Free Training Transcript: Sorting

Welcome to this video on Sorting. You can download the Exercise workbook to follow along in your own copy of Tableau Desktop.

Ways to Sort

There are several ways to sort. First, and perhaps easiest, is the Quick Sort on the axis. For views with an axis, hovering brings up the Quick Sort icon. One click sorts the bars descending, another click switches to ascending, and a third click clears the sort. This kind of sorting helps identify the top or bottom values in a pane (within the context of how the view is built).

What if we wanted to sort by descending Profit? Profit is on color, not an axis, so there's no quick sort button. If we open the pill's menu, there's no sort option. In this case, the toolbar buttons allow easy sorting. Click on the pill we want to sort by, in this case Profit, then select the appropriate sort from the toolbar.

We can also sort from the field labels. If we want to sort the regions, we can hover over the field label (which is the name above the pane) and choose to sort alphabetically or by any of the measures. If we want to sort the markets as well, we can hover over that field label and sort again.

But sometimes we want to set our own sort. Here, the fields have an inherent order—Low should come after Medium, and Same Day should be above First Class. To do this easily right from the view, we can drag the headers in the view or in the legend. For the most control, however, we can sort from the pill itself.

Sorting from the Pill

To control the sort from a pill, unlike when using the toolbar buttons, we don't click the pill of the field we want to sort *by*, we click the discrete pill that we want to *have sorted*. Here we want to sort our Sub-Categories, so we click that pill to get the dropdown and click Sort. We can fine-tune exactly how we want to sort, such as alphabetic or manual, but we can also sort by field. And the field doesn't even have to be in the view – we can pick Quantity, and set the aggregation, and choose our sort order, I like descending.

It's also possible to sort different pills different ways. With that sort on Sub-Category, we could also sort Category by ascending sum of Sales.

Clearing Sorts

A sorted pill has an icon on the right side – so it's always easy to tell if there are sorts in the view. Perhaps the handiest thing of all, though, is the ability to clear the sorts – come to the clear sheet icon, here, and in the dropdown, select "Clear Sorts".

Nested Sorts

If we have multiple dimensions in the view that don't have a hierarchical relationship, we have to think carefully about how we want to sort. For example, here we have Market and Region. Each region falls into exactly one market, so if we sort by Profit, everything appears as expected. But here, we have Ship Mode and Order Priority, and the order priorities span multiple ship modes. If we sort Order Priority by Shipping Cost from the field label, all that Tableau considers is the shipping cost per order priority, and clearly medium orders have the highest shipping cost overall, so medium is brought to the top in each pane, even if for some ship modes, high priority orders have higher shipping costs.

When we sort by the field label, we're sorting across panes, so to speak, and each pane (Ship Mode) will have the same order of the next dimension that's being sorted (Order Priority). By contrast, a nested sort, which is the default behavior when sorting from the quick sort icon, simply sorts each bar within each pane. The longest bar in the First Class pane, High priority orders, is first, independent of the fact that for Standard Class orders, Medium priority orders are first.

Conclusion

Thank you for watching this video on how to Sort in Tableau. We invite you to continue with the Free Training videos to learn more.