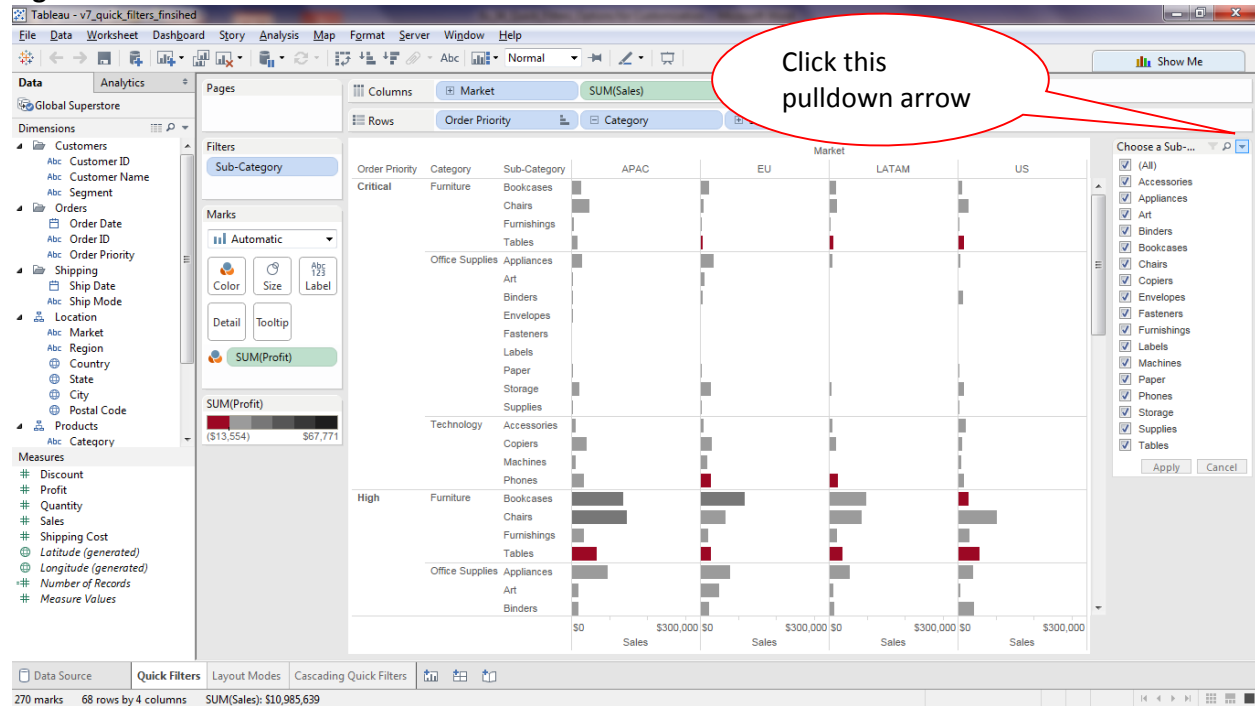


Objective: This exercise will demonstrate the use of the Customize and Edit Title quick filter options

