..

Working with Dimension Hierarchies

Date published: 2020-10-30
Date modified: 2022-09-21

CLOUD≡RA

Legal Notice

Contents

Creating new dimension hierarchies

About this task

You may find it useful to define a hierarchy of dimensions, to enable visuals with variable levels of granularity over the same range of data.

Note:

This feature is available only to users with administrative privileges.

The following steps demonstrate how to define such a hierarchy on the dataset World Life Expectancy [data source samples.world_life_expectancy]. We will use the dimensions un_region, un_subregion, and country to define a dimensional hierarchy called Region.

Procedure

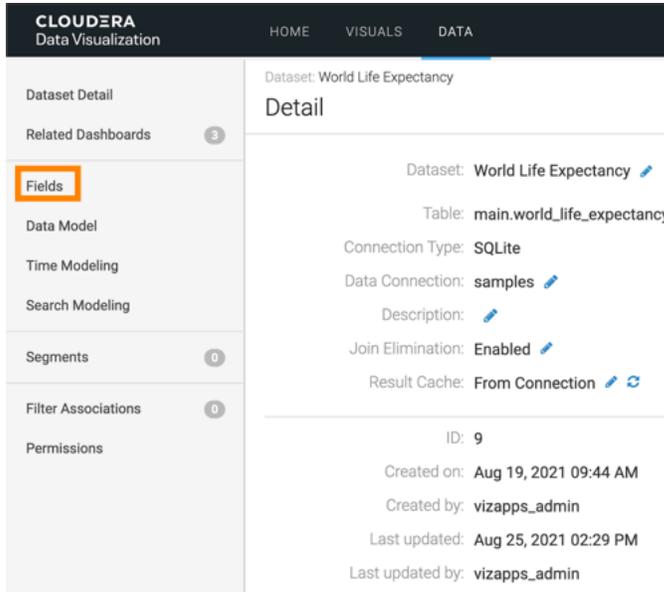1. On the main navigation bar, click Data.

   The Data view appears.
2. Open on the Datasets tab.
3. In the left navigation menu, click Samples.
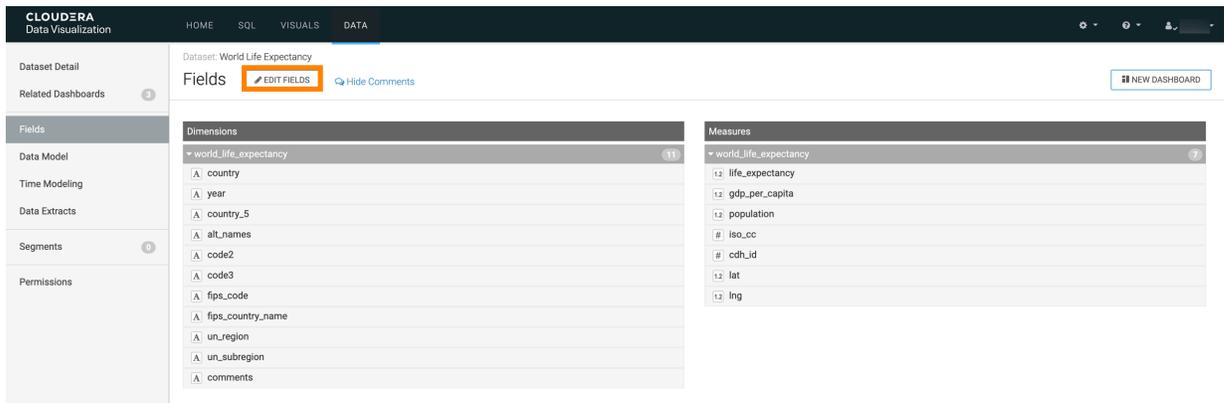4. In the Datasets area, select World Life Expectancy (samples.world_life_expectancy).

