Groups, Sets and Hierarchies Step by Step Guide

1. Import Southern_Superstore file, add Southern_Region sheet

Groups

2. Drag the Product Name to the Rows shelf

3. Scroll down until the AT&T products

4. Select all the AT&T products -> right click and select Group
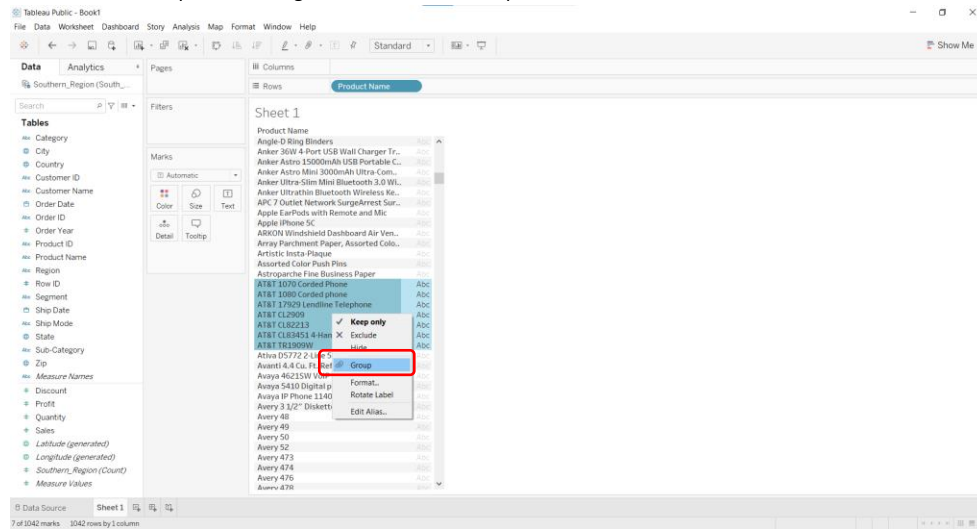
5. Select the new group, right click and select Edit Alias and rename the group AT&T Items
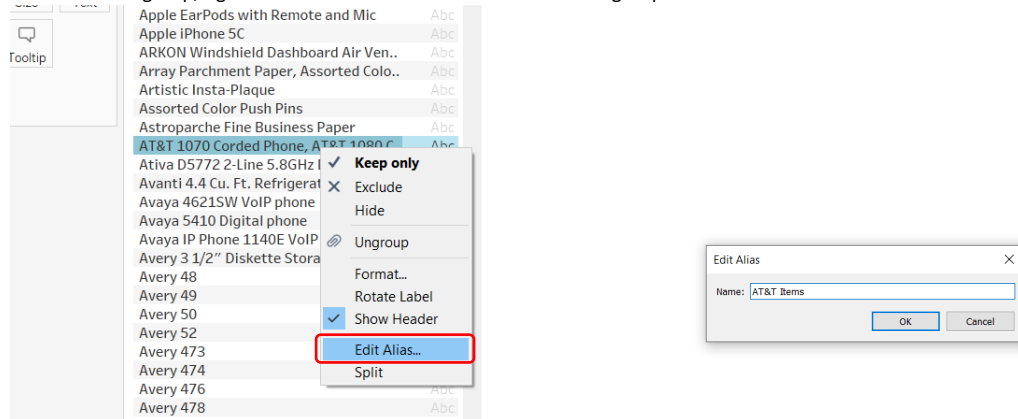
6. Drag Sales to the View. Now we can see that the AT&T Items has the sum of sales from all the products that are contained in that group