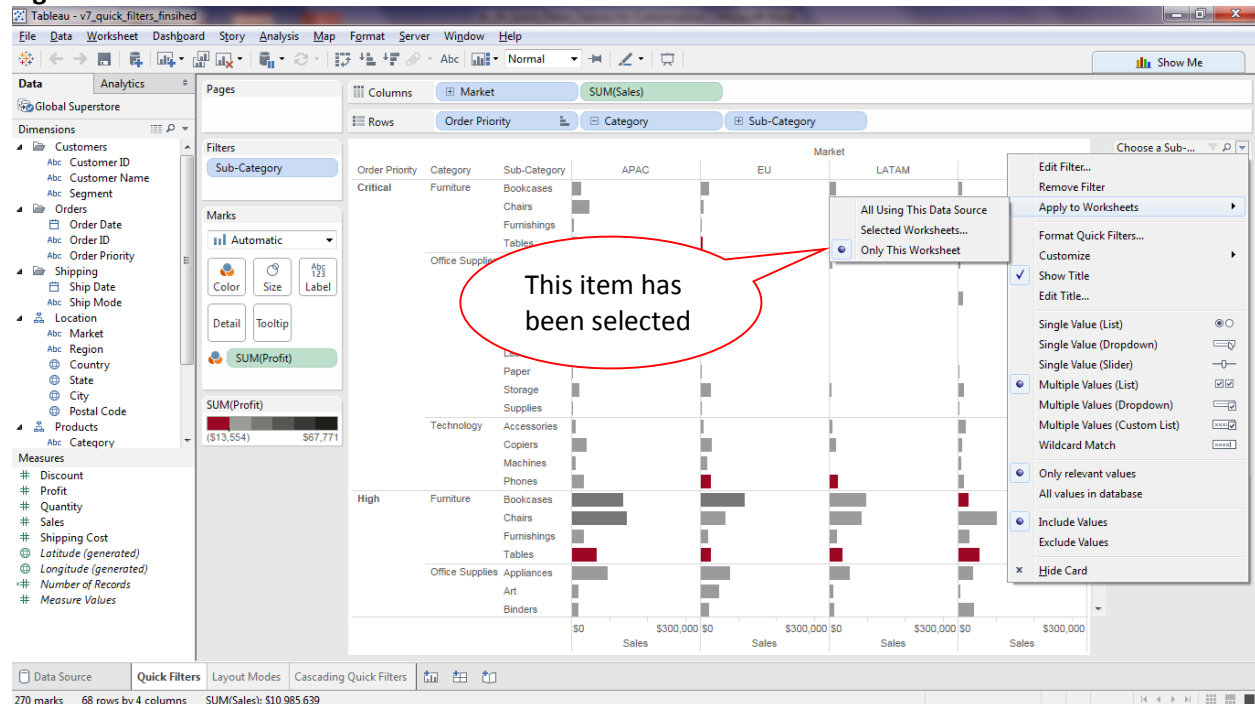
Figure 1 displays a visualization with the **Sub-Category** Quick Filter, which can be customized using options that can be accessed via its menu tree.

Figure 1



- Click the pulldown arrow for the **Quick Filter** as shown on Figure 1, which will popup the menu tree displayed on Figure 2

Figure 2



The menu highlighted on Figure 2 displays three options for applying the Quick Filter. Depending on which sub-menu tree item is selected, the Quick Filter can be applied to the selected worksheet or the currently displayed worksheet. On Figure 2, the menu tree item **Only this Worksheet** has been selected. Therefore, the Quick Filter will only apply to the currently displayed worksheet.

We will now navigate through some of the commonly used items displayed on the Quick Filter menu tree.

