

Groups, Sets and Hierarchies Step by Step Guide

1. Import Southern_Superstore file, add Southern_Region sheet

Tableau Public - Book1

File Data Window Help

Connections

South_Superstore

Sheets

Southern_Region

Southern_Region (South_Superstore)

Need more data?

Drag tables here to relate them. Learn more

Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Zip	Region
7181	CA-2011-106054	1/6/2013	1/7/2013	First Class	JD-15145	Jack O'Brian	Corporate	United States	Athens	Georgia	30605	South
7475	CA-2011-167299	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Elzeadi	Home Office	United States	Henderson	Kentucky	42420	South
7476	CA-2011-167299	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Elzeadi	Home Office	United States	Henderson	Kentucky	42420	South
7477	CA-2011-167299	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Elzeadi	Home Office	United States	Henderson	Kentucky	42420	South
7478	CA-2011-167299	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Elzeadi	Home Office	United States	Henderson	Kentucky	42420	South

Groups

2. Drag the Product Name to the Rows shelf

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Data Analytics

Southern_Region (South_Superstore)

Columns

Product Name

Rows

Marks

Automatic

Sheet 1

Product Name

1.7 Cubic Foot Compact "Cube" Office...

3-Ring Stapler

3.6 Cubic Foot Counter Height Office R...

30 Systems Cube Printer, 2nd Genera...

3M Hangers With Command Adhesive...

3M Organizer Strips

3M Polarizing Light Filter Sleeves

3M Polarizing Task Lamp with Clamp A...

9 1/4 Diameter Round Wall Clock

12 1/2 Diameter Round Wall Clock

14 7/8 x 11 Blue Bar Computer Printin...

24 Capacity Mail Data Binder Racks, P...

24 Hour Round Wall Clock

50 Cabinet Long Pencils

2300 Heavy Duty Transfer File System...

4000 Highlighters by Sanford

While you Were Out - Message Book...

930 Self Seal White Envelopes

930 White Business Envelopes, 4 1/8 x...

930 4 1/8 x 9 1/2" Recycled Envelopes

Aastra 571 VoIP phone

Aastra 6 Outlet Guardian Premium Surge...

Aastra 6 Outlet Guardian Standard Surge...

Aastra 7 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

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Aastra 8 Outlet Masterpiece Power Cent...

Aastra 8 Outlet Masterpiece Power Cent...

3. Scroll down until the AT&T products

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Data Analytics

Southern_Region (South_Superstore)

Columns

Product Name

Rows

Marks

Automatic

Sheet 1

Product Name

AT&T 1070 Corded Phone

AT&T 1080 Corded phone

AT&T 17929 Landline Telephone

AT&T CL12099

AT&T CL82213

AT&T CL82451 4 Handset Telephone

AT&T TR1909W

Aastra 4.4 Co. T5 Softphone

Aastra 46215W VoIP phone

Aastra 5410 Digital phone

Aastra IP Phone 1150E VoIP phone

Aastra 3 1/2" Diskette Storage Pages...