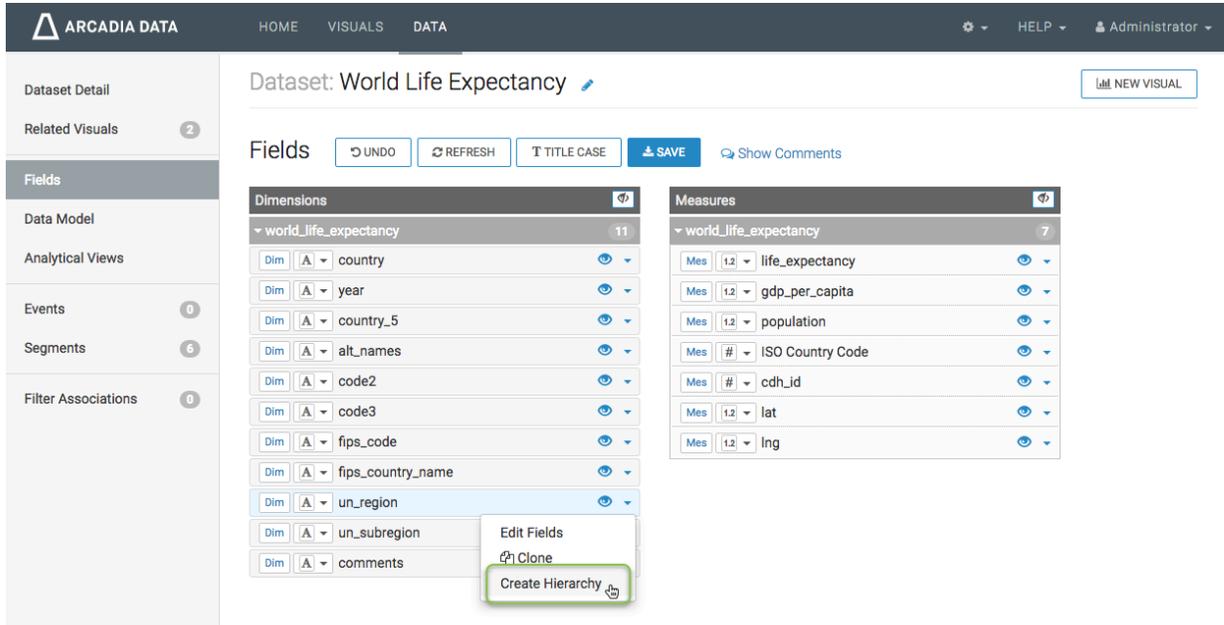**5.** In the Dataset Detail menu, select Fields.

**6.** In the Fields interface, select Edit fields.

7. In the editable Fields interface, under Dimensions, find the field un_region.

8. Click Down icon on the un_region line, and select Create Hierarchy.

9. In the Create Hierarchy modal window, enter the values for Hierarchy Name and Hierarchy Comment, and click Create.

   We named our hierarchy Region, and described it as Geographical Granularity.
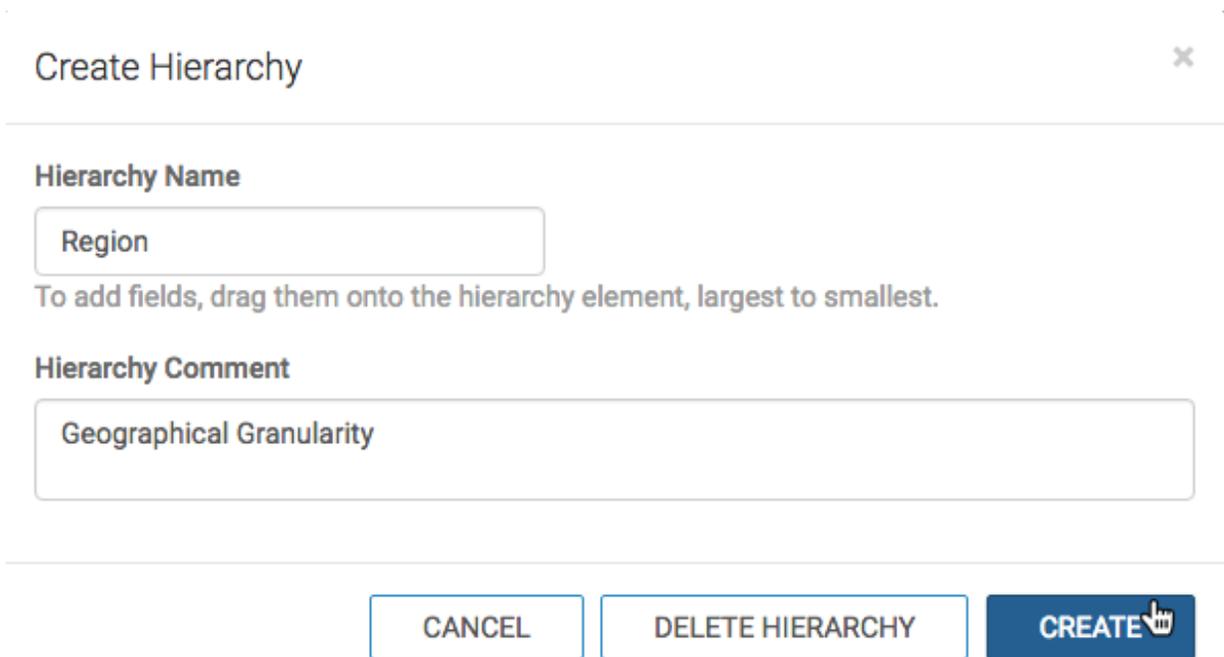
10. Note that Measures now contain a hierarchy Region, denoted by the Hierarchy icon. The hierarchy contains a single element, un_region.
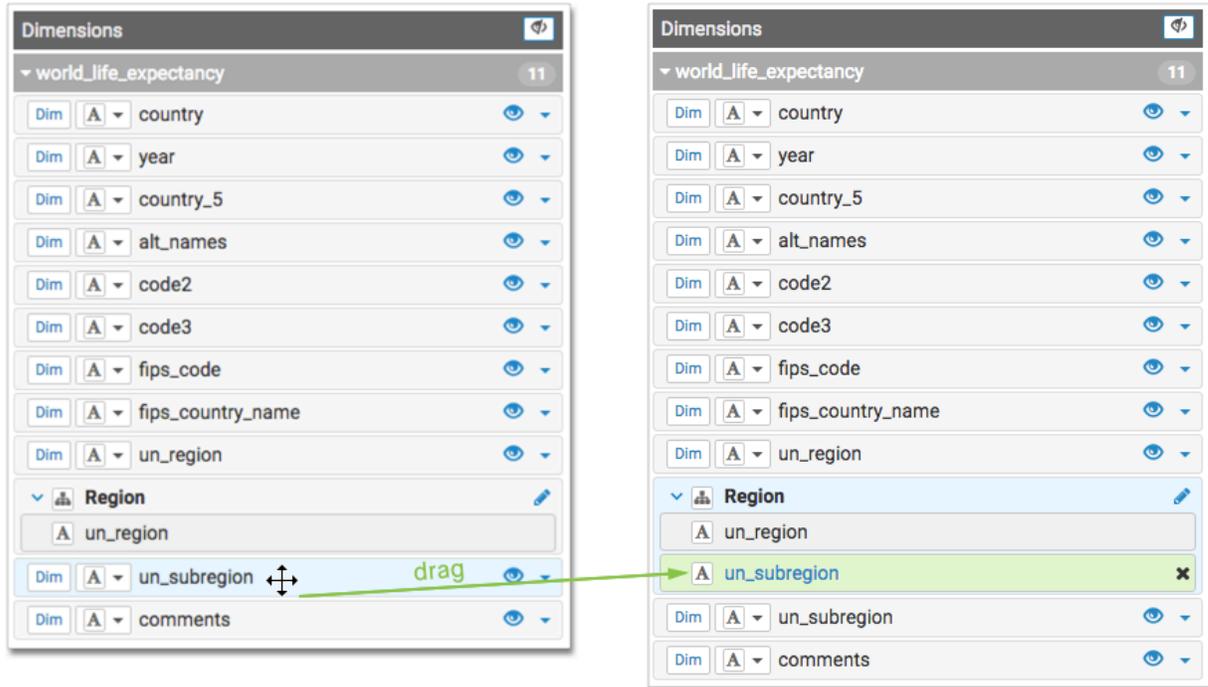
11. To add more levels to the hierarchy, simply click and drag the relevant dimensions or measures to the newly created hierarchy. Be sure to arrange them in order of scale, from largest to smallest.