Figure 3

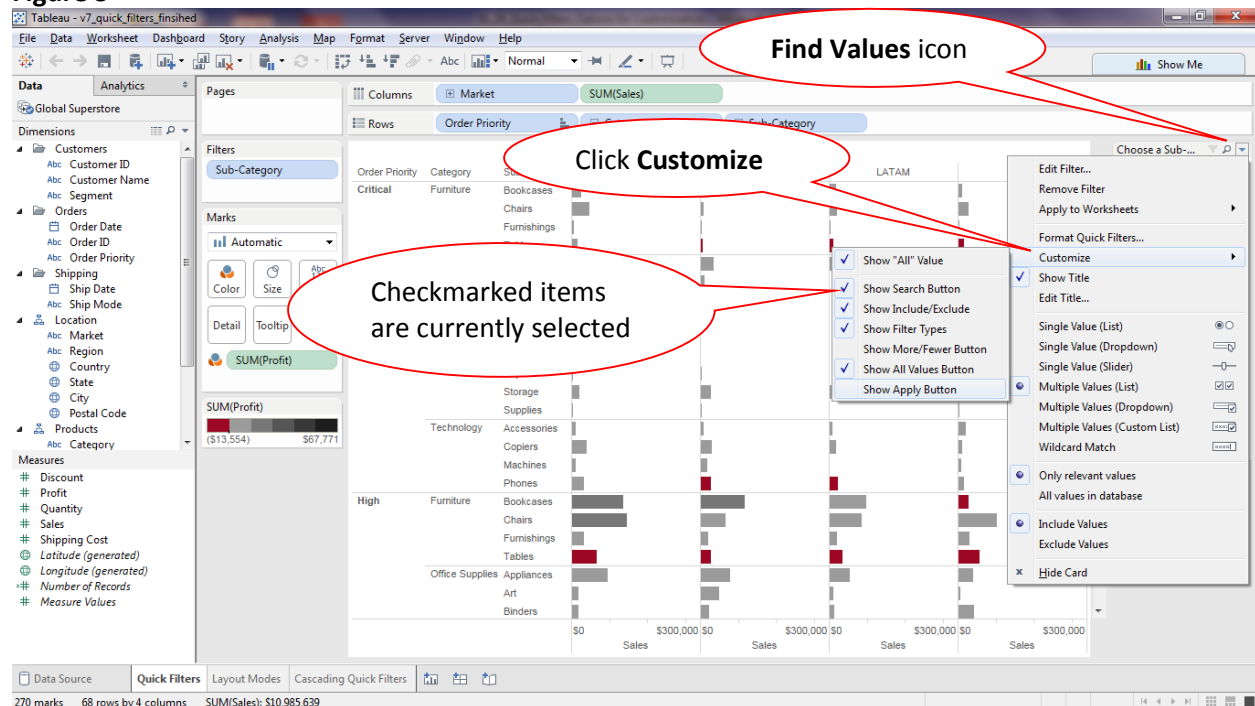


Figure 3 displays various options for the **Customize** menu item:

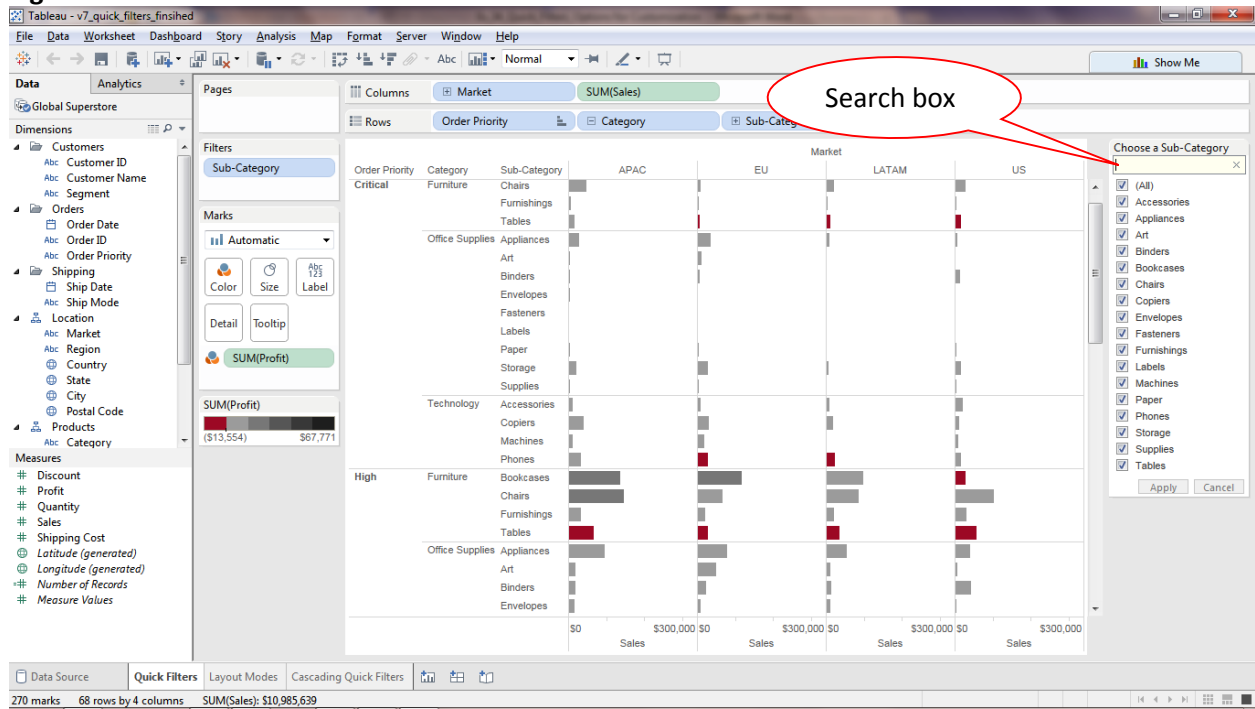
- Click **Customize** which will popup the sub-menu tree shown on Figure 3, where 5 out of the 7 displayed items are currently checkmarked and, hence, selected

Each of these sub-menu tree items enable useful functionality. For example, if a list is very long, the search box can be used to narrow the search.

