HOW TO CREATE EXTRACT FILTERS

Extract filter is used to filter the extracted data from the data source
Extract filters in Tableau are used to extract a small subset of data from the original data source
As per Tableau's Order of Operations the Extract Filters are executed the first
These filters are the most performant filters as they stop data from entering the extract
This filter is utilized if the user extracts the data from the data source

After connecting the data source file to Tableau, we can see the two options,
Live and **Extract** in the top right corner in the canvas of the data source tab

A live connection is directly connected to a data source
And extract connection extracts the data from the data source and creates a local copy in Tableau repository

HOW TO CREATE EXTRACT FILTERS

STEP 1: In the **Canvas** of **Data Source** page ensure that **Extract** is selected under **Connection**
Click on **Edit** next to **Extract**

STEP 2: Extract Data dialog box will appear. Click on **Add**

HOW TO CREATE EXTRACT FILTERS

STEP 3: In the **Add Filter** dialog box enter the required field e.g: **Category**. Click **OK**
Select the required members e.g: **Office Supplies** and **Technology**
Once finished, Click **OK**
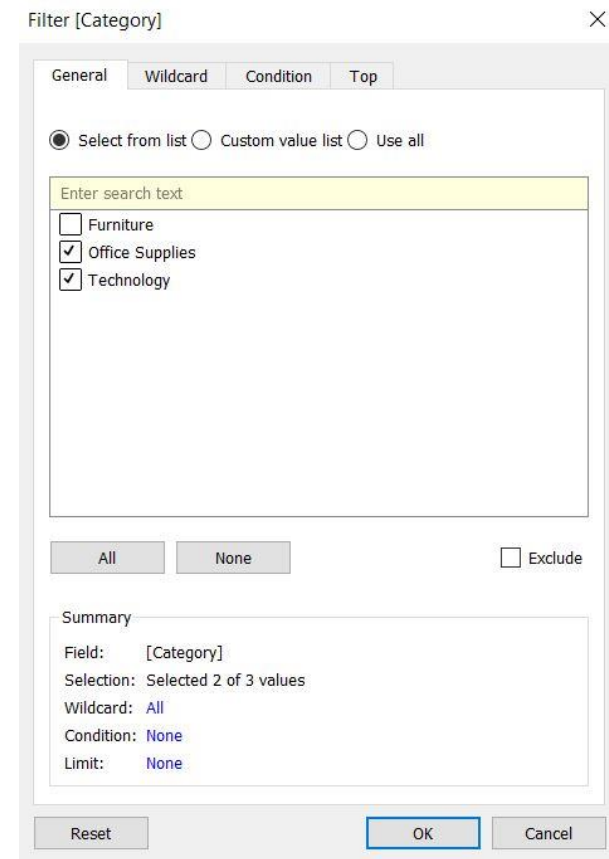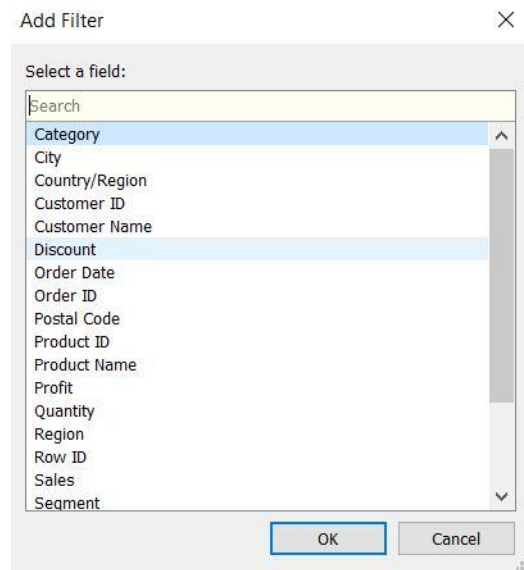
HOW TO CREATE EXTRACT FILTERS

