

# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

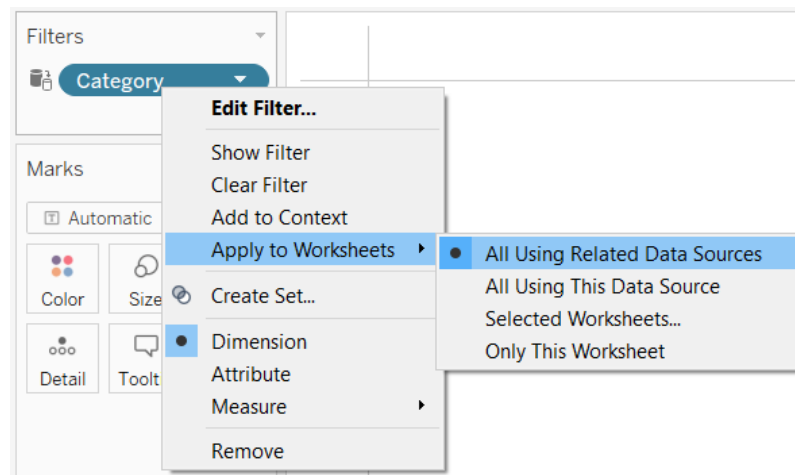
Let's consider the situation that we have connected to multiple data sources, each with common dimensions like Category, Date, Product, or Location.

And as part of the analysis process, we might want to have a single filter applied across all the sources.

Any time we have data sets that share a common dimension, we can filter across the data sets.

We need to make use of the below option

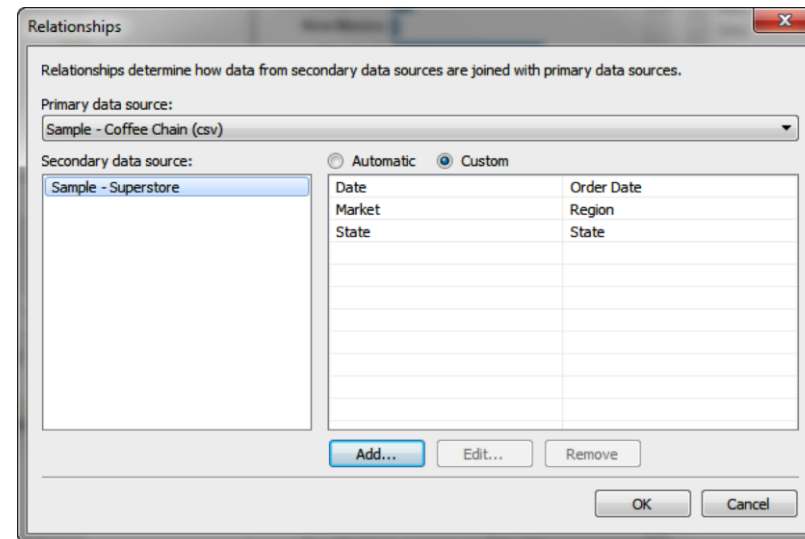
**Apply to Worksheets > All Using Related Data Sources**



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

By default, Tableau treats any fields with the same name as related.

If we have common fields in different data sources with different names, we can define a custom relationship (mapping the field names together), or we can simply rename the fields so that they match.

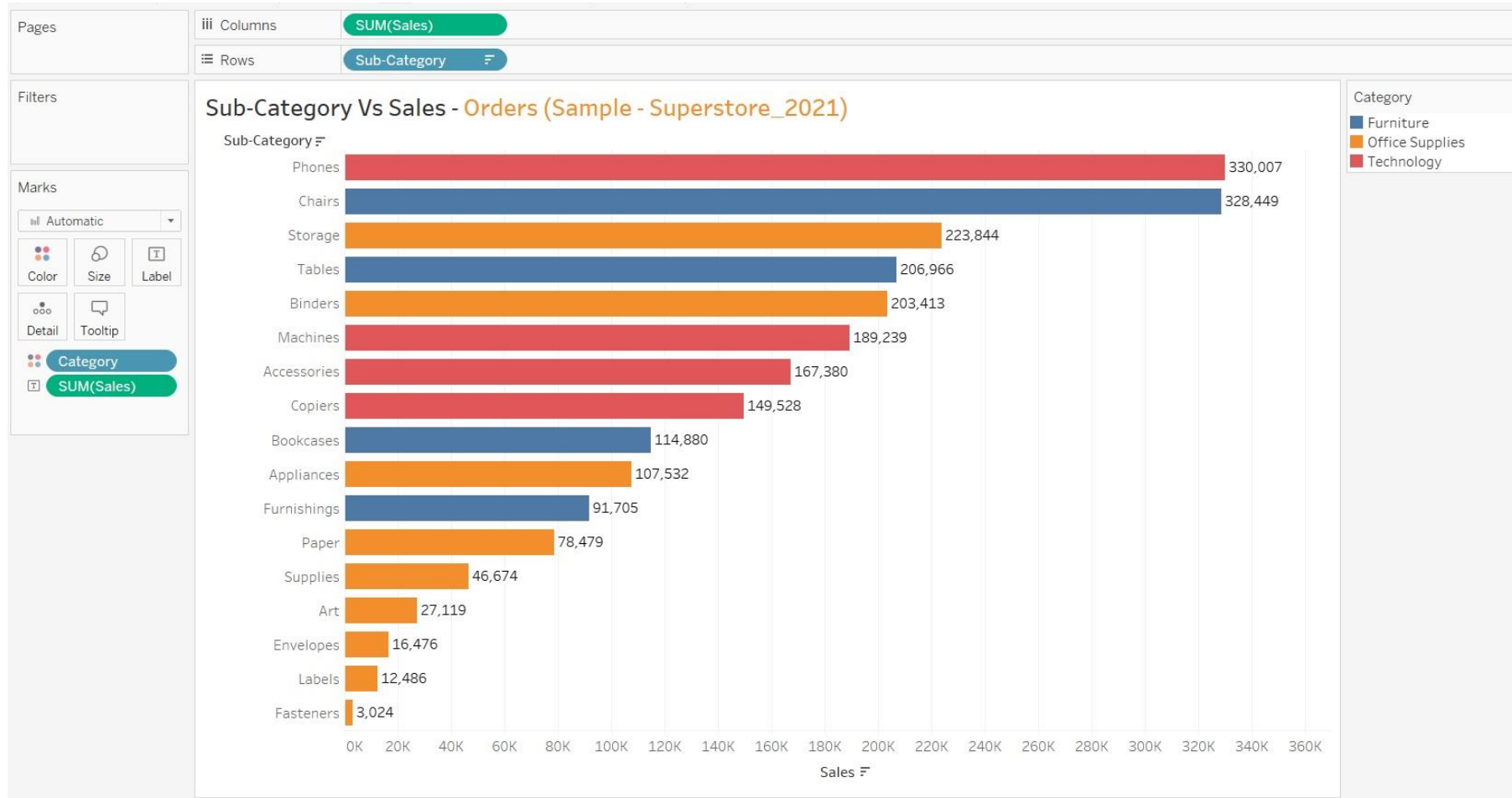


Courtesy: <https://www.tableau.com/about/blog/2016/5/requested-you-can-filter-across-data-sources-tableau-10-54330>

We will go through a simple example for understanding the importance of the **All Using Related Data Sources** option.

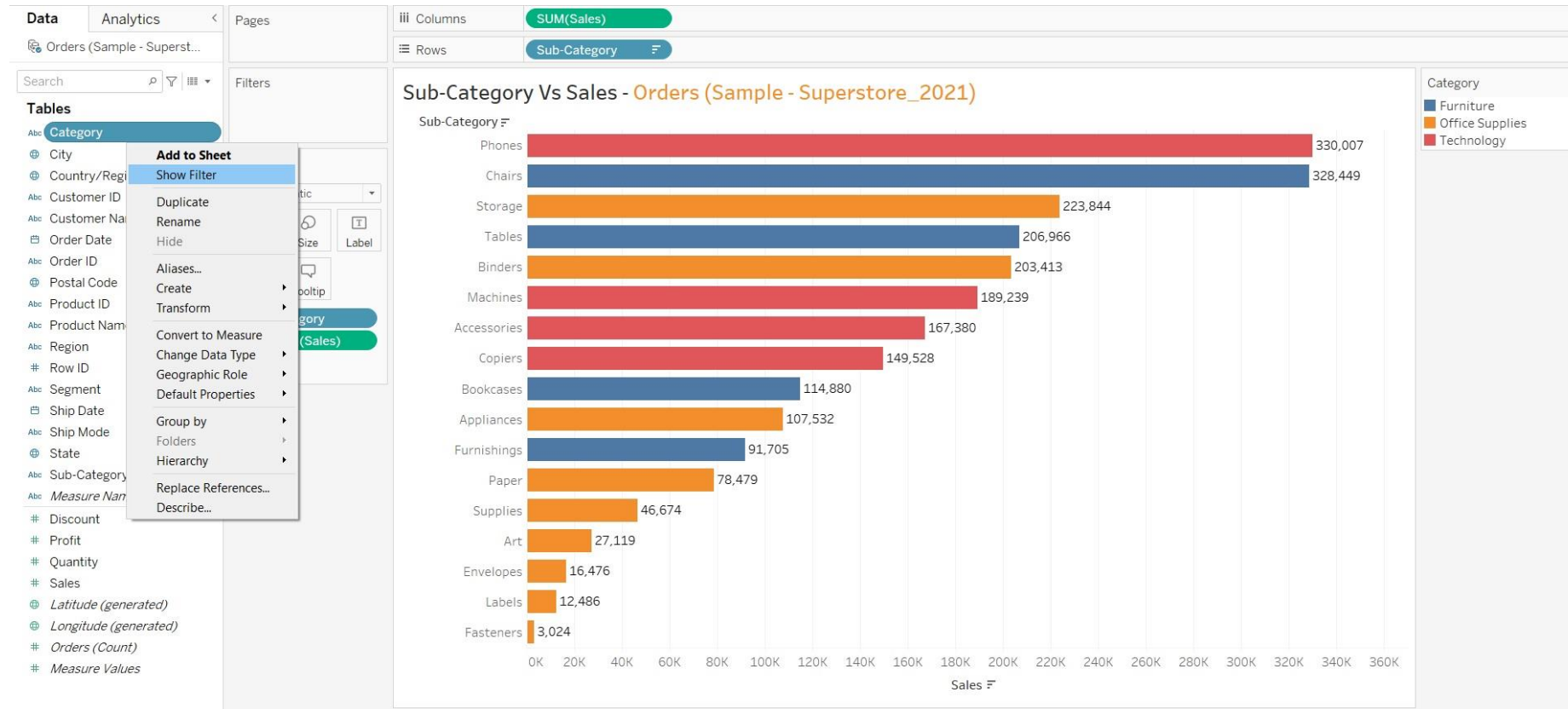
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**STEP 1:** Let us start with the below mentioned view of **Sub-Category Vs Sales** using the **Orders Table** from the **Sample Superstore** data source