To access the search box:

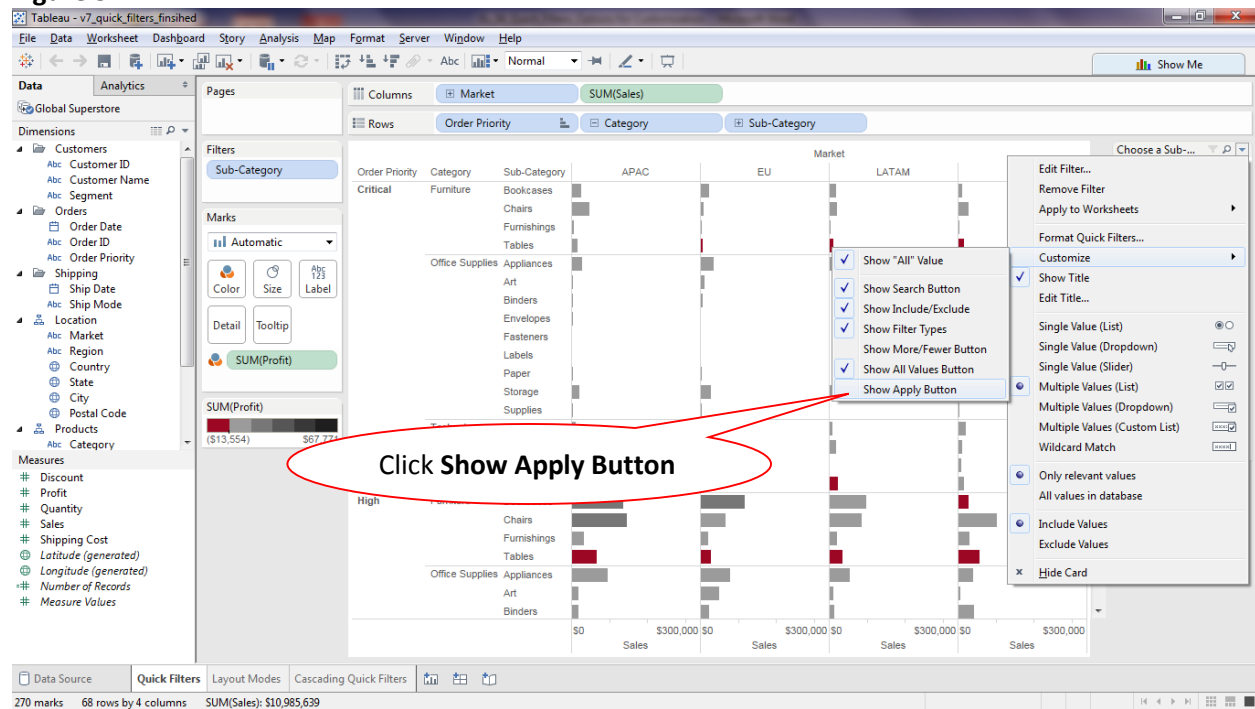
- Click the **Find Values** icon as shown on Figure 3, which will open a small box, displayed on Figure 4, where the name to be searched can be typed in

Figure 4



On Figure 5, the 7th item on the **Customize** sub-menu tree, **Show Apply Button**, is unchecked. This item is used to display or hide the **Apply** button.

