

QUICK FILTERS

There are multiple methods to add a filter to a view in Tableau but in this example we will go through the details of how to add a **Quick Filter**

We will also understand the subtle differences between the standard method of adding a filter and a quick filter (i.e., directly by using **Show Filter**)

Methods to add a quick filter

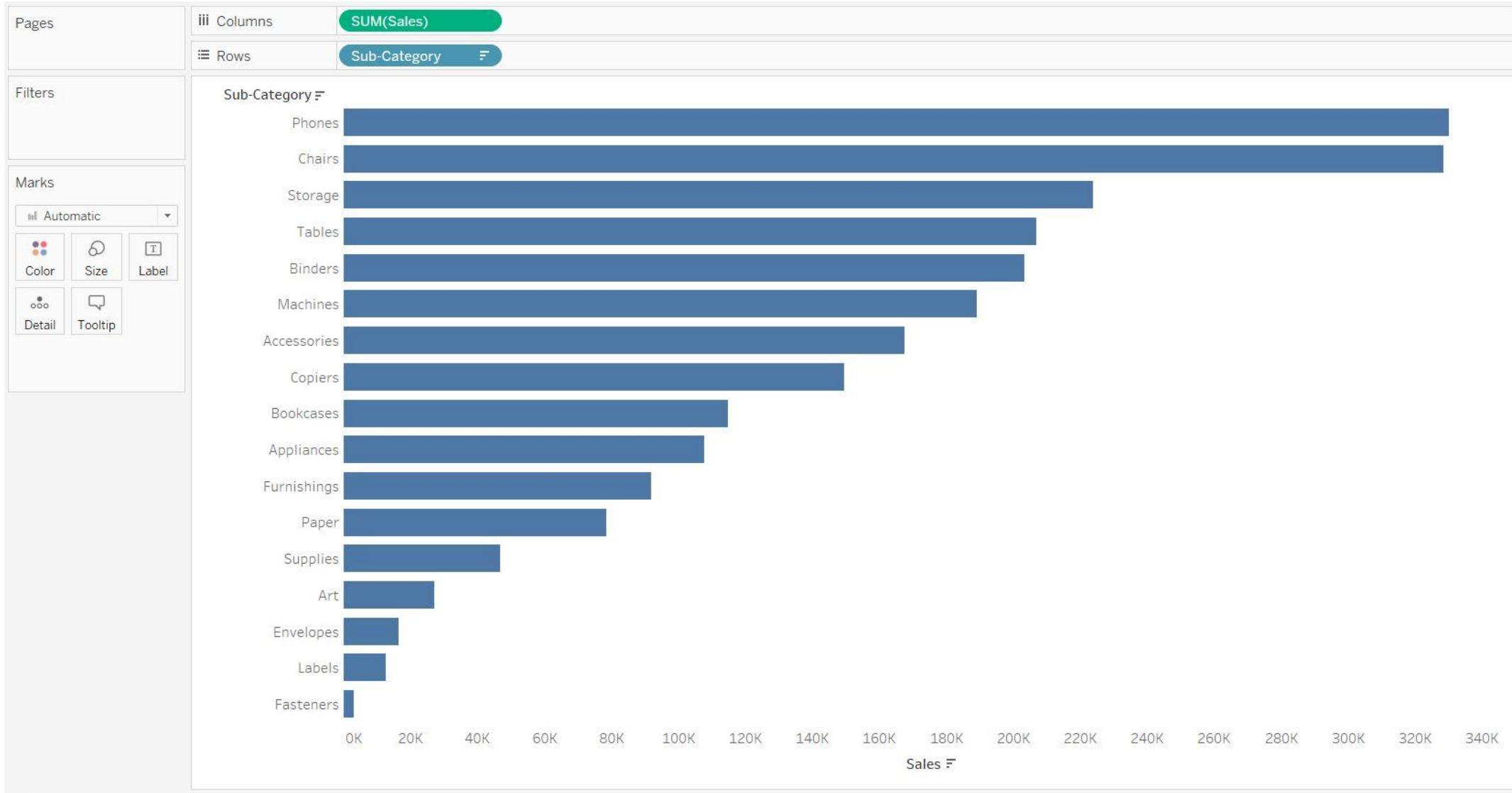
Method-I: Via selection of marks from the view

Method-II: Via **Show Filter** from **Rows** or **Columns** Shelf (for fields already in the view)

Method-III: Via **Show Filter** from **Data** pane (for fields currently not in the view)

