

## Tableau Create Group, Hierarchy, Sets & Sort Data

In this tutorial, you will learn-

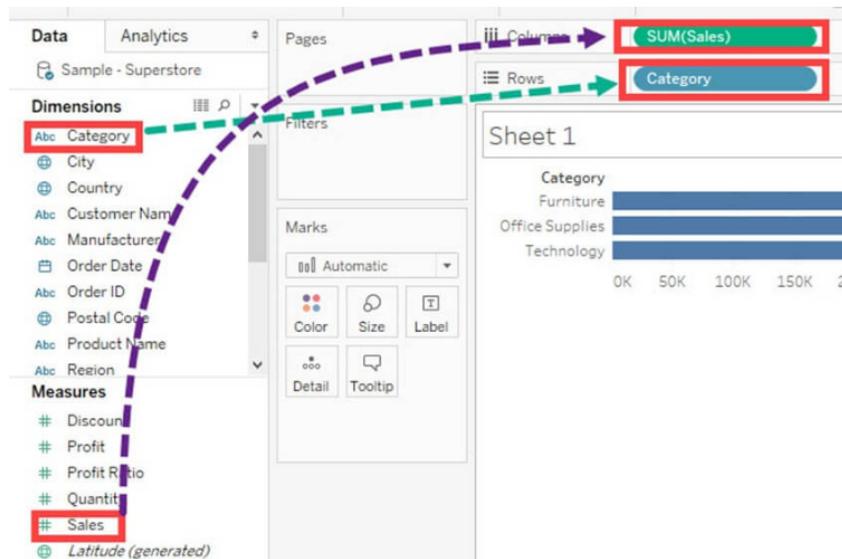
- Sort data
- Build groups
- Build Hierarchy
- Build Sets

### Sort data:

Data present in the visualization and worksheet can be sort based on the requirement. It can sort the data based on data source order, ascending, descending or depend on any measured value.

The procedure for sorting is given as follows.

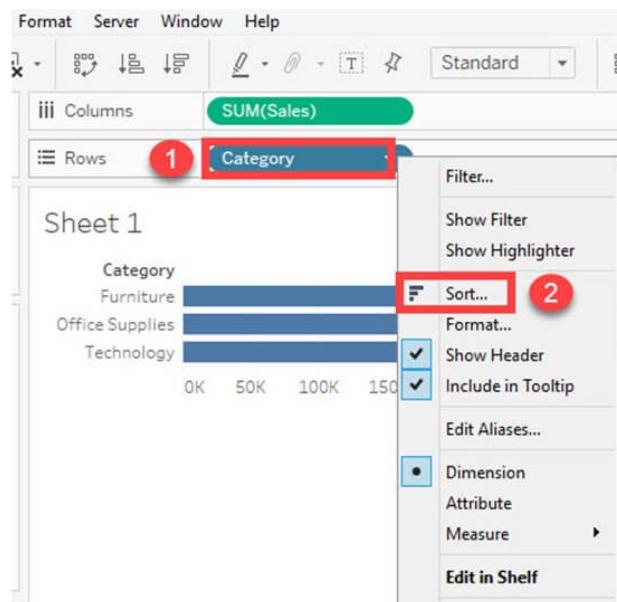
**Step 1)** Go to a Worksheet and drag a dimension and measure as given in the image.



It creates a bar chart by default. Category Present in the visual is sorted based on data source order by default. We can change the sort order by following the below procedure.