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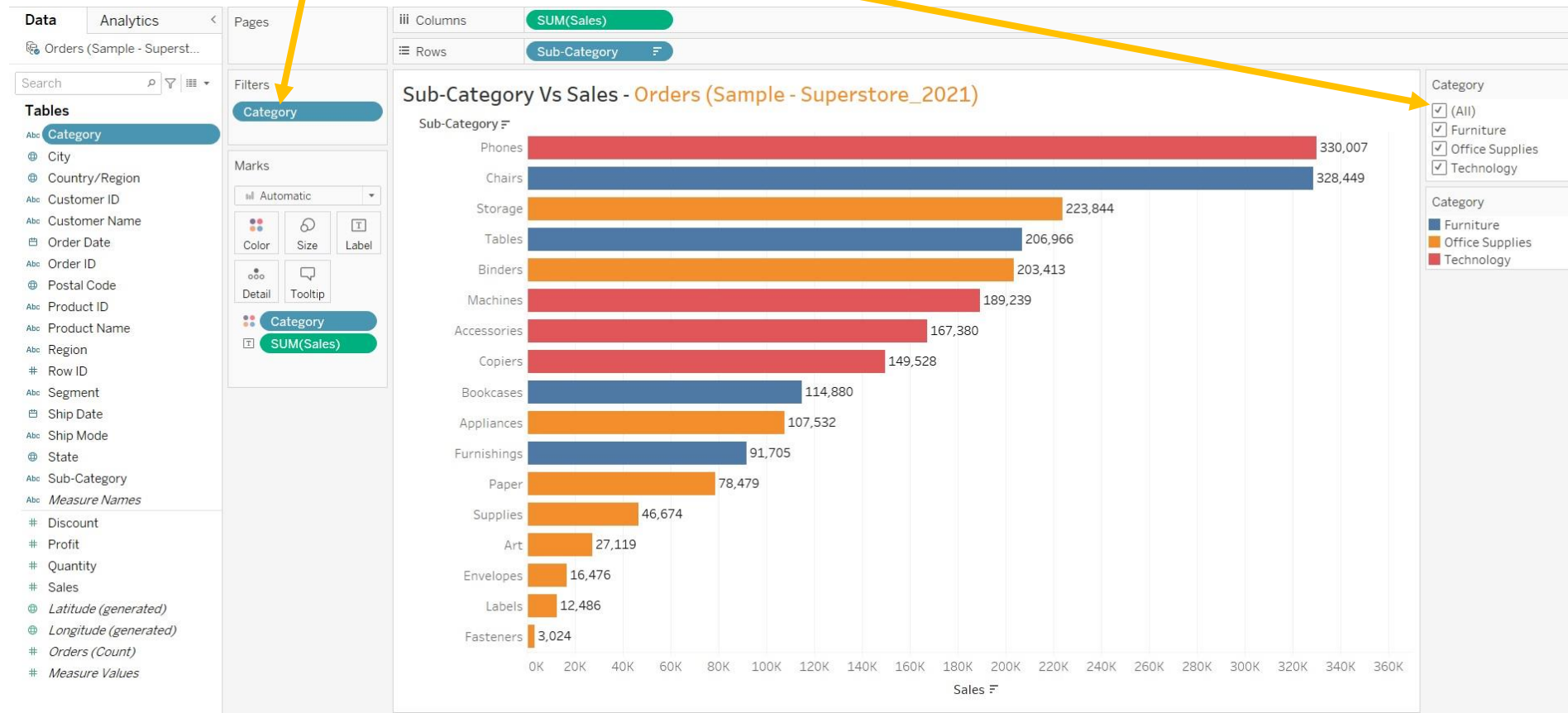
**STEP 2:** Right-click on **Category** in **Data** pane and select **Show Filter**



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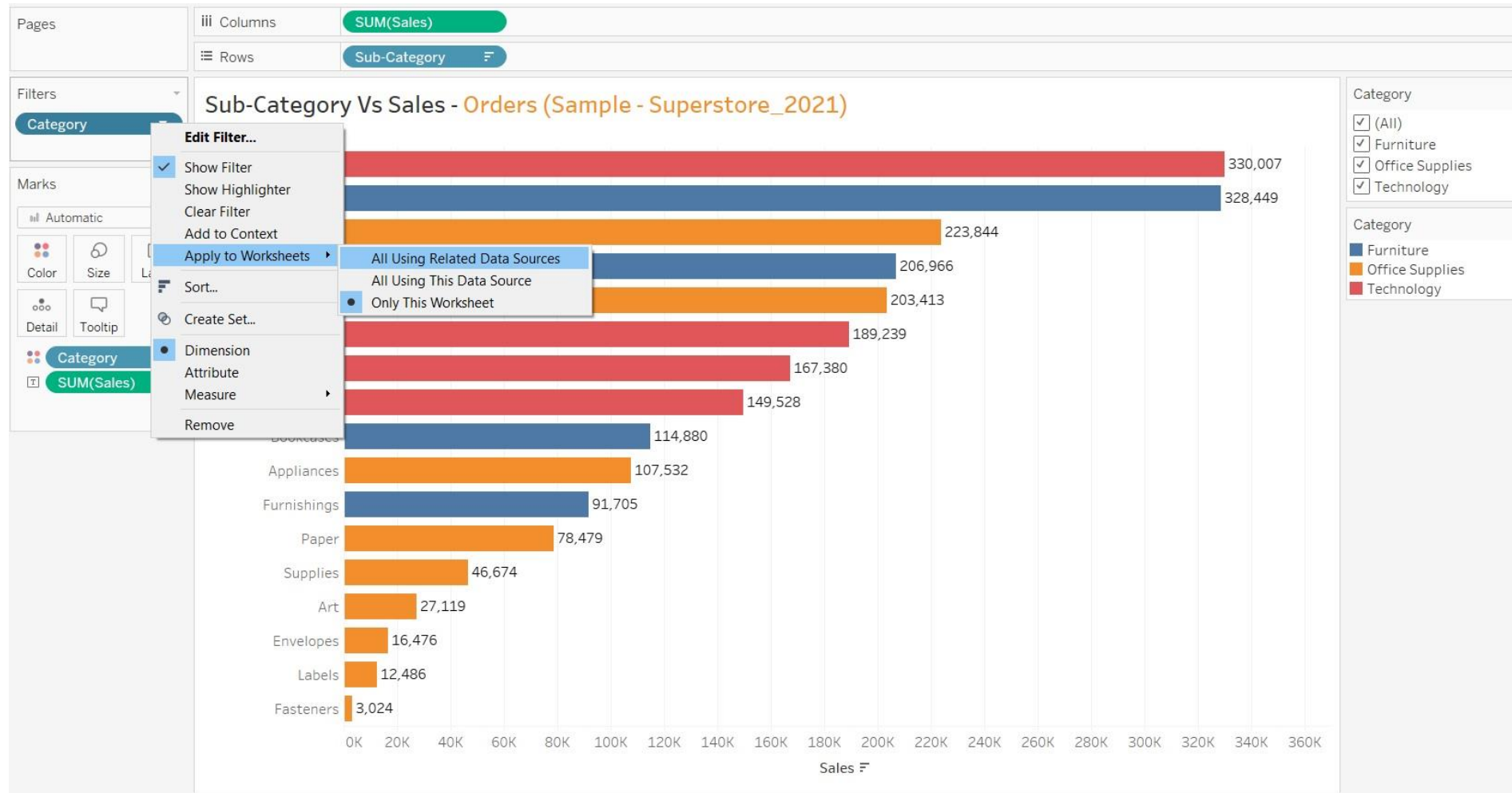
**STEP 3: Category** field is now present in the **Filters** shelf