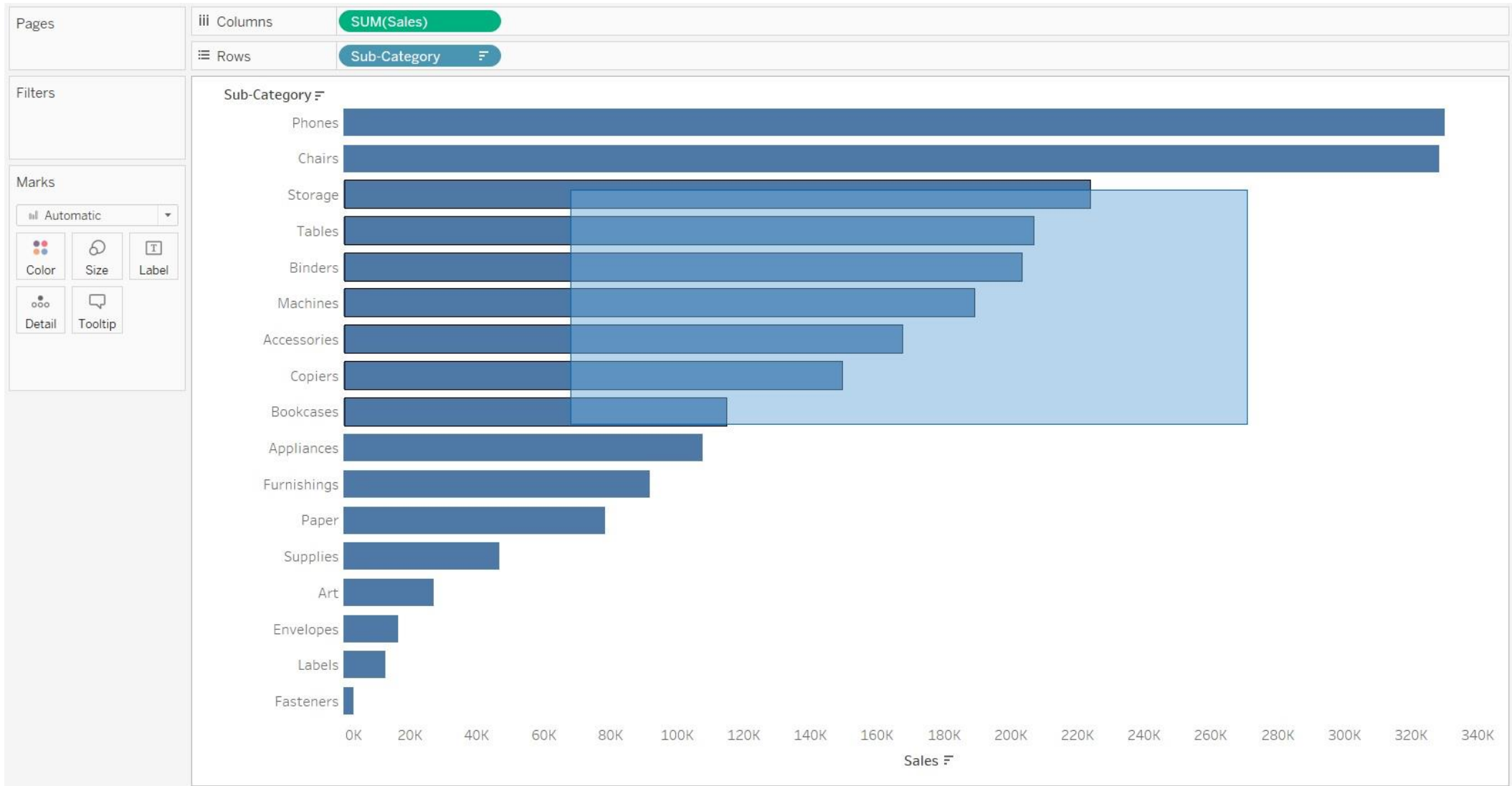
METHOD-I TO ADD A QUICK FILTER

Step 1: Let us assume that we have the below mentioned visual



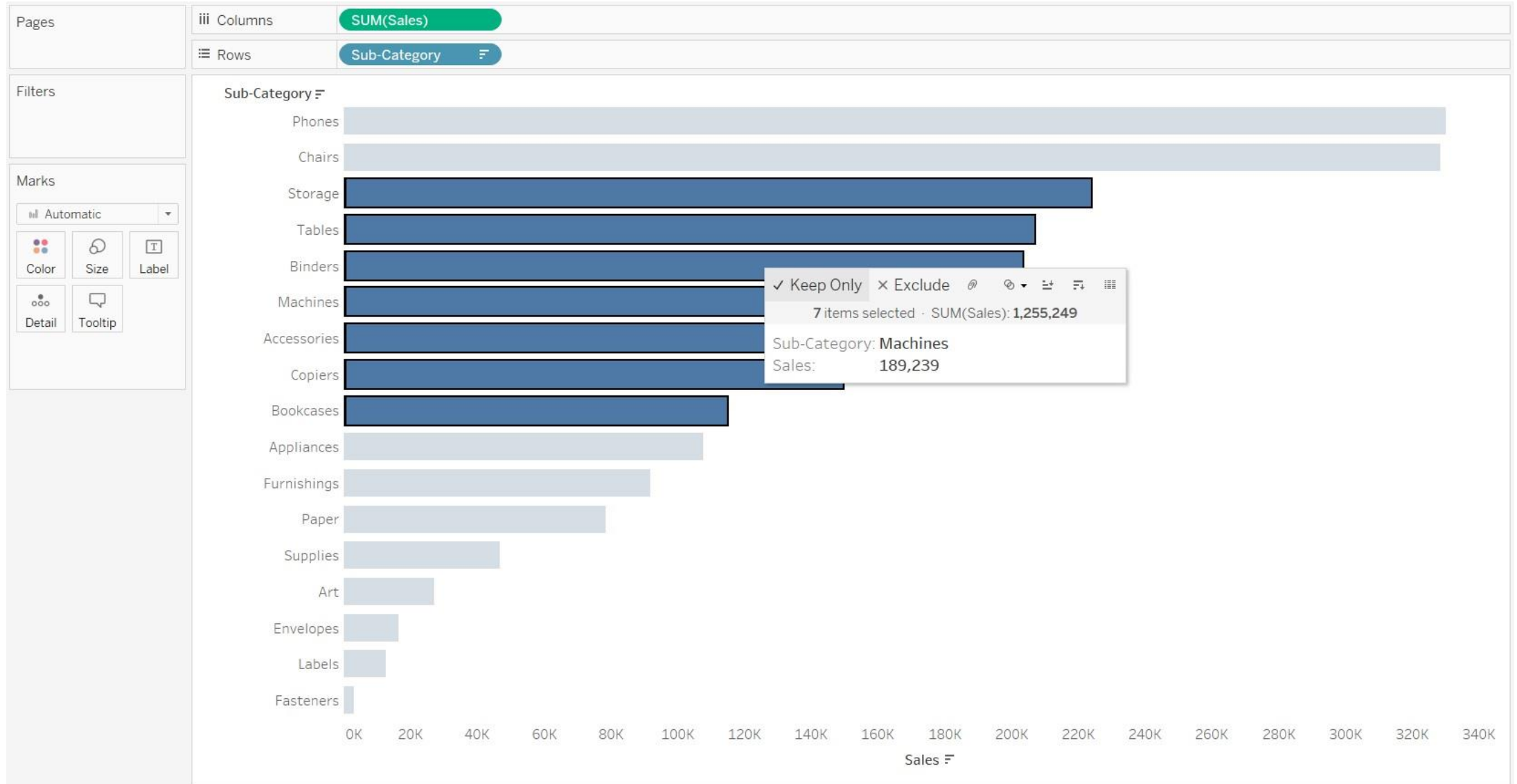
METHOD-I TO ADD A QUICK FILTER

Step 2: Highlight the required marks from the view



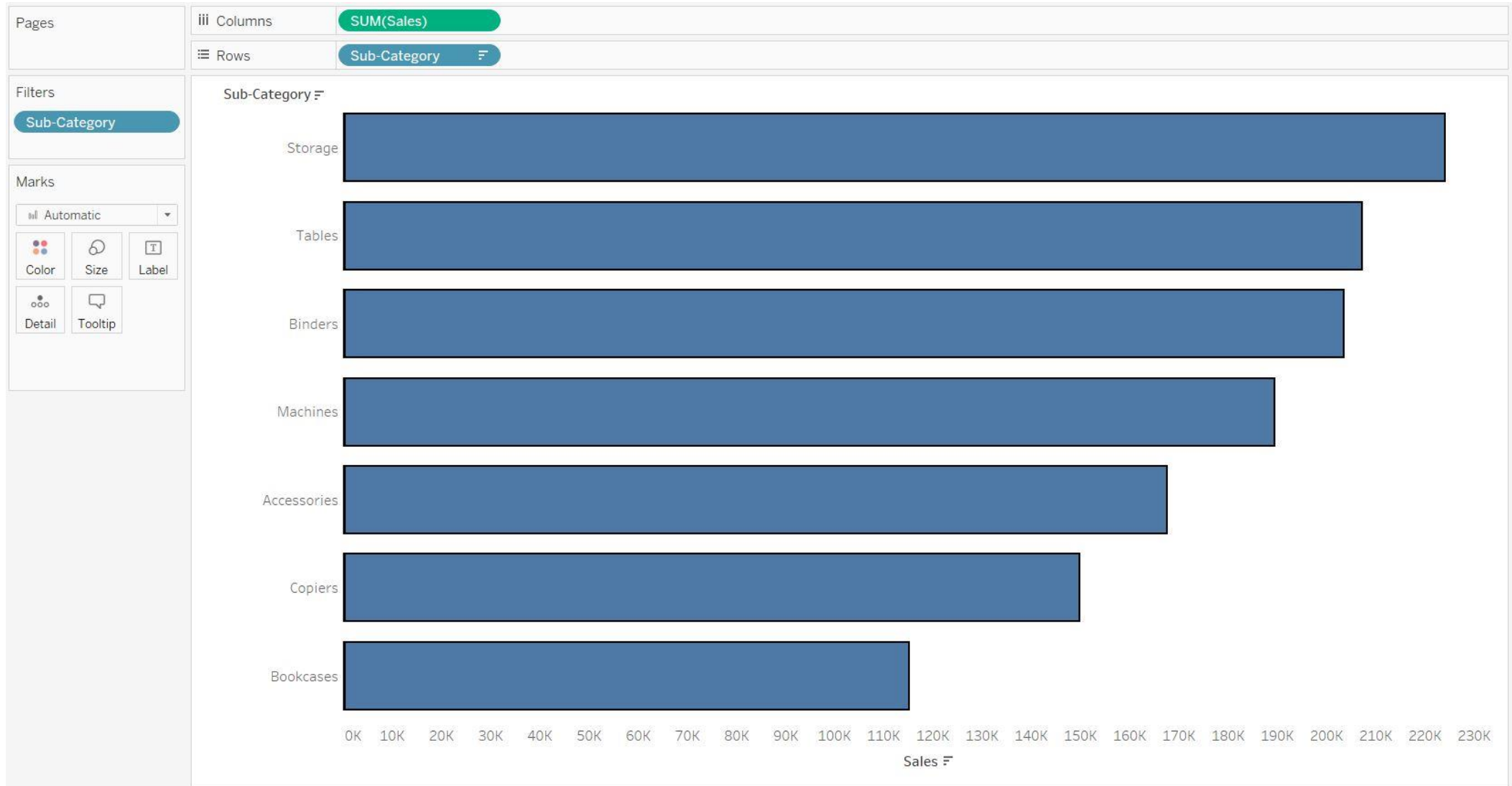
METHOD-I TO ADD A QUICK FILTER

Step 3: Wait for the tooltip to appear and select **Keep Only**



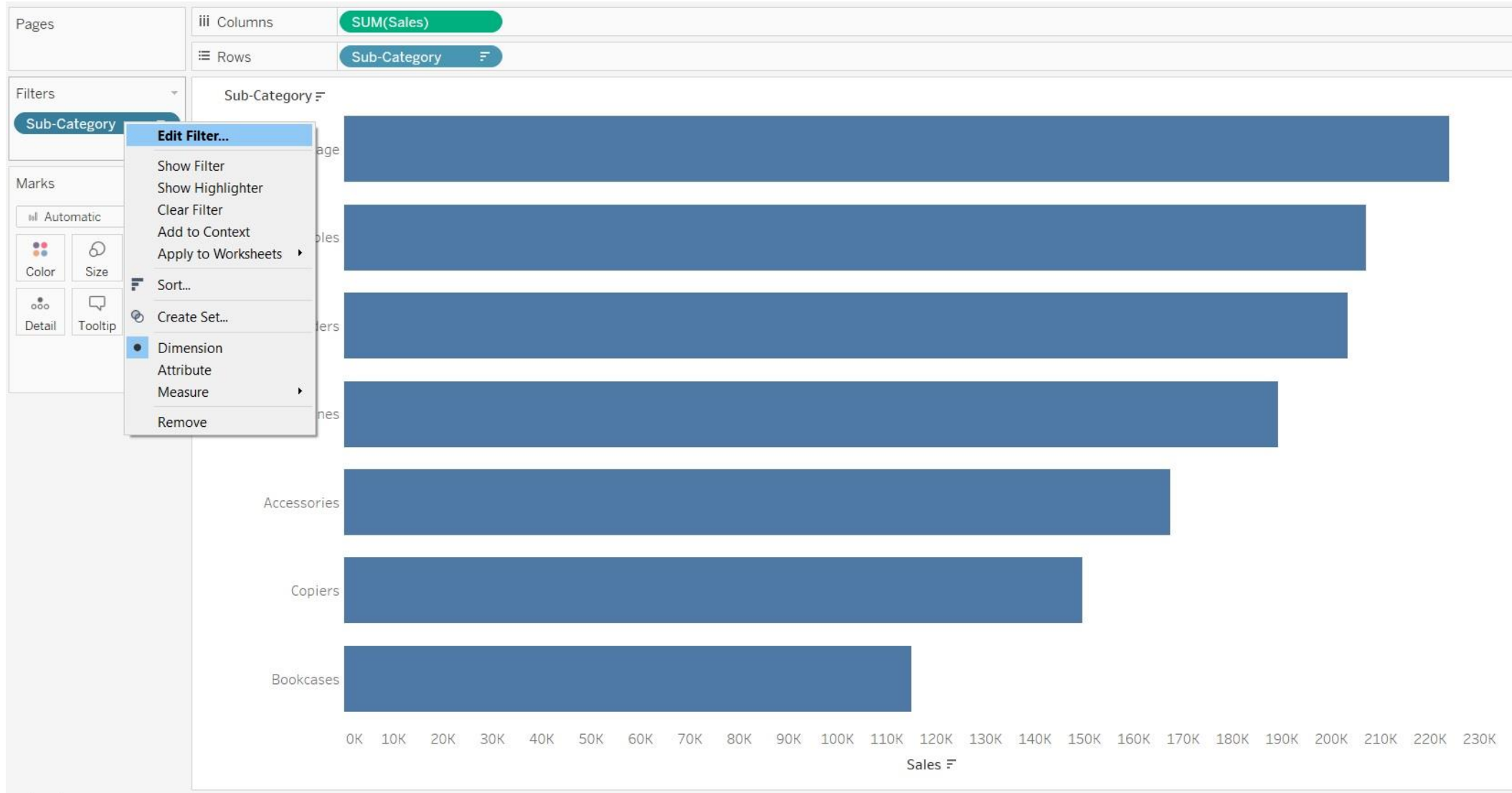
METHOD-I TO ADD A QUICK FILTER

Step 4: The **Sub-Category** field is now present in the **Filters Shelf**



METHOD-I TO ADD A QUICK FILTER

Step 5: Right-click **Sub-Category** pill in the **Filters** Shelf, Select **Edit Filter**



