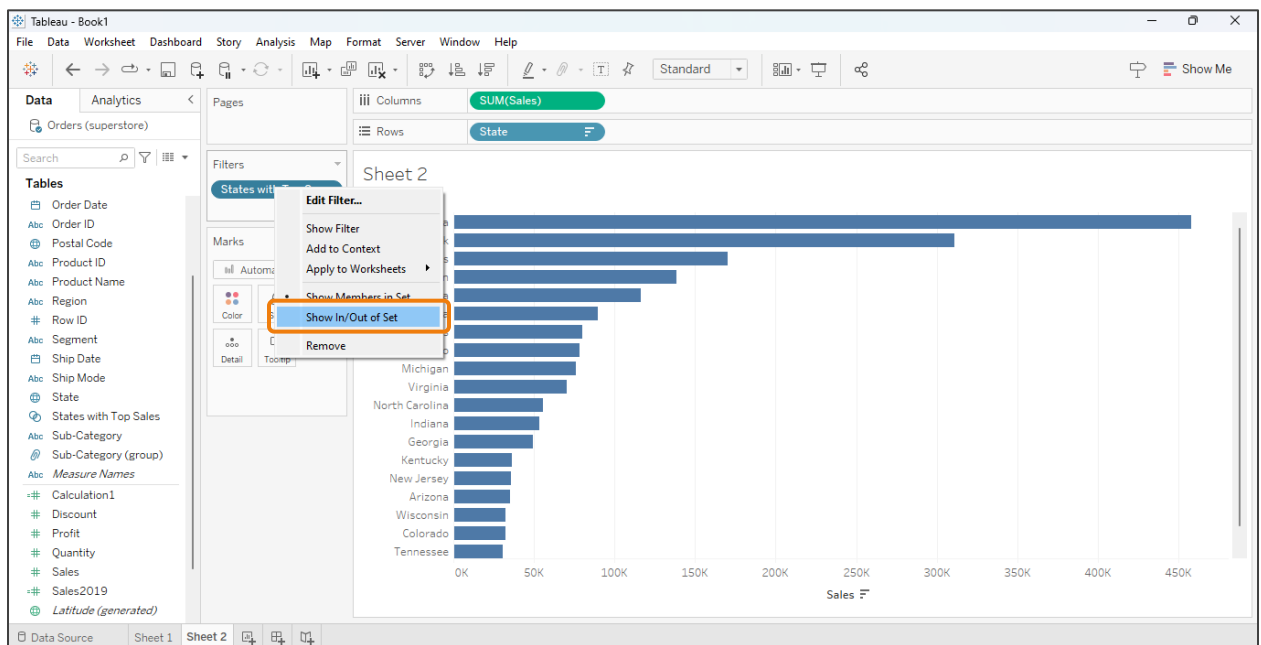## Step 4: Apply the Fixed Set as a filter