**Filter control** for **Category** is present in the **card**



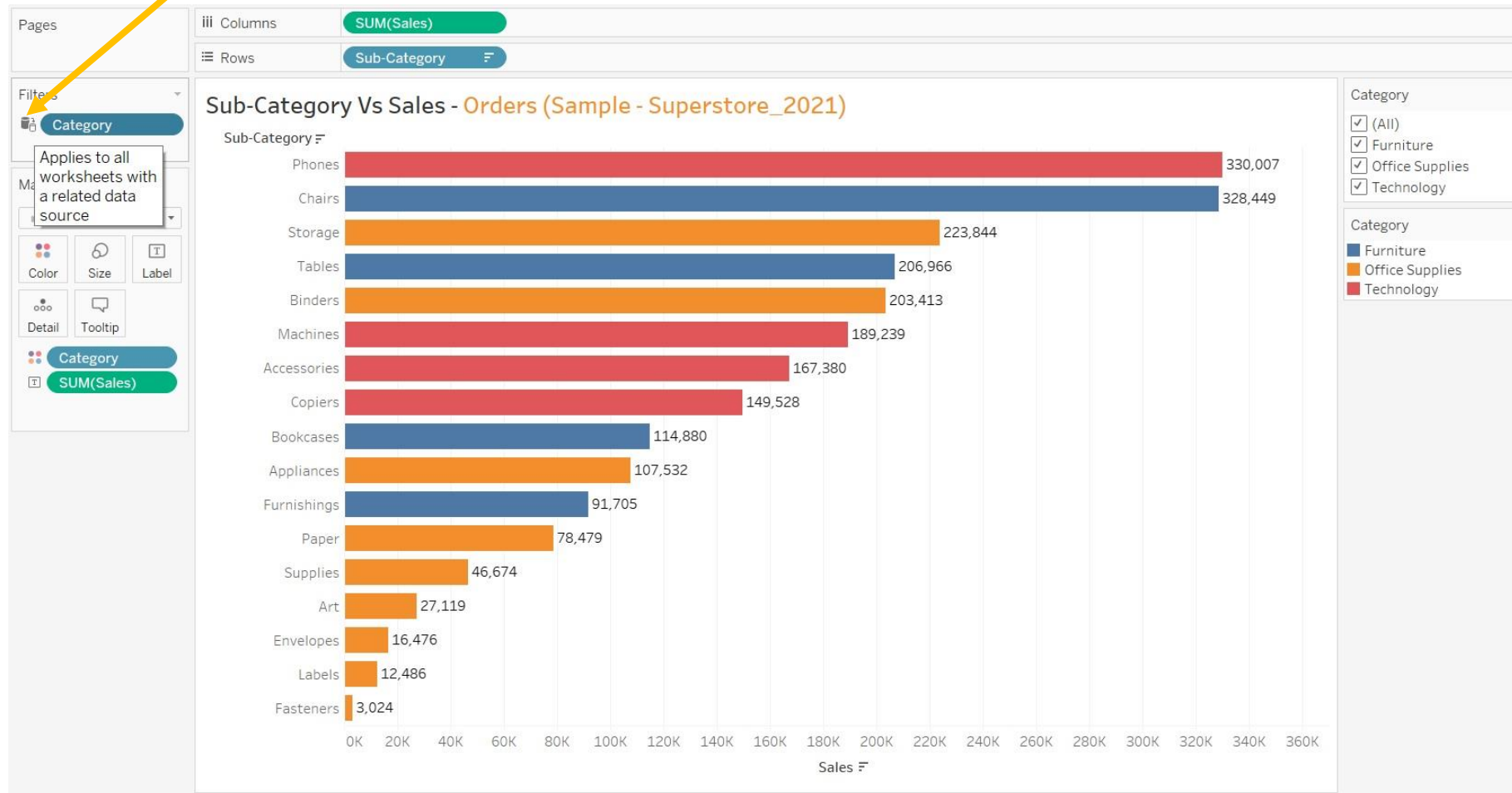
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 4:** Right-click on **Category** in **Filters** shelf,  
Select **Apply to Worksheets > All Using Related Data Sources**



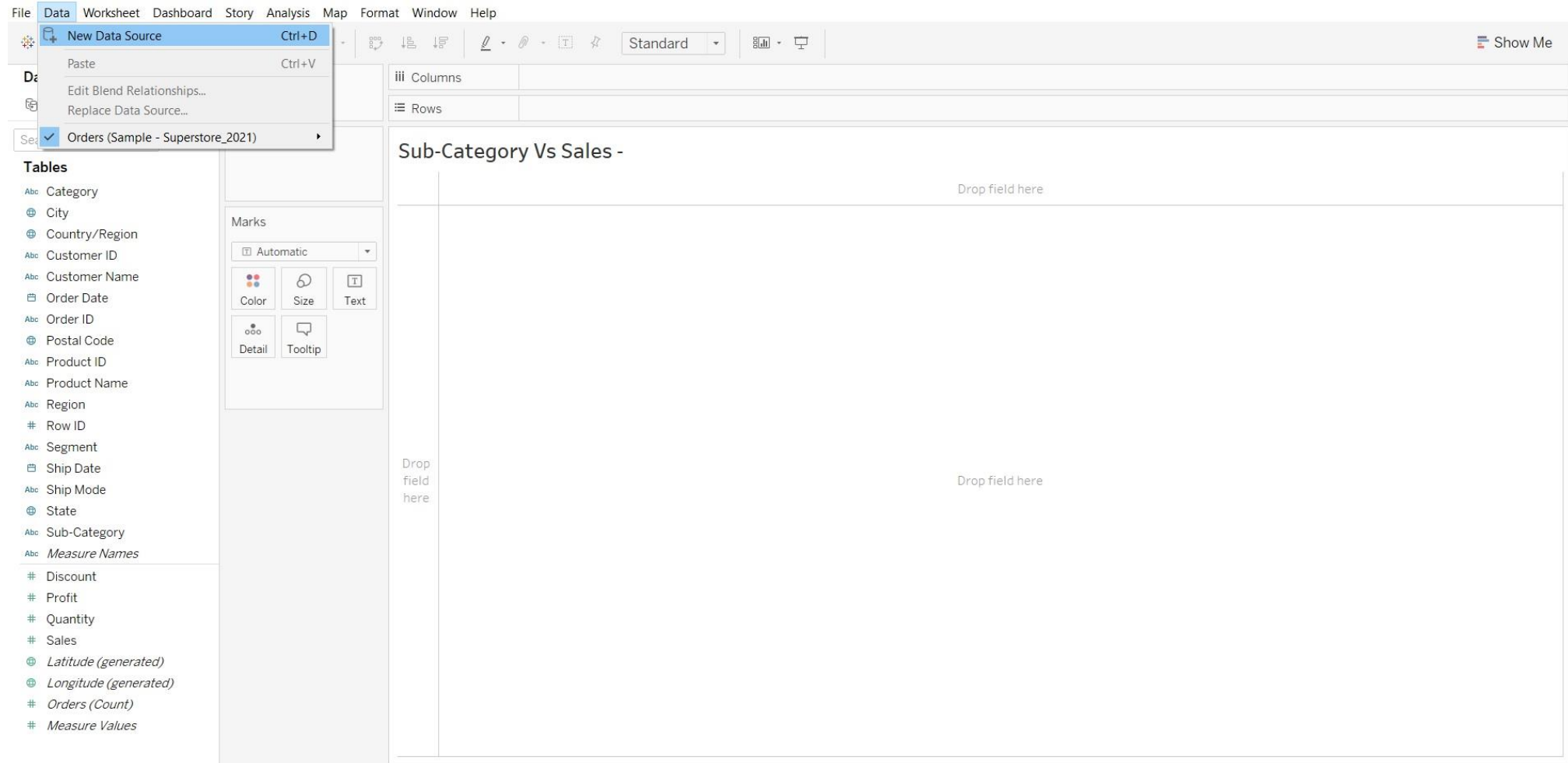
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 5:** An icon is added next to the field on the **Filters** shelf, indicating that the filter is being applied to multiple data sources



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

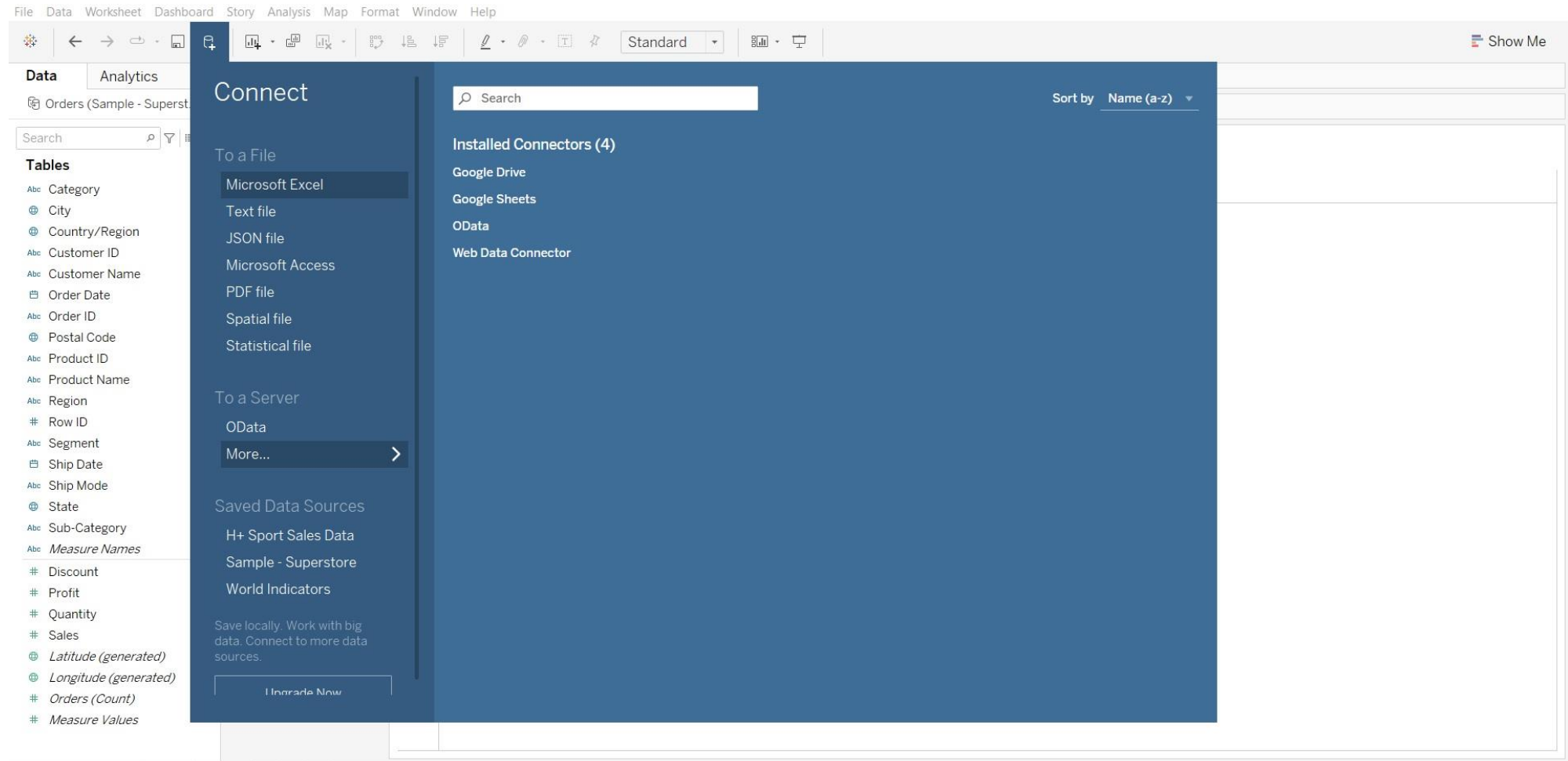
**STEP 6:** Let us add a second data source. Click on **Data > New Data Source**





# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

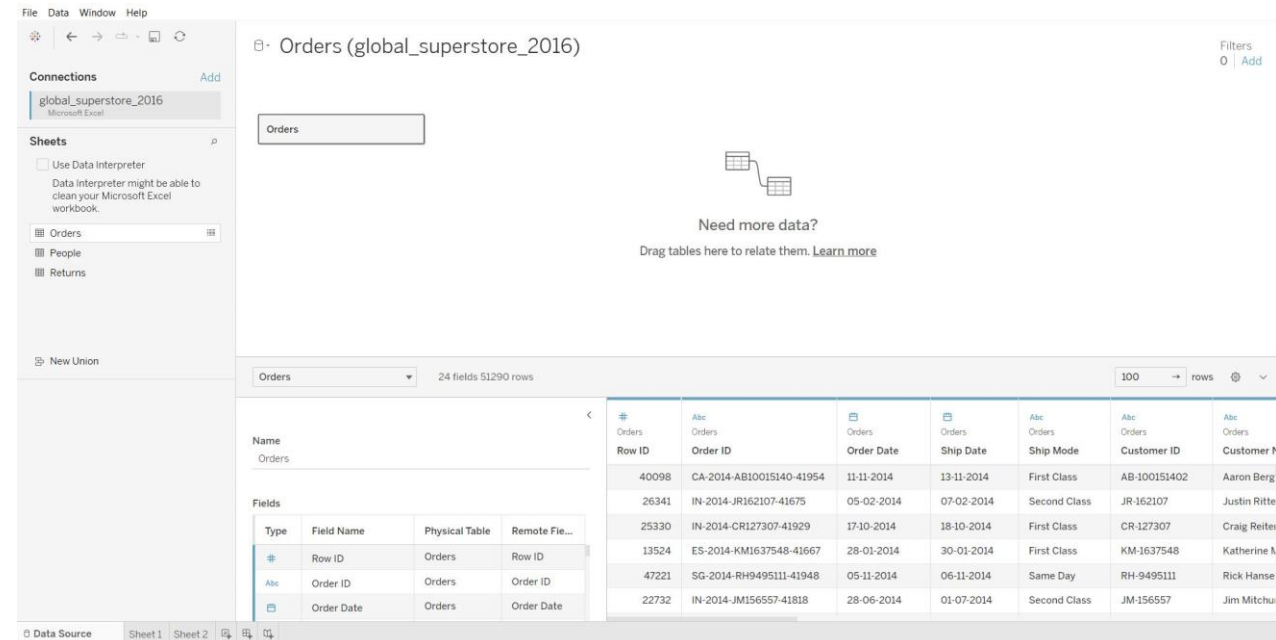
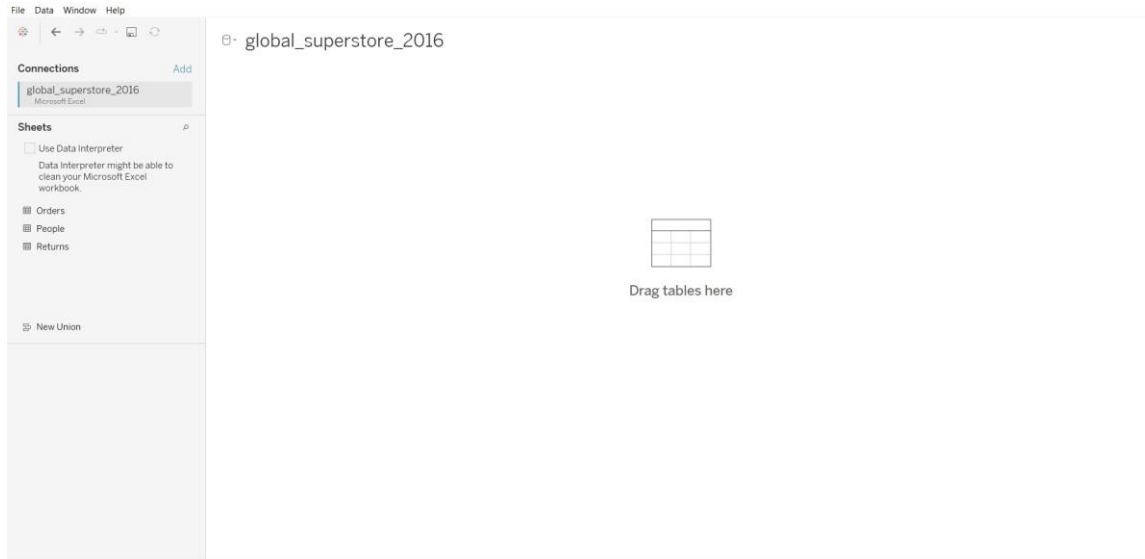
**STEP 7:** Under **To a File**, Select **Microsoft Excel** and select the 2<sup>nd</sup> file



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 8:** Drag the **Orders** table into the **Canvas** area of the **Data Source** page

**NOTE:** This is from the **2<sup>nd</sup> Data Source** i.e., **global\_superstore\_2016**



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**STEP 9:** Select the 2<sup>nd</sup> Data Source below Data

**Drag and drop Sub-Category from Data pane to the Rows shelf**

The screenshot displays the Tableau Desktop interface. On the left, the 'Data' pane is active, showing a list of data sources: 'Orders (global\_superstor...)' and 'Orders (Sample - Superst...'. Below this is a search bar and a list of fields under 'Tables'. The 'Sub-Category' field is highlighted. In the center, the 'Columns' shelf is empty, and the 'Rows' shelf contains the 'Sub-Category' field. The 'Marks' card is set to 'Automatic'. The main view area is titled 'Sub-Category Vs Sales -' and contains two 'Drop field here' prompts. A yellow arrow points from the 'Sub-Category' field in the Data pane to the 'Sub-Category' field on the Rows shelf.

**Data** | Analytics

Orders (global\_superstor...) | Orders (Sample - Superst...)

Search

**Tables**

- Category
- City
- Country
- Customer ID
- Customer Name
- Market
- Order Date
- Order ID
- Order Priority
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Shipping Cost
- Latitude (generated)
- Longitude (generated)

**Columns**

**Rows** | Sub-Category

**Filters**

**Marks**

Automatic

Color | Size | Text

Detail | Tooltip

Sub-Category Vs Sales -

Drop field here

Drop field here

# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 10:** Tableau automatically adds the dimension e.g: **Category** that was set as **All Using Related Data Sources** filter for the 1<sup>st</sup> Data Source

The screenshot shows the Tableau interface with the following components:

- Data Source:** Orders (global\_superstor...)
- Columns:** Sub-Category
- Filters:** Category
- Marks:** Automatic
- Visualization:** Sub-Category Vs Sales - Orders (global\_superstore\_2016)
- Table:** A table showing Sub-Category and Sales data.

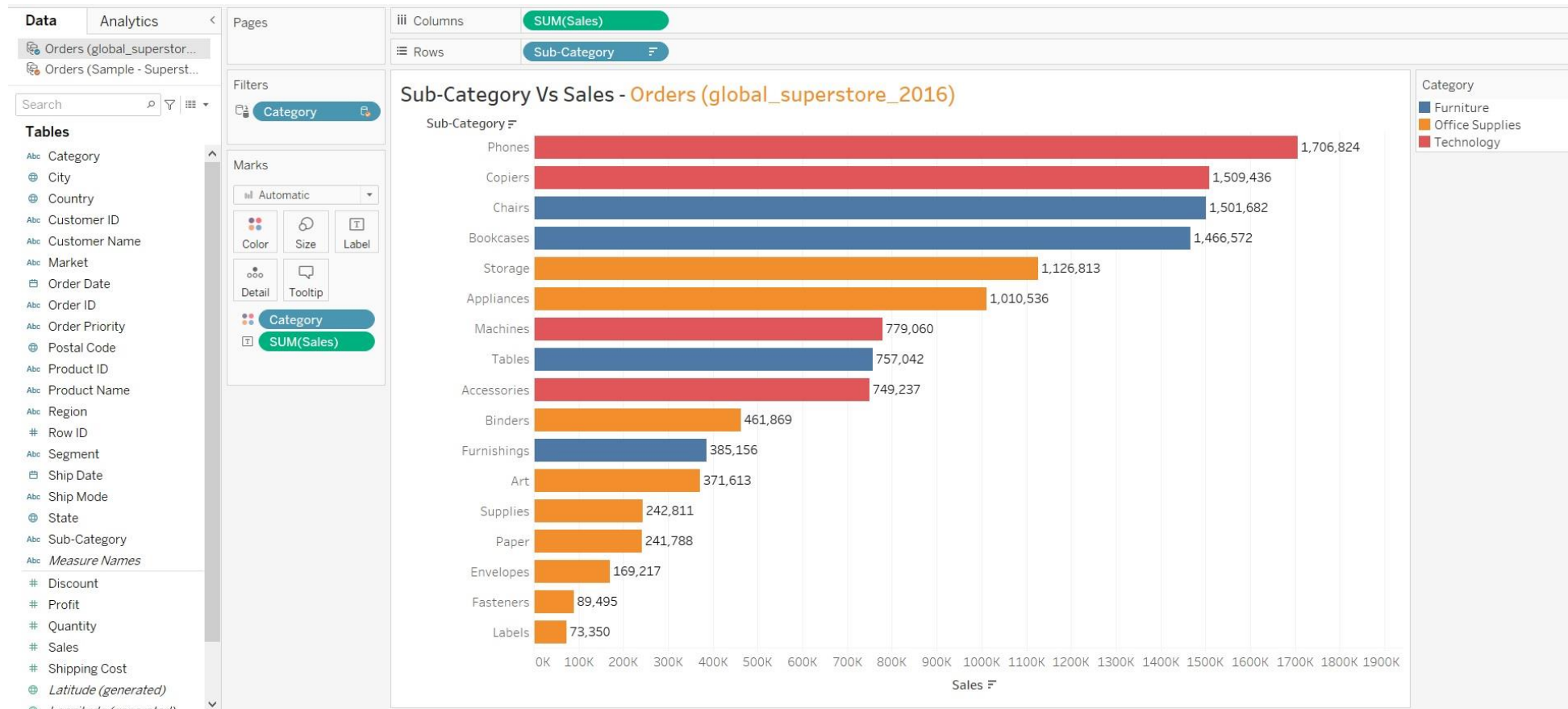
A yellow arrow points from the text "set as All Using Related Data Sources filter for the 1<sup>st</sup> Data Source" to the "Category" filter in the Filters shelf.