Avery 48

Avery 49

Avery 50

Avery 52

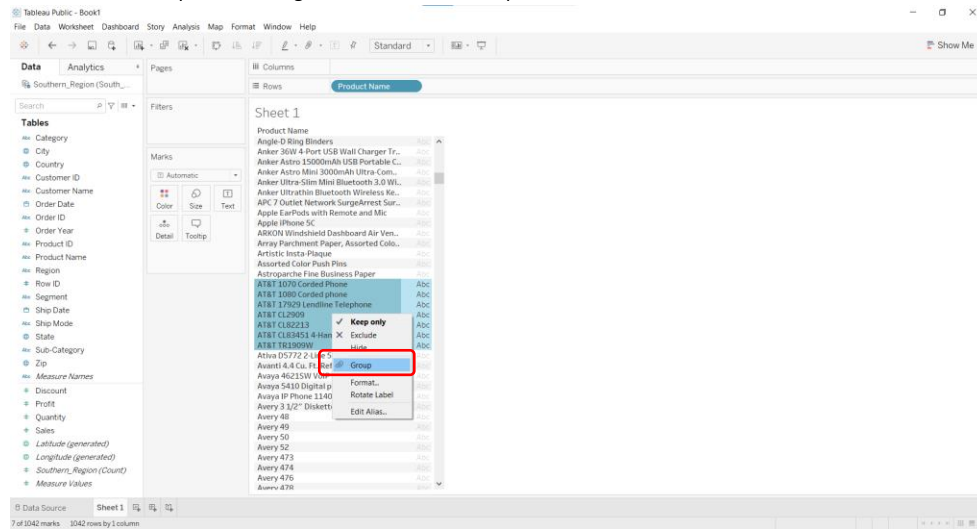
Avery 473

Avery 474

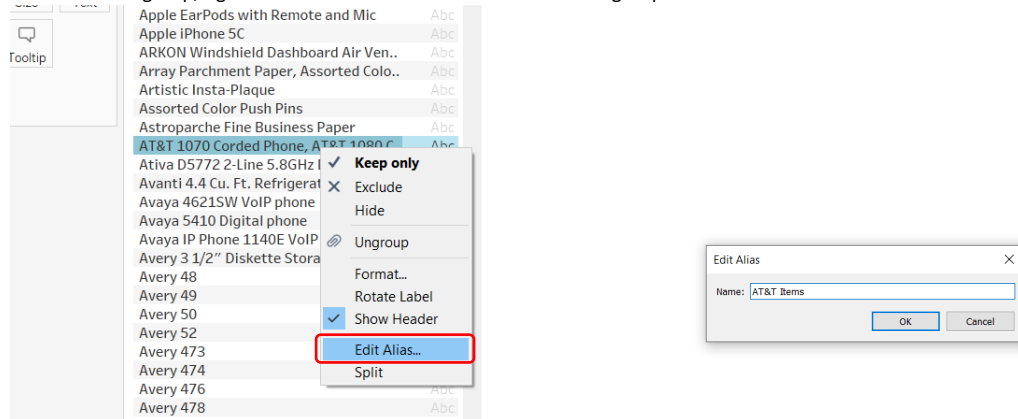
Avery 476

Avery 478

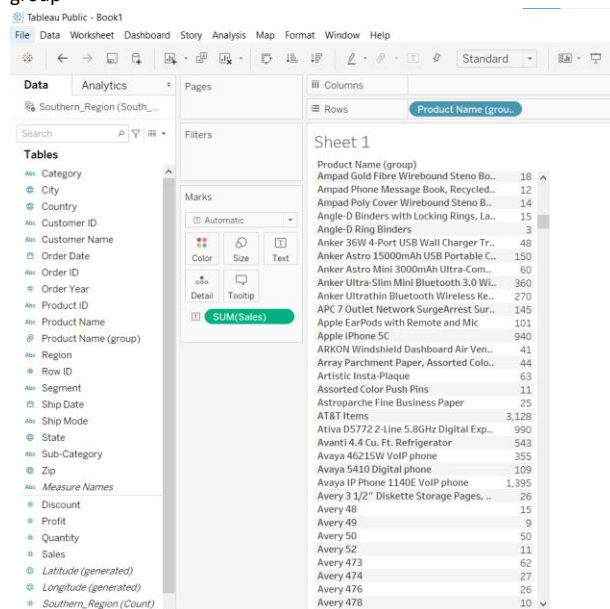
- Select all the AT&T products -> right click and select Group



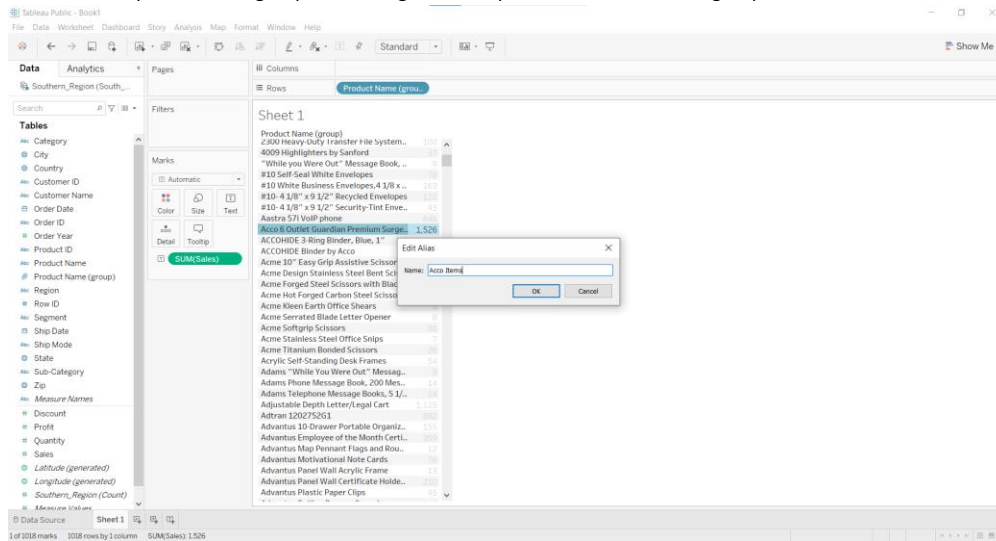
- Select the new group, right click and select Edit Alias and rename the group AT&T Items