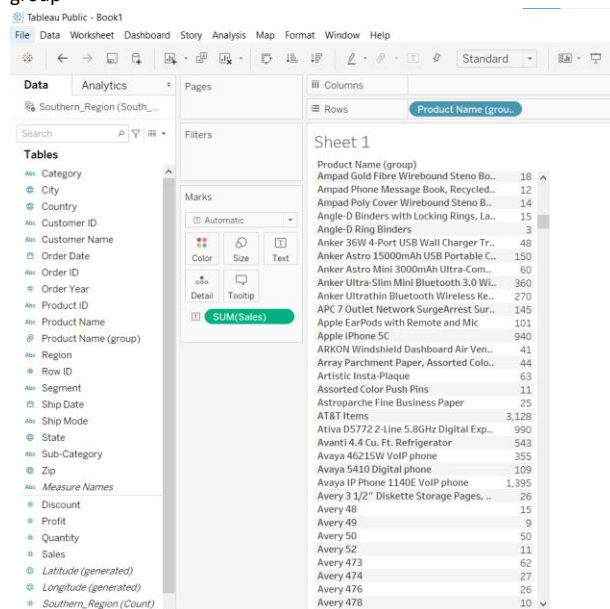
7. Select all Acco products and group them using the same process and rename the group as Acco Items
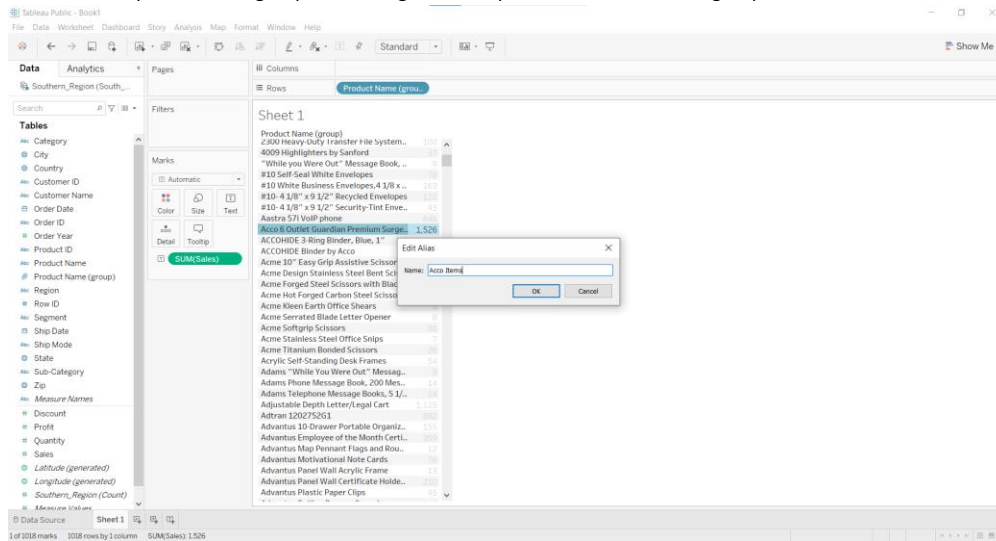
8. To edit or check the groups you can select the field Product Name (group) and select Edit Group
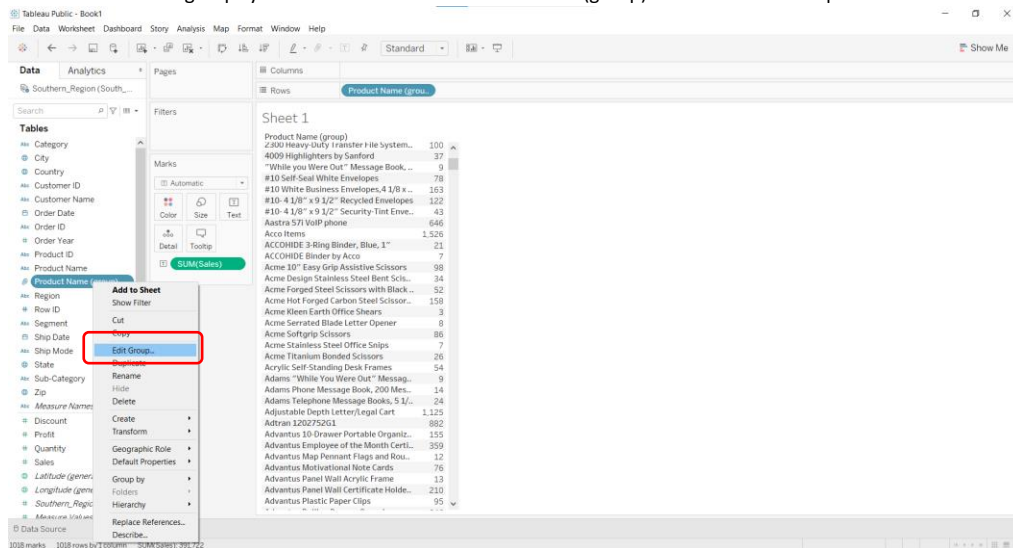
9. In the following menu, you can check, edit or create new groups.