4.1   Move the **Set** to the Filter to isolate these states sales in the visualization
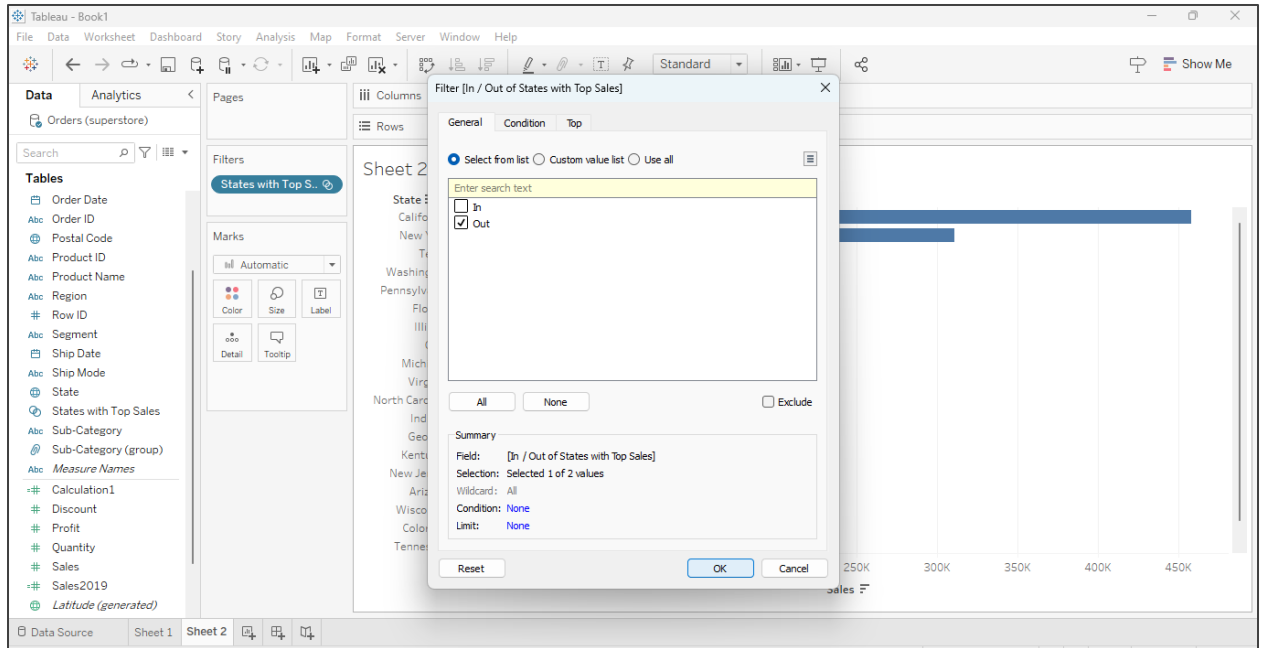
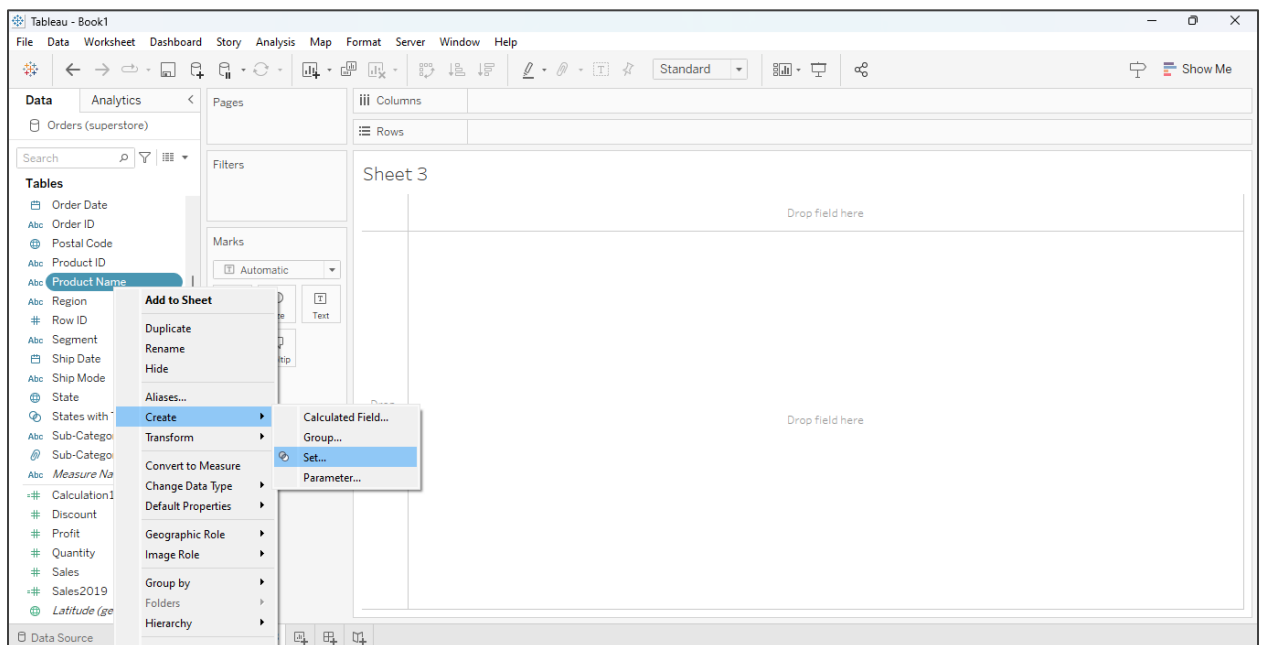## 4.2 Enable filter display by right-clicking and selecting **Show Filter**