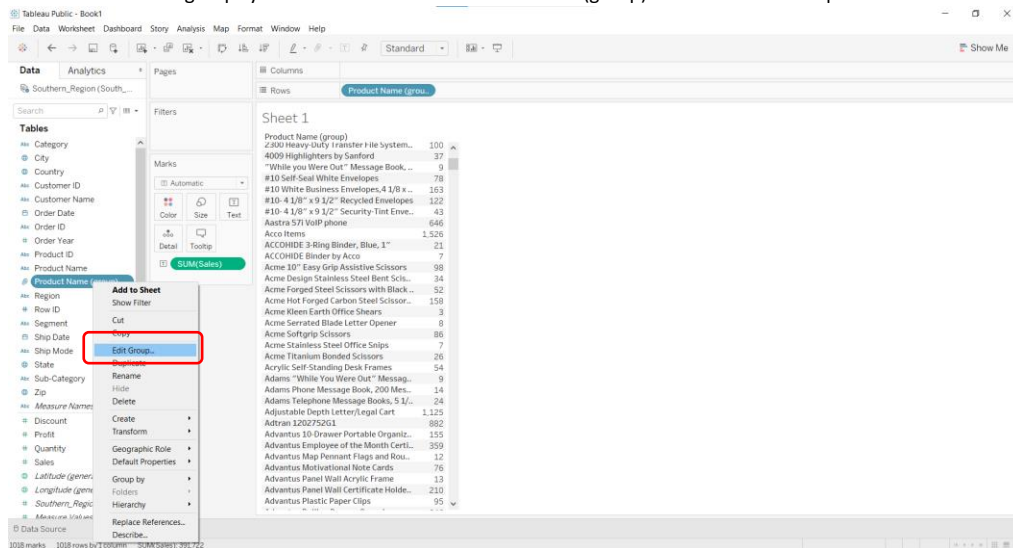
- Drag Sales to the View. Now we can see that the AT&T Items has the sum of sales from all the products that are contained in that group



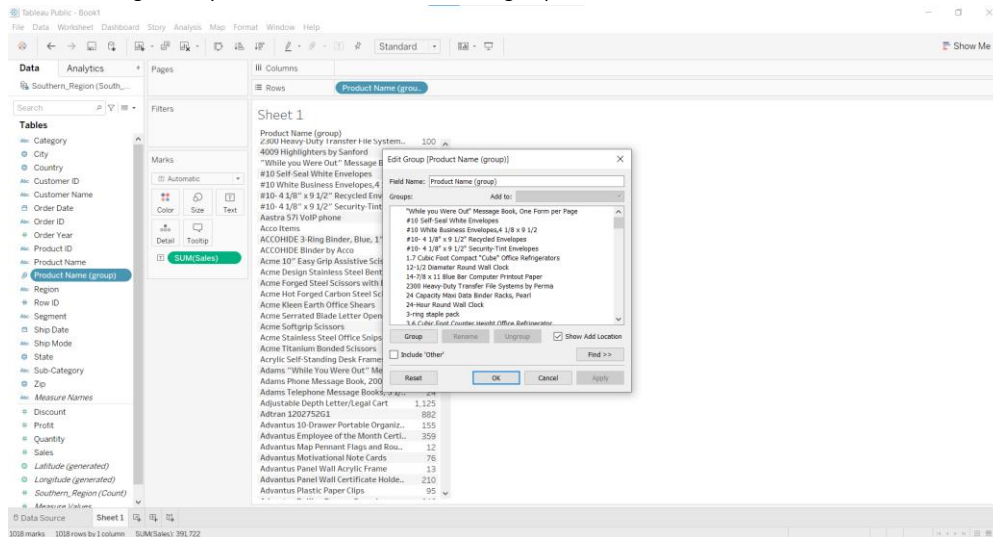
7. Select all Acco products and group them using the same process and rename the group as Acco Items



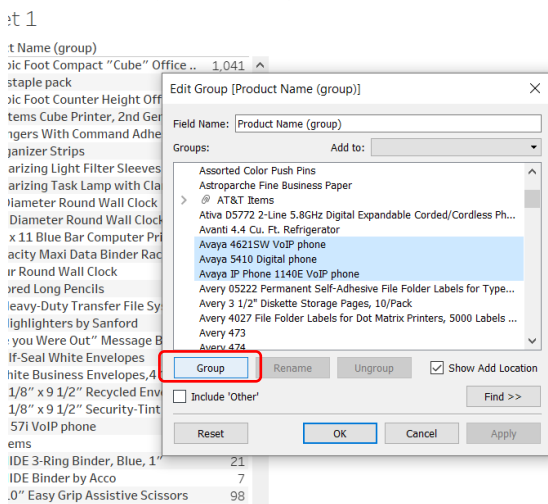
8. To edit or check the groups you can select the field Product Name (group) and select Edit Group