METHOD-I TO ADD A QUICK FILTER

Step 6: We observe that only the members of **Sub-Category** (that were high-lighted) are present

Filter [Sub-Category] X

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

- ☒ Accessories
- ☐ Appliances
- ☐ Art
- ☒ Binders
- ☒ Bookcases
- ☐ Chairs
- ☒ Copiers
- ☐ Envelopes
- ☐ Fasteners
- ☐ Furnishings
- ☐ Labels

All None ☐ Exclude

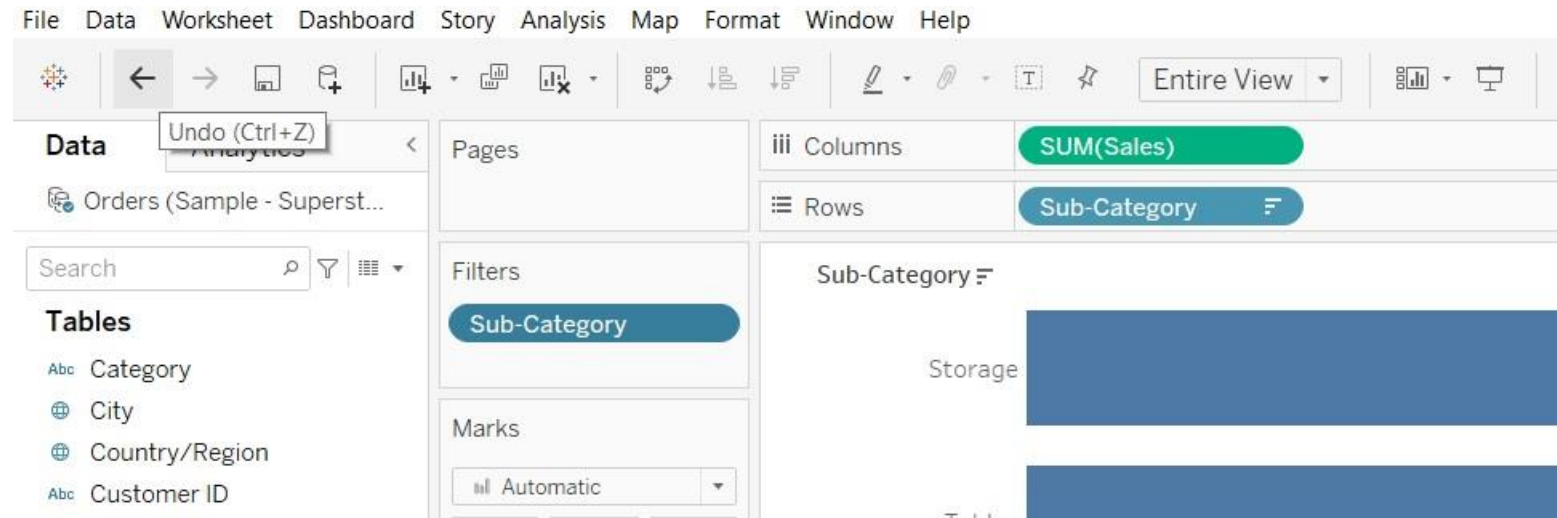
Summary

Field: [Sub-Category]
Selection: Selected 7 of 17 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