**Step 2)**

1. Right click on Category.
2. Select 'Sort' option.

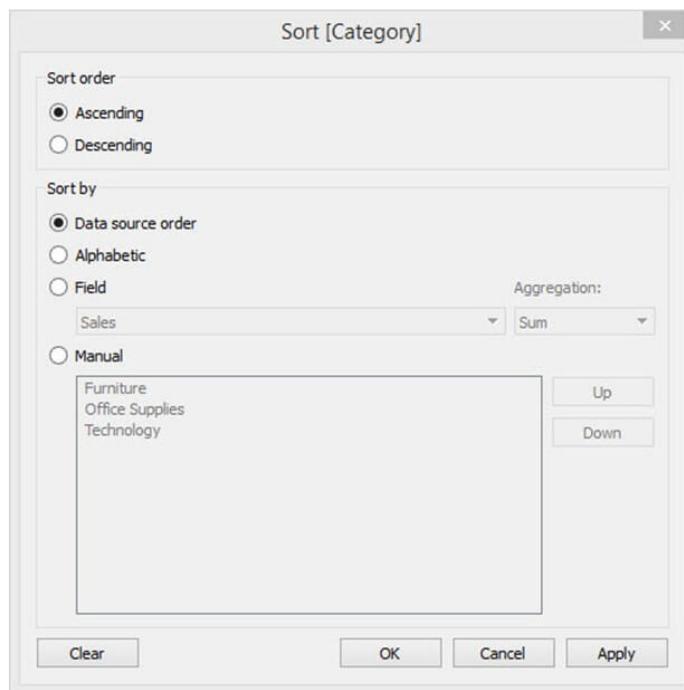


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It opens the Sort window. The options present inside the sort window is explained as follows.



#### Sort Order:

- Ascending: It sorts the order of selected dimension in ascending order.
- Descending: It sorts the order of selected dimension in descending order.

#### Sort by:

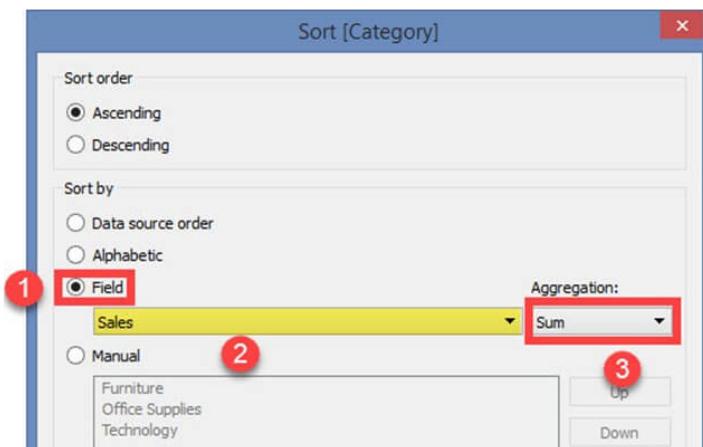
The field can be sorted by different types of methods. It is explained as follows.

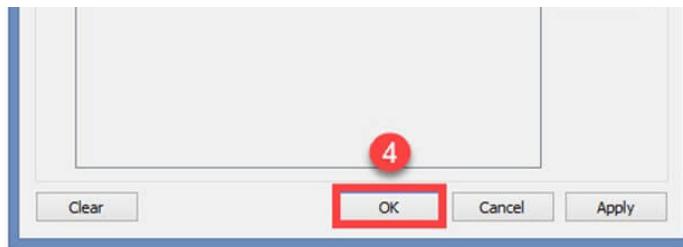
Data Source order	It sorts the field based on data source order.
Alphabetic	It sorts the field based on the alphabetic order.
Field	It sorts the field based on other dimension or measure values.
Manual	The user can manually sort the data using this option.

In this example, the category is sorted based on another field namely 'Sales.'

**Step 1:** In this window,

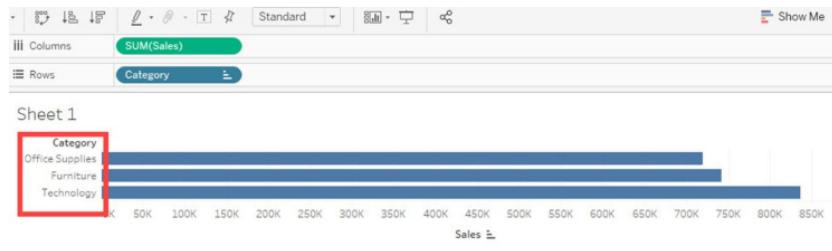
1. Click on 'Field' radio button.
2. Select the field on which the category is to be filtered.
3. Select the aggregation type.
4. Click on OK.





The above example filters the category field based on the sum of sales in ascending order.

It sorts the data as shown in the figure.

