

# HOW TO ADD A CONTEXT FILTER

## STEP 1: Assume that we have a Crosstabs view of Sales for States and Cities

The screenshot displays the Tableau interface for a Crosstabs view. The left sidebar contains the following sections:

- Pages:** No pages are currently added.
- Filters:** A filter for 'Measure Names: Sal...' is applied.
- Marks:** The mark type is set to 'Automatic'. The 'Measure Values' shelf contains 'SUM(Sales)'.

The main view area shows a Crosstabs table with the following structure:

- Columns:** Measure Names
- Rows:** State, City

A 'Context Filter' is applied to the view, filtering the data by State. The resulting table is as follows:

State	City	Sales
Alabama	Auburn	\$2K
	Decatur	\$3K
	Florence	\$2K
	Hoover	\$1K
	Huntsville	\$2K
	Mobile	\$5K
	Montgomery	\$4K
	Tuscaloosa	\$0K
Arizona	Avondale	\$1K
	Bullhead City	\$0K
	Chandler	\$1K
	Gilbert	\$4K
	Glendale	\$3K
	Mesa	\$4K
	Peoria	\$1K
	Phoenix	\$11K
	Scottsdale	\$1K
	Sierra Vista	\$0K
	Tempe	\$1K
	Tucson	\$6K
Arkansas	Yuma	\$1K
	Conway	\$0K
	Fayetteville	\$4K
	Hot Springs	\$0K
	Jonesboro	\$3K
	Little Rock	\$4K
	Pine Bluff	\$0K
	Rogers	\$0K
	Springdale	\$0K
	Texarkana	\$1K
California	Anaheim	\$8K
	Antioch	\$0K
	Apple Valley	\$2K

# HOW TO ADD A CONTEXT FILTER

**STEP 2:** Consider that we want to identify the Top 10 Cities in California State by Sales  
Drag and drop the **State** to the **Filters** shelf

The screenshot shows a Tableau interface with the following components:

- Columns Shelf:** Measure Names
- Rows Shelf:** State, City
- Filters Shelf:** Measure Names: Sal., State
- Marks Shelf:** Automatic (dropdown), Color, Size, Text, Detail, Tooltip, Measure Values (dropdown)
- Measure Values:** SUM(Sales)

The main view displays a table titled "Context Filter" with the following data:

State	City	Sales
Alabama	Auburn	\$2K
	Decatur	\$3K
	Florence	\$2K
	Hoover	\$1K
	Huntsville	\$2K
	Mobile	\$5K
	Montgomery	\$4K
	Tuscaloosa	\$0K
Arizona	Avondale	\$1K
	Bullhead City	\$0K
	Chandler	\$1K
	Gilbert	\$4K
	Glendale	\$3K
	Mesa	\$4K
	Peoria	\$1K
	Phoenix	\$11K
	Scottsdale	\$1K
	Sierra Vista	\$0K
	Tempe	\$1K
	Tucson	\$6K
	Yuma	\$1K
Arkansas	Conway	\$0K
	Fayetteville	\$4K
	Hot Springs	\$0K
	Jonesboro	\$3K
	Little Rock	\$4K
	Pine Bluff	\$0K
	Rogers	\$0K
	Springdale	\$0K
	Texarkana	\$1K
California	Anaheim	\$8K
	Antioch	\$0K
	Apple Valley	\$2K

# HOW TO ADD A CONTEXT FILTER

**STEP 3: "Filter[State]" dialog box will appear**  
**Click None**

Filter [State] X

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

- ☒ Alabama
- ☒ Arizona
- ☒ Arkansas
- ☒ California
- ☒ Colorado
- ☒ Connecticut
- ☒ Delaware
- ☒ District of Columbia
- ☒ Florida
- ☒ Georgia
- ☒ Idaho

All None ☐ Exclude

Summary

Field: [State]  
Selection: Selected 49 of 49 values  
Wildcard: All  
Condition: None  
Limit: None