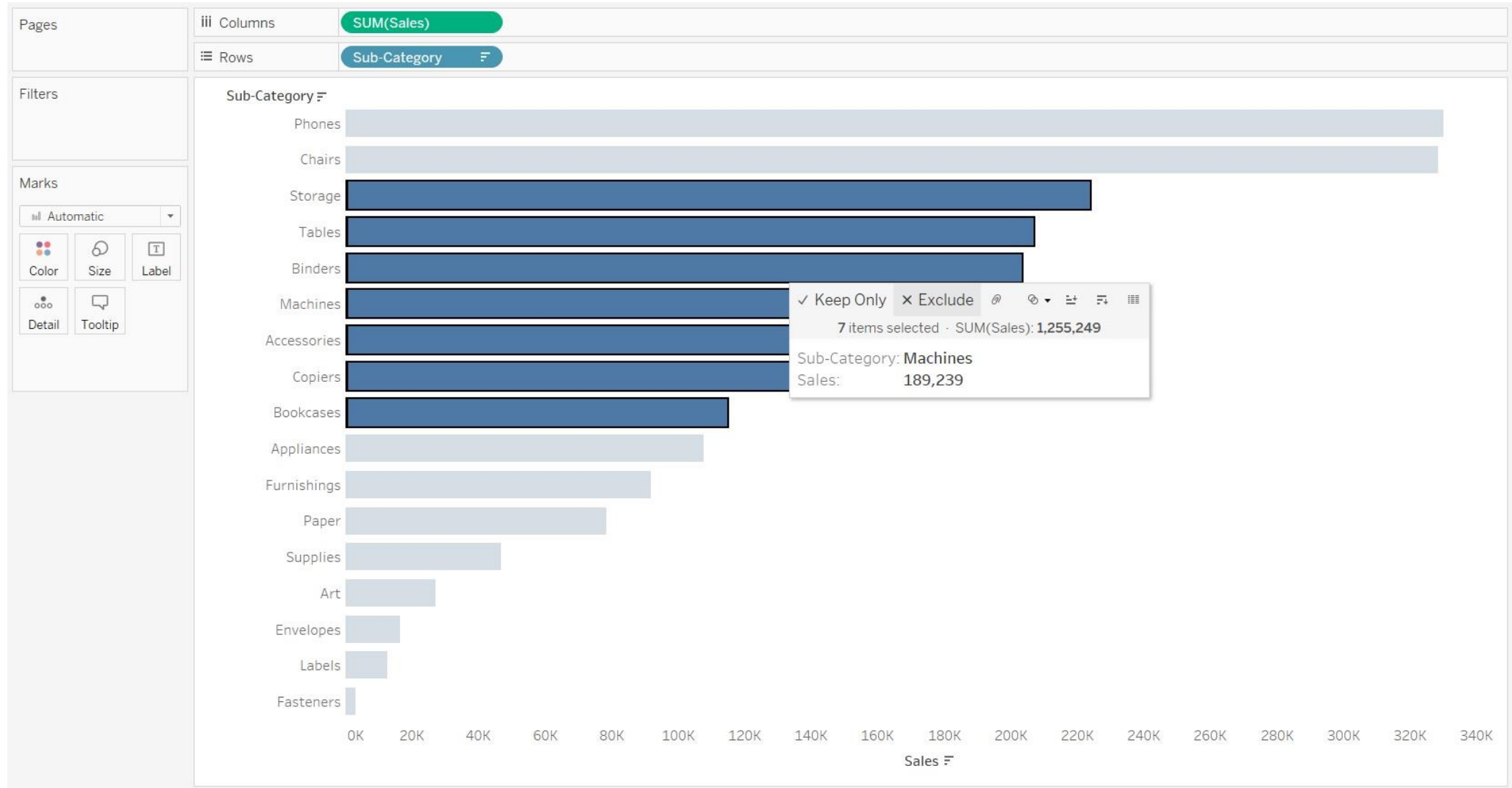
METHOD-I TO ADD A QUICK FILTER

Step 7: Undo (Ctrl + Z) the previous step



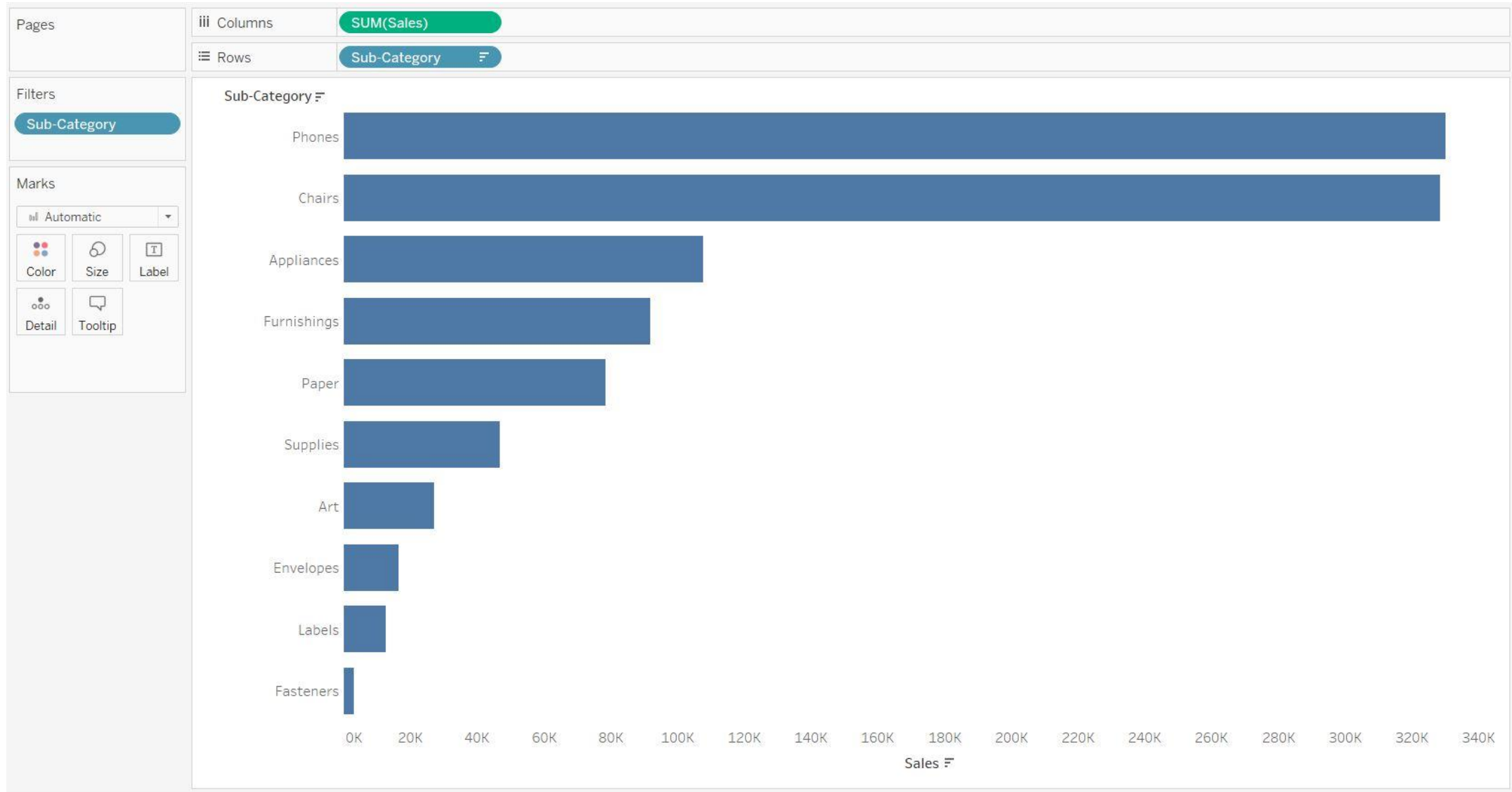
METHOD-I TO ADD A QUICK FILTER

Step 8: This time Highlight the required marks and select **Exclude** from Tooltip menu



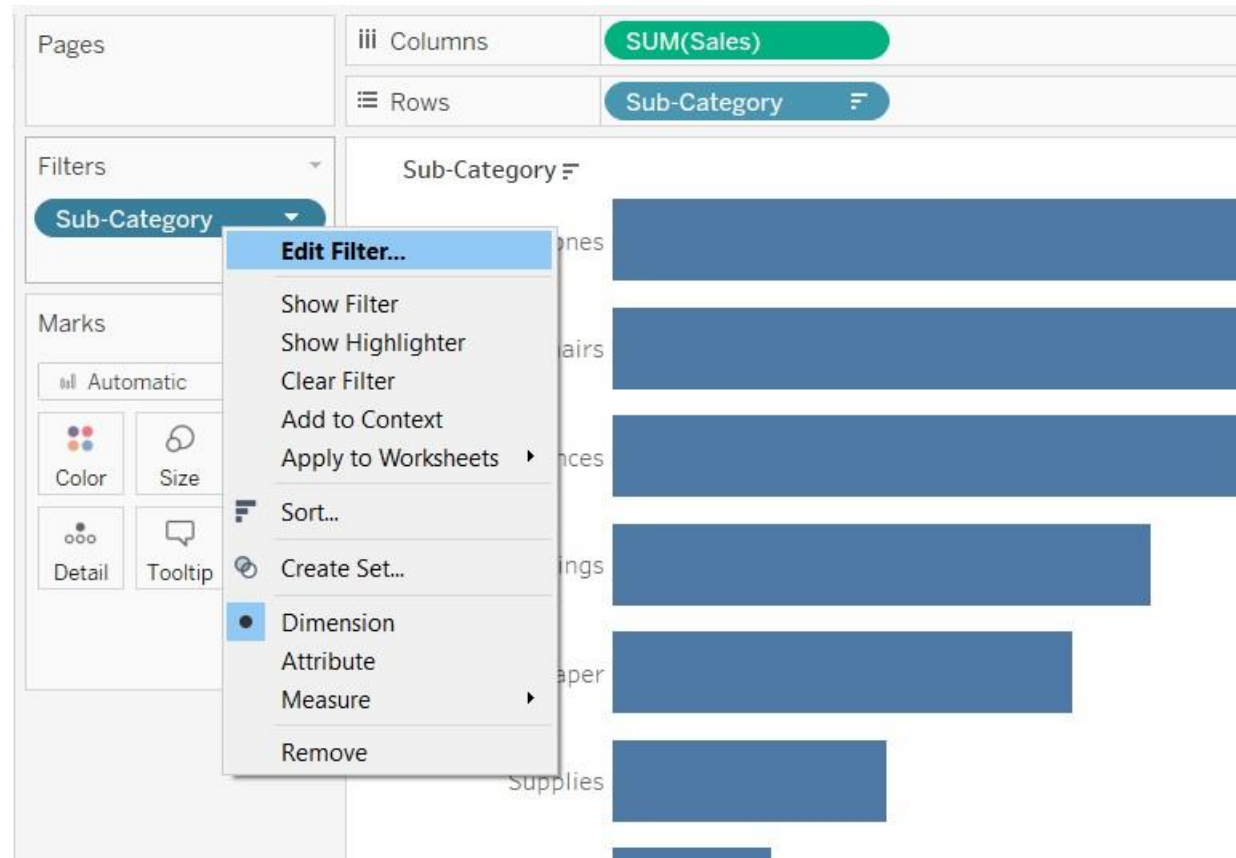
METHOD-I TO ADD A QUICK FILTER

Step 9: The **Sub-Category** field is now present in the **Filters Shelf**



METHOD-I TO ADD A QUICK FILTER

Step 10: Right-click **Sub-Category** pill in the **Filters** Shelf, Select **Edit Filter**



METHOD-I TO ADD A QUICK FILTER

Step 11: The values have been selected but with a strike-through and the **Exclude** option has been selected. The **Exclude** option will act like a reverse filter

Filter [Sub-Category] X

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

- ☒ Accessories
- ☐ Appliances
- ☐ Art
- ☒ Binders
- ☒ Bookcases
- ☐ Chairs
- ☒ Copiers
- ☐ Envelopes
- ☐ Fasteners
- ☐ Furnishings
- ☐ Labels

All None ☒ Exclude

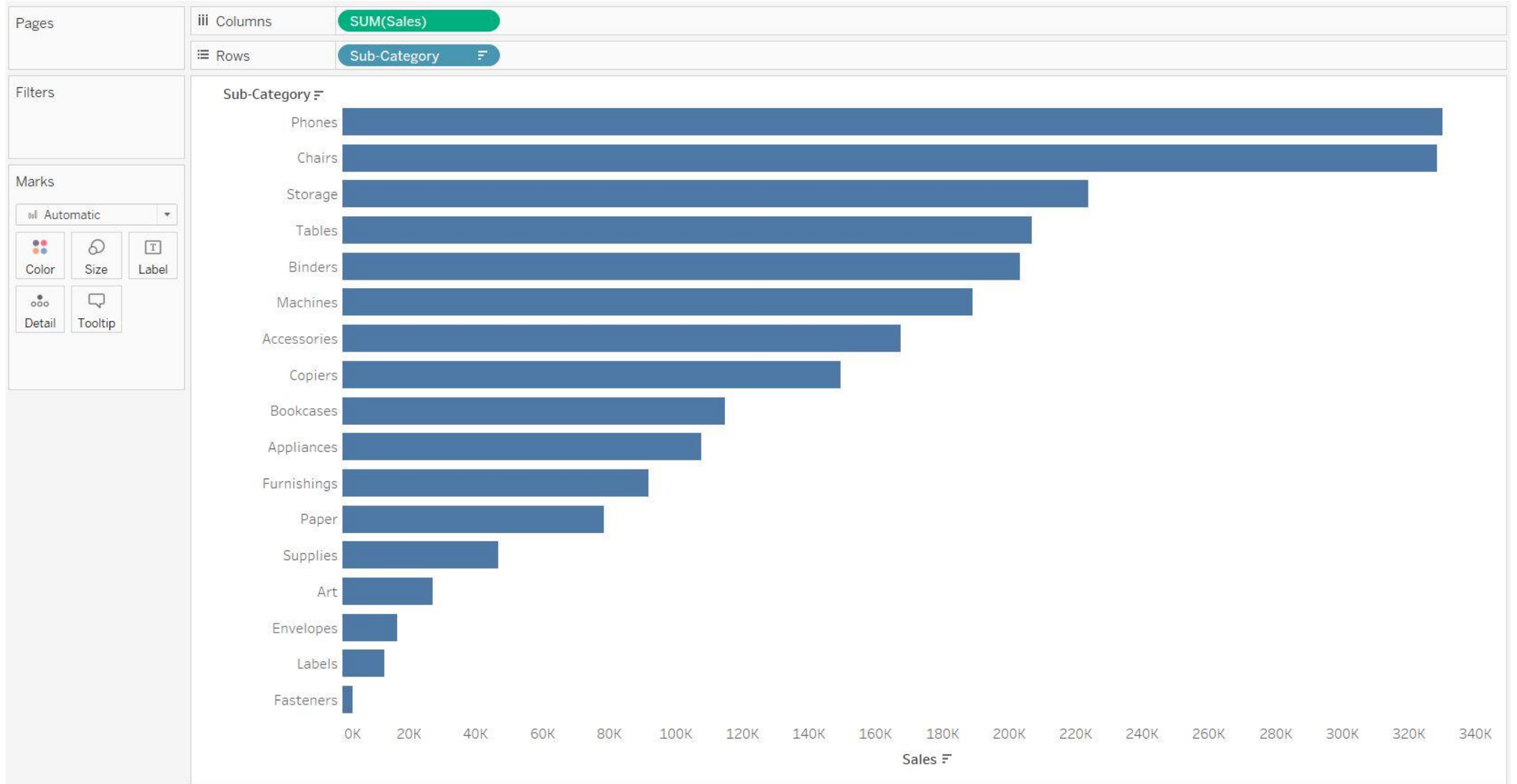
Summary

Field: [Sub-Category]
Selection: Excluded 7 of 17 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