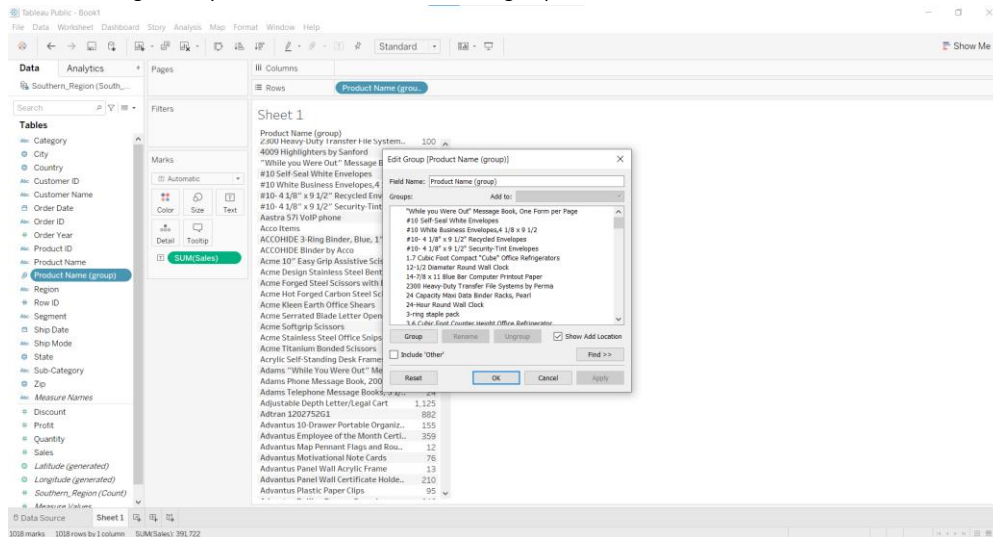
10. Select the Avaya products, click group and rename it Avaya Items
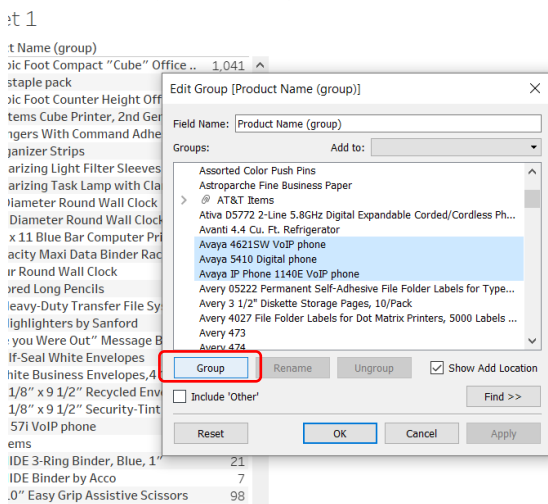
11. We can add the Product Name field to the view so that we can see the products that are contained by each group
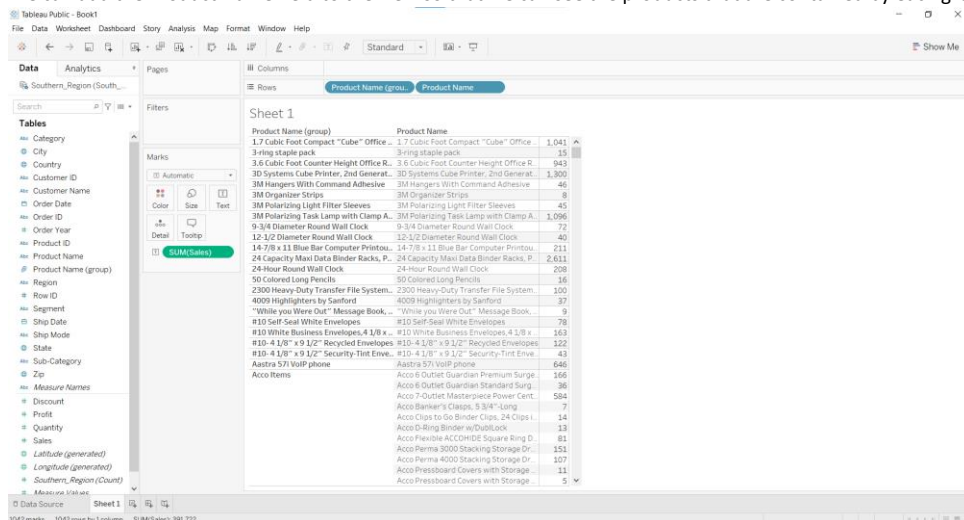
Sets