Filter using Category (Orders (Sample - Superstore\_2021)) to filter Category.  
Also applies to worksheet:  
Sheet 1 filtering Category (Orders (Sample - Superstore\_2021))

Sub-Category	Sales
Binders	Abc
Bookcases	Abc
Chairs	Abc
Copiers	Abc
Envelopes	Abc
Fasteners	Abc
Furnishings	Abc
Labels	Abc
Machines	Abc
Paper	Abc
Phones	Abc
Storage	Abc
Supplies	Abc
Tables	Abc

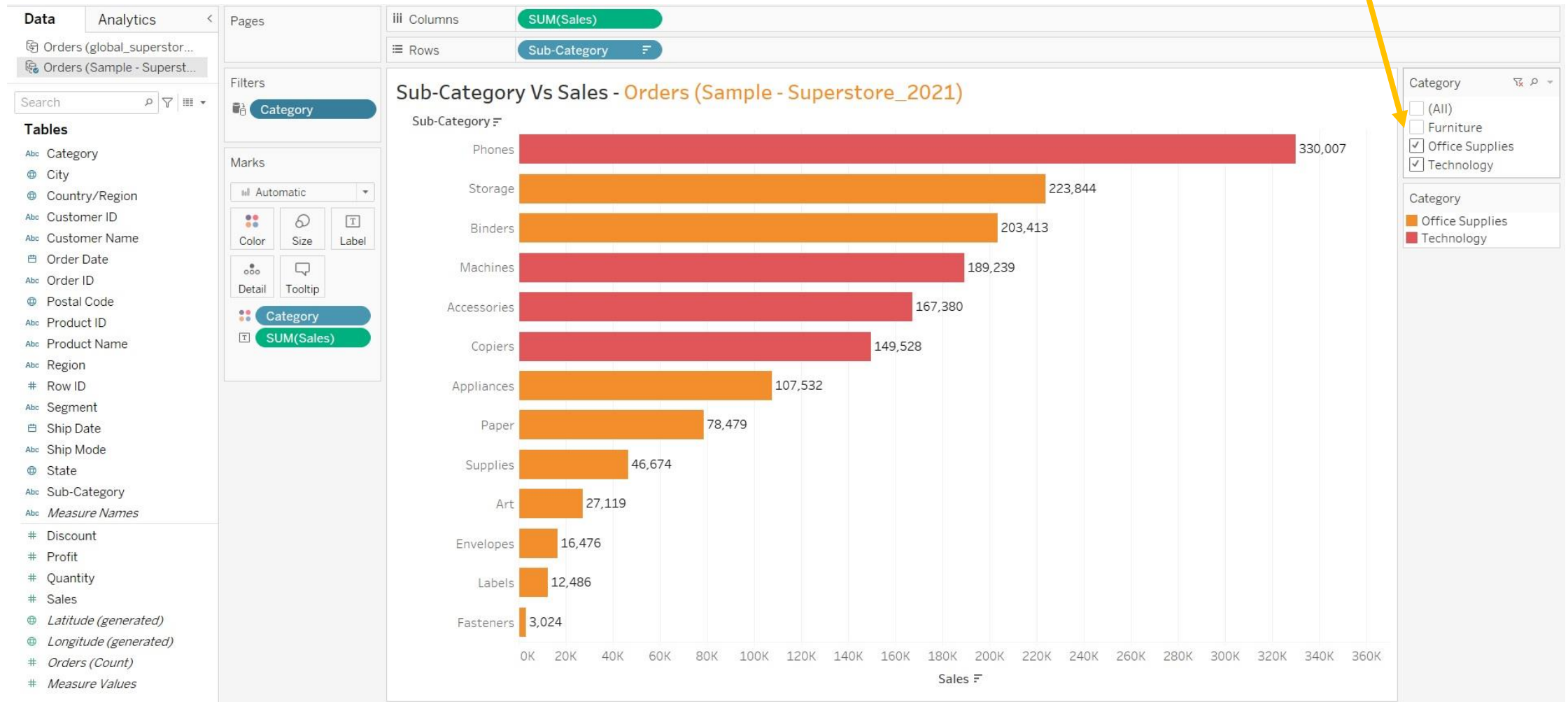
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 11:** Let us create the same view that was present in the sheet of the 1<sup>st</sup> Data Source



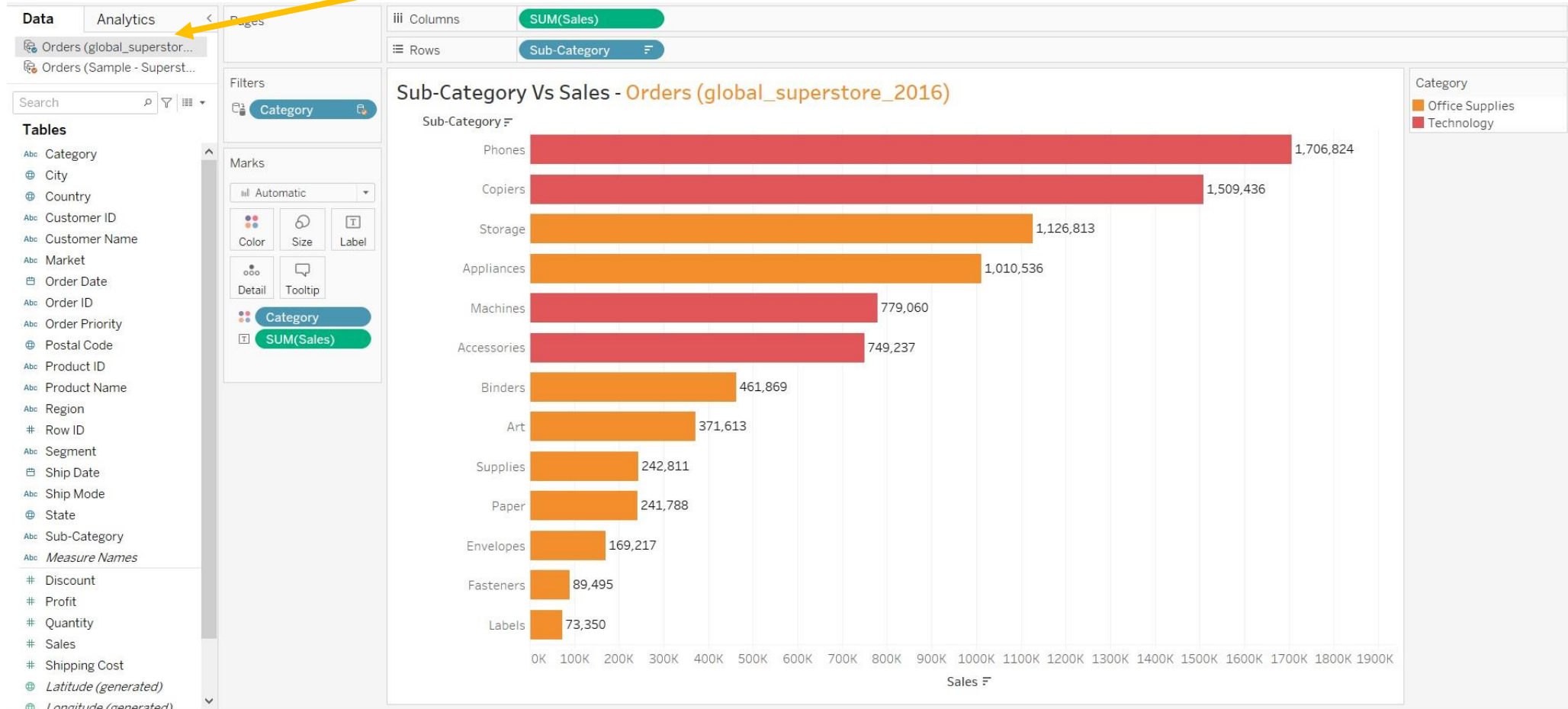
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 12:** In the previous sheet (of 1<sup>st</sup> Data Source) edit the **Category** Filter i.e., de-select **Furniture**. The view now shows the **Sub-Categories only** related to the **Office Supplies** and **Technology Category**