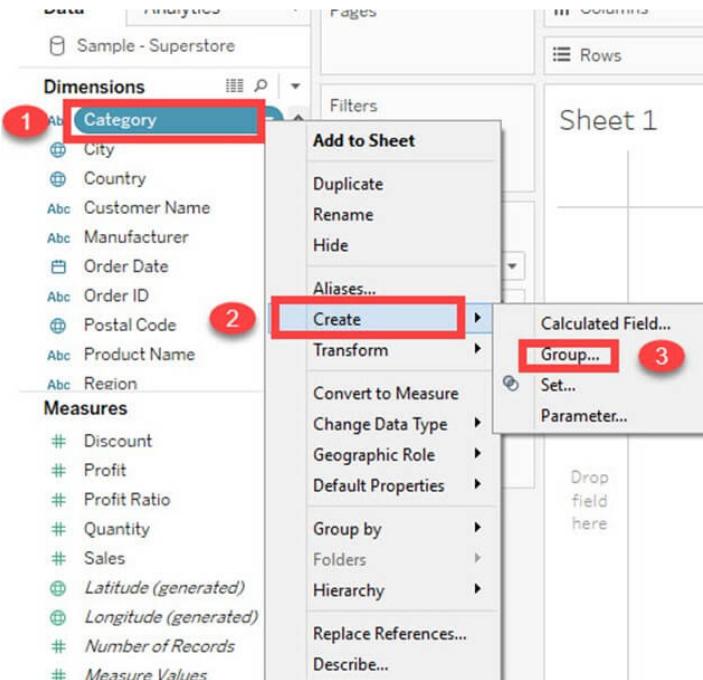


## Build groups:

Group is used to combine members present in a field. For example, aggregated values of 'Furniture' and 'Office Supplies' can be obtained by using group. Once the group is built, aggregated value of 'Furniture' and 'Office Supplies' can be shown in the visuals. The procedure to build group is given as follows.

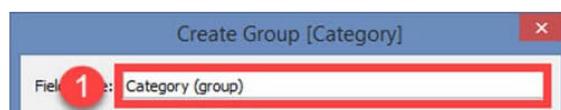
### Step 1)

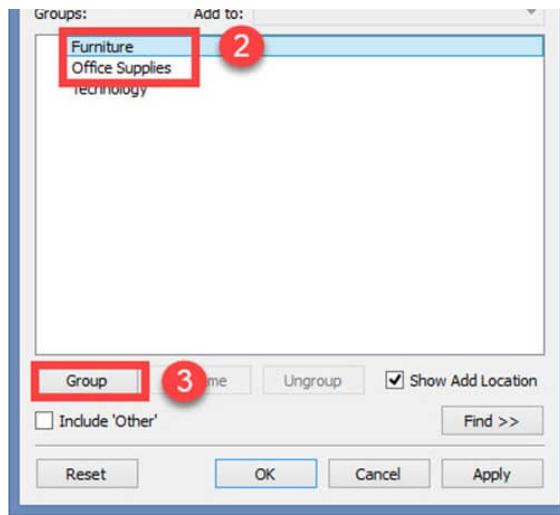
1. Right-click on the dimension 'Category'.
2. Click on 'Create' option.
3. Select 'Group' option.



**Step 2)** It opens the 'Create group' window.

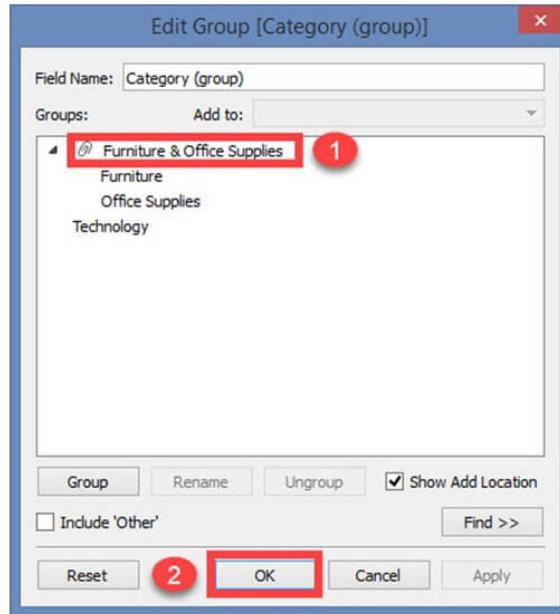
1. Type the name of the group.
2. Select the members to be grouped.
3. Click on 'Group' button.