STEP 4: Under **Filters (optional)** we can now see the selected field i.e., **Category** along with the filtered condition in the **Details**. Once finished, Click **OK**
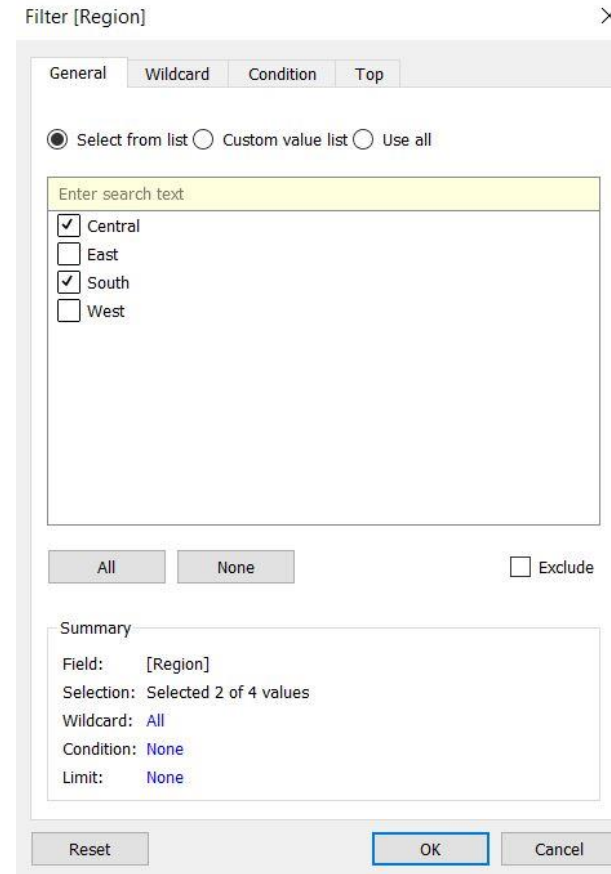
STEP 5: If required we can add another field e.g: **Region**. Click **OK**
Select the required members e.g: **Central** and **South**
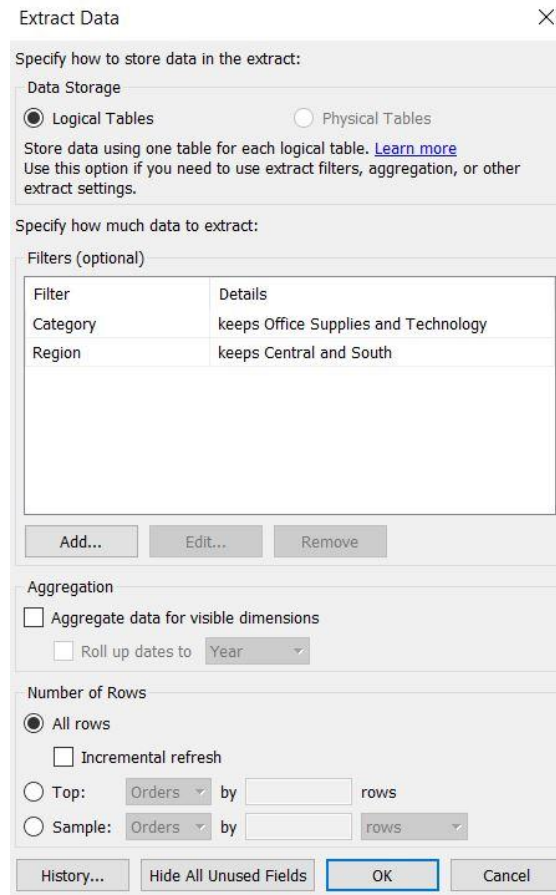Once finished, Click **OK**

HOW TO CREATE EXTRACT FILTERS

STEP 6: Under **Filters (optional)** we can now see the new field i.e., **Region** along with the filtered condition in the **Details**. Once finished, Click **OK**

HOW TO CREATE EXTRACT FILTERS

STEP 7: In the **Canvas** of **Data Source** page ensure that the below line is observed
      Extract will include subset of data

Connection
○ Live   ◉ Extract | Edit Refresh   Filters
0 | Add
Extract will include subset of data.

HOW TO CREATE EXTRACT FILTERS

STEP 8: Click on **Sheet1**. We will be prompted to save the extract
If required browse to the desired location, rename the file and click on **Save**

HOW TO CREATE EXTRACT FILTERS

STEP 9: Build a view with **Region** in **Columns** shelf and **Category** in **Rows** shelf
Drag the **Sales** to **Text** on **Marks** card. Only the filtered members are seen in the view

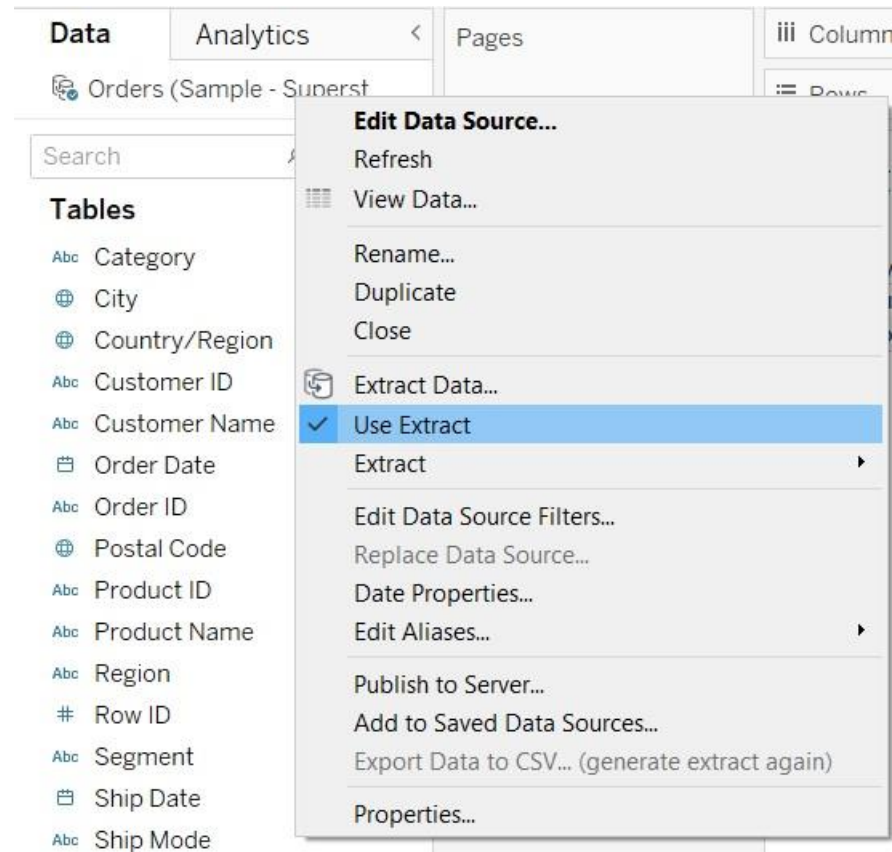The workbook is connected to an extract that still references the underlying data

HOW TO CREATE EXTRACT FILTERS

STEP 10: Right-click on the data source and de-select the **Use Extract**

HOW TO CREATE EXTRACT FILTERS

STEP 11: Now the view shows all members of **Region** and **Category**