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

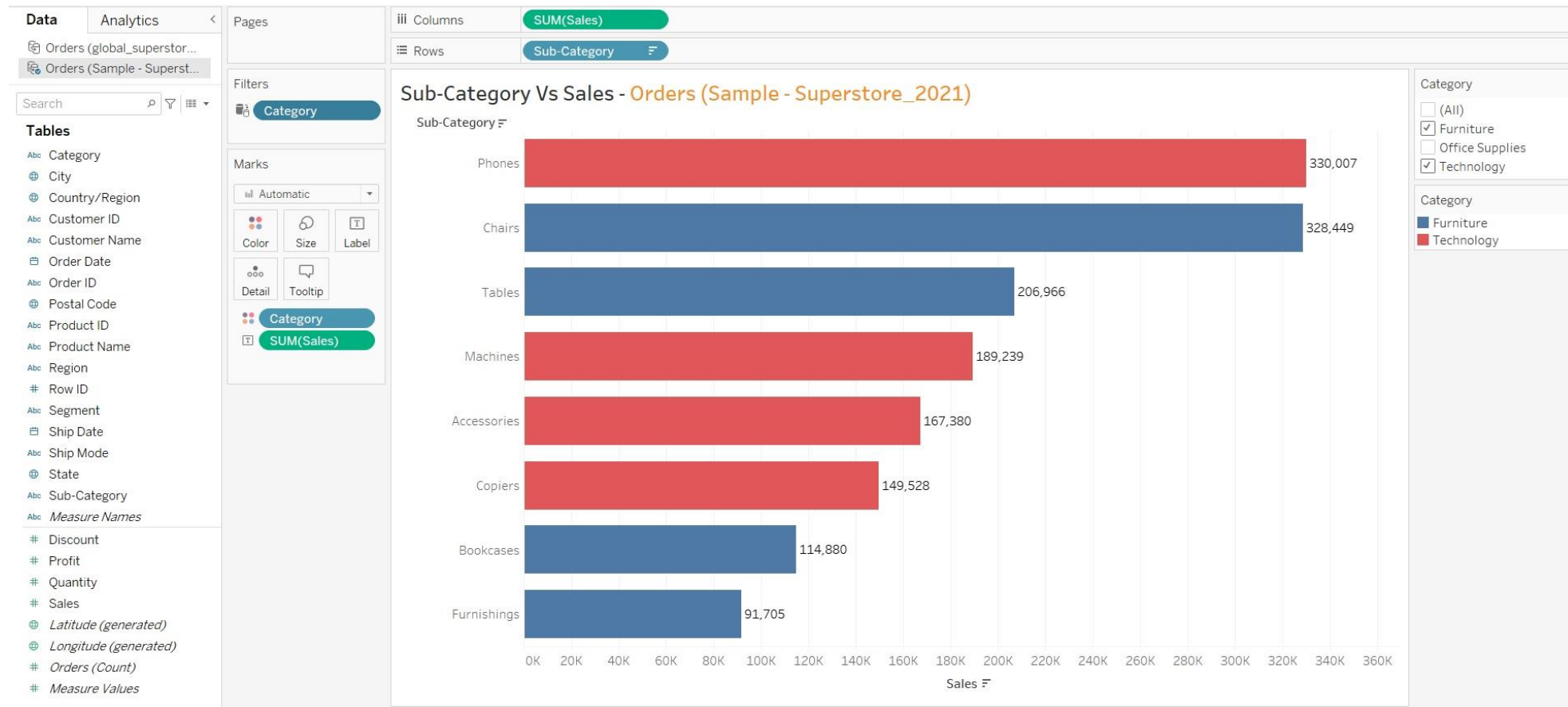
**STEP 13:** The filter changes in 1<sup>st</sup> Data Source are automatically reflected in the sheet of the 2<sup>nd</sup> Data Source





# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

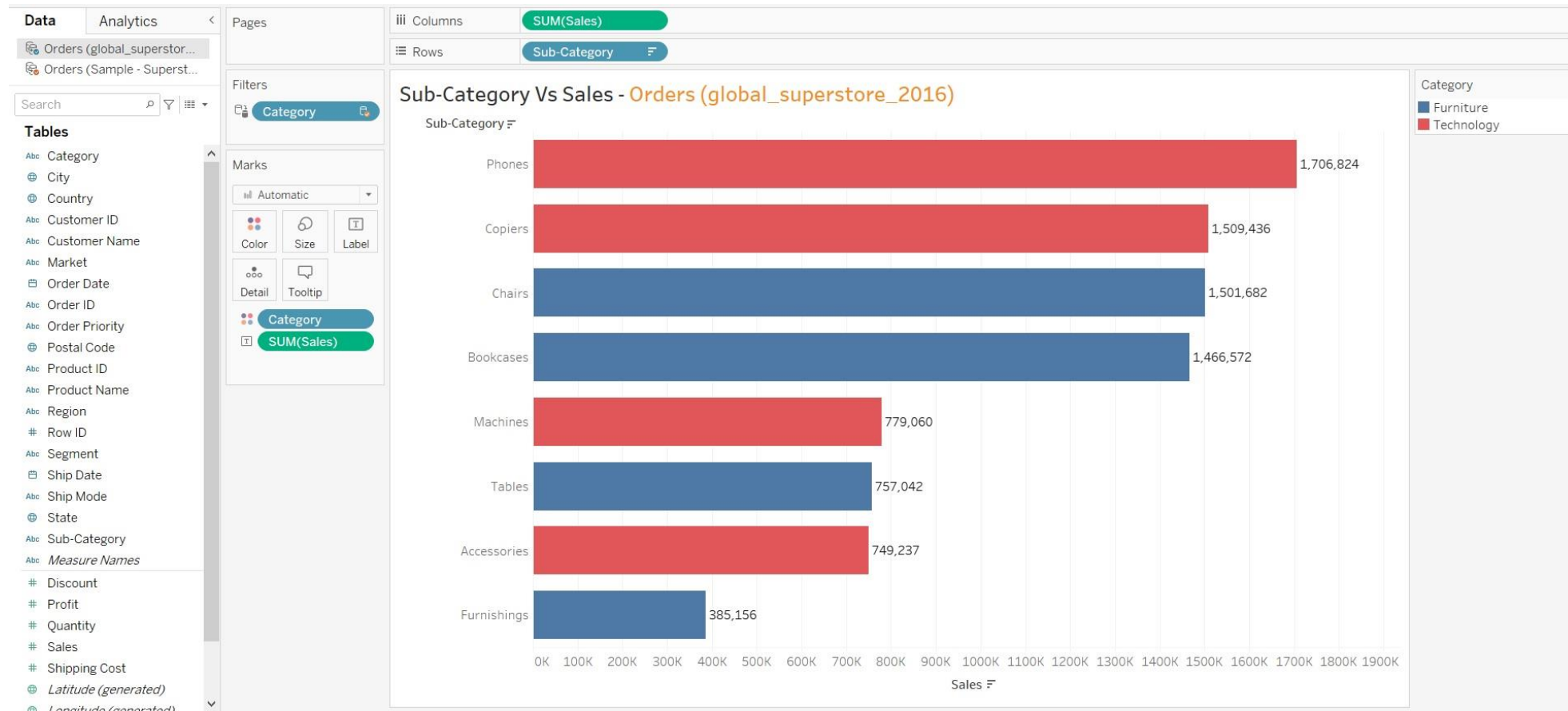
**STEP 14:** In the previous sheet (of 1<sup>st</sup> Data Source) edit the **Category** Filter i.e., de-select only **Office Supplies**. The view now shows the **Sub-Categories only** related to the **Furniture** and **Technology** Category





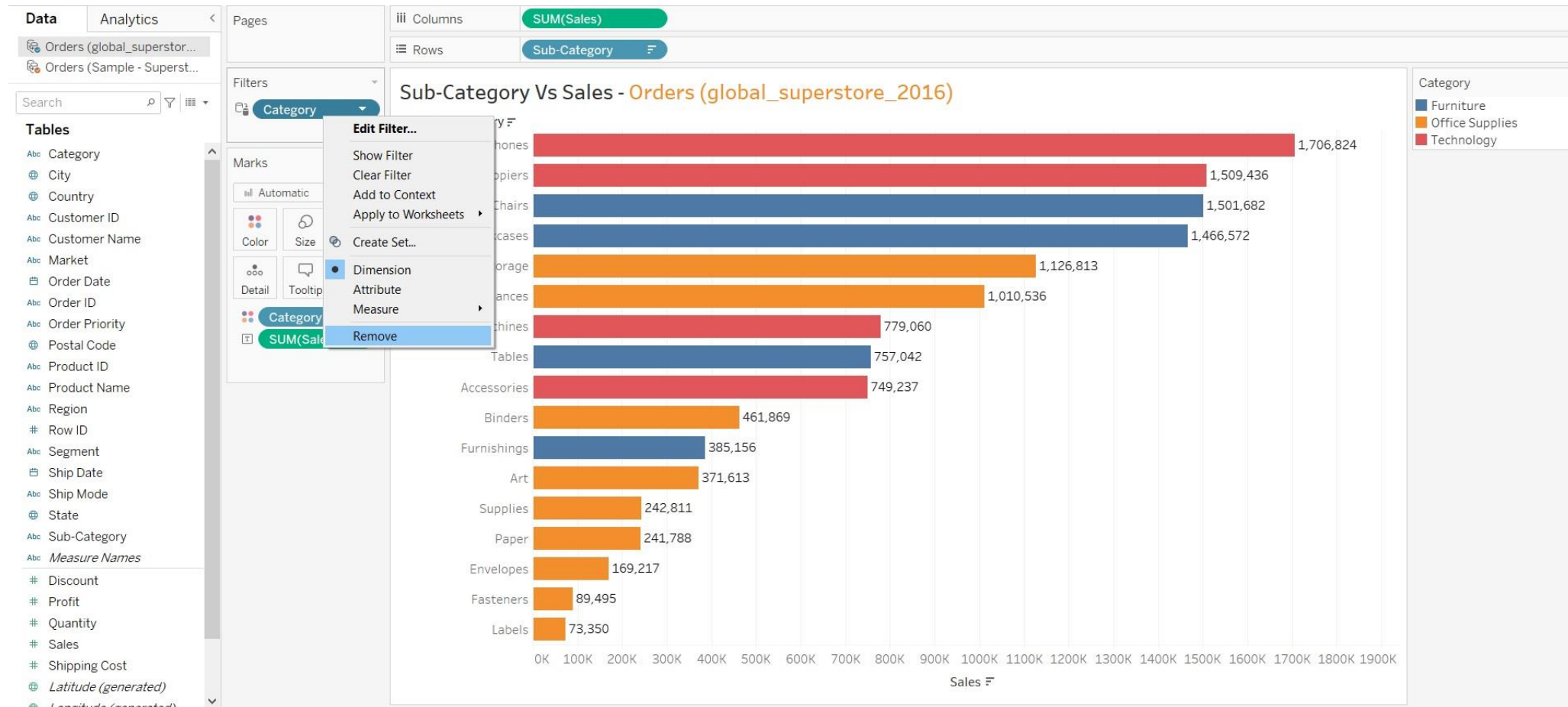
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 15:** The filter changes in 1<sup>st</sup> Data Source are automatically reflected in the sheet of the 2<sup>nd</sup> Data Source