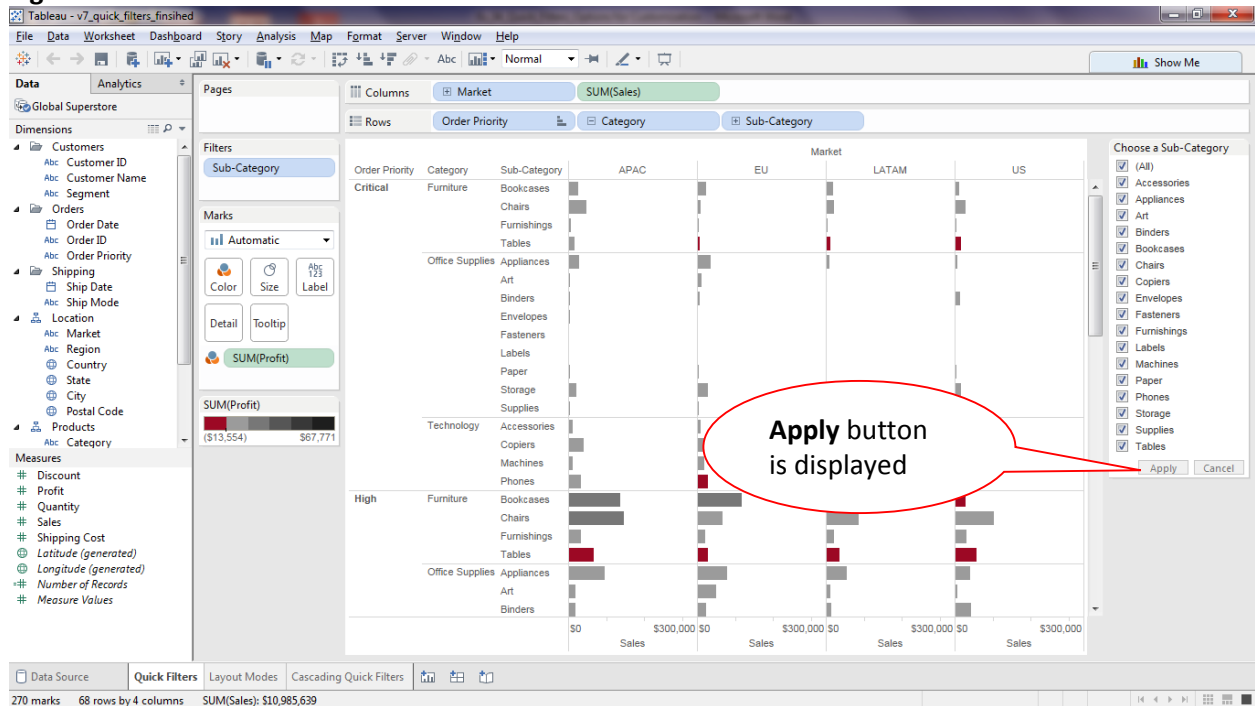
Figure 5



To display the **Apply** button:

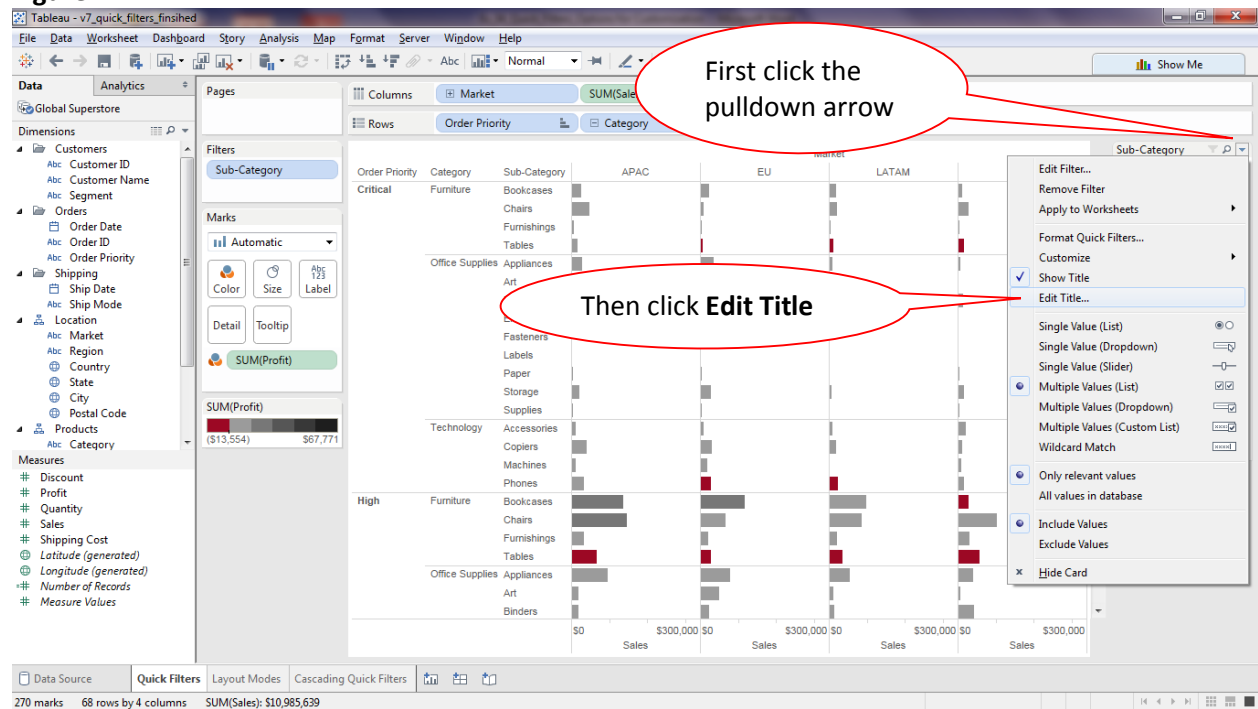
- Click **Show Apply Button** as shown on Figure 5, which will lead to the display on Figure 6