12. Right click the Product Name field -> Create -> Set
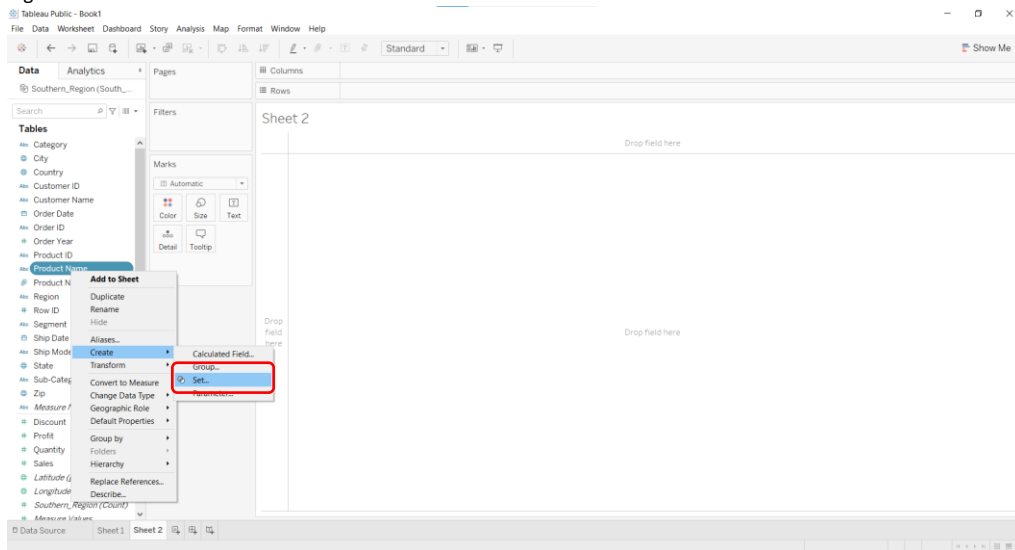
13. Name the new set as Top 10 Products by Sales -> go to Top tab -> check the By field check box -> select the Sales field and the Sum calculation and click OK

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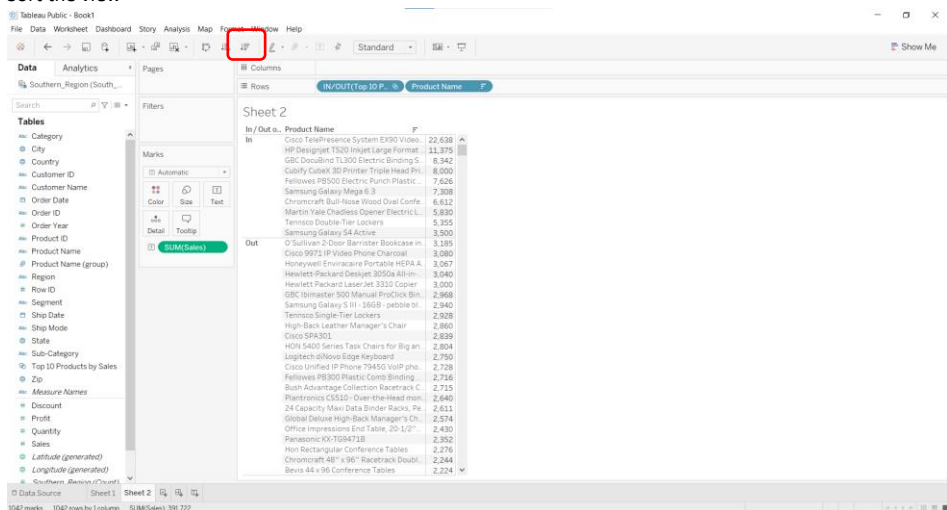
17. To use the set as a filter, drag it from the Rows shelf to the Filter pane and select In

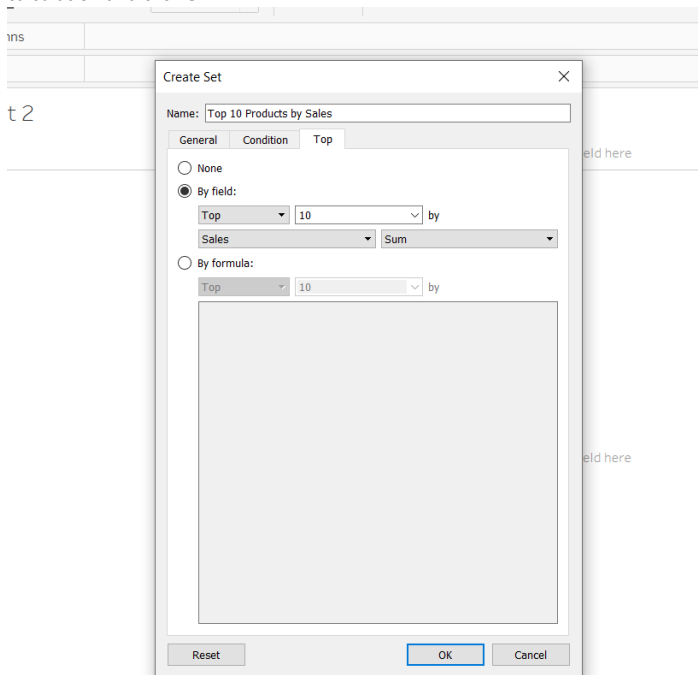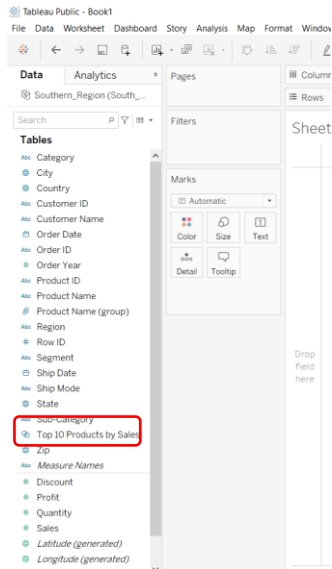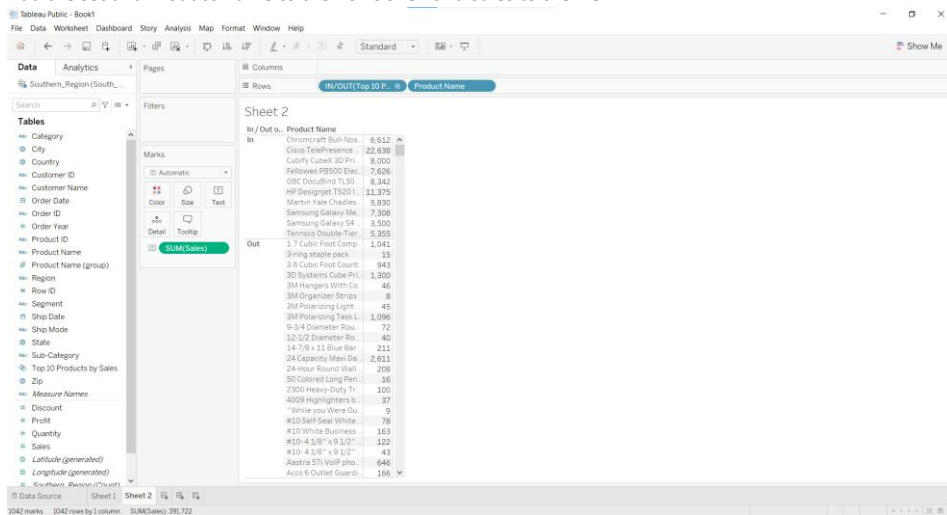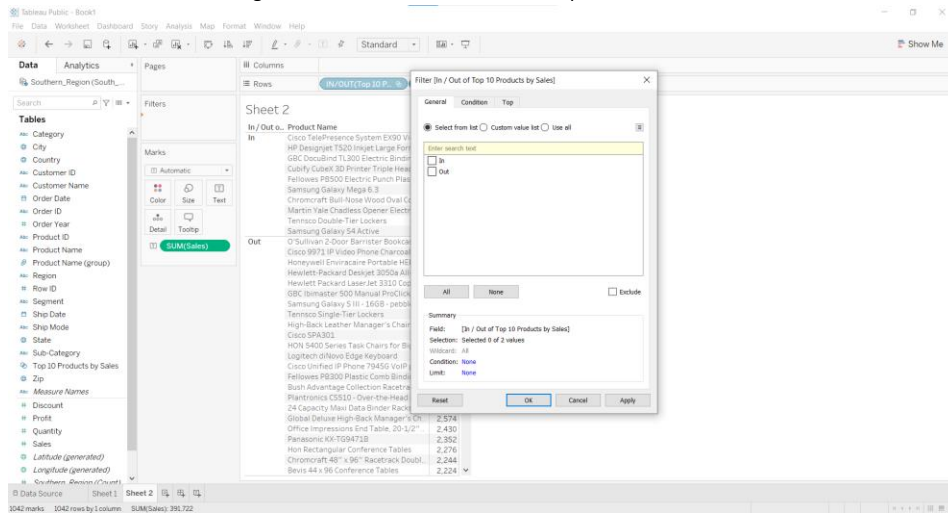18. Right click the set pill from the Filter pane and choose Show Filter

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
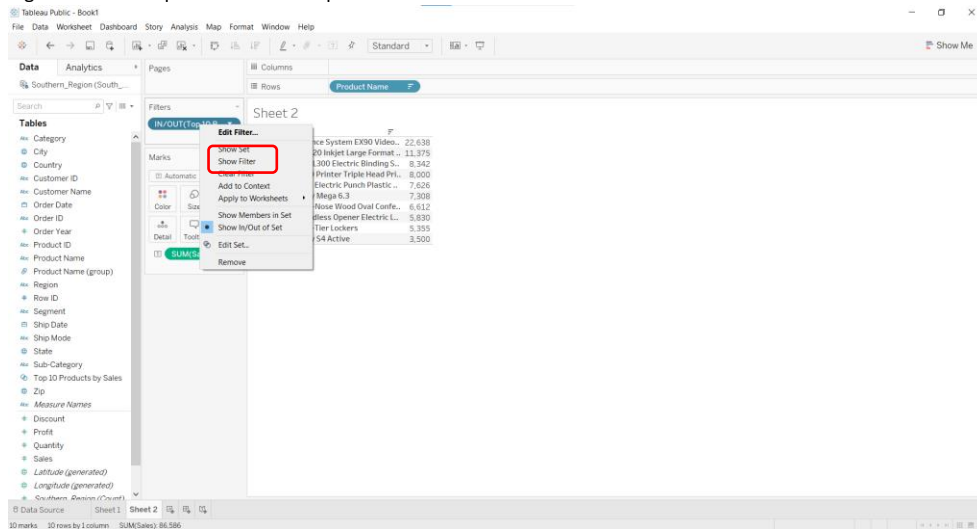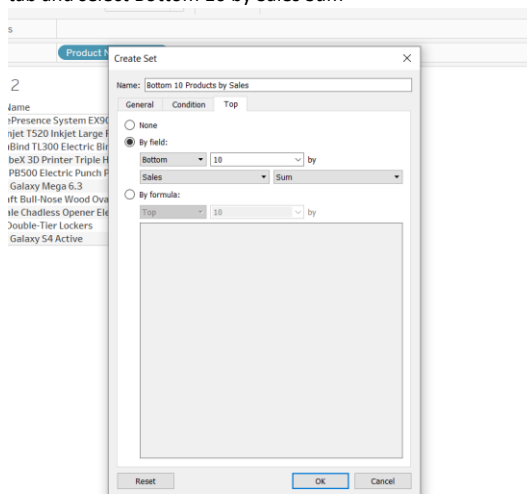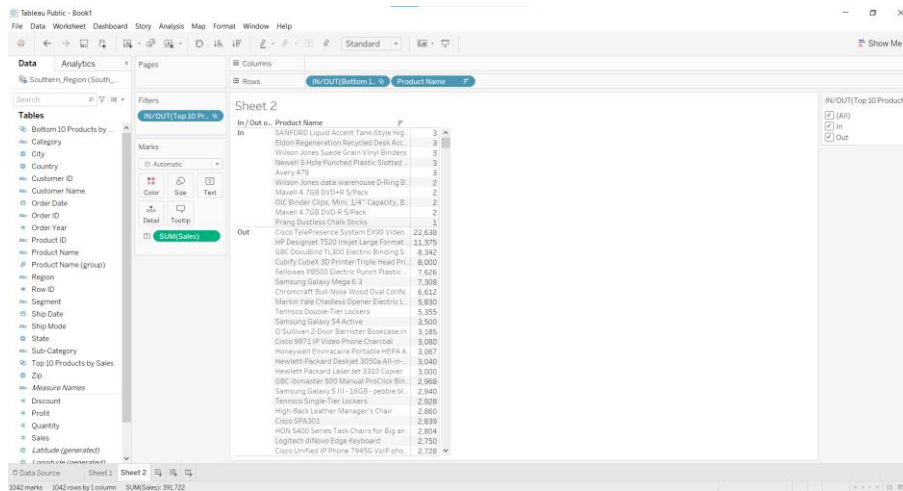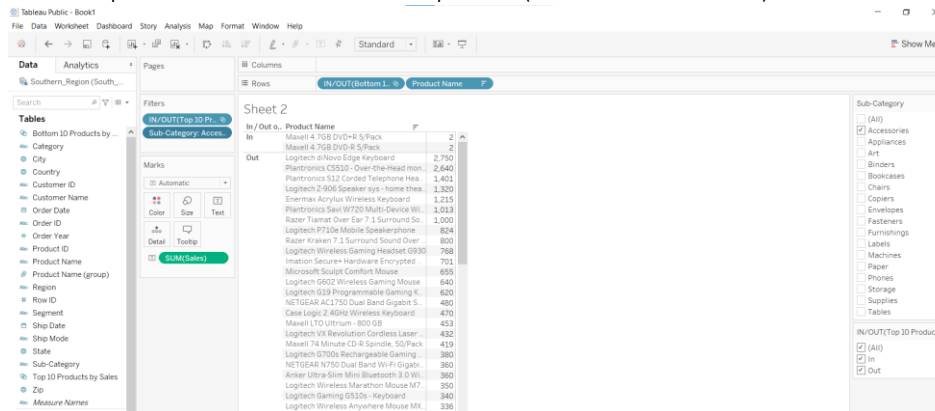

21. If we add the Product Sub-category to the view we would notice that filtering with sets would not produce the outputs that some of us would expect because the Tableau's order of operations (Set comes before the filter).

