ORGANISE YOUR DATA

Groups & Bins

Group

- Group simplifies large numbers of dimension members by combining them into higher-level categories.

- You can use the group field like other fields in the view, adding it to the Columns or Rows shelves, to the Marks card, or to the Filters shelf.

- Groups are static values and the members of the group donot change automatically. If you need to add or remove any member of the group, you have to manually do it.

Creating groups

A Group can be created by selecting headers in the view or selecting marks.

A Group can be created from a dimension in the Data pane. Regardless of how you create a group, a new group field is added to the Data pane.

A group field can be created like other fields in the view, adding it to the Columns or Rows shelves, to the Marks card, or to the Filters shelf.

When a group is created by selecting headers or marks in the view, the view is updated to use the grouped field.
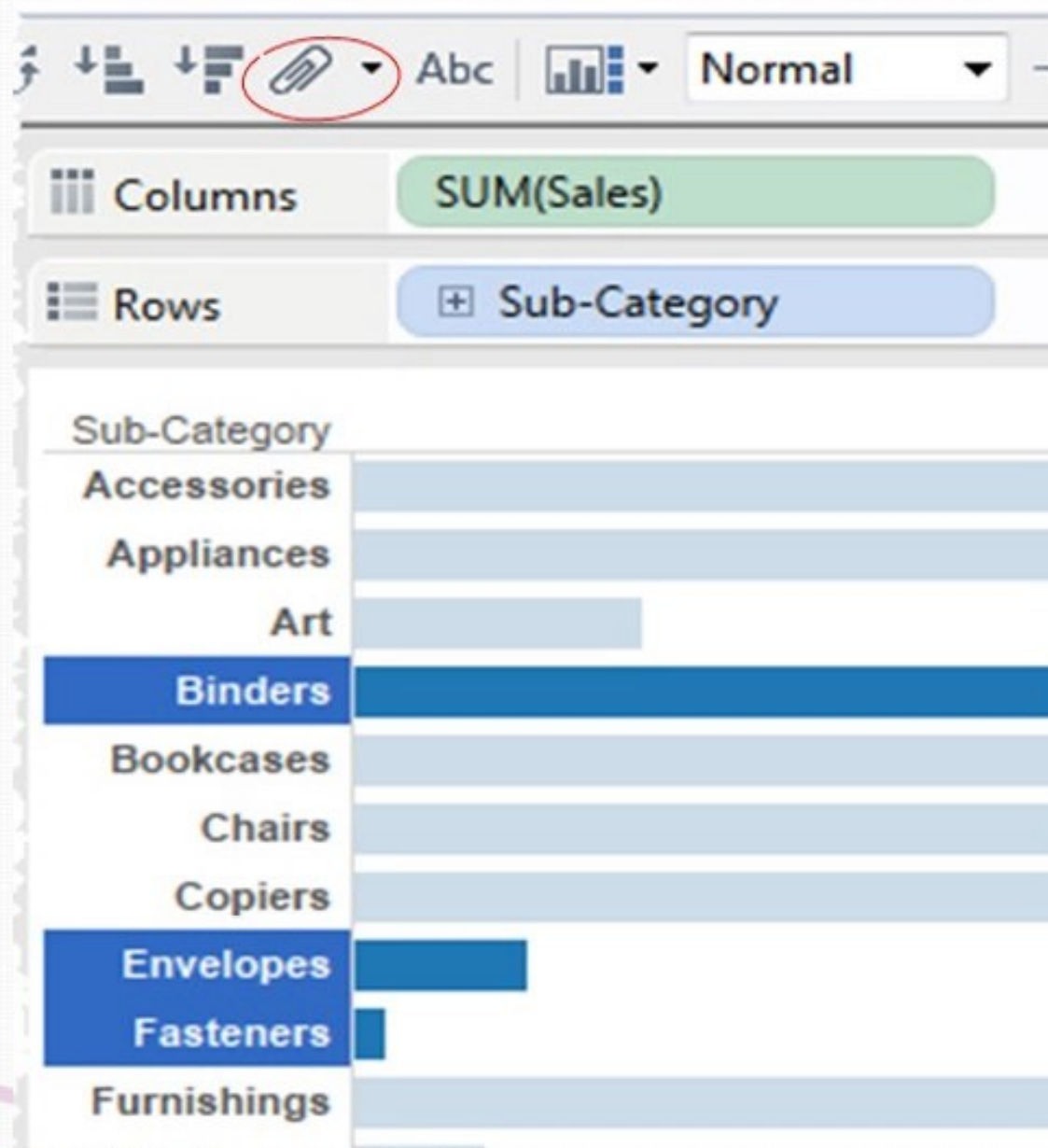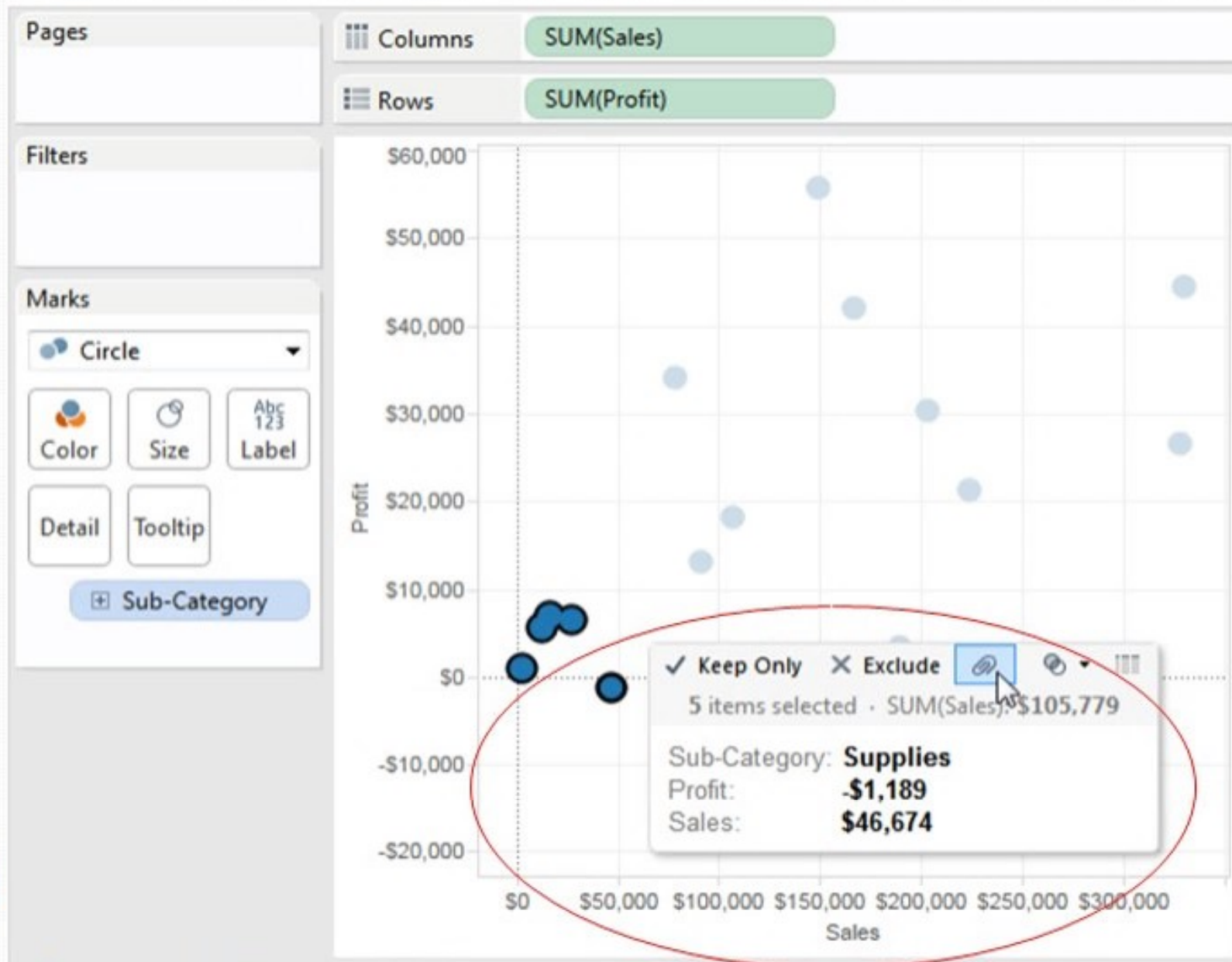
How to group Dimensions

1.Press and hold the Command key on the keyboard to multi-select headers in the view.

2.Click the **Group** button 📎 on the toolbar.

Alternatively, you can right-click and select **Group** or click the **Group** icon on the tooltip.

Pages

Columns | SUM(Sales)

Rows | SUM(Profit)

Filters

Marks

Circle ▼

| Color | Size | Abc 123 Label |

| Detail | Tooltip |

⊞ Sub-Category

Profit

$60,000

$50,000

$40,000

$30,000

$20,000

$10,000

$0

-$10,000

-$20,000

✓ Keep Only   ✗ Exclude   📎   ⊘ ▼   ⎢⎢⎢

5 items selected · SUM(Sales): $105,779

Sub-Category: **Supplies**
Profit: **-$1,189**
Sales: **$46,674**

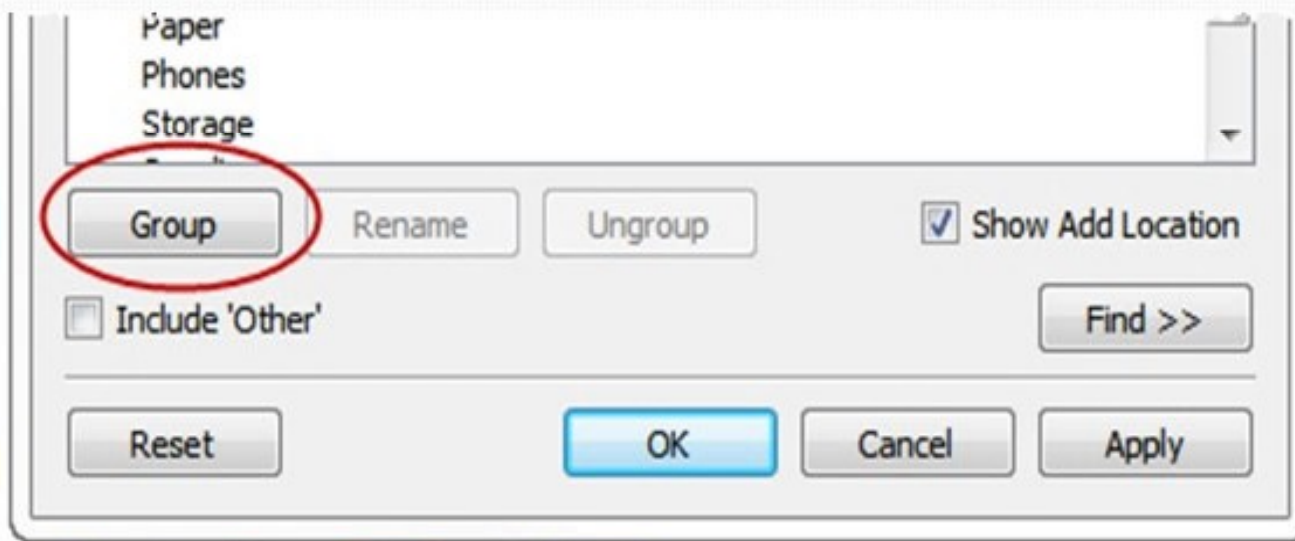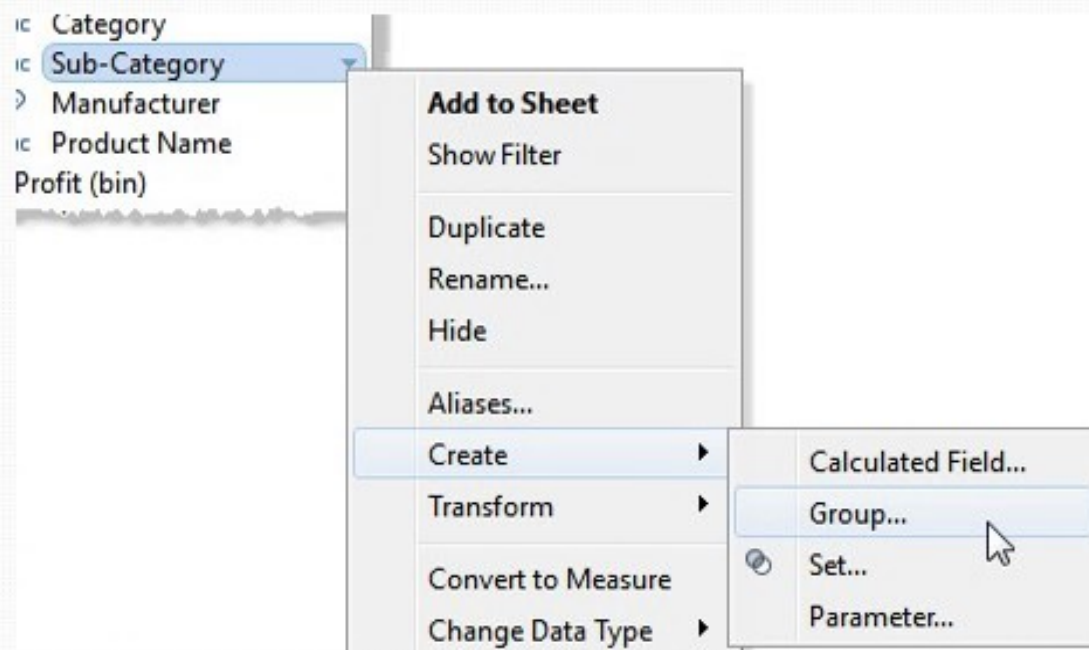$0 $50,000 $100,000 $150,000 $200,000 $250,000 $300,000

Sales

Create group in data pane

A Group can be created directly from a dimension in the **Data** pane.

1) Right-click a dimension in the **Data** pane and select **Create** > **Group**.

2) In the Create Group dialog box, select several members that you want to group. Press and hold the Command key on your keyboard to select multiple members.

3) Click the **Group** button at the bottom of the dialog box.

IC Category
IC Sub-Category ▼
> Manufacturer
IC Product Name
Profit (bin)

Add to Sheet	
Show Filter	
Duplicate	
Rename...	
Hide	
Aliases...	
Create ▶	Calculated Field...
Transform ▶	Group...
	Set...
Convert to Measure	Parameter...
Change Data Type ▶	

Paper
Phones
Storage

Group	Rename	Ungroup	☑ Show Add Location

☐ Include 'Other'   Find >>

Reset   OK   Cancel   Apply

Groups- Hands On

- Create a group (wooden) with chairs and tables and show the Sales.

- Create a group Stationery with all the relevant sub Categories in it.