Figure 6



The Quick Filter title can be edited, if desired, to make the title more meaningful or to provide a prompt to the users.

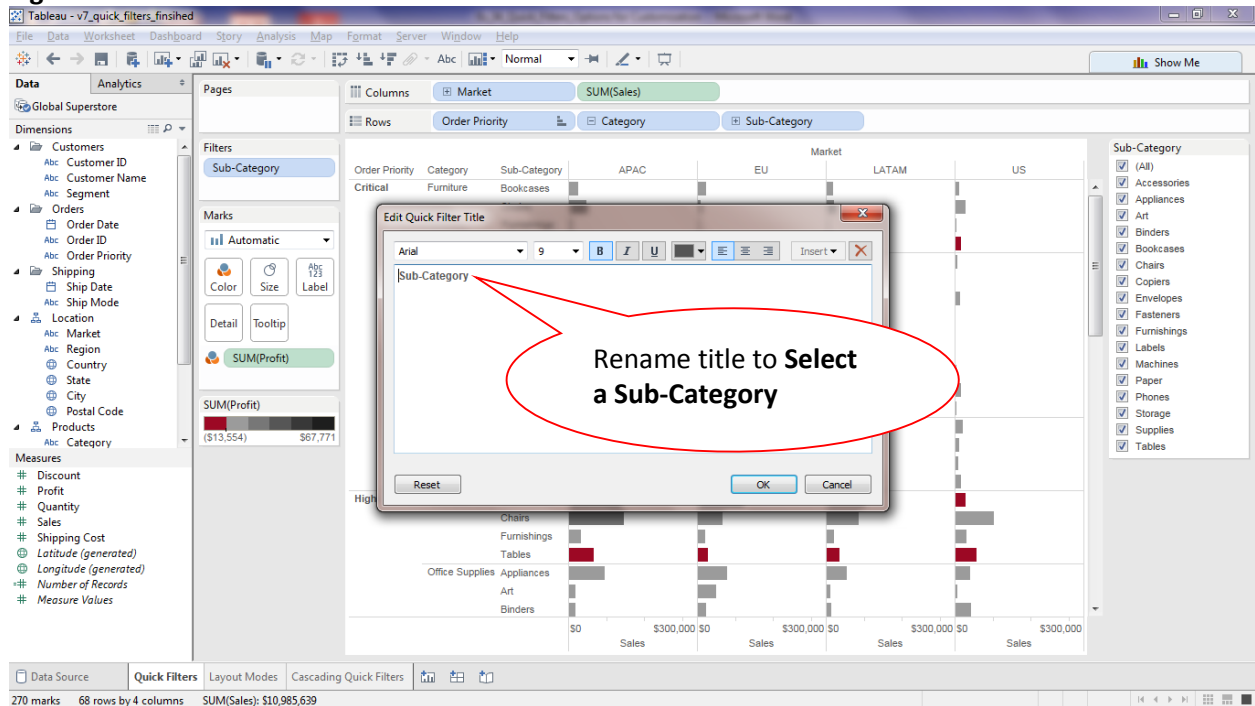
Figure 7



To edit the Quick Filter title:

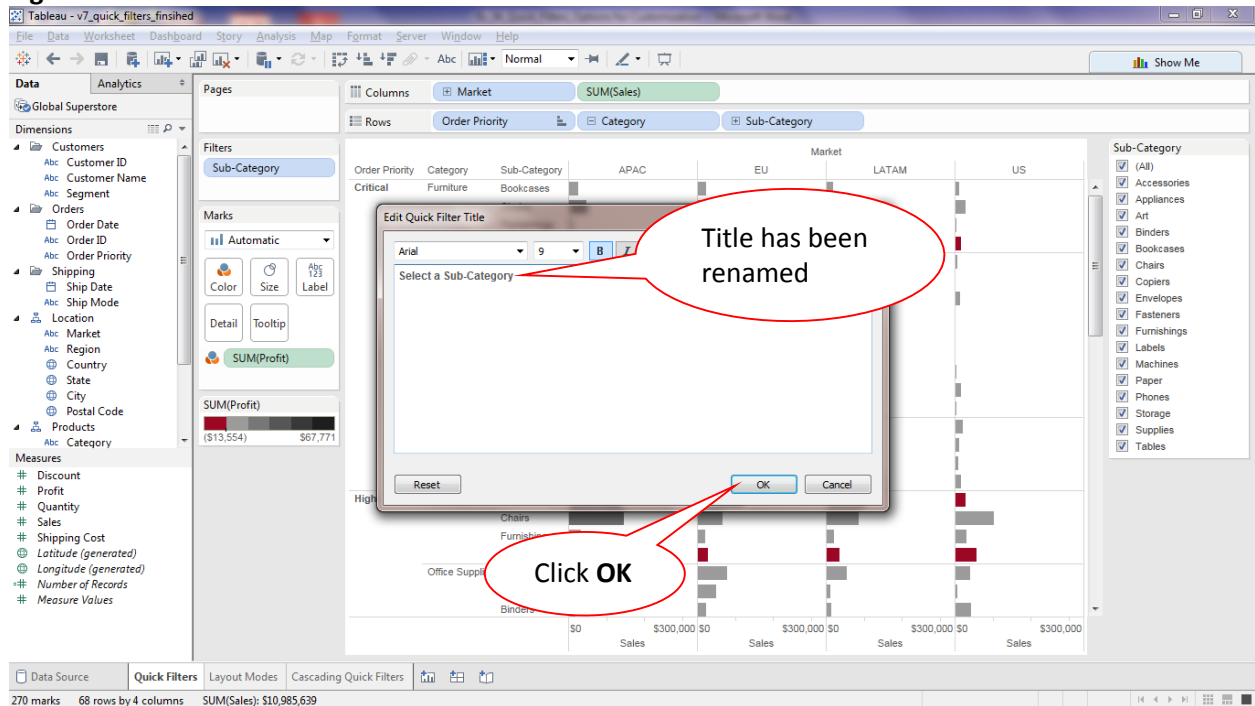
- Click the Quick Filter's pulldown arrow as shown on Figure 7, which will popup the menu tree
- Click **Edit Title** as shown on Figure 7, which will popup the **Edit Quick Filter Title** window displayed on Figure 8

Figure 8



- Rename the default title to **Select a Sub-Category** as shown on Figure 8, by typing in the new title, which will lead to the display on Figure 9

Figure 9



- Click **OK** after the title has been renamed as shown on Figure 9, which will lead to the display on Figure 10

The screenshot shows the Tableau Desktop interface. The main view is a pivot table with the following structure:

- Columns:** Market (SUM(Sales))
- Rows:** Order Priority, Category, Sub-Category

The pivot table displays data for various categories and sub-categories, including:

- Order Priority:** Critical, High
- Category:** Furniture, Office Supplies, Technology
- Sub-Category:** Bookcases, Chairs, Furnishings, Tables, Appliances, Art, Binders, Envelopes, Fasteners, Labels, Paper, Storage, Supplies, Accessories, Copiers, Machines, Phones

A red callout bubble points to the 'Sub-Category' field in the Rows shelf, with the text "New title is displayed".

The right-hand pane shows the 'Select a Sub-Category' list, which includes:

- (All)
- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper
- Phones
- Storage
- Supplies
- Tables

The bottom status bar indicates: 270 marks, 68 rows by 4 columns, