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# On-Demand Training: Working with Sets Transcript

Welcome to this video on Working with Sets. You can download the Exercises workbook to follow along in your own copy of Tableau. This content builds on the Creating Sets video and uses the same workbook.

## Editing Sets

Sets can be edited, but to what degree is dependent on how they were created.

If a set was created from marks, such as European Home Office, right clicking on the set and selecting “Edit Set” will bring up the list of members— and the only option will be to remove individual members.

- Members cannot be added to this existing set, though a second set can be created from the desired new members, and the new and previous sets can be combined.

If a set was created from a calculation, such as “Customers with “A” Names”, right clicking and selecting “Edit Set” will bring up the same dialog that was originally used to create the set. This can be modified and saved.

If the set was created by combining sets, right clicking and selecting “Edit Set” will bring up the combination window. This can be modified and saved.

## IN/OUT versus Members

Sets can be used like any other field, but they have an additional feature of In/Out versus Members.

- By default, when a set is brought into the view, say to color, the marks are colored for which fall within the set and which are not in the set.
- By contrast, if we change the set to Detail by clicking on the color icon then changing it to detail
- then right click the pill and change the mode to Show Members, we’re now only looking at members of the set,
  - and the filter shelf shows we’re filtering by that set.

## Sets and Filters

Sets can be thought of similarly to filter results.

- If there is a subset of the data that can be thought of as a useful set, or a frequently used combination of filters, it may be worthwhile to create a formal set from those filter results, and then use the members of that set instead of constantly evaluating the filters.
  - When a set is first created, like so, there’s an option “Add to filter shelf” to immediately use only the members in that set.
  - This is the same behavior as using “Show Members”.
  - And it’s also the behavior for sets that are generated by filter actions.
- Alternatively, to create a set from a single filter, right click on the filter shelf’s pill and select “Create Set”

## Sets in Hierarchies and Calculations

Like Groups, Sets can be added to hierarchies.

- We can drag “European Home Office” into the Products hierarchy.
- Now when we drill in the bar chart, we see the only place that has “in” bars is in Europe, and the smaller bar is Home Office sales.
- For more information on hierarchies, check out the video in this section.

Unlike groups, sets can also be used in calculations.

- Here, we have a set based on Customer Names that start with A.
- If we wanted to know the profits from only those customers, all it takes is a simple calculation.
- Right click on the set and say “Create Calculated Field”.
- We’ll name this “A Name Profits”, and the formula will be a simple IF statement.
  - IF [Customers with “A” Names] THEN [Profit] END
- This will check to see if a customer is in the set, and if they are, it will return the profits for their orders.

This is a very basic example, but the fact sets can be used in a calculation like any other field gives a lot of power to the analysis.

## Conclusion

Thank you for watching this video on working with Sets. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.