On-Demand Training: Ways to Filter Transcript

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

Ways to Filter

Filtering allows you to exclude members of a field based on a particular characteristic. If you're familiar with SQL, this is like the "WHERE" clause. There are a few basic ways to filter in Tableau: on the Filter Shelf, with a Quick Filter, or in the view.

First, we can drag a field, such as Category, to the filter shelf directly, here we'll remove technology

Second, if we want to let the user interact with the filter, we can use a quick filter by right clicking on the field, we'll use Order Priority, and selecting "Show Quick Filter", and there it is in the view

- Note the quick filter does not have to be a field in the view, we added this quick filter just by right clicking on the field in the data window

- Adding a quick filter puts that field on the filter shelf

Third, in the view itself, we can select a mark or group of marks, then click to bring up the command buttons in the tooltip, and keep only or exclude

- We can also click on a header to see those same options.

- If you're on a view with headers, such as a bar chart, you can double click on a header to keep only that

- Keep only and exclude can also be done from some legends by right clicking

Removing Filters

All of these types of filters put a pill on the filter shelf. To remove a filter, drag the pill off the shelf.

More Information

Filtering is a complex topic.

- For more information on using the filter shelf, including the options that are presented for dimensions, measures, and dates, check out the video Using the Filter Shelf

- There's also a video specifically on quick filters, which covers how to create a quick filter and the options for customizing and formatting them.

- Filtering can be done at the record or row level in the data source, on the aggregated view, or before data even comes into Tableau. To learn more, watch the video Where Tableau Filters.

- Filtering can also be done conditionally. This is covered in Filtering for Top and Top N.

- Finally, the video Additional Filtering Topics covers deeper concepts such as context filters, and include versus exclude.

Conclusion

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