Groups- Hands On

Edit Group [Sub-Category (group)]

Field Name: Sub-Category (group)

Groups: Add to: [▼]

- Accessories
- Appliances
- Art
- ▷ 📎 Papers
- Bookcases
- ▷ 📎 Wooden
- Copiers
- Fasteners
- Furnishings
- Labels
- Machines
- Phones
- Storage
- Supplies

[Group] [Rename] [Ungroup]   ☑ Show Add Location

☐ Include 'Other'   [Find >>]

[Reset]   [OK]   [Cancel]   [Apply]

Pages

Columns

Rows   Sub-Category (group)

Filters

Marks

Abc Automatic ▼

Color | Size | Abc 123 Text

Detail | Tooltip

Abc 123 SUM(Sales)

Sub-Category (group)	
Accessories	167,380
Appliances	107,532
Art	27,119
Bookcases	114,880
Copiers	149,528
Fasteners	3,024
Furnishings	91,705
Labels	12,486
Machines	189,239
Papers	298,368
Phones	330,007
Storage	223,844
Supplies	46,674
Wooden	535,415

- If you click on 'Include Other' option in group window the VIZQL will group all the remaining dimensions into Other group. This is very useful for comparative analysis.
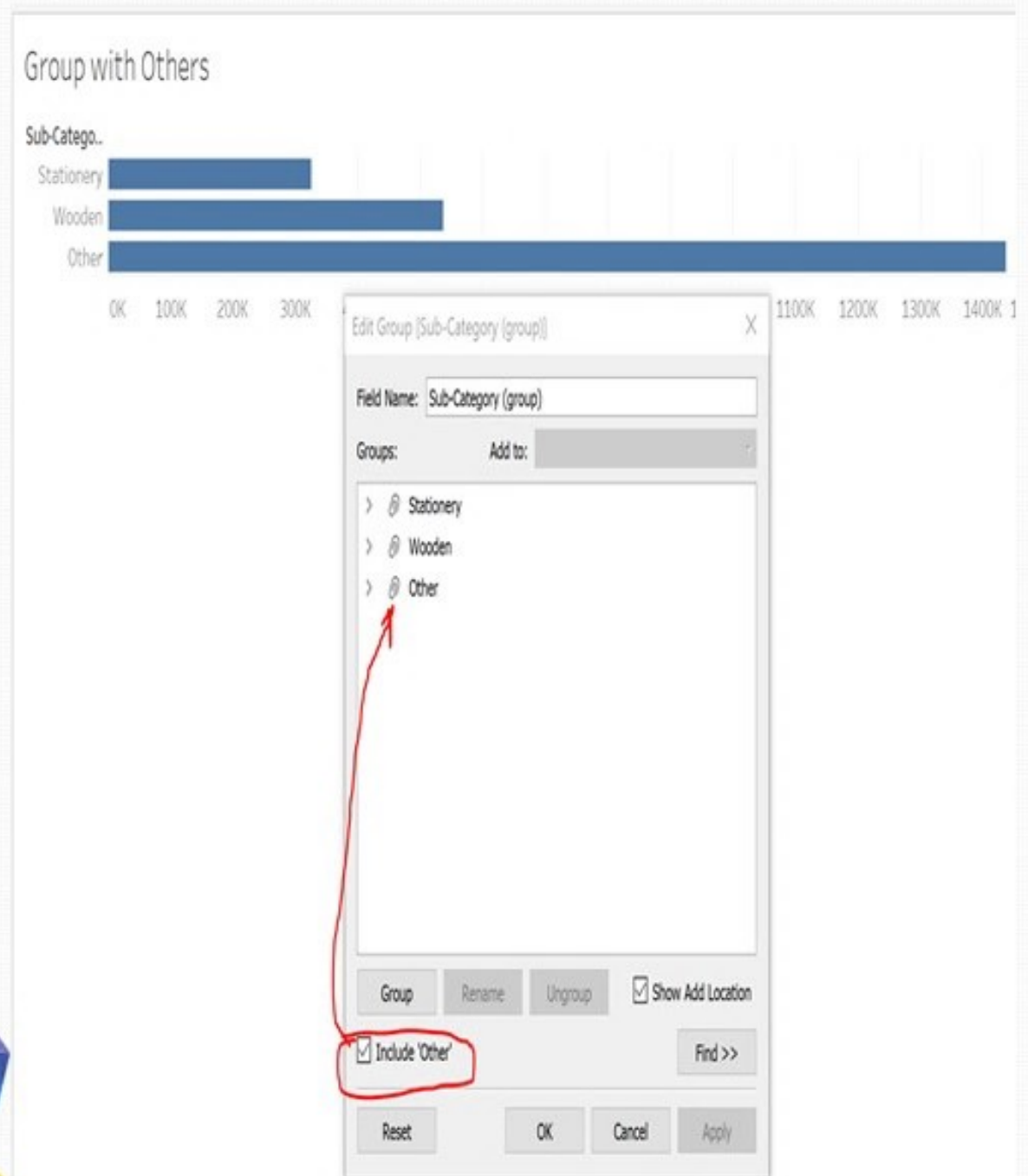
Bins

- One way to view a measure in Tableau Desktop is to split it into bins. Bins can be said as buckets based on a range of values.

- By default, Tableau looks into the min and the max measure values and creates even-sized bins based on a size you specify.

- Bins are created on Continuous measures only. Bins once created results in a dimension.

- Bins are of 2 types: Fixed Size Bins and Variable Size Bin. You can even add a parameter to change the bin size.
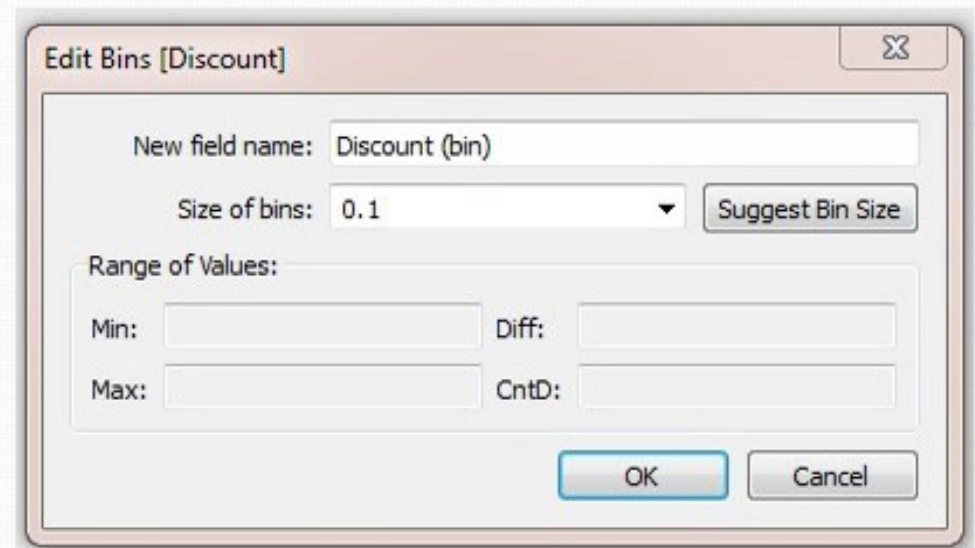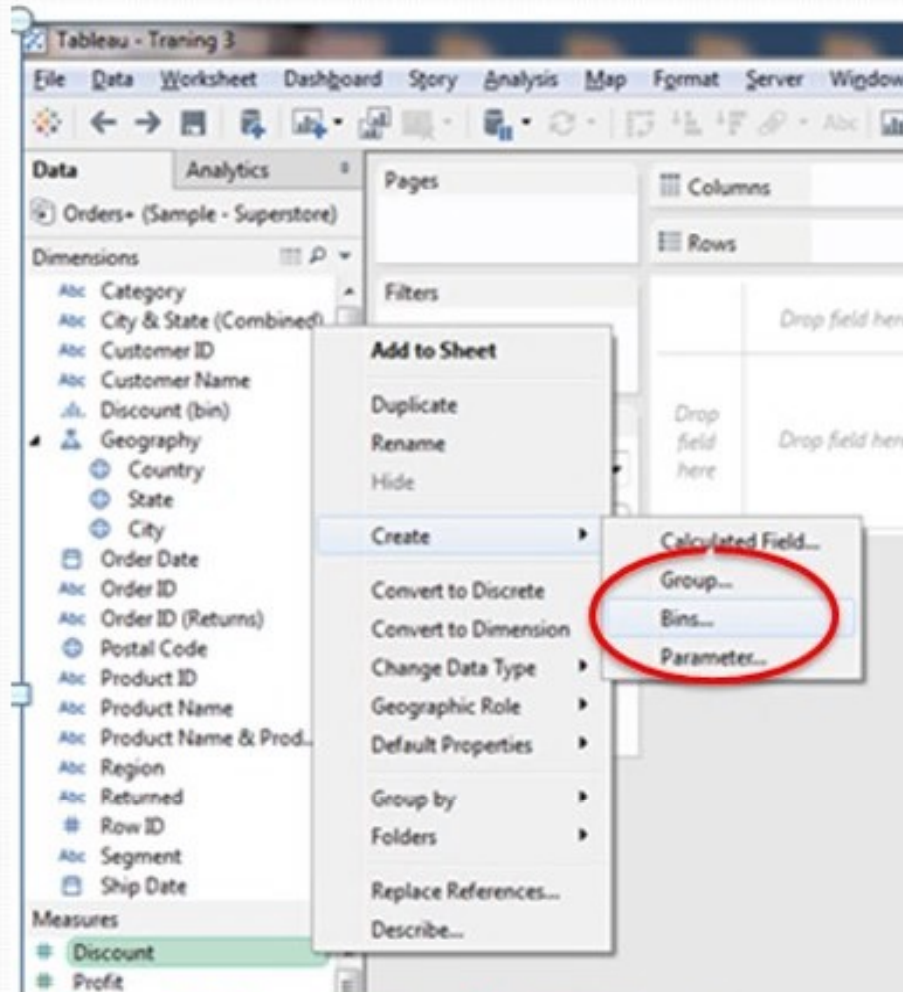
Fixed sixe bins

