

# 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**

File Data Server Window Help

Connections [Add](#)

Sample - Superstore\_2021  
Microsoft Excel

**Sheets**

☐ Use Data Interpreter  
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders  
People  
Returns  
Orders  
People  
Returns  
New Union

Orders (Sample - Superstore\_2021)

Connection  
☐ Live ☒ Extract [Edit](#) Refresh 0 [Add](#)  
Extract will include all data.

Filters

Orders

Need more data?  
Drag tables here to relate them. [Learn more](#)

Orders 21 fields 9994 rows 100 rows

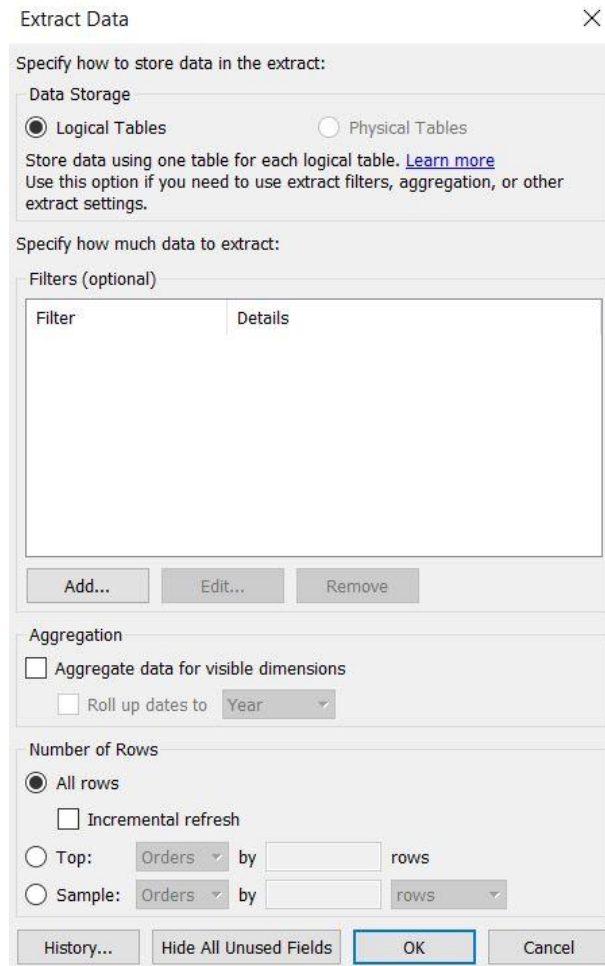
#	Abc	Abc	Abc	Abc	Abc	Abc
Orders	Orders	Orders	Orders	Orders	Orders	Orders
Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name
1	CA-2020-152156	08-11-2020	11-11-2020	Second Class	CG-12520	Claire Gute
2	CA-2020-152156	08-11-2020	11-11-2020	Second Class	CG-12520	Claire Gute
3	CA-2020-138688	12-06-2020	16-06-2020	Second Class	DV-13045	Darrin Van Huff
4	US-2019-108966	11-10-2019	18-10-2019	Standard Class	SO-20335	Sean O'Donnell
5	US-2019-108966	11-10-2019	18-10-2019	Standard Class	SO-20335	Sean O'Donnell
6	CA-2018-115812	09-06-2018	14-06-2018	Standard Class	BH-11710	Brosina Hoffman

Type	Field Name	Physical Table	Remote Fie...
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ID
Abc	Order Date	Orders	Order Date

Data Source Sheet 1

# HOW TO CREATE EXTRACT FILTERS

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



The 'Extract Data' dialog box is shown with a close button (X) in the top right corner. It contains several sections for configuring data extraction.

**Specify how to store data in the extract:**

**Data Storage**

☒ Logical Tables ☐ Physical Tables

Store data using one table for each logical table. [Learn more](#)  
Use this option if you need to use extract filters, aggregation, or other extract settings.

**Specify how much data to extract:**

**Filters (optional)**

Filter	Details
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**Aggregation**