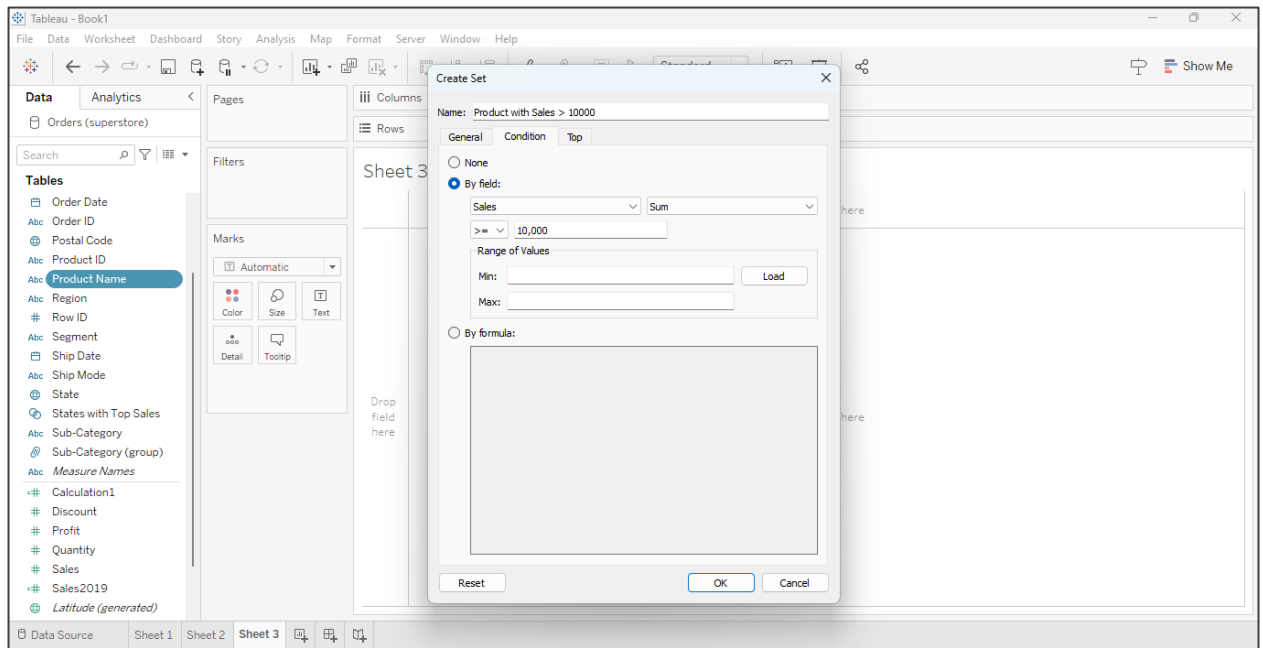## 4.3 Employ the **IN/OUT** functionality by adjusting the filter to show states outside the Set