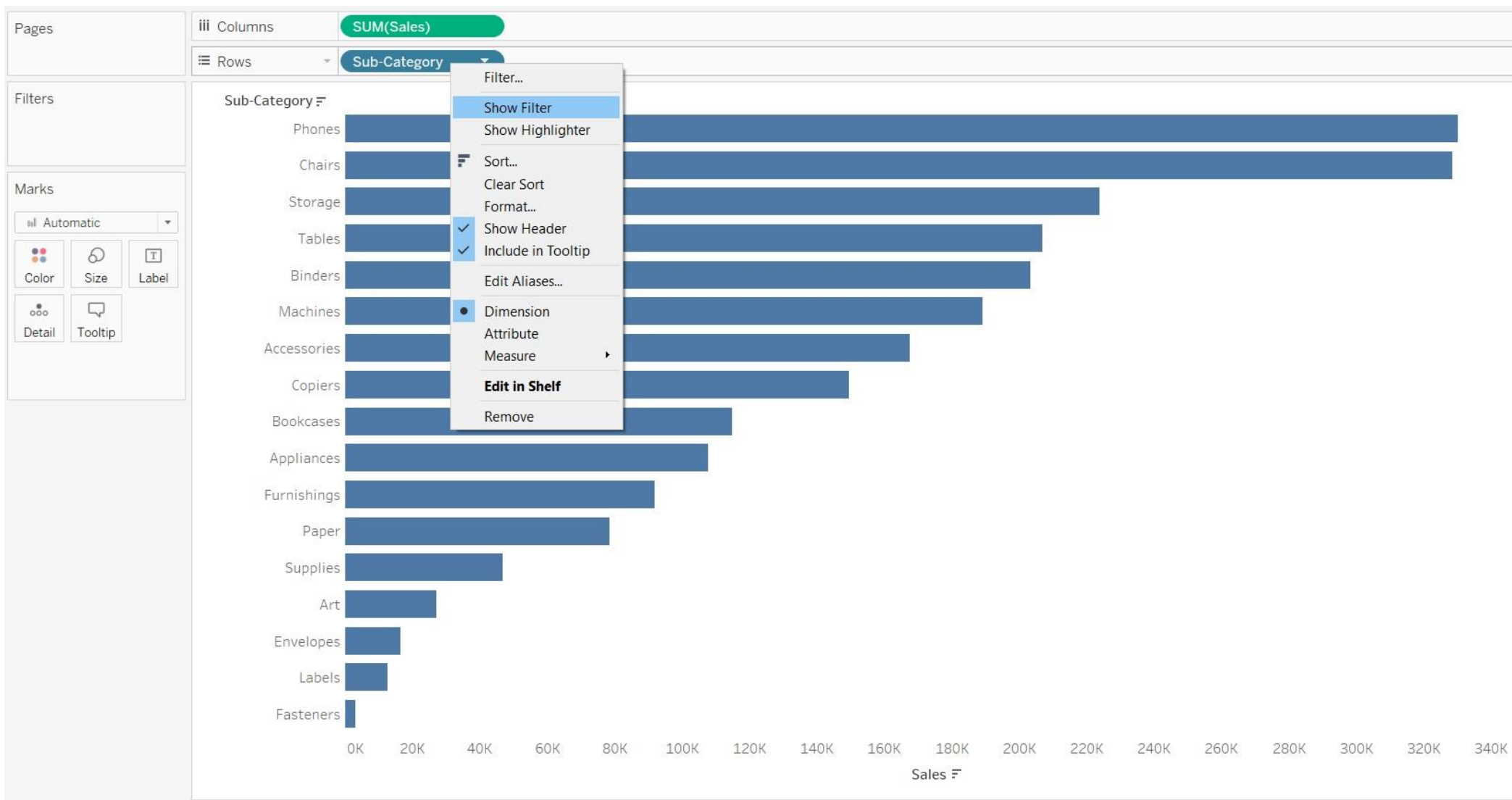
METHOD-II TO ADD A QUICK FILTER

Step 1: Let us assume that we have the below mentioned visual



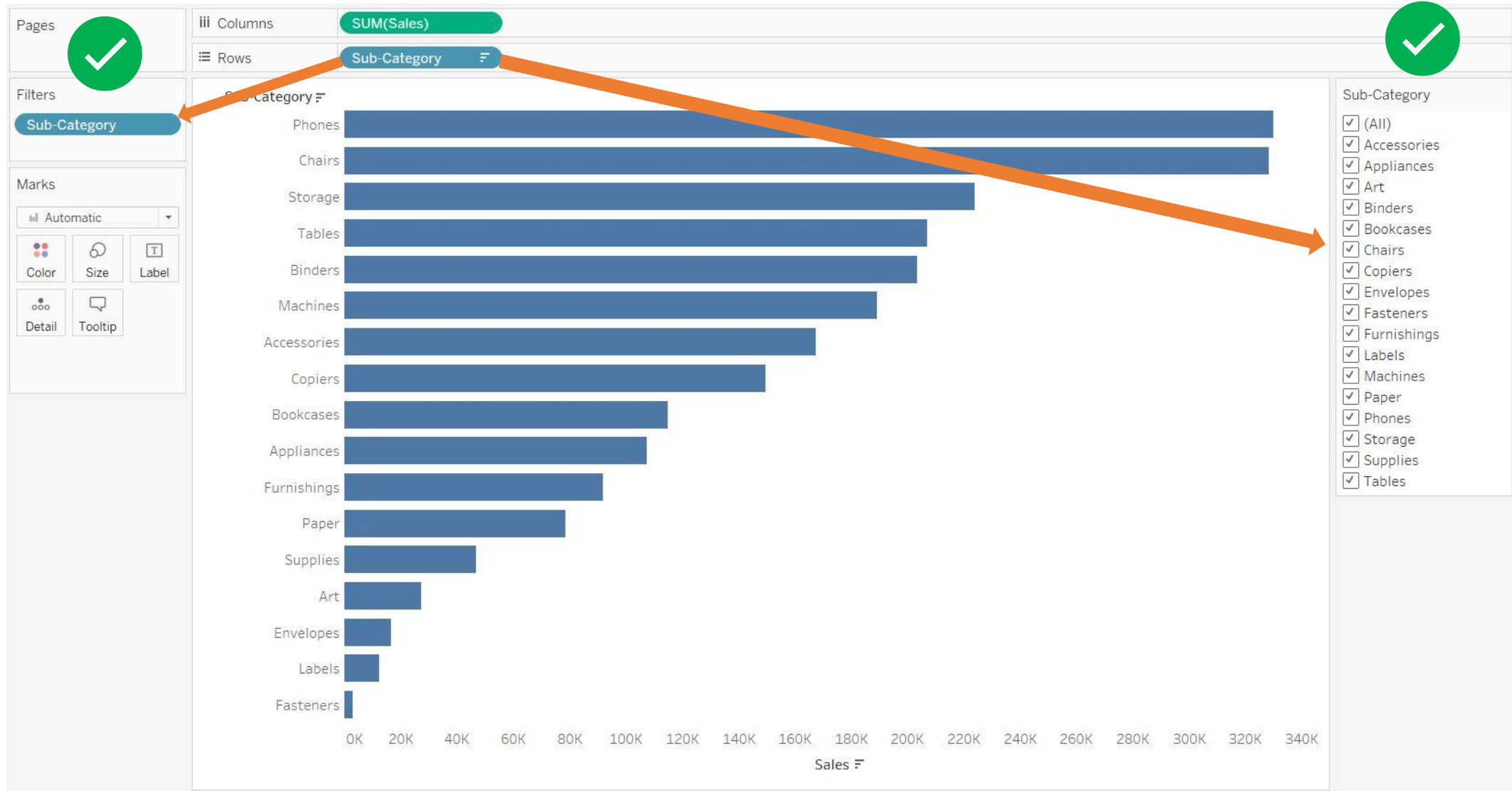
METHOD-II TO ADD A QUICK FILTER

Step 2: Right-click **Sub-Category** pill in **Rows Shelf**, Select **Show Filter**



