



Free Training Transcript:
Interactive Filters

Welcome to this video on Interactive Filters. You can download the Exercises workbook to follow along in your own copy of Tableau.

Basic Interactive Filters

Dragging a field to the filter shelf is an easy way to filter, but what if we want to be able to modify the filter selection directly from the view? If we right click anywhere we see the Sub-Category field and select “Show Filter”, the field is automatically added to the filter shelf, and we get an Interactive Filter in the view.

We can edit the appearance and functionality of the Interactive Filter by clicking on the caret to bring up the menu. Interactive filters can be applied across specific worksheets, all views using that data source, or across related data source. Under Customize, we can control if the option to select “all” is showing, as well as those floating control buttons like search, or we can even add an “apply button”. The title can be toggled on/off or edited. It’s often good to put in an action word in the title, something like “Choose a Sub-Category”. We can also change whether selections made in the interactive filter are included or excluded by the filter.

Layout Mode for Interactive Filters

The mode, or visual layout, of the Interactive Filter depends on what type of field is being filtered. There are lots of options for discrete fields, including single value, multiple value, dropdowns, and wildcards. How the Interactive Filter is laid out can impact things like space and interactivity on a dashboard – dropdowns and wildcards save space, but lists may be more intuitive to click through. The Interactive Filter for a continuous field, such as Shipping Cost, has different layout options including a slider or at least/at most. If we create an interactive filter from a continuous date field, we get some cool options such as relative date, starting date, browse periods....Picking a filter layout should be based on both the screen real estate but also thinking about how the filter will be used. The filter layout should mesh with the purpose of the dashboard.

Cascading Interactive Filters

Another useful option in the menu is “Only relevant values” versus “all values in database”. All values will always show every option for the field, regardless of any other filters. A good example of when this is useful is something like cascading filters on a map. If we add an Interactive filters for Country, see how long that list is? Let’s open the

menu, note that “Only relevant Values is selected? So, when we then pick a Market from the filter the list of countries shortens considerably, because it includes only countries for a selected market, let’s change it to a single value dropdown, which automatically selects a single country. Note that the Market filter collapsed – it only shows the relevant market to the Country selected in the filter. That’s because it is also set to “only relevant values. If we want to always be able to select any market at any time, we can go to the menu and select “all values in database”.

Cascading interactive filters are a great way to get interactivity into your analysis, or to tidy up long lists of values to make it more intuitive for the end user. However, they do require more work for the queries back to the database and may impact performance. As a note, hiding the quick filter control does not remove the filter; it’s necessary to remove it from the filter shelf or from the menu of the filter.

Interactive Filters are a great way to let end users interact with a visualization. Do note, however, that excessive numbers of Interactive Filters may slow down the performance of a dashboard or workbook.

Conclusion

Thank you for watching this video on interactive filters. We invite you to continue with the Free Training videos to learn more.