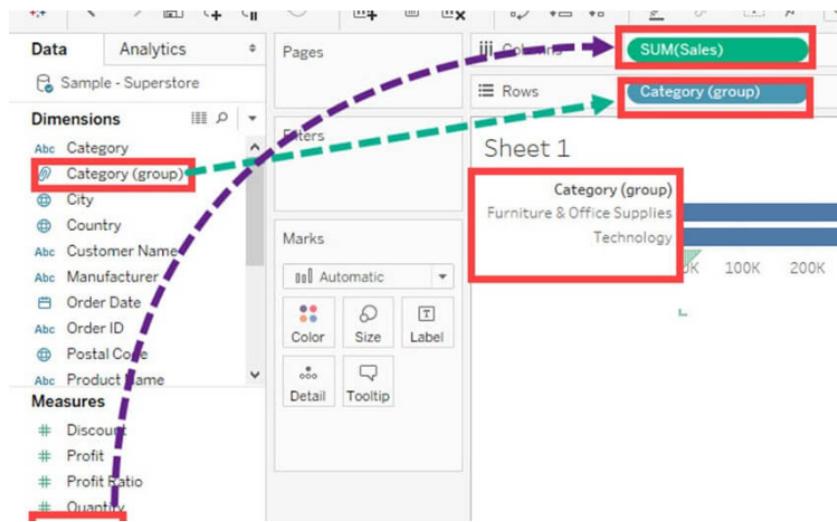
**Step 3) In Edit Group Window,**

1. It creates a group of 'Furniture' and 'Office supplies'.
2. Click on Ok to create the group.



It created a group in the name of Category (Group) and added in the dimension list. This can be used for visualizing the group of members present in a field.

The following image explains the functionality. The sum of sales is visualized for both furniture and office supplies.



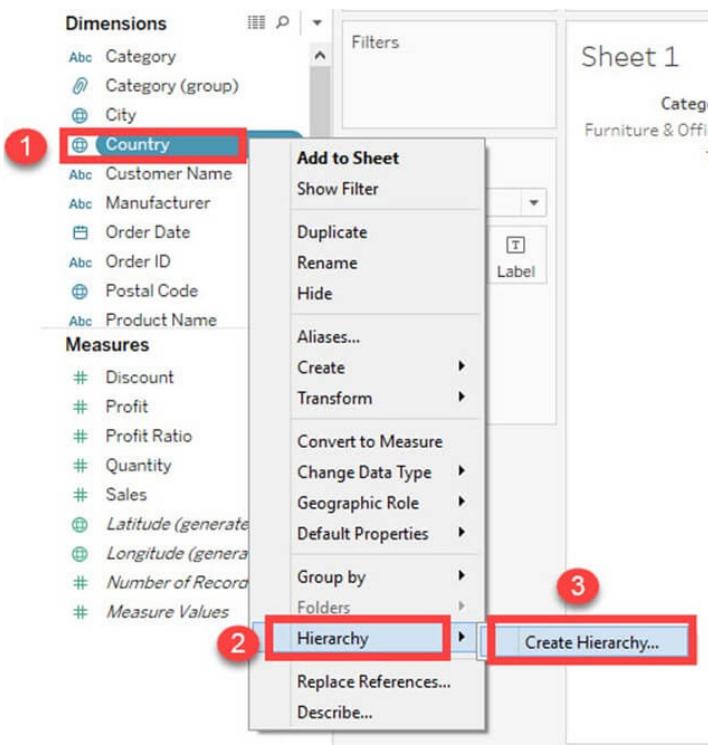


## Build Hierarchy:

Hierarchies can be built in Tableau to visualize the data in granular level. It can be created in tableau by following the given steps.

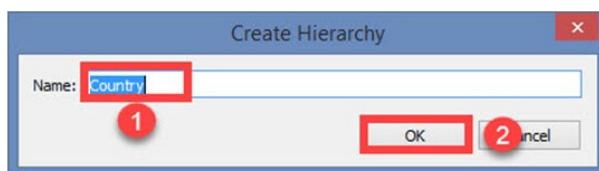
**Step 1)** Go to a worksheet.

1. Select a dimension to create a hierarchy. Right-click on the dimension.
2. Select 'Hierarchy' option.
3. Click on 'Create hierarchy' option.