Reset OK Cancel Apply

Filter [State] X

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

- ☐ Alabama
- ☐ Arizona
- ☐ Arkansas
- ☐ California
- ☐ Colorado
- ☐ Connecticut
- ☐ Delaware
- ☐ District of Columbia
- ☐ Florida
- ☐ Georgia
- ☐ Idaho

All None ☐ Exclude

Summary

Field: [State]  
Selection: Selected 0 of 49 values  
Wildcard: All  
Condition: None  
Limit: None

Reset OK Cancel Apply

# HOW TO ADD A CONTEXT FILTER

## STEP 4: Select California Click **OK**

Filter [State] ✕

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all ☰

Enter search text

- ☐ Alabama
- ☐ Arizona
- ☐ Arkansas
- ☒ California
- ☐ Colorado
- ☐ Connecticut
- ☐ Delaware
- ☐ District of Columbia
- ☐ Florida
- ☐ Georgia
- ☐ Idaho

☐ All ☐ None ☐ Exclude

Summary

Field: [State]  
Selection: Selected 1 of 49 values  
Wildcard: All  
Condition: None  
Limit: None

Reset OK Cancel Apply

# HOW TO ADD A CONTEXT FILTER

**STEP 5:** Ensure that the **State: California** is now present in the **Filters** shelf

Pages

Filters

Measure Names: Sal..

State: California

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

SUM(Sales)

Columns

Measure Names

Rows

State

City

Context Filter

State	City	Sales
California	Anaheim	\$8K
	Antioch	\$0K
	Apple Valley	\$2K
	Bakersfield	\$1K
	Brentwood	\$5K
	Burbank	\$3K
	Camarillo	\$1K
	Chico	\$2K
	Chula Vista	\$1K
	Citrus Heights	\$0K
	Coachella	\$0K
	Concord	\$3K
	Costa Mesa	\$1K
	Danville	\$1K
	Davis	\$0K
	Dublin	\$0K
	El Cajon	\$1K
	Encinitas	\$1K
	Escondido	\$0K
	Fairfield	\$1K
	Fresno	\$8K
	Hesperia	\$1K
	Huntington Beach	\$3K
	Inglewood	\$3K
	La Mesa	\$0K
	La Quinta	\$0K
	Laguna Niguel	\$0K
	Lake Elsinore	\$0K
	Lake Forest	\$2K
	Lakewood	\$2K
	Lancaster	\$0K
	Lodi	\$0K
	Long Beach	\$5K

# HOW TO ADD A CONTEXT FILTER

## STEP 6: Drag and drop the **City** to the **Filters** shelf

The screenshot shows the Tableau interface with the following configuration:

- Columns:** Measure Names
- Rows:** State, City
- Filters:** Measure Names: Sales, State: California, City
- Marks:** Automatic (Measure Values)
- Measure Values:** SUM(Sales)