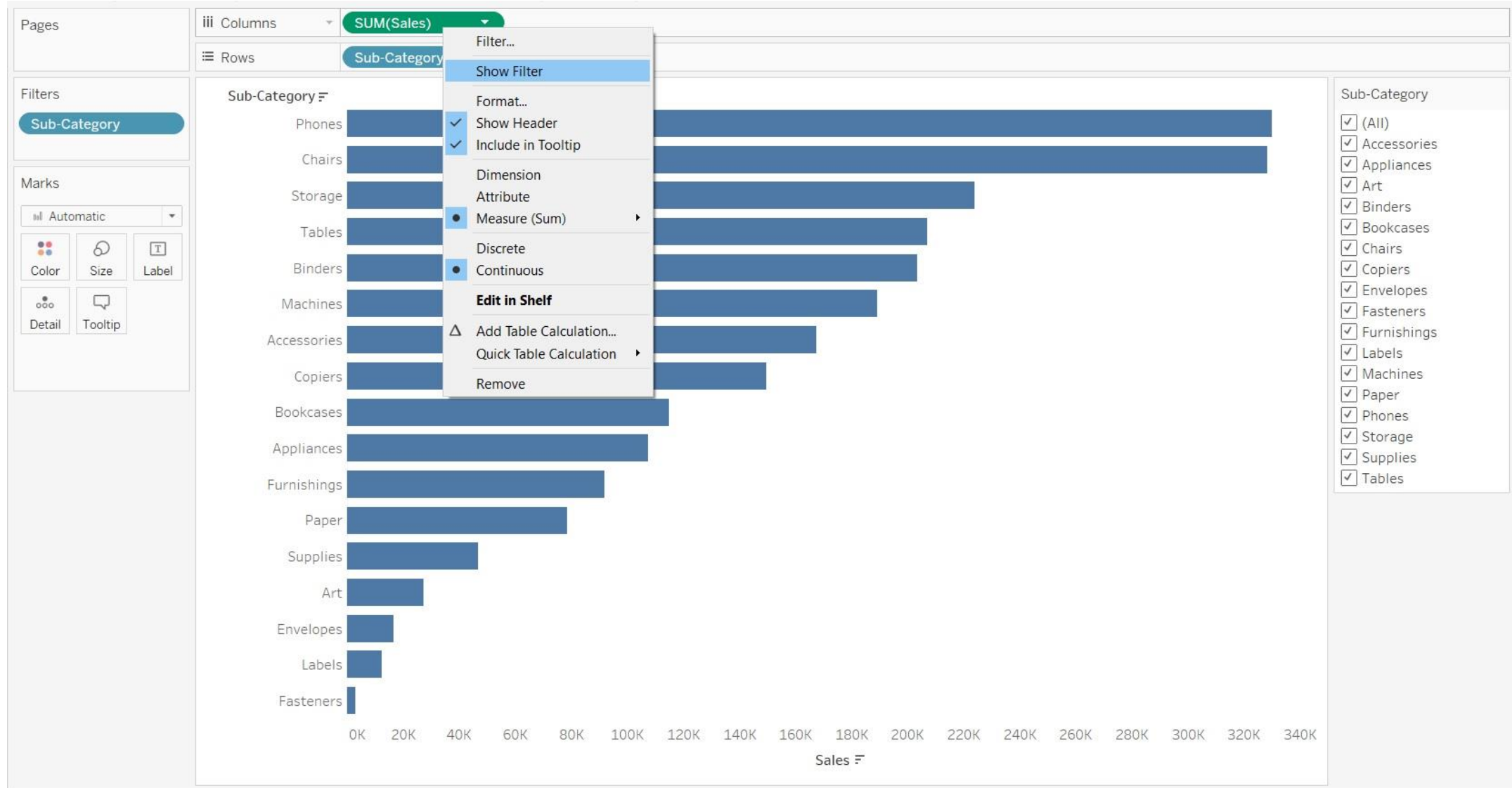
METHOD-II TO ADD A QUICK FILTER

Step 3: Sub-Category is added to both **Filters Shelf** and **control** is shown via **Filters Card**



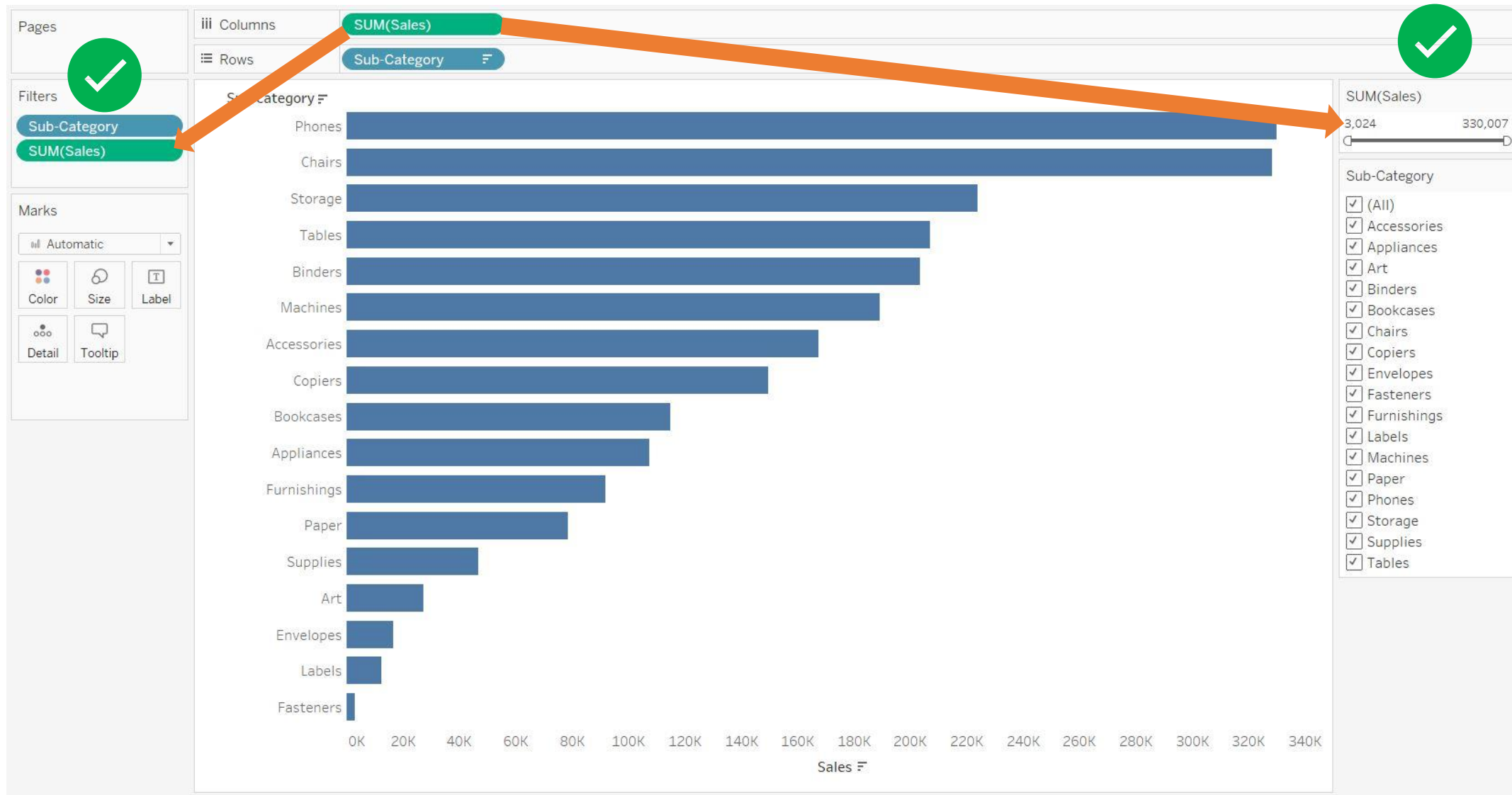
METHOD-II TO ADD A QUICK FILTER

Step 4: Right-click **SUM(Sales)** pill in **Columns Shelf**, Select **Show Filter**