☐ Aggregate data for visible dimensions

☐ Roll up dates to

**Number of Rows**

☒ All rows

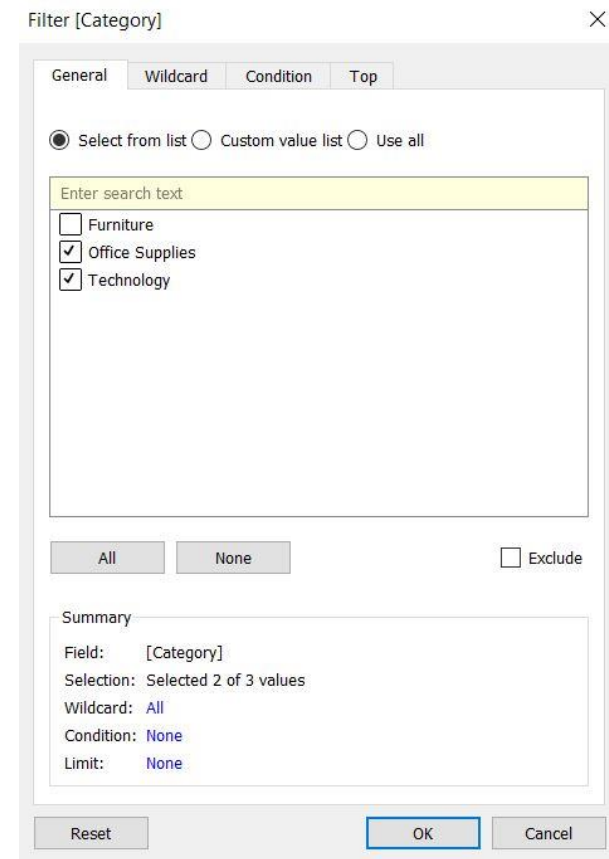
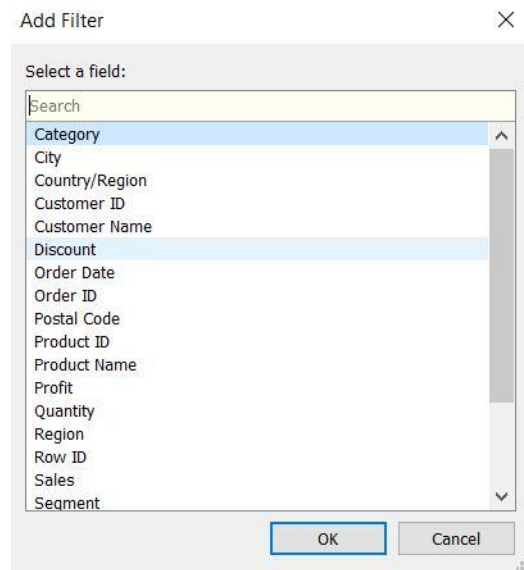
☐ Incremental refresh

☐ Top:  by  rows

☐ Sample:  by  rows

# 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**

The screenshot shows the 'Extract Data' dialog box with the following sections:

- Specify how to store data in the extract:**
  - Data Storage:** ☒ Logical Tables, ☐ Physical Tables. Text: 'Store data using one table for each logical table. [Learn more](#) Use this option if you need to use extract filters, aggregation, or other extract settings.'
- Specify how much data to extract:**
  - Filters (optional):** A table with two columns: 'Filter' and 'Details'. The first row contains 'Category' and 'keeps Office Supplies and Technology'. Below the table are buttons: 'Add...', 'Edit...', and 'Remove'.
- Aggregation:** ☐ Aggregate data for visible dimensions. ☐ Roll up dates to: Year (dropdown).
- Number of Rows:** ☒ All rows, ☐ Incremental refresh. Radio buttons for 'Top' and 'Sample' are also present, each followed by a dropdown menu (currently showing 'Orders') and a 'by' field, and a 'rows' dropdown menu (currently showing 'rows').

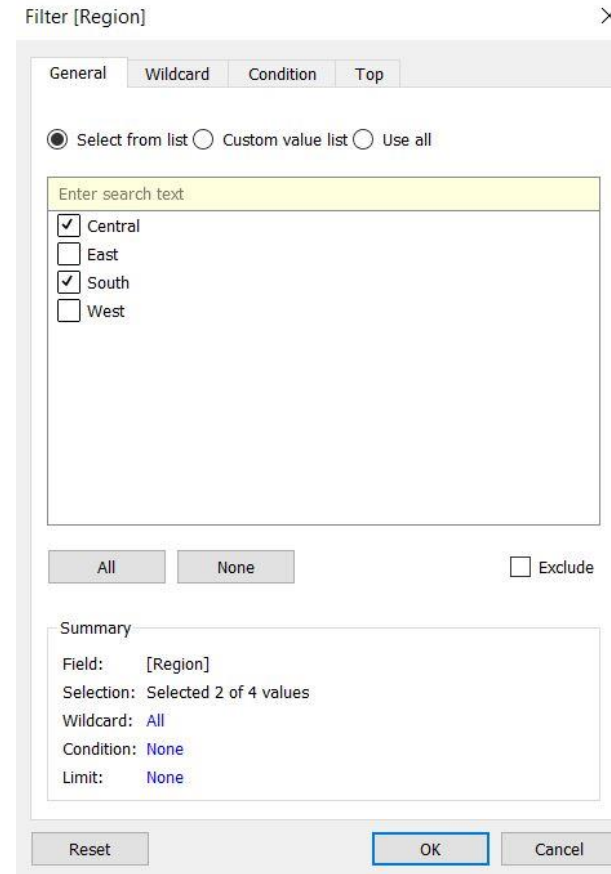
At the bottom are buttons: 'History...', 'Hide All Unused Fields', 'OK' (highlighted with a blue border), and 'Cancel'.