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 16:** In the sheet of 1<sup>st</sup> Data Source remove the Filter  
Right-click **Category** in the **Filters** shelf, Select **Remove**



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

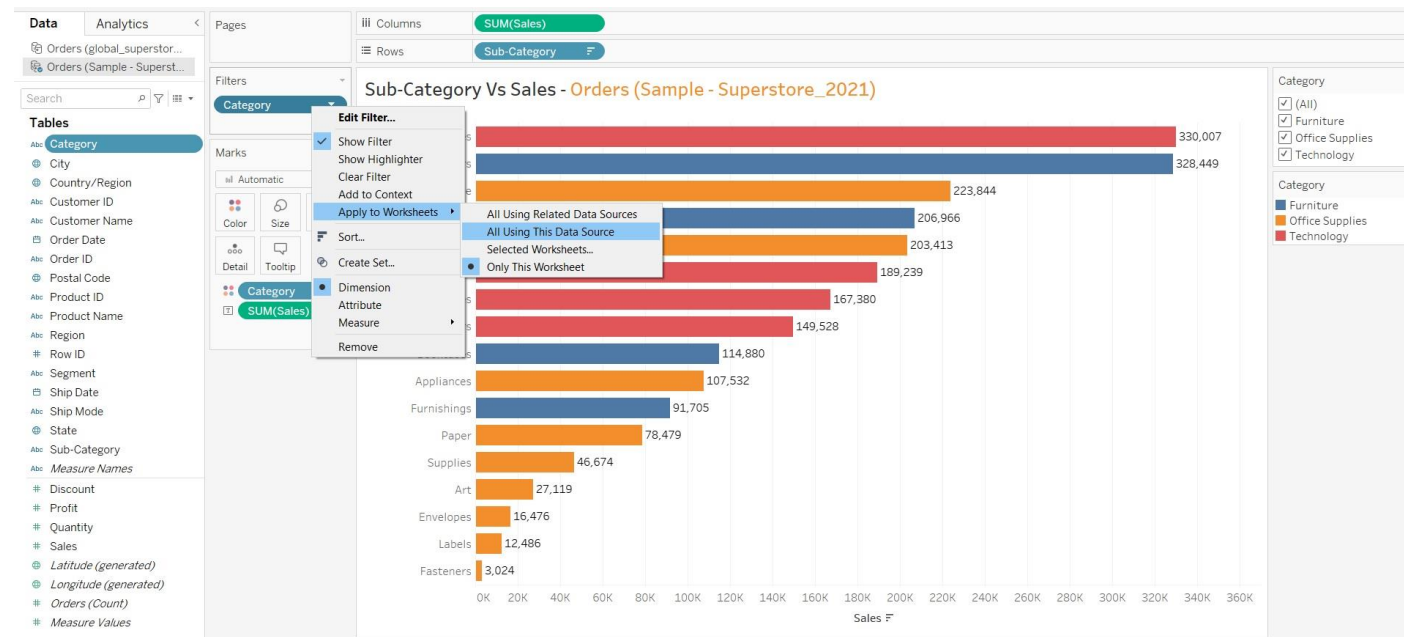
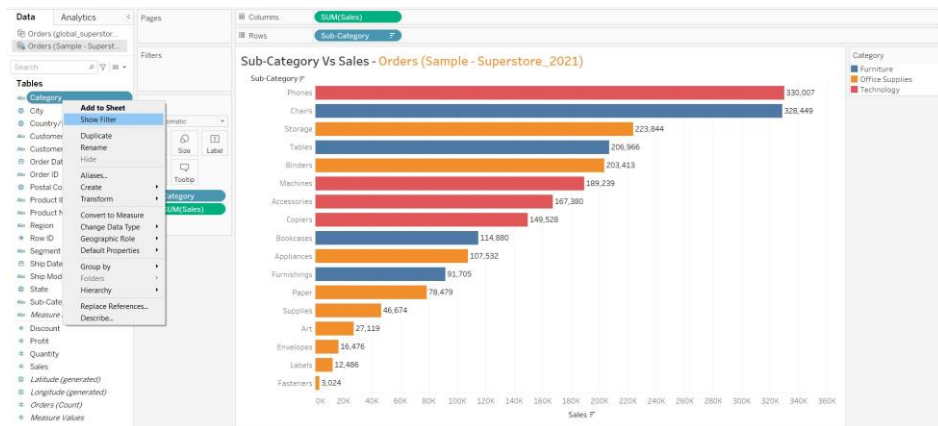
**STEP 17:** In the sheet of 1<sup>st</sup> Data Source Right-click on **Category** in **Data** pane and select **Show Filter**

**Category** field is now present in the **Filters** shelf

**Filter control** for **Category** is present in the **card**

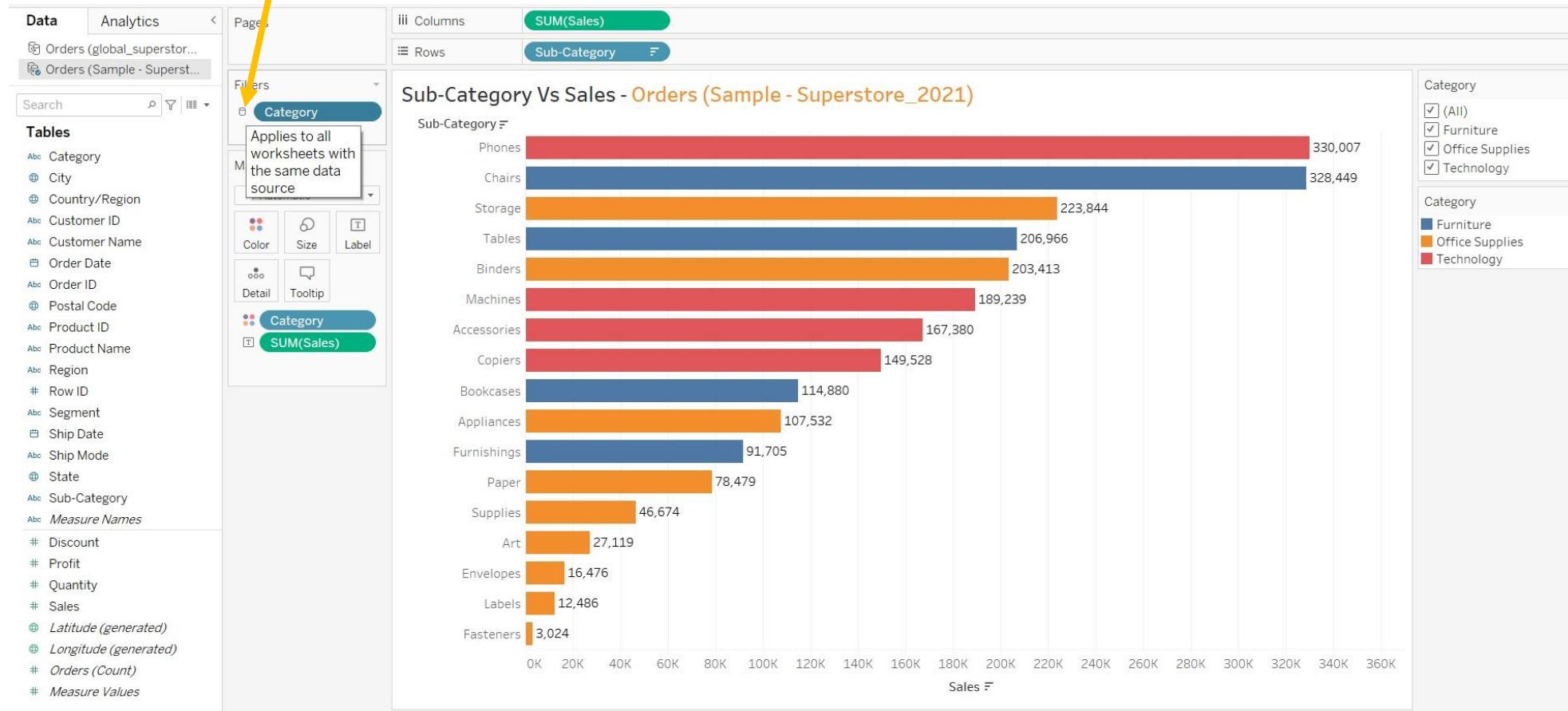
Right-click on **Category** in **Filters** shelf,