22. Change the Sub-category filter type by right clicking the pill in the Filter pane and select Add to Context
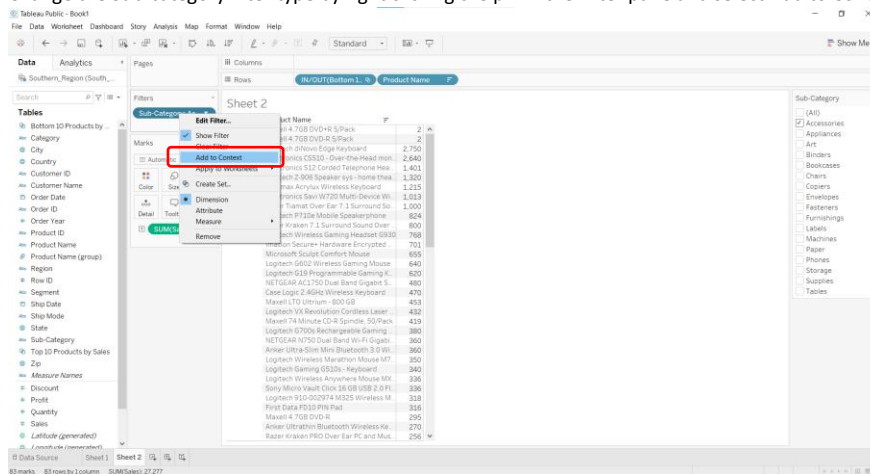
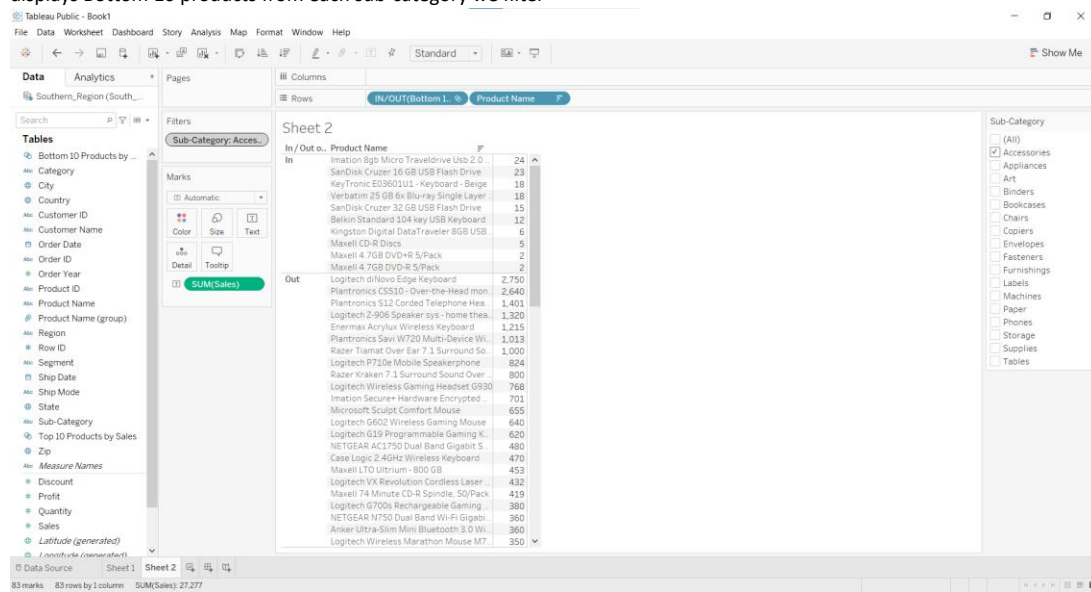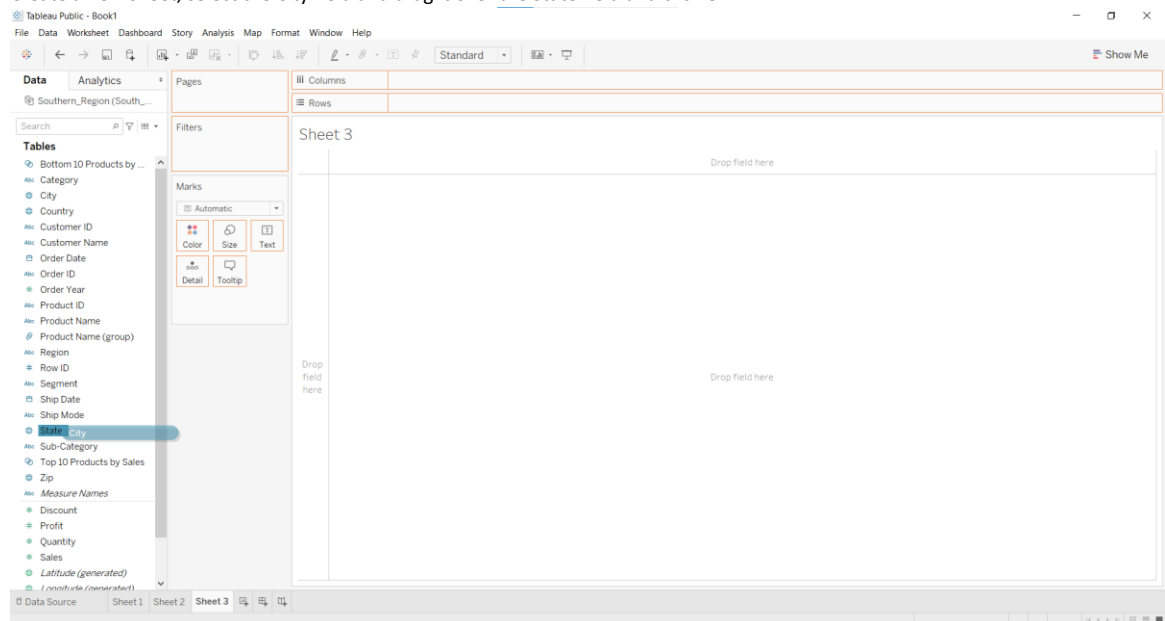23. By creating the Sub-category context filter, you've moved this filter before the Set in the order of operations so now the view displays Bottom 10 products from each sub-category we filter
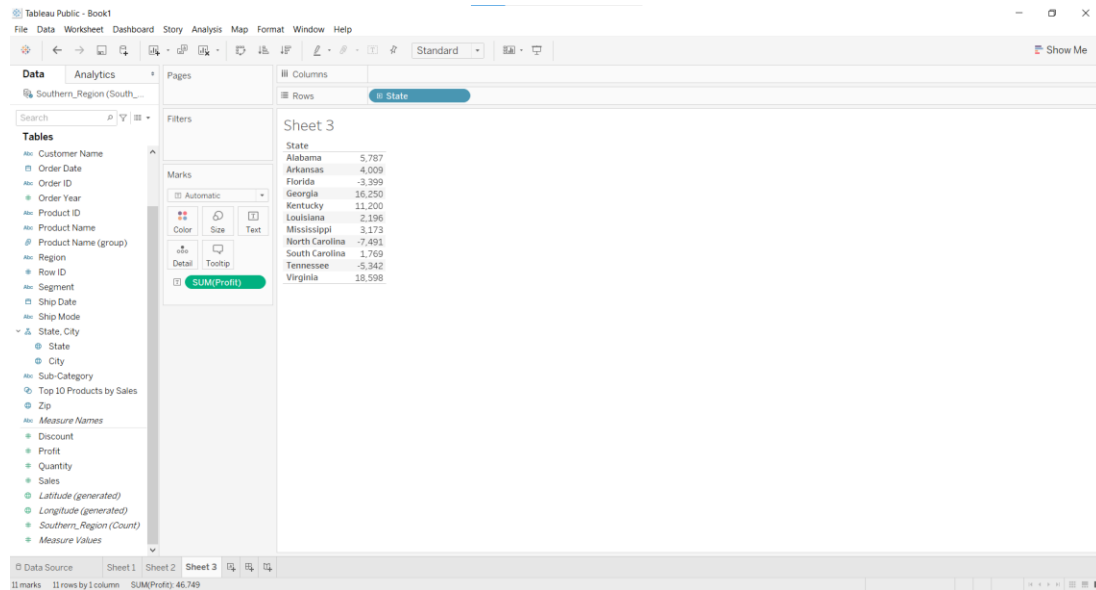

Hierarchies

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