Lesson 4 - Exercise 4.2: Grouping, Alias, and Sets
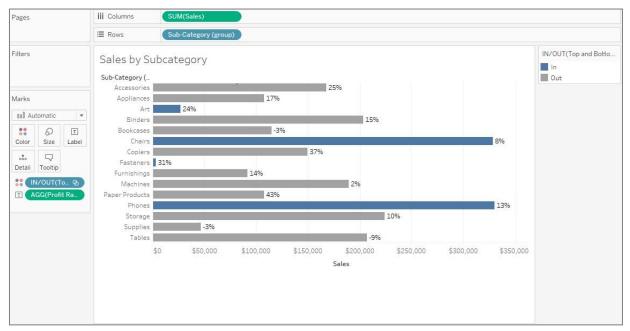
Business Scenario

The sales manager of a leading retail company wants to launch an end-of-season sales initiative to encourage the sale of products. As a part of this initiative, she wants to examine the combined sales for envelopes, labels, and papers. In addition to this, she wants to view the combined top 2 and bottom 2 sub-categories based on sales. Create a view showing the accumulated sales for paper products and answer the following questions:

- Which are the bottom 2 products?

- What is the profit ratio for supplies?

Overview

- Create a view with **Sub-Categories** and **Sales.**
- Create a group called **Paper Products,** including **Envelopes**, **Labels**, and **Paper**.
- Create two sets to represent the top 2 and bottom 2 products.
- Combine those sets and place it on **Color**.
- Label the view by **Profit Ratio**.

The final result should resemble the image below:

Sales by Subcategory

Sub-Category (..	Sales	Label
Accessories		25%
Appliances		17%
Art		24%
Binders		15%
Bookcases		-3%
Chairs		8%
Copiers		37%
Fasteners		31%
Furnishings		14%
Machines		2%
Paper Products		43%
Phones		13%
Storage		10%
Supplies		-3%
Tables		-9%

Detailed Instructions

1. Open **Tableau 10.x** (You can go to Start Menu -> All Programs -> Tableau 10.x).
2. From the home page, connect to the saved **Sample - Superstore** dataset.
3. To create a view, in Sheet 1, drag **Sub-Category** to the Rows shelf and **Sales** to the Columns shelf.
4. Holding the **Control** key, select **Envelopes, Labels,** and **Paper** sub-categories.
5. To group these items, click on the paper clip icon on the toolbar and select **Sub-Category**.
6. Right-click on the **Envelopes, Labels, Paper** field in the view, and select **Edit Alias**.
7. Name the group as **Paper Products**.
8. Click **OK**.
9. To create a set, right click **Sub-Category(Group)** and select **Create > Set**.
10. Enter the name **Top 2 Subcategories**.
11. Navigate to the **Top** tab.
12. Select **By field**, make sure **Top** is selected, and enter value as 2.
13. Select **Sales** from the drop-down list and **Sum** as aggregation.
14. Click **OK.**
15. To create the bottom 2 set, repeat steps 9 to 14. This time, change **Top** to **Bottom**.
16. To combine these sets, under Sets, press **CTRL** and select these sets.
17. Next, right click and select **Create Combined Sets**.

18. Enter the name **Top and Bottom**.
19. Make sure the first radio button is selected and Click **OK.**
20. Drag this newly created set to **Color**.
21. Drag the **Profit Ratio** measure to the Label shelf.
22. Rename the worksheet as **Sales by Sub-Category.**
23. Close the workbook.

Answers

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

- Which are the bottom 2 products based on Sales?
  Answer – **Art** and **Fasteners**

- What is the profit ratio for supplies?
  Answer – **-3%**