# HOW TO CREATE EXTRACT FILTERS

**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**



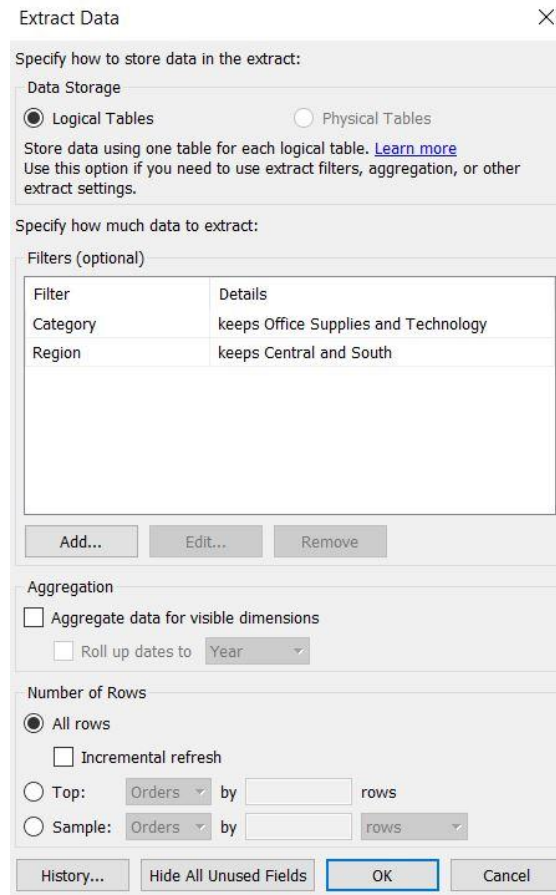
The 'Add Filter' dialog box is shown. It has a title bar with a close button (X). Inside, there is a section 'Select a field:' with a list box containing 'Region', 'Country/Region', and 'Region'. The 'Region' item is selected. At the bottom, there are 'OK' and 'Cancel' buttons.



The 'Filter [Region]' dialog box is shown. It has a title bar with a close button (X). Inside, there are tabs: 'General', 'Wildcard', 'Condition', and 'Top'. The 'General' tab is selected. It contains a section with radio buttons: 'Select from list' (selected), 'Custom value list', and 'Use all'. Below this is a search box labeled 'Enter search text'. Underneath the search box is a list of checkboxes: 'Central' (checked), 'East' (unchecked), 'South' (checked), and 'West' (unchecked). Below the list are buttons for 'All', 'None', and an 'Exclude' checkbox. At the bottom, there is a 'Summary' section with the following text: 'Field: [Region]', 'Selection: Selected 2 of 4 values', 'Wildcard: All', 'Condition: None', and 'Limit: None'. At the very bottom, there are 'Reset', 'OK', and 'Cancel' buttons.

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**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**



The screenshot shows the 'Extract Data' dialog box with the 'Filters (optional)' section expanded. The 'Data Storage' section has 'Logical Tables' selected. The 'Specify how much data to extract' section shows a table with filters and details.

Extract Data

Specify how to store data in the extract:

Data Storage

☒ Logical Tables ☐ Physical Tables

Store data using one table for each logical table. [Learn more](#)  
Use this option if you need to use extract filters, aggregation, or other extract settings.

Specify how much data to extract:

Filters (optional)

Filter	Details
Category	keeps Office Supplies and Technology
Region	keeps Central and South

Add... Edit... Remove

Aggregation

☐ Aggregate data for visible dimensions

☐ Roll up dates to Year

Number of Rows

☒ All rows

☐ Incremental refresh

☐ Top: Orders by rows

☐ Sample: Orders by rows

History... Hide All Unused Fields OK Cancel

# 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  
Extract will include subset of data.

Filters  
0 | [Add](#)



# 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**

The screenshot shows the Tableau Desktop interface. On the left, the 'Connections' pane shows 'Sample - Superstore\_2021' (Microsoft Excel). Below it, the 'Sheets' pane shows a list of worksheets: Orders, People, Returns, Orders, People, Returns, and New Union. The main workspace displays the 'Orders (Sample - Superstore\_2021)' data source. A 'Save Extract As' dialog box is open, showing a list of folders in the 'My Tableau Repository' under 'Datasources'. The 'File name' field is set to 'Orders (Sample - Superstore\_2021).test.hyper' and the 'Save as type' is 'Tableau Data Extract (\*.hyper)'. The background shows a data table with columns: Ship Date, Ship Mode, Customer ID, and Customer Name. The table contains 6 rows of data.

Ship Date	Ship Mode	Customer ID	Customer Name
11-11-2020	Second Class	CG-12520	Claire Gute
11-11-2020	Second Class	DV-13045	Darrin Van Huff
18-10-2019	Standard Class	SO-20335	Sean O'Donnell
18-10-2019	Standard Class	SO-20335	Sean O'Donnell
14-06-2018	Standard Class	BH-11710	Brosina Hoffman

# 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

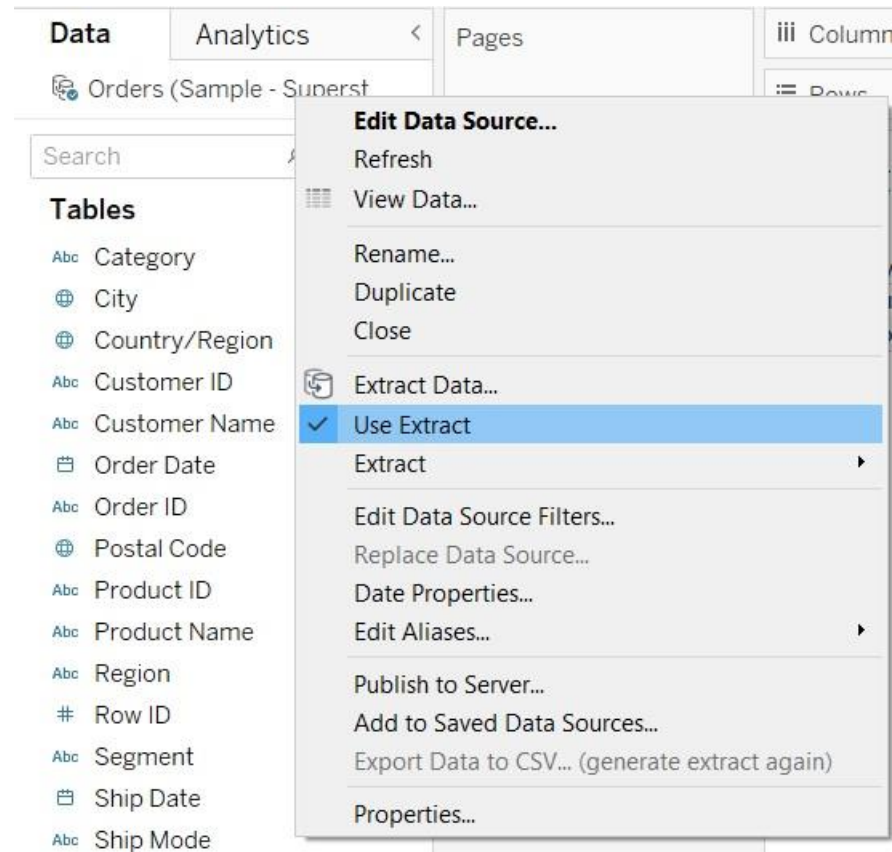
The screenshot shows the Tableau Desktop interface. On the left, the 'Data' pane lists fields from the 'Orders (Sample - Superstore)' data source. A blue arrow points to this data source. The 'Columns' shelf contains 'Region' and the 'Rows' shelf contains 'Category'. The 'Marks' card is set to 'Text' and displays 'SUM(Sales)'. The main view shows a table with the following data:

Category	Region	
	Central	South
Office Supplies	167,026	125,651
Technology	170,416	148,772

At the bottom, the status bar indicates '4 marks', '2 rows by 2 columns', and 'SUM(Sales): 611,866'.

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



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

The screenshot shows a data visualization tool interface. On the left, there is a 'Data' pane with a search bar and a list of fields under 'Tables'. The fields include 'Category', 'City', 'Country/Region', 'Customer ID', 'Customer Name', 'Order Date', 'Order ID', 'Postal Code', 'Product ID', 'Product Name', 'Region', 'Row ID', 'Segment', 'Ship Date', 'Ship Mode', 'State', 'Sub-Category', and 'Measure Names'. Below 'Measure Names', there are 'Discount', 'Profit', 'Quantity', 'Sales', 'Latitude (generated)', 'Longitude (generated)', 'Orders (Count)', and 'Measure Values'. The 'Columns' shelf at the top right contains 'Region', and the 'Rows' shelf contains 'Category'. The 'Marks' shelf is set to 'Automatic' and displays a green pill with 'SUM(Sales)'. The main view area shows a table titled 'Sheet 1' with the following data:

Category	Region			
	Central	East	South	West
Furniture	163,797	208,291	117,299	252,613
Office Supplies	167,026	205,516	125,651	220,853
Technology	170,416	264,974	148,772	251,992

At the bottom of the interface, there is a status bar showing '12 marks', '3 rows by 4 columns', and 'SUM(Sales): 2,297,201'.