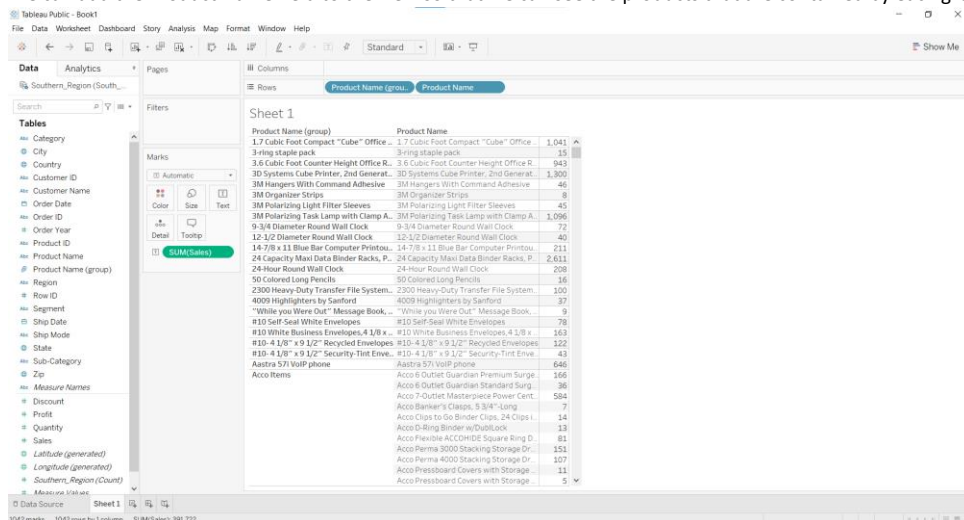
9. In the following menu, you can check, edit or create new groups.



10. Select the Avaya products, click group and rename it Avaya Items

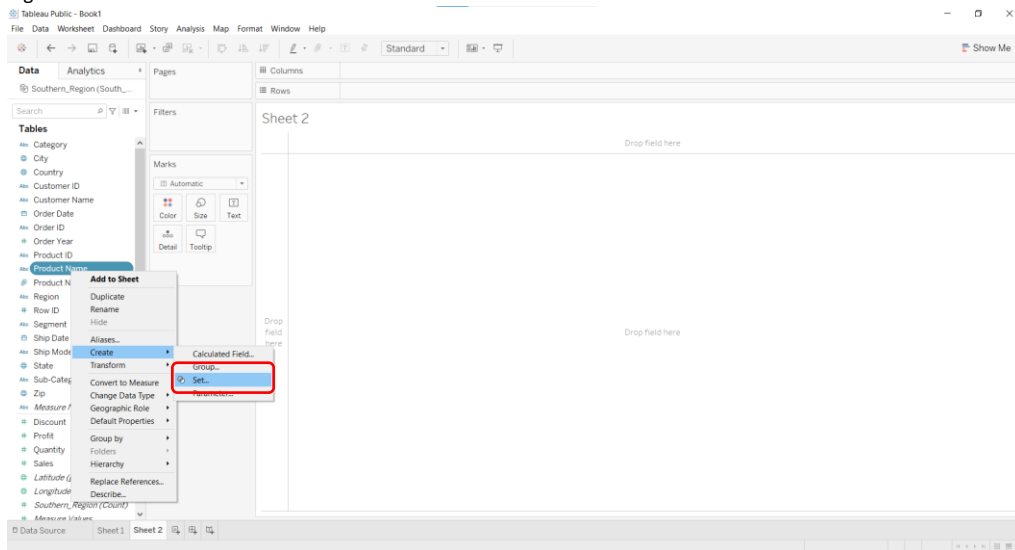


11. We can add the Product Name field to the view so that we can see the products that are contained by each group

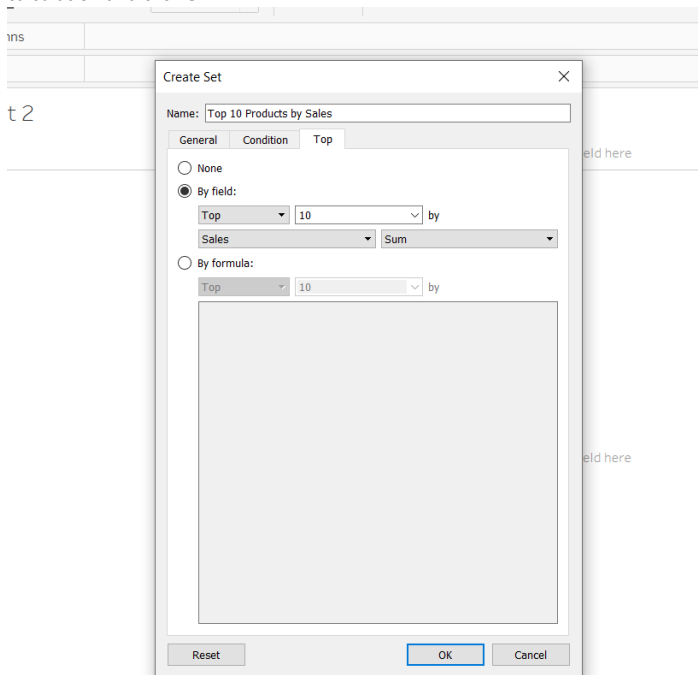


Sets

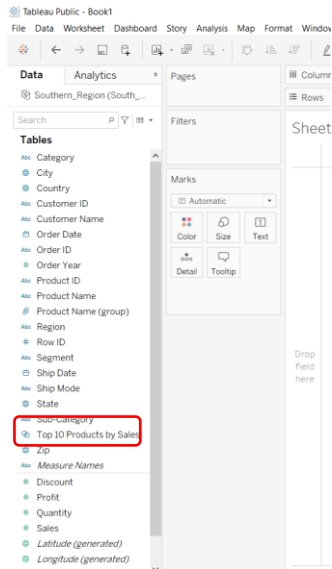
- Right click the Product Name field -> Create -> Set