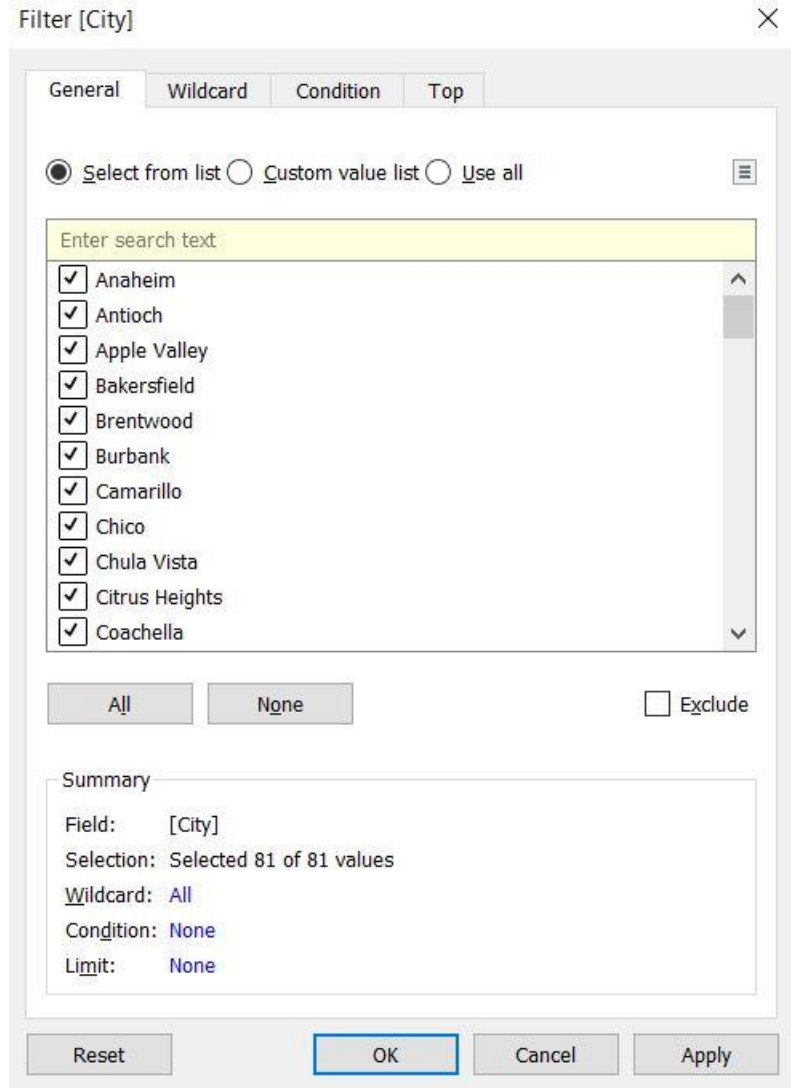
The main view displays a table titled "Context Filter" showing sales data for California, filtered by City. The table has three columns: State, City, and Sales.

State	City	Sales
California	Anaheim	\$8K
	Antioch	\$0K
	Apple Valley	\$2K
	Bakersfield	\$1K
	Brentwood	\$5K
	Burbank	\$3K
	Camarillo	\$1K
	Chico	\$2K
	Chula Vista	\$1K
	Citrus Heights	\$0K
	Coachella	\$0K
	Concord	\$3K
	Costa Mesa	\$1K
	Danville	\$1K
	Davis	\$0K
	Dublin	\$0K
	El Cajon	\$1K
	Encinitas	\$1K
	Escondido	\$0K
	Fairfield	\$1K
	Fresno	\$8K
	Hesperia	\$1K
	Huntington Beach	\$3K
	Inglewood	\$3K
	La Mesa	\$0K
	La Quinta	\$0K
	Laguna Niguel	\$0K
	Lake Elsinore	\$0K
	Lake Forest	\$2K
	Lakewood	\$2K
	Lancaster	\$0K
	Lodi	\$0K
	Long Beach	\$5K

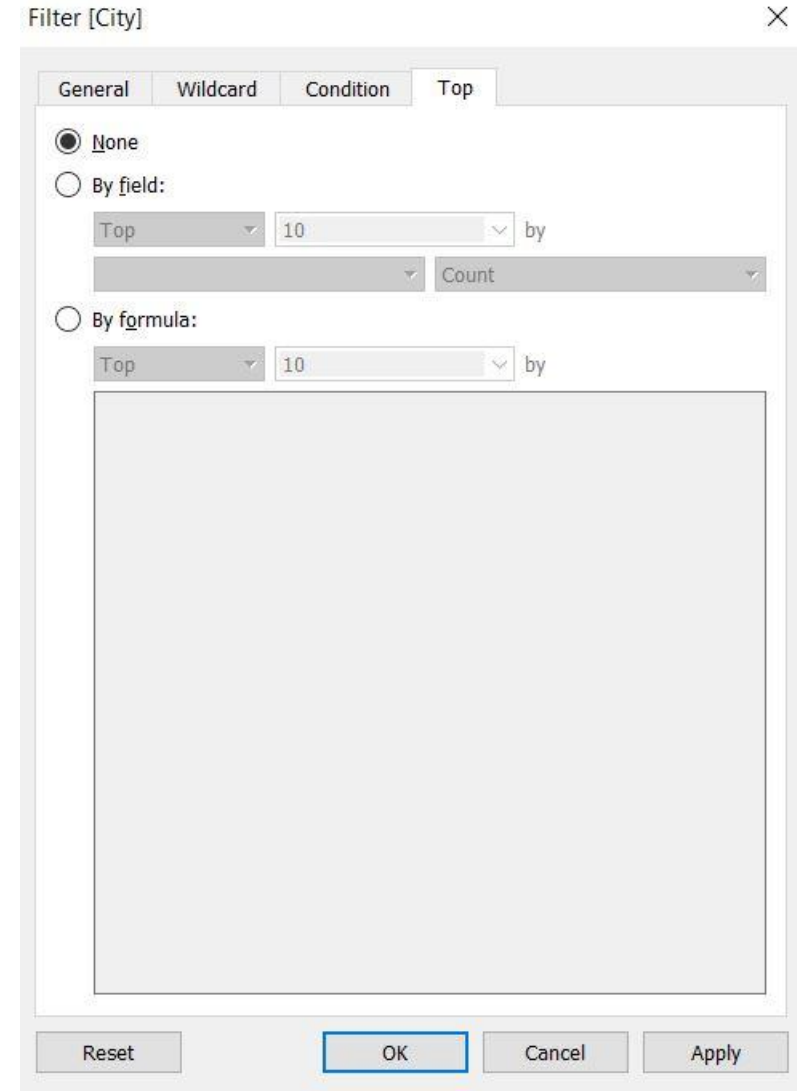
# HOW TO ADD A CONTEXT FILTER

**STEP 7: "Filter[City]" dialog box will appear**

**Click Top option**



The "Filter [City]" dialog box is shown with the "General" tab selected. It features four tabs: "General", "Wildcard", "Condition", and "Top". Under the "General" tab, there are three radio buttons: "Select from list" (selected), "Custom value list", and "Use all". Below these is a search bar labeled "Enter search text" and a list of cities with checkboxes: Anaheim, Antioch, Apple Valley, Bakersfield, Brentwood, Burbank, Camarillo, Chico, Chula Vista, Citrus Heights, and Coachella. At the bottom of the list are buttons for "All", "None", and an "Exclude" checkbox. A "Summary" section at the bottom left shows: Field: [City], Selection: Selected 81 of 81 values, Wildcard: All, Condition: None, and Limit: None. At the very bottom are "Reset", "OK", "Cancel", and "Apply" buttons.



The "Filter [City]" dialog box is shown with the "Top" tab selected. It features four tabs: "General", "Wildcard", "Condition", and "Top". Under the "Top" tab, there are two radio buttons: "None" (selected) and "By field:". Below "By field:" are two dropdown menus: the first is set to "Top" and the second to "10", followed by the word "by" and a dropdown menu set to "Count". Below these is another radio button labeled "By formula:". Below "By formula:" are two dropdown menus: the first is set to "Top" and the second to "10", followed by the word "by" and a large empty text area for a formula. At the bottom are "Reset", "OK", "Cancel", and "Apply" buttons.