Below un_region, we added un_subregion.

Below un_subregion, we added country.
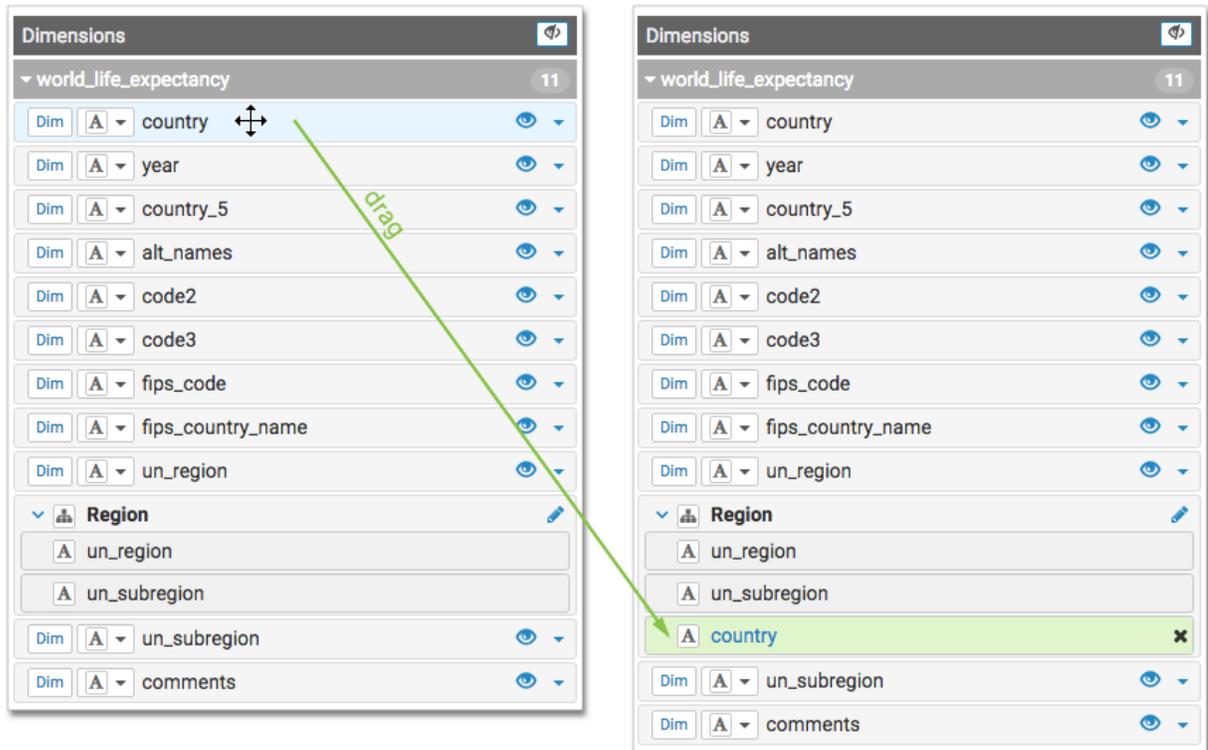
12. Click Save.

Note that the hierarchy Region appears alongside the dimensions obtained directly from the data table.

Results

Defined dimension hierarchies, such as Region that we created here, can be used just as any other dimension field of the dataset.
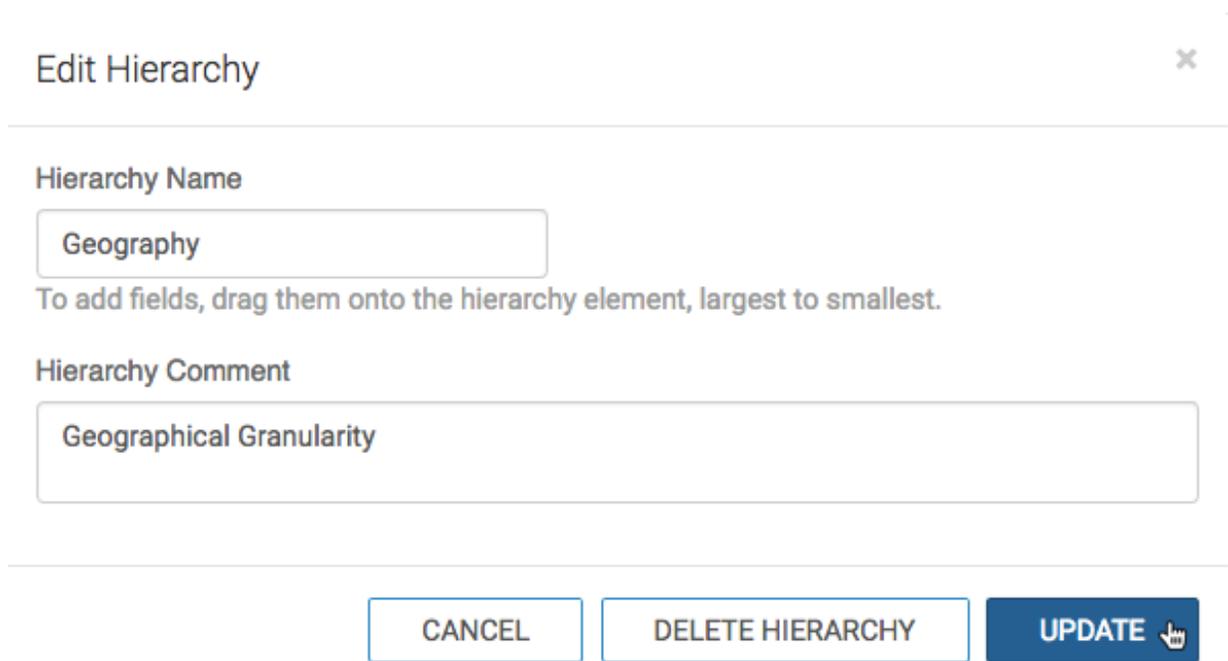
Changing the name of the hierarchy

Procedure

1. Click Edit Fields.

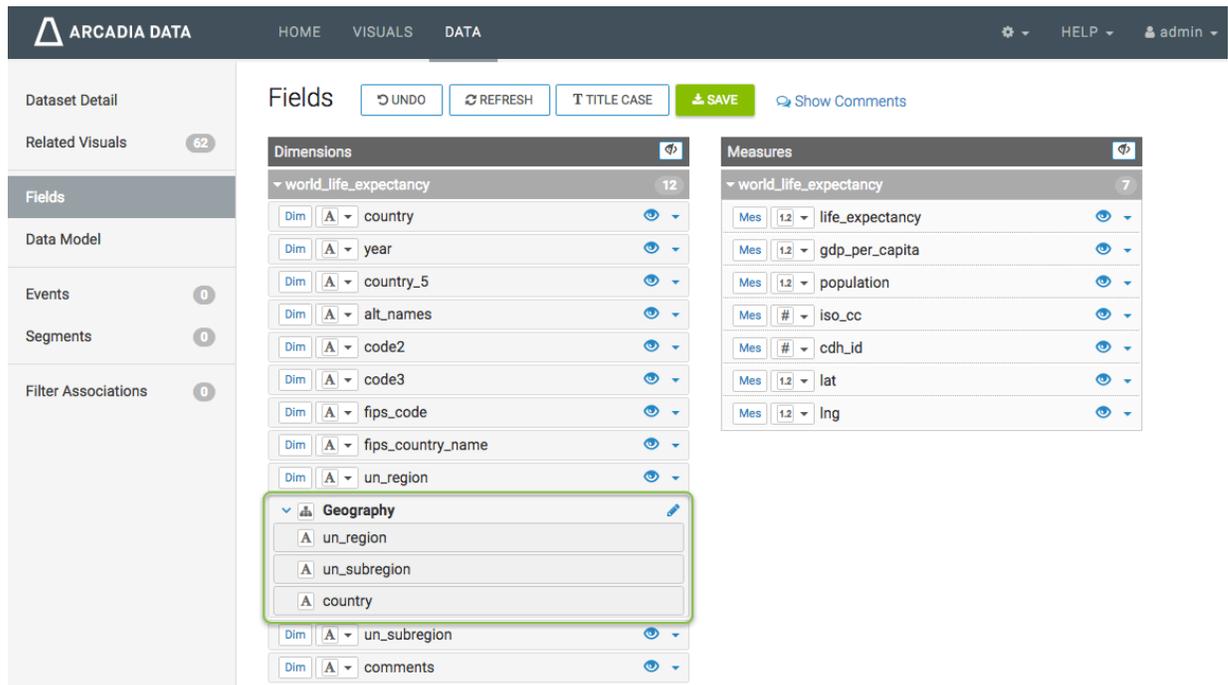**2.** In the list of Dimensions, find the Region hierarchy, and click the Pencil icon next to it.

3. In the Edit Hierarchy modal window, change Hierarchy Name, and click Update.

We changed the name of the hierarchy to Geography.

The hierarchy title Geography now appears in the list of dimensions, instead of Region.

4. Click SAVE.

Changing the order of components in the hierarchy

Procedure

1. Click Edit Fields.
2. Click one of the components of the hierarchy, and move it up or down the list.

   In this case, we moved country from third level to second level in a three-tier dimensional hierarchy Region.
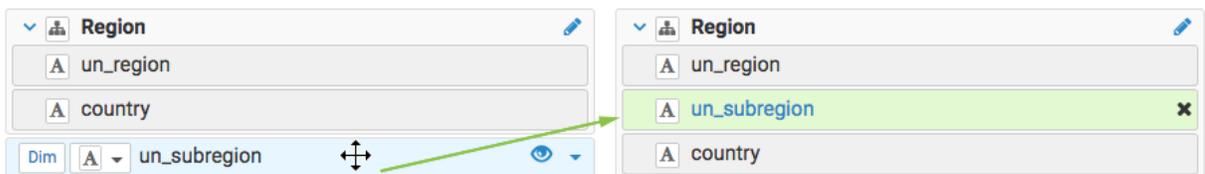

3. Click Save.

Adding levels to the hierarchy

Procedure

1. Click Edit Fields.
2. Pick a component to add to the hierarchy, such as un_subregion, click it, and drag into the desired position inside the hierarchy area.

3. Click Save.

Removing levels from the hierarchy

Procedure

1. Click Edit Fields.
2. Pick a component of the hierarchy to remove, and click its Remove icon.

   In this case, we removed un_subregion from the dimensional hierarchy Region.

3. Click Save.

Deleting dimension hierarchies

About this task

To delete the hierarchy, you must make changes in the dataset Fields interface.

Procedure

1. Click Edit Fields.
2. In the list of Dimensions, find the hierarchy to delete, and click the Pencil icon next to it.

    We are deleting the Region hierarchy.

3. In the Edit Hierarchy modal window, click Delete Hierarchy.

4. Click Save.

The hierarchy no longer appears in the list of dimensions.

Hierarchy drill into support on the color shelf

About this task

You can use the hierarchy drill-down data discovery on the Colors shelf of the Lines, Bars, Areas, Grouped Bars and Scatter visuals. To use the drill-down, click the legend colors.

> **Note:** You must create the hierarchy in advance, on the Dataset Field interface.