METHOD-II TO ADD A QUICK FILTER

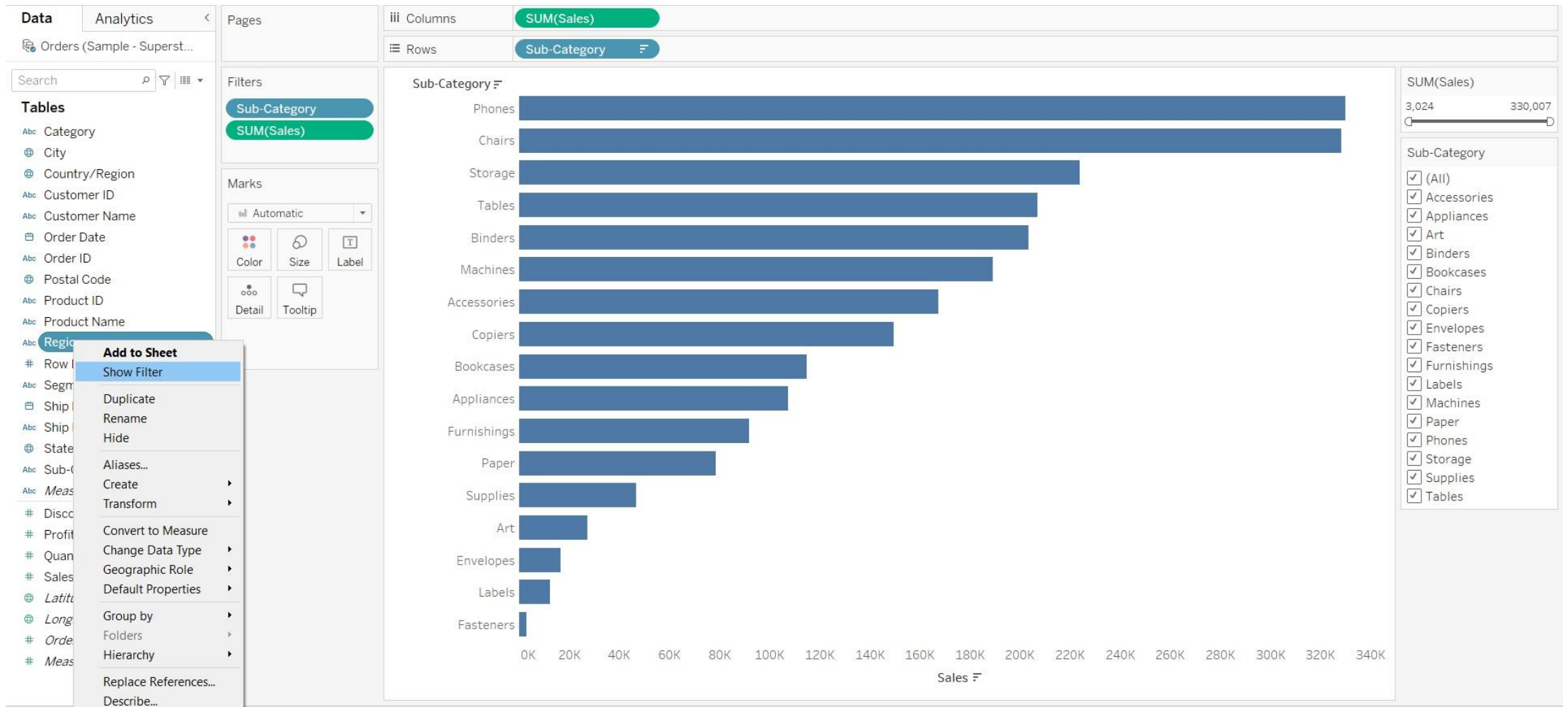
Step 5: SUM(Sales) is added to both **Filters Shelf** and **control** is shown via **Filters Card**



NOTE: The Quick filter behavior is the same for dimensions and measures

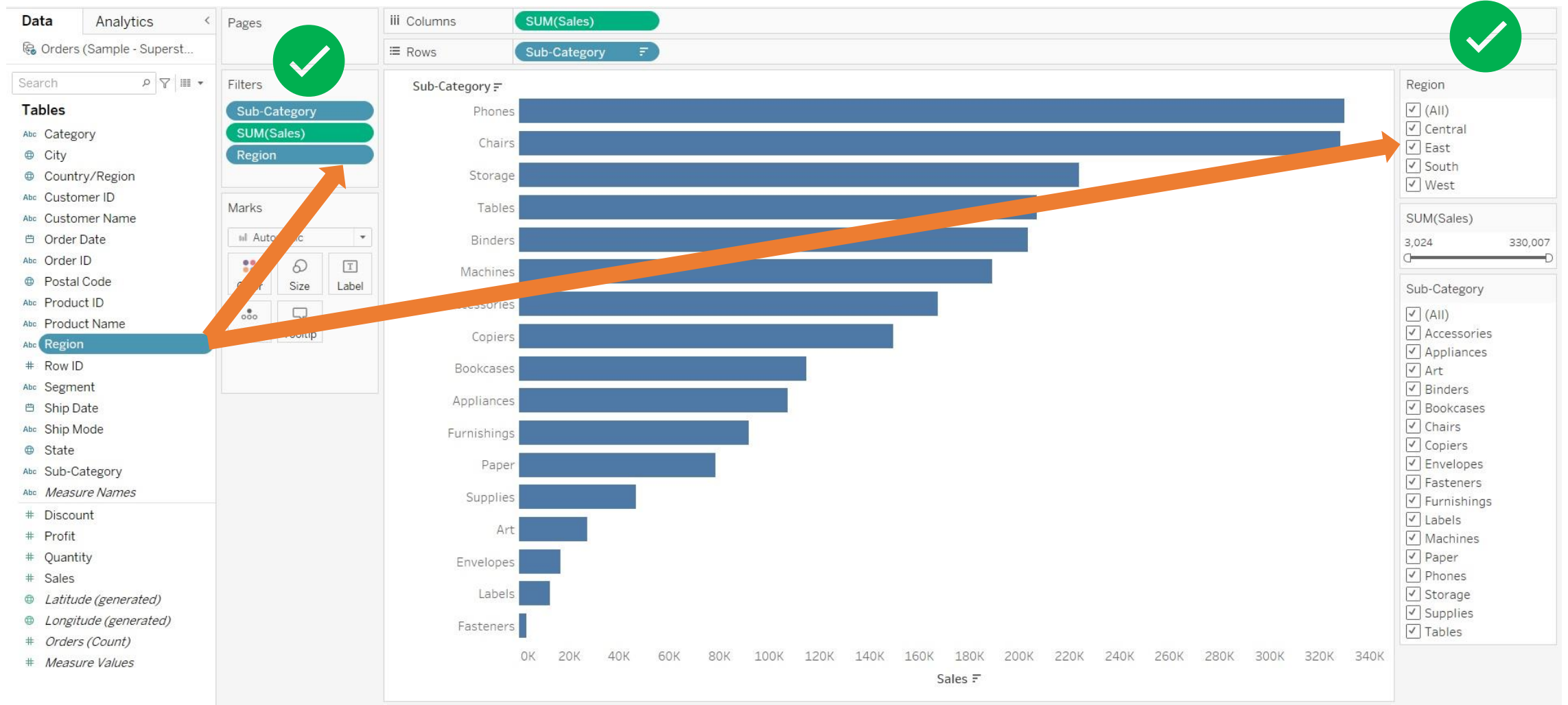
METHOD-III TO ADD A QUICK FILTER

Step 1: We can also add another field as a Filter that is not yet in the canvas or view
Right-click **Region** pill in **Data** pane, Select **Show Filter**



METHOD-III TO ADD A QUICK FILTER

Step 2: Region is added to both **Filters Shelf** and control is shown via **Filters Card**



DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

When we drag a dimension to the **Filters** Shelf the field is added only to **Filters** Shelf (after a dialog box that asks us to select the required filter options) but the control is **NOT** made visible to end user

For enabling the control to the user, we need to right-click the field in **Filters** Shelf and select **Show Filter**.

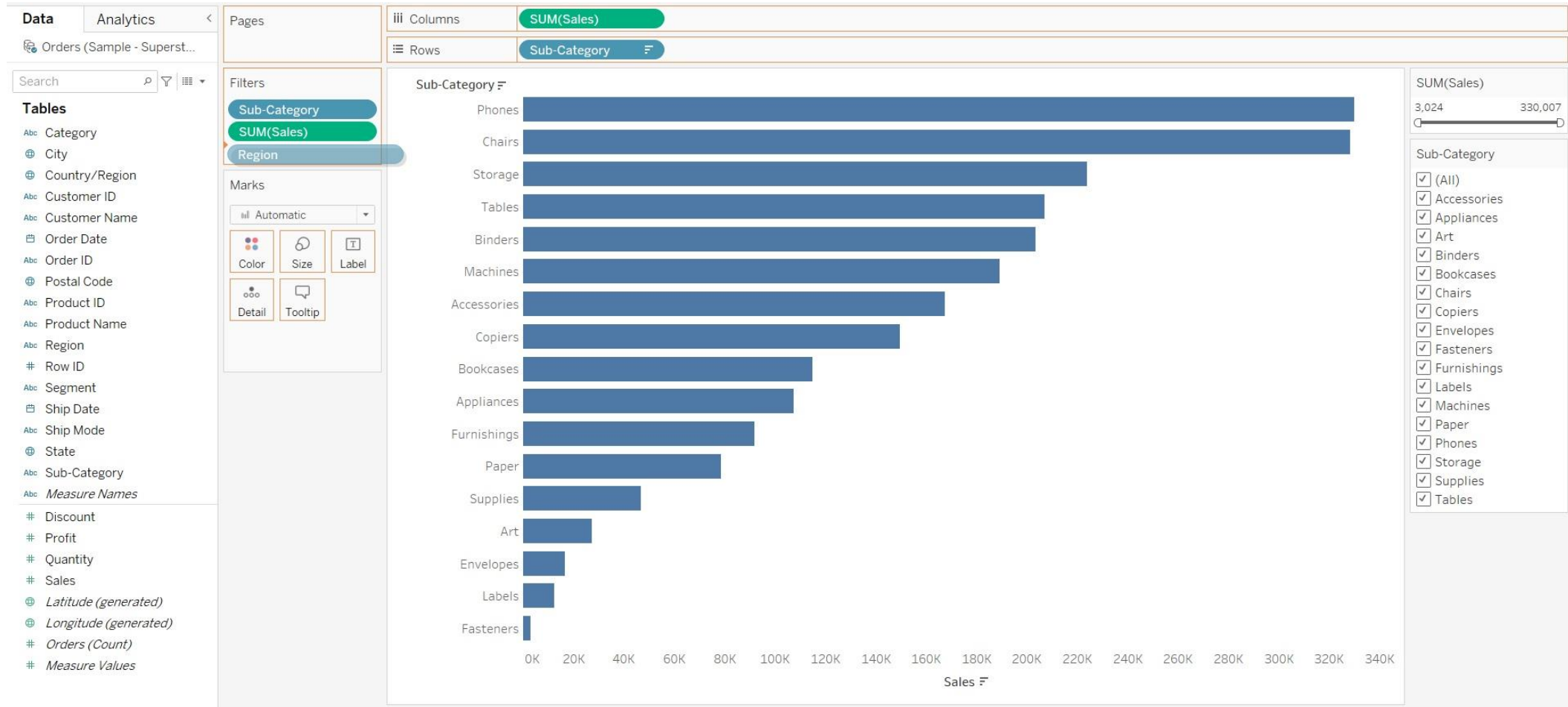
Hence, it is a **2-step process**.

