SETS IN TABLEAU

Agenda

- Fixed/Manual Sets
- Creating Charts with Sets (In/Out)
- Dynamic Sets
- Dynamic Sets Using Parameters
- Combined Sets
- Types Of Joins In Sets
- Difference Between Data Joins and Set Joins
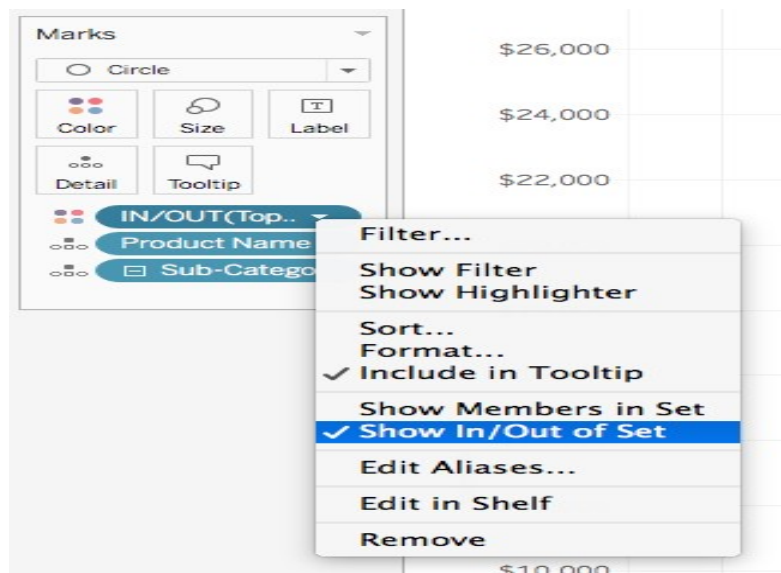- Using Sets In Calculations

Fixed Sets/Manual Sets

Create a fixed set

- The members of a fixed set do not change. A fixed set can be based on a single dimension or multiple dimensions.
- To create a fixed set:
  - In the visualization, select one or more marks (or headers) in the view.
  - Right-click the mark(s) and select **Create Set**.

Show In/Out members in a set

- In most cases, when you drag a set to the viz, Tableau displays the set using the In/Out mode. This mode separates the set into two categories:
  - In - The members in the set.
  - Out - Any members that are not part of the set.
- **To show In/Out members in the visualization:**
  - In Tableau Desktop, right-click the set in the visualization workspace and select **Show In/Out of Set**.

Dynamic Sets

- Create a dynamic set

- The members of a dynamic set change when the underlying data changes. Dynamic sets can only be based on a single dimension.

- To create a dynamic set:

  - In the Data pane, under Dimensions, right-click a field and select **Create** > **Set**.

- In the Create Set dialog box, configure your set. You can configure your set using the following tabs:
  - **General**: Use the General tab to select one or more values that will be considered when computing the set.
    - You can alternatively select the **Use all** option to always consider all members even when new members are added or removed.

  - **Condition**: Use the Condition tab to define rules that determine what members to include in the set.
    - For example, you might specify a condition that is based on total sales that only includes products with sales over $100,000.

  - **Top**: Use the Top tab to define limits on what members to include in the set.
    - For example, you might specify a limit that is based on total sales that only includes the top 5 products based on their sales.

Combined Sets

- You can combine two sets to compare the members. When you combine sets you create a new set containing either the combination of all members, just the members that exist in both, or members that exist in one set but not the other

- **To combine sets:**

  - In the Data pane, under Sets, select the two sets you want to combine.

  - Right-click the sets and select **Create Combined Set**.

Types of Joins in sets

Create Set [Set 5]   ✕

Name: Combined Set

How would you like to combine the two sets?

Sets: Set 2 ▼   ⬤ Set 3 ▼

◉ ⬤ All members in both sets

○ ◑ Shared members in both sets

○ ◐ "Set 2" except shared members

○ ◑ "Set 3" except shared members

Separate members by [,]   East, Green Tea, 2012

                                            OK   Cancel

Difference between Set Joins and Data Joins

Sets in Calculations

- Sets can be used in calculations whereas groups can't.

Top 20 Customers | Orders (Sample - Superstore) ✕

```
IF [Top 20 By Profit] THEN [Customer Name]
ELSE "Others"
END
```

Set

The calculation is valid.   1 Dependency ▾   Apply   OK

Thank You!

Any Queries??