- Fixe size bins can be created by specifying the size of each bin in the Create Bin Window.

- By default, Tableau creates even sized bins based on the size you specify.

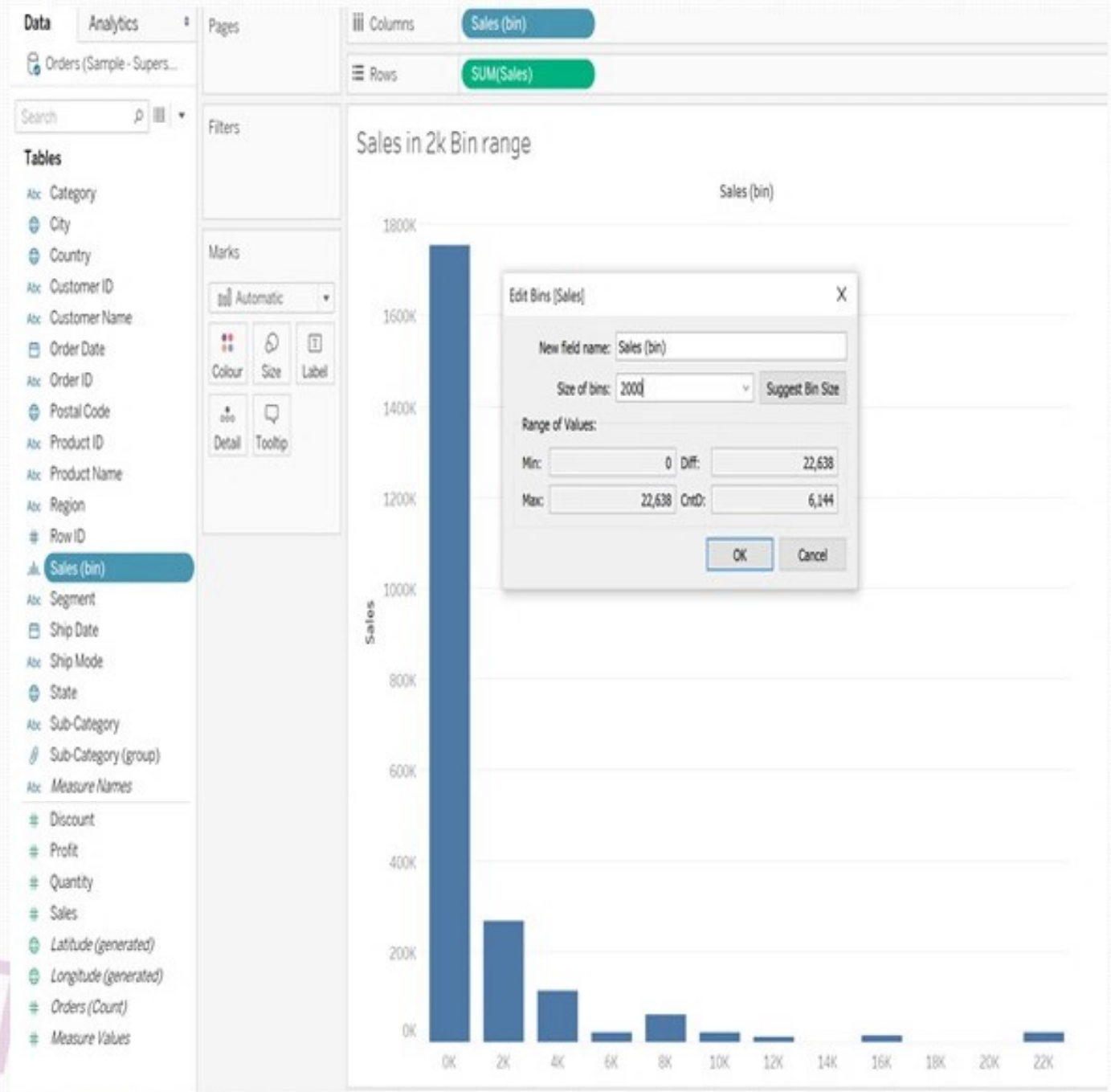- But you can manually also decide the bin size for your measures.

Bins- Hands On

- Create a Discount bin of size 10 each.

Exercise -2

- Bin the Sales in 2000 range.

Variable Size Bins

- To create a Variable size Bin we create a calculated field with an appropriate script, or you can add a parameter to change the bin size from the end user perspective.

Exercise - 3

- Create a Sales Bin at 500 range, to show the distribution of Sales range.

Step : 1

Sales bin with parameter

Drop field here

Edit Bins [Sales]

New field name: Sales (bin with Parameter)

Size of bins: *Create a New Parameter...*

Range of Values:

Min: 0 | Diff:
Max: 22,638 | CntD:

OK

Drop field here

Create Parameter ✕

Name: Sales Bin Parameter | Comment >>

Properties

Data type: Float

Current value: 500

Value when workbook opens: Current value

Display format: Automatic

Allowable values: ○ All ○ List ● Range

Range of values

☑ Minimum: 500 | Set from Parameter ▸
☑ Maximum: 5,00,000 | Set from Field ▸
☑ Step size: 500

OK | Cancel

Step : 2

Columns — Sales (bin with Pa.. ▾

Rows — SUM(Sales)

Sales with Bin Size of 3,500

Sales Bin Parameter

3,500

(Y-axis: Sales — 2000K, 1800K, 1600K, 1400K, 1200K, 1000K, 800K, 600K, 400K, 200K, 0K)

(X-axis: 0, 3500, 7000, 10500, 14000, 17500, 21000)