However, when we add a **quick filter** given below are the two things that will happen

1. Field (either dimension or measure) will be added to the **Filters** shelf
2. The control is shown to the end user by means on the **Filters** card (on right side of the view)

DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 1: Drag and drop **Region** pill in **Filters Shelf**



DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 2: Filter[Region] dialog box appears

Filter [Region] X

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

☐ Central
☐ East
☐ South
☐ West

All None ☐ Exclude

Summary

Field: [Region]
Selection: Selected 0 of 4 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

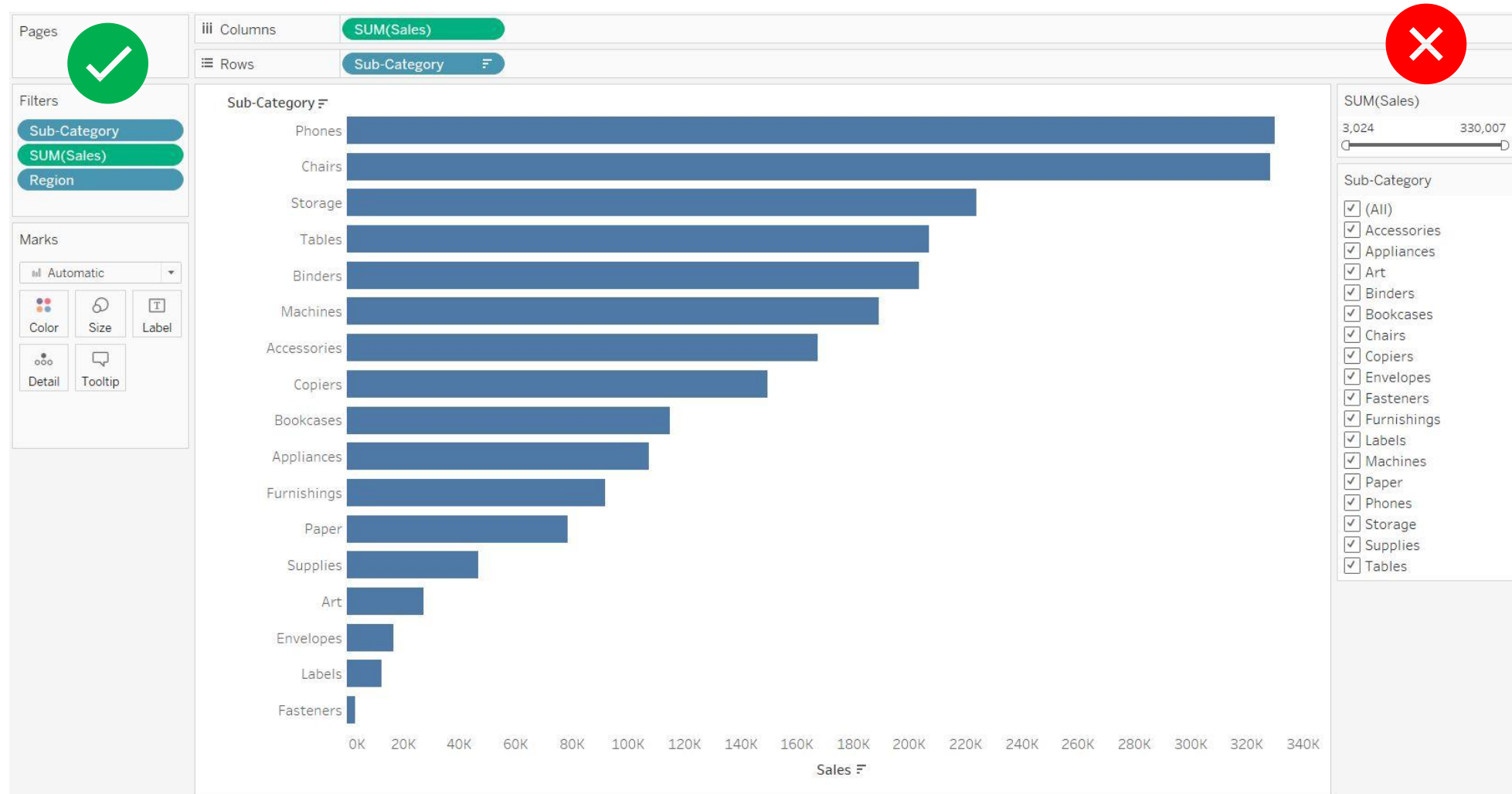
DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 3: Select the **Use all** if all the members of **Region** are required

The screenshot shows a dialog box titled "Filter [Region]" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Wildcard", "Condition", and "Top". The "General" tab is active. Inside the "General" tab, there are three radio buttons: "Select from list", "Custom value list", and "Use all". The "Use all" radio button is selected. Below the radio buttons is a large, empty rectangular area. At the bottom of the dialog, there are two buttons: "All" and "None", and a checkbox labeled "Exclude" which is currently unchecked. Below these buttons is a "Summary" section with the following text: "Field: [Region]", "Selection: All", "Wildcard: All", "Condition: None", and "Limit: None". At the very bottom of the dialog are four buttons: "Reset", "OK", "Cancel", and "Apply". The "OK" button is highlighted with a blue border.

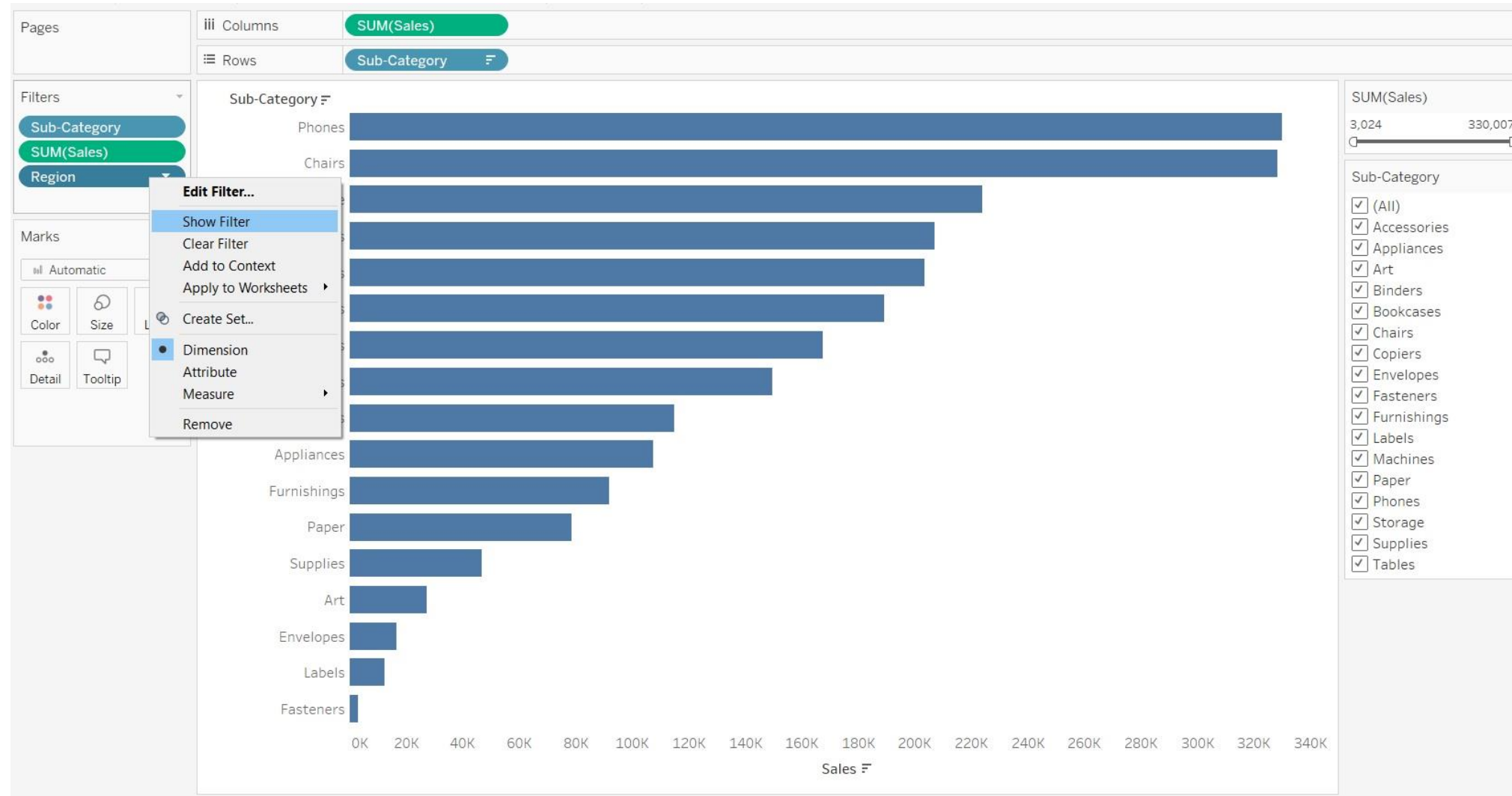
DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 4: Region is added only to the **Filters** Shelf and control is **NOT** shown via **Filters Card**



DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 5: Right-click **Region** pill in **Filters** shelf, Select **Show Filter**



DIFFERENCE BETWEEN QUICK FILTERS (USING SHOW FILTER) AND DROPPING FIELD IN FILTERS SHELF

Step 6: Now the control for **Region** is shown via **Filters Card**