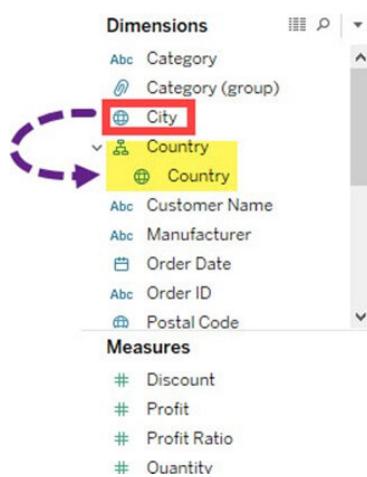


**Step 2)** It opens the 'Create Hierarchy' Window.

1. Enter a name for hierarchy.
2. Click on OK.



It creates a Hierarchy as shown in the image.



- # Sales
- ⌚ Latitude (generated)
- ⌚ Longitude (generated)
- # Number of Records
- # Measure Values

You can add another field to the box and create the hierarchy. In this example, the city is added into a country hierarchy.

The Dimensions pane shows a tree structure of fields. A red box highlights the 'Country' node under the 'Dimensions' category. This node has two children: 'Country' and 'City'. Other visible nodes include 'Category', 'Category (group)', 'Customer Name', 'Manufacturer', 'Order Date', 'Order ID', and 'Postal Code'.

## Build Sets:

Sets create a set of members out of the field present in a data set. It acts as a separated field or dimension. The procedure to build sets is given as follows.

**Step 1)** Go to a Worksheet.

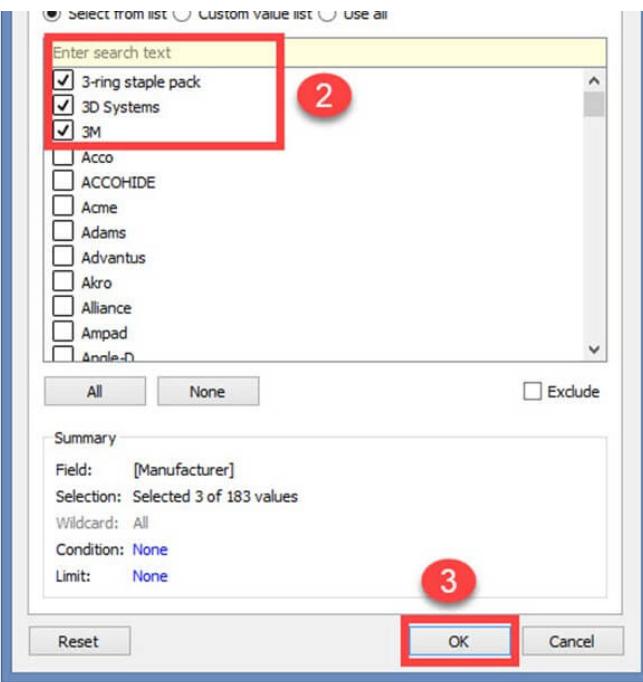
1. Right-click on a dimension.
2. Select 'Create' option.
3. Click on 'Set' option.

A screenshot of a worksheet interface. On the left, there's a 'Dimensions' pane with various fields listed. In the main area, 'Manufacturer' is selected and highlighted with a red box. A context menu is open over 'Manufacturer', with the 'Create' option highlighted by a red box. A sub-menu for 'Create' is displayed, containing options like 'Calculated Field...', 'Group...', 'Set...', 'Parameter...', etc. The 'Set...' option is also highlighted with a red box.

**Step 2)** It opens 'Create Set' Window.

1. Name the set to be created.
2. Select the members needs to be added in the set.
3. Click on OK.

A screenshot of the 'Create Set' dialog box. At the top, it says 'Create Set'. Below that, there's a 'Name:' input field containing 'Set 1', which is also highlighted with a red box and has a red circled '1' above it. Below the input field are three tabs: 'General', 'Condition', and 'Top'. The 'General' tab is currently selected.



This creates a set of the given name.

#### Summary:

- Users can sort the fields present in the data set.
- Groups can be built to group the members present in a dimension.
- Users can build hierarchy to show the granularity level present in the dataset.
- Sets can be created to select or exclude one or more members from a field. A set can be added as a separate dimension in Tableau.

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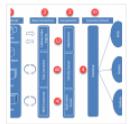


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