Step 5: Construct a Dynamic Set

5.1   In a new Tableau Sheet, right-click on **Product name**, choose Create > Set, and name it **Product with Sales > 10000**
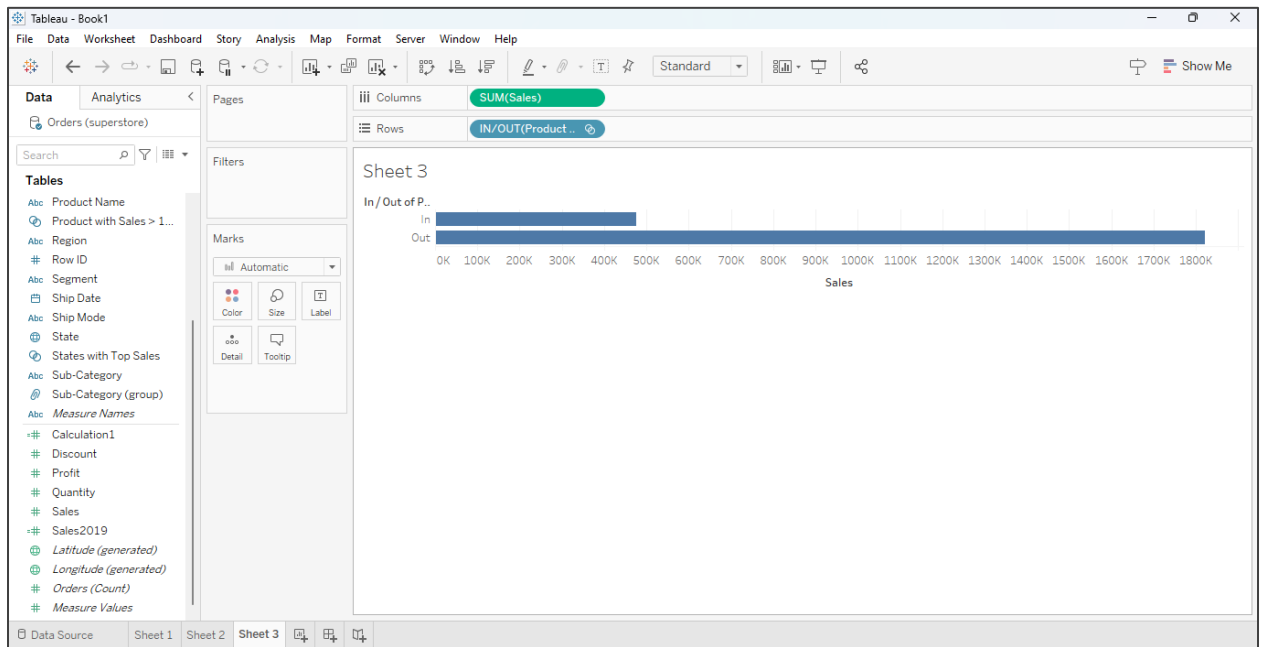
5.2   In the **Condition** tab, select the **Sales** field, set aggregation to Sum, and condition as **>= 10000** for the dynamic set criteria
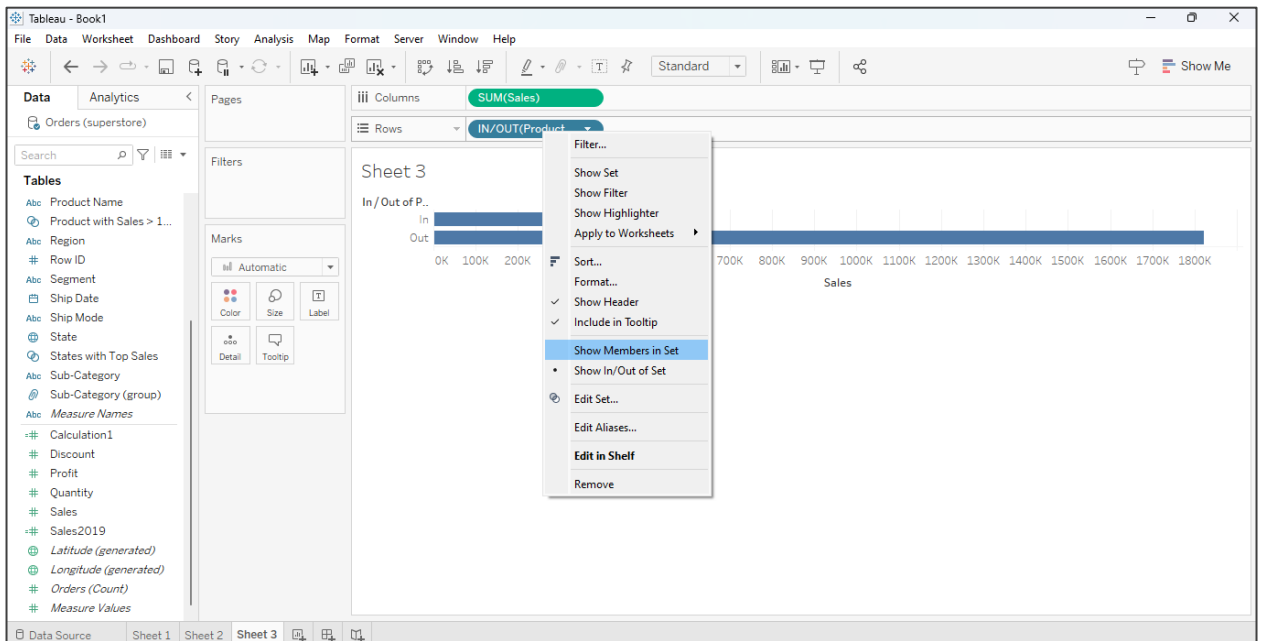