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## STEP 8: Select the **By Field** option

Filter [City] ×

General Wildcard Condition **Top**

☐ None

☒ By field:

Top 10 by

Count

☐ By formula:

Top 10 by

Reset OK Cancel Apply



# HOW TO ADD A CONTEXT FILTER

**STEP 9:** Select **Top** (default option)

Enter the required number in this example it is **10**

Filter [City] ×

General Wildcard Condition **Top**

☐ None

☒ By field:

Top 10 by

Top

Bottom Count

☐ By formula:

Top 10 by

Reset OK Cancel Apply

# HOW TO ADD A CONTEXT FILTER

**STEP 10:** Select **Sales** as the field from the drop-down

The image shows a 'Filter [City]' dialog box with a close button (X) in the top right corner. The dialog has four tabs: 'General', 'Wildcard', 'Condition', and 'Top'. The 'Top' tab is selected. In the 'General' section, there are two radio buttons: 'None' and 'By field:'. The 'By field:' radio button is selected. Below it, there is a dropdown menu set to 'Top', a text input field containing '10', and a 'by' label. To the right of this is another dropdown menu set to 'Count'. Below these, there is a search bar and a list of fields. The 'Sales' field is highlighted in blue. The list of fields includes: Category, City, Country, Customer ID, Customer Name, Discount, Order Date, Order ID, Orders, Postal Code, Product ID, Product Name, Profit, Quantity, Region, Row ID, Sales, Segment, Ship Date, Ship Mode, State, Sub-Category, Sub-Category (group), Sub-Category (group) 1, Sub-Category (group) 2, and Target Profit. At the bottom of the dialog, there are 'Cancel' and 'Apply' buttons.

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**STEP 11:** Select **Sum** (default option) as the aggregation  
Click **OK**

The screenshot shows a dialog box titled "Filter [City]" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Wildcard", "Condition", and "Top". The "Top" tab is selected. Inside the dialog, there are two radio buttons: "None" and "By field:". The "By field:" radio button is selected. Below it, there are two dropdown menus: the first is set to "Top" and the second is set to "10". To the right of these is the word "by". Below the "by" word is a dropdown menu showing a list of aggregation functions: "Sum", "Sum", "Average", "Median", "Count", "Count (Distinct)", "Minimum", "Maximum", "Percentile", "Std. Dev", "Std. Dev (Pop.)", "Variance", and "Variance (Pop.)". The "Sum" option is highlighted in blue. At the bottom of the dialog, there are four buttons: "Reset", "OK", "Cancel", and "Apply". The "OK" button is highlighted with a blue border.

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**STEP 12:** Ensure that the **City** is now present in the **Filters** shelf

But the problem is that we are seeing only 3 cities in California state while we needed the Top 10 cities by Sales

The screenshot shows a Tableau worksheet with the following configuration:

- Columns:** Measure Names
- Rows:** State, City
- Filters:** Measure Names: Sal.., State: California, City
- Marks:** Automatic (Measure Values)
- Measure Values:** SUM(Sales)

A context filter is applied, showing the following data:

State	City	Sales
California	Los Angeles	\$176K
	San Diego	\$48K
	San Francisco	\$113K

# HOW TO ADD A CONTEXT FILTER

**STEP 13:** Right-click the **State: California** pill in the **Filters** shelf and select the **Add to Context** option

The screenshot shows the Tableau interface with the following components:

- Columns Shelf:** Measure Names
- Rows Shelf:** State, City
- Filters Shelf:** Measure Names: Sal..., State: California, City
- Marks Shelf:** Automatic, Color, Size, Detail, Tooltip
- Measure Values:** SUM(Sales)

A right-click context menu is open over the 'State: California' pill in the Filters shelf. The menu options are:

- Edit Filter...
- Show Filter
- Show Highlighter
- Clear Filter
- Add to Context** (highlighted)
- Apply to Worksheets
- Sort...
- Create Set...
- Dimension
  - Attribute
  - Measure
- Remove

The main view displays a 'Context Filter' table with the following data:

State	City	Sales
California	Los Angeles	\$176K
California	San Diego	\$48K
California	San Francisco	\$113K

# HOW TO ADD A CONTEXT FILTER

**STEP 14:** Ensure that the **State:California** pill is **gray** now.

This is the **context filter** for this view.

Now we get the **Top 10 Cities in California State by Sales**

