



On-Demand Training: Grouping Transcript

Welcome to this video on Grouping. You can download the Exercise workbook to follow along in your own copy of Tableau.

Grouping

Have you ever tried to do an analysis with data that's less than perfect? What if we have both the postal abbreviation "FL" and the full state name "Florida" but we want our analysis to consider them as the same thing? Or we may not care about the smallest Office Supplies sub-categories individually. Grouping lets us create a new field based on a combination of members.

Grouping from the Header

Let's say our data contains both FL and Florida. We know these are the same thing, so we want to combine the records for FL and Florida into a group. It's as easy as control clicking on the headers for both FL and Florida (Option click on a Mac), and in the tooltip, click the paperclip icon to group. The automatic name is a concatenation, but we can right click and edit the alias to just say Florida.

Grouping from the Data Window

Or we can group those smaller Office Supplies, but this time from the data window. We'll right click on the field we want to group within, Sub-Category, and click Create > Group.

- Now we can chose the members we want to group,
 - Envelopes, Fasteners, Labels, Paper, and Supplies
- We'll click "Group".
- We can rename this "Small Office Supplies"
- If we notice left out a member, we can select it and add it to the group using this dropdown.

There's even a powerful "find" option to help us search fields with lots of values.

Once we click OK, the new field shows up in the data window, with a paperclip icon and the word (group) tacked onto the end.

And this field is ready to use.

If we ever realize we need to modify the group, we can right click on that grouped field and select "Edit Group" to get back to that editing dialog.

If we right click on the pill, here on the Rows shelf, we see an option to "Include Other". This is also available in the original dialog box. Selecting this creates a group of any non-grouped members. This can help emphasize our original group. We'll undo that.

Using a Grouped Field

Once we have a grouped version of a field, we can use it instead of the original. Note that we still have the original field, unchanged. The grouped one is in addition.

- For example, let's say we want our "Small Items" version of sub-category to appear in the hierarchy.

- It's as simple as dragging that field into the hierarchy list, dragging out the original, and there we go.
- That grouping will stay with us as we drill through the hierarchy.

Grouping Marks – Visual Grouping

What if we don't want to actually combine values into a new mark, we just want to call them out somehow? We can create a Visual Group.

- This is done by selecting the marks directly, instead of the headers,
- then clicking the paperclip icon.
- This can be handy in views like scatterplots.

Here, the marks that are selected and grouped and assigned color, with everything else becoming "other".

If the marks selected to be grouped span multiple dimensions, we can group by all or a particular dimension, say Ship Mode

- Here we've grouped all the other marks in the view that share those values for Ship Mode.

If we don't want this grouping-across-dimensions and just want the marks we selected, simply select "all dimensions" when grouping

A Note on Groups and Sets

A note on Groups and Sets: these are concepts we're all familiar with, but in Tableau they have specific, though similar, meanings.

- Groups in Tableau can be thought of as metadata definitions
- Sets in Tableau are combinations of data, almost like filter results
- Groups cannot be combined to create new groups
- Sets can be combined to create new sets
- Groups cannot be used in calculated fields
- Sets can be used in calculated fields
- Groups have specific, limited uses across data sources – see the video on Metadata Management with Data Blending for more information
- Sets can be used across data sources

As a rule, sets are more powerful than groups, but groups have many uses.

Conclusion

Thank you for watching this video on Grouping in Tableau. We invite you to continue with the On Demand Training videos to learn more about using Tableau Desktop.