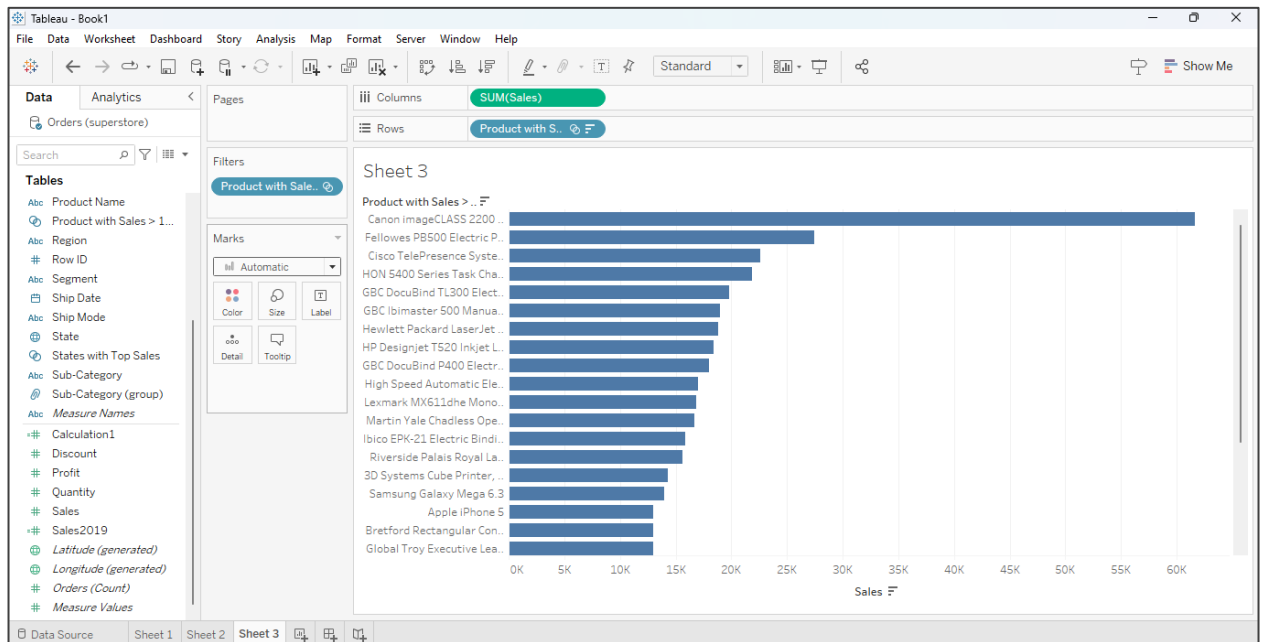## Step 6: Employ the Dynamic Set for enhanced analysis

6.1   Drag the **Dynamic Set** to Rows and **Sales** to Columns to visualize the sales distribution of products within the set

6.2   For detailed insights, right-click on the **Set** in Rows and select **Show Members in the Set**

The final output will appear as shown below:

With these steps, you will be able to enhance your analysis by effectively utilizing groups, sets, and filters in Tableau to gain deeper insights into your data.