Select **Apply to Worksheets > All Using This Data Source**



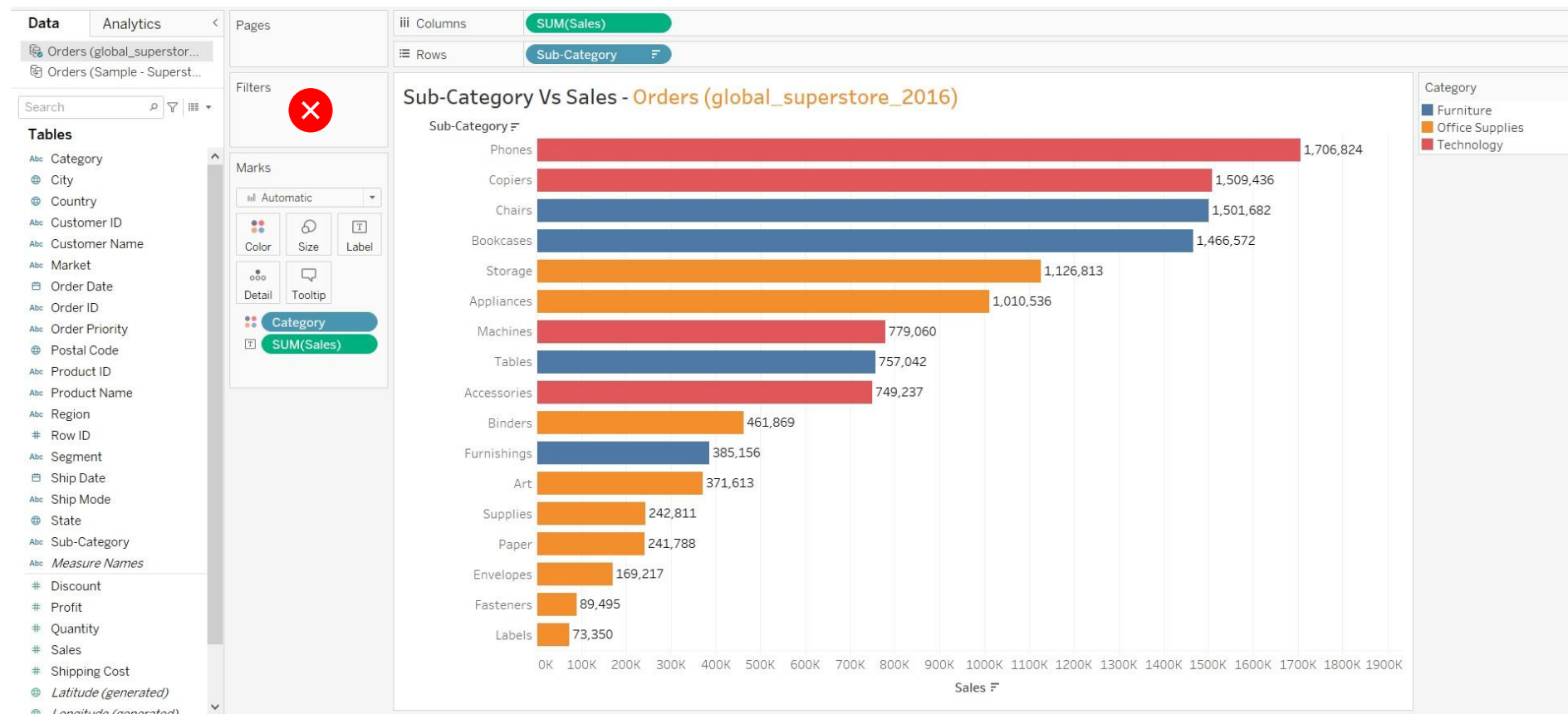
# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 18:** An icon is added next to the field on the **Filters** shelf, indicating that the filter is being applied to all worksheets with the same data source



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 19:** In this case the dimension i.e.: **Category** from the 1<sup>st</sup> Data Source is not added as a filter in the 2<sup>nd</sup> Data Source since that filter was set as **All Using This Data Source**

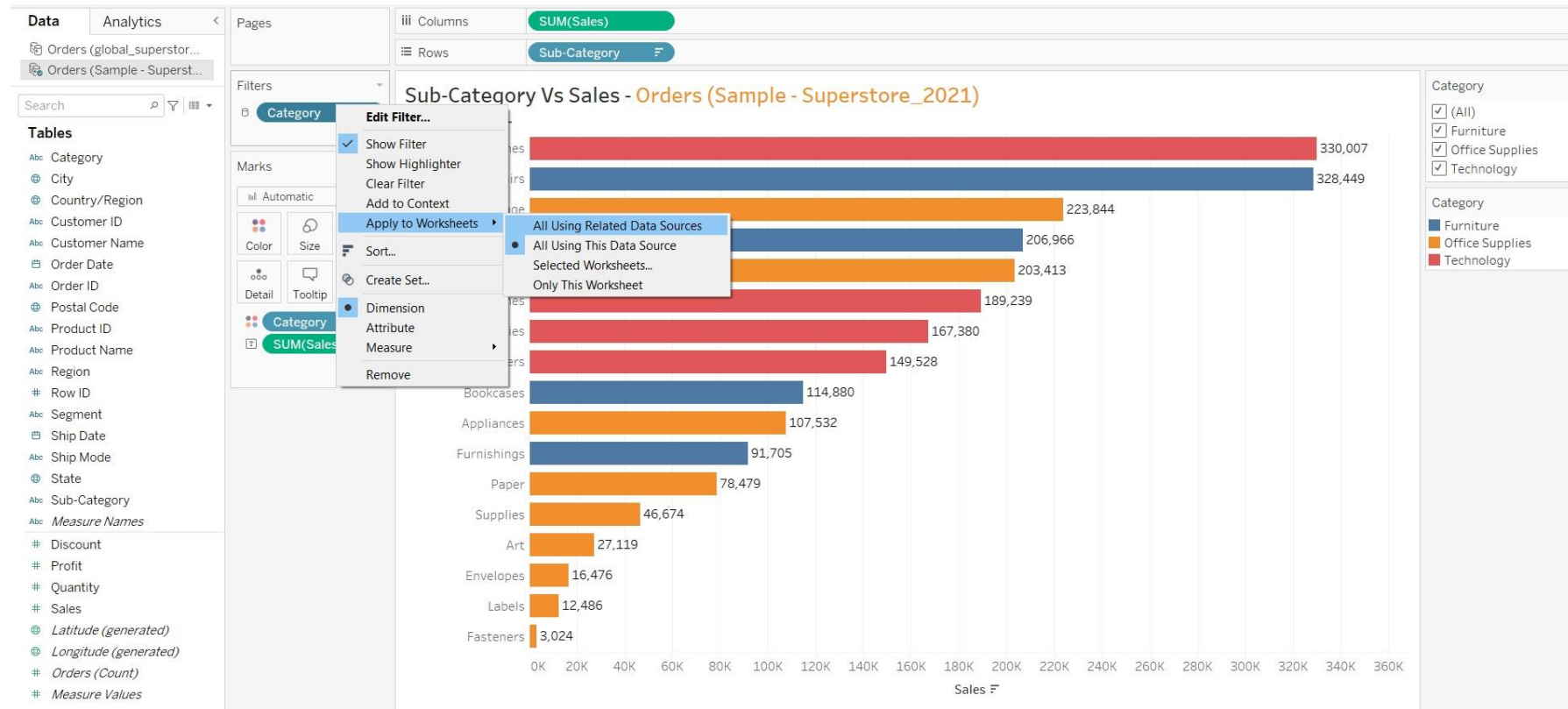


# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 20:** In the sheet of the 1<sup>st</sup> Data Source

Right-click on **Category** in **Filters** shelf,

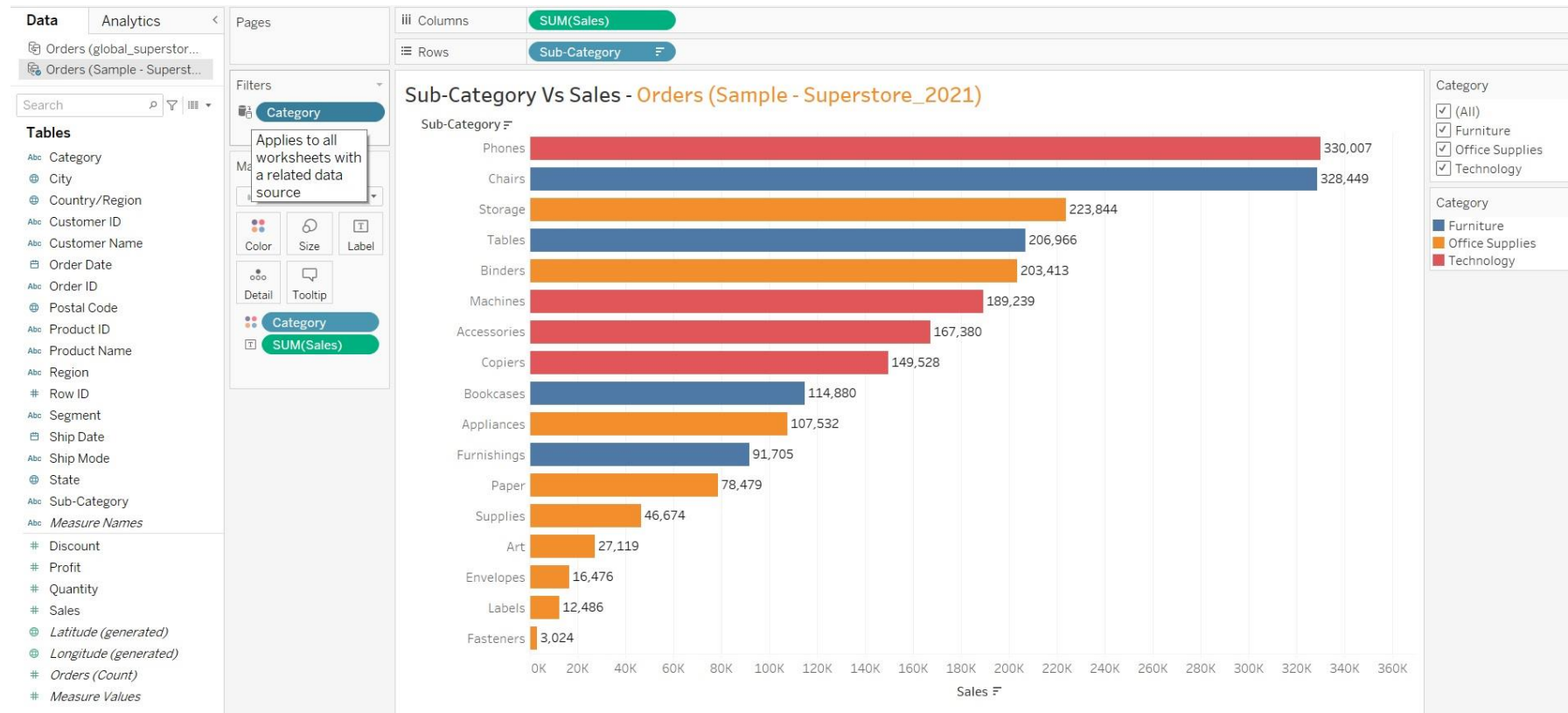
Select **Apply to Worksheets > All Using Related Data Sources**





# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 21:** An icon is added next to the field on the **Filters** shelf, indicating that the filter is being applied to multiple data sources



# DIMENSION FILTERS – ALL USING RELATED DATA SOURCES

**STEP 22:** In this case the dimension i.e.: **Category** from the 1<sup>st</sup> Data Source is automatically added as a filter in the 2<sup>nd</sup> Data Source since that filter was set as **All Using Related Data Sources**