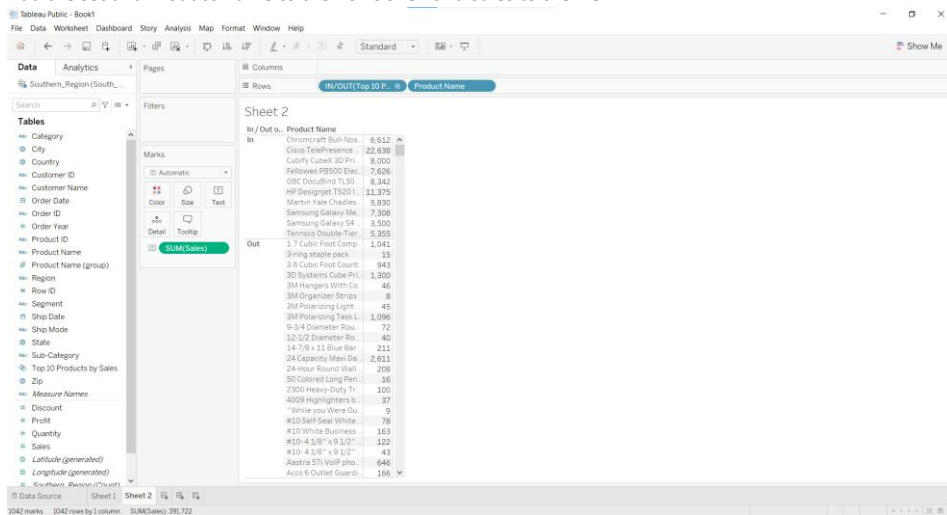
- Name the new set as Top 10 Products by Sales -> go to Top tab -> check the By field check box -> select the Sales field and the Sum calculation and click OK



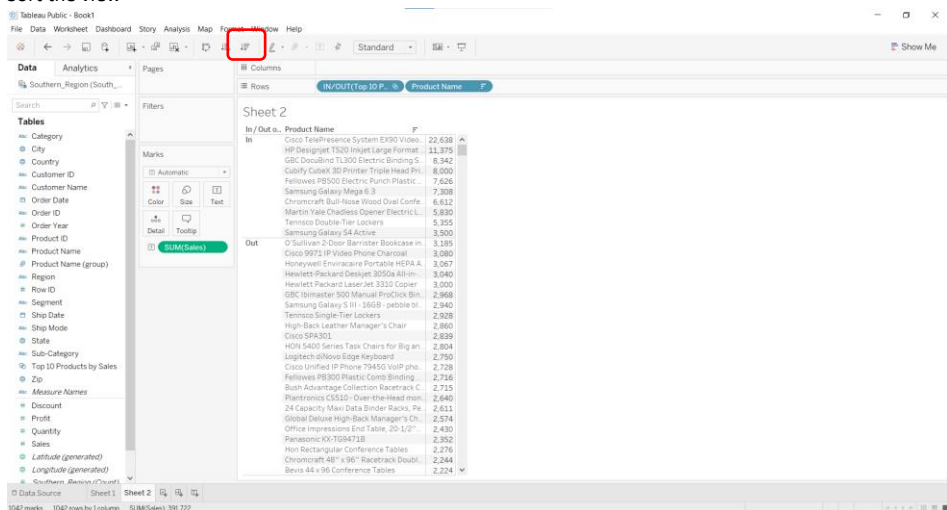
14. Now we have a set in the field list in the left side



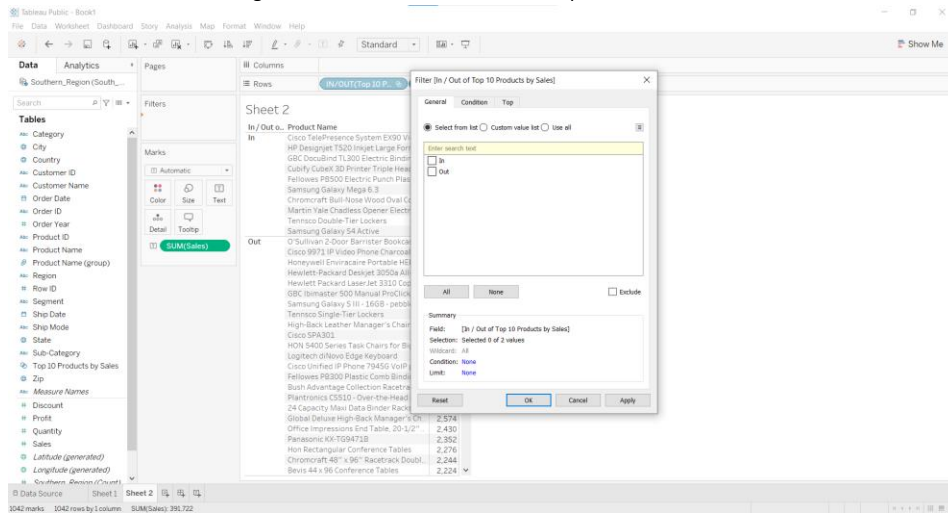
15. Add the set and Product Name to the Rows shelf and Sales to the view



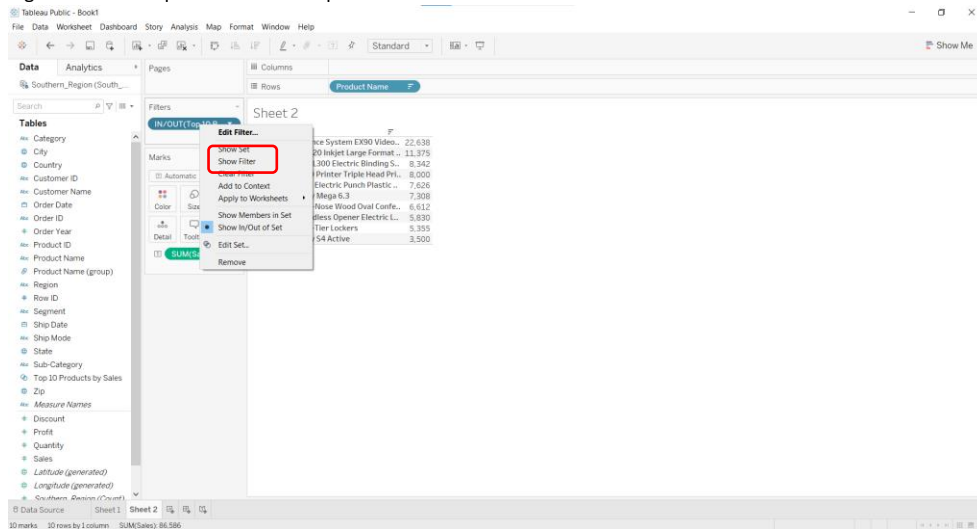
16. Sort the view



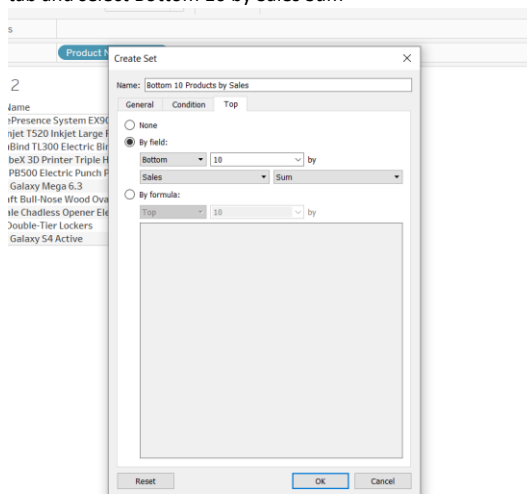
17. To use the set as a filter, drag it from the Rows shelf to the Filter pane and select In



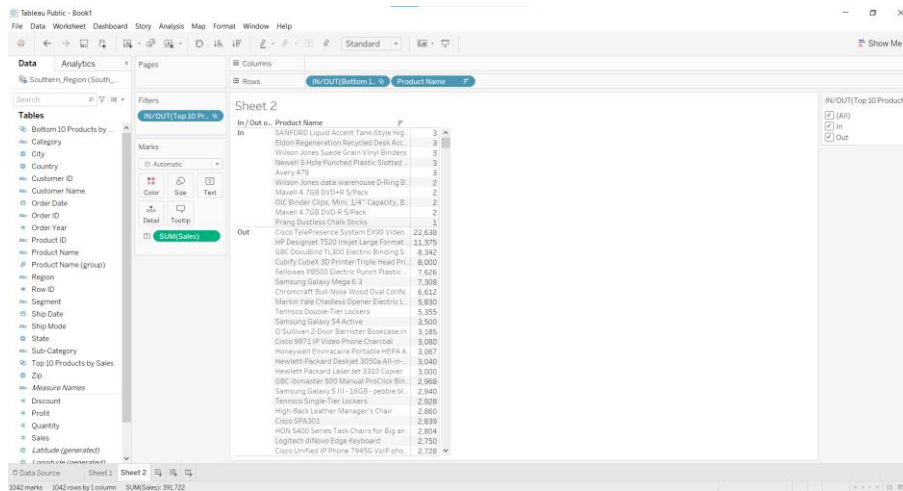
18. Right click the set pill from the Filter pane and choose Show Filter



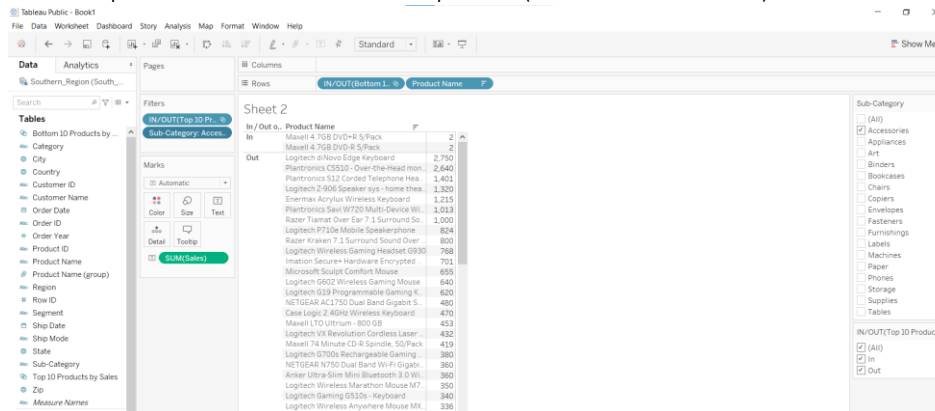
19. Create another set from the Product Name field (right click -> Create -> Set) with the name Bottom 10 Products by Sales. Go to Top tab and select Bottom 10 by Sales Sum



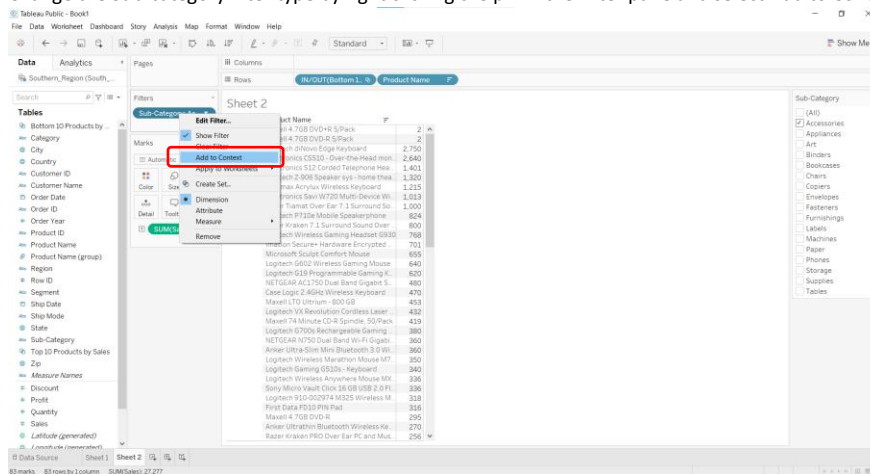
20. Add the Bottom 10 set to the Rows shelf before the Product Name. Now we can see the top 10 products with the smallest amount of sales



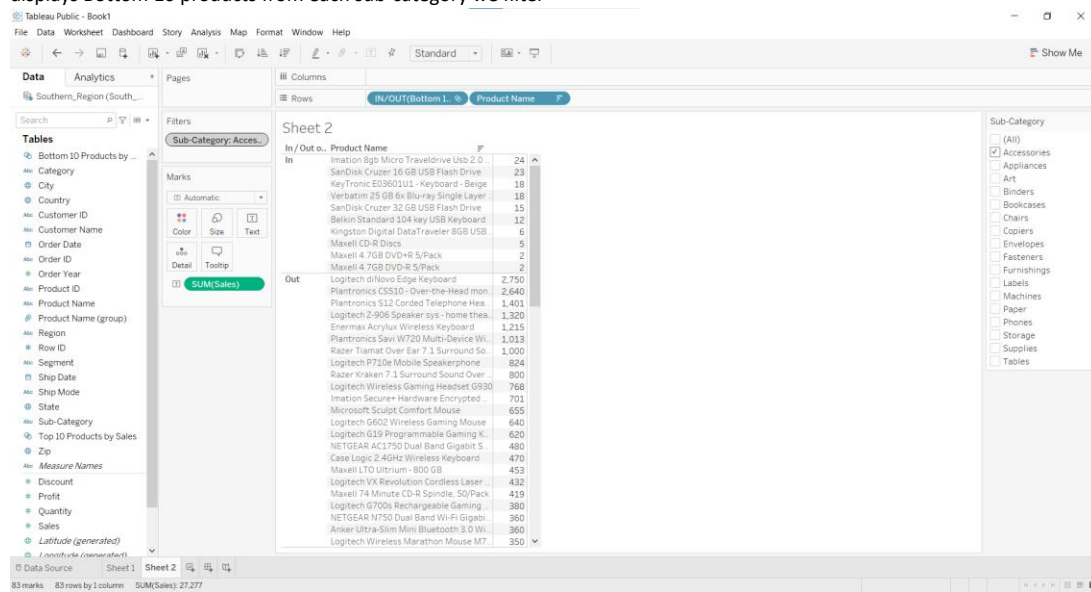
21. If we add the Product Sub-category to the view we would notice that filtering with sets would not produce the outputs that some of us would expect because the Tableau's order of operations (Set comes before the filter).



22. Change the Sub-category filter type by right clicking the pill in the Filter pane and select Add to Context

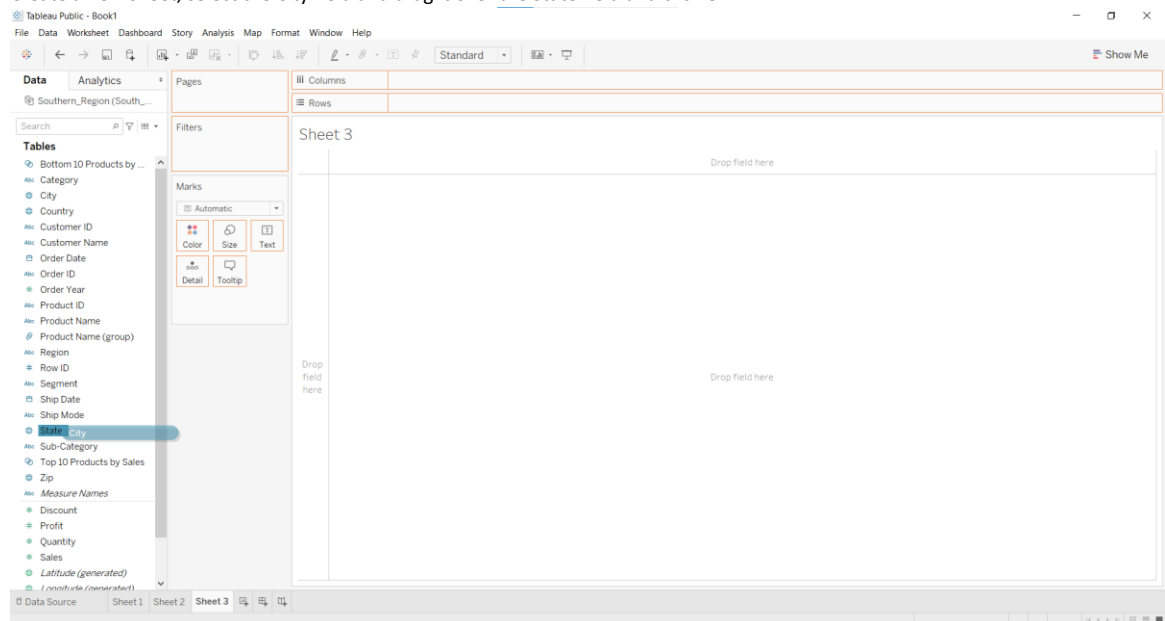


23. By creating the Sub-category context filter, you've moved this filter before the Set in the order of operations so now the view displays Bottom 10 products from each sub-category we filter

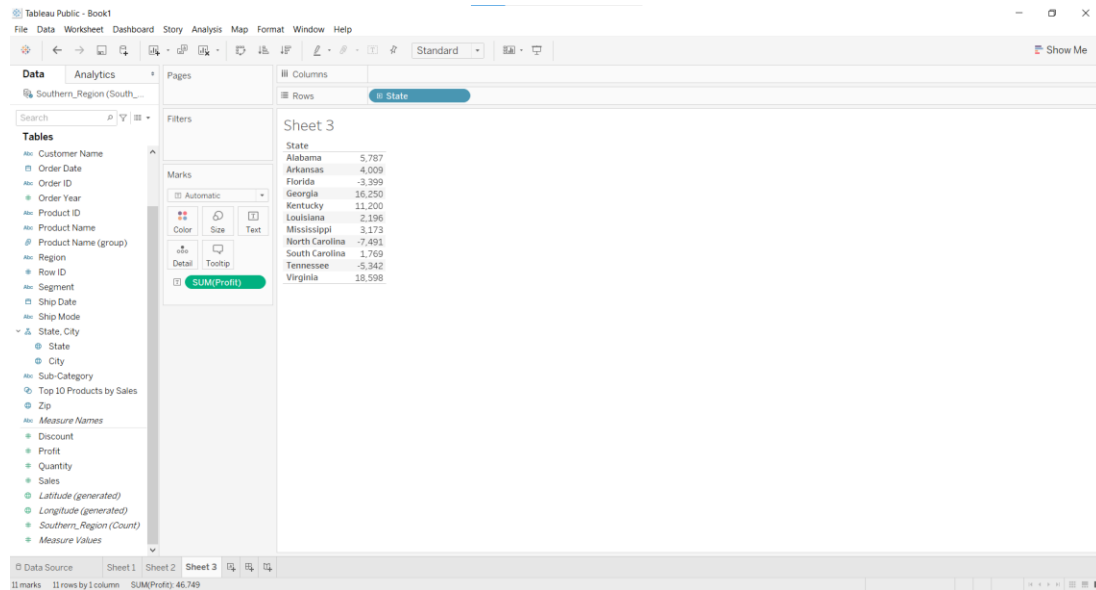


Hierarchies

24. Create a new sheet, select the City field and drag it over the State field and click Ok



25. Select and add the State field to the Rows shelf and add the Profit to the view



26. From the plus sign near the State pill from the Rows shelf we can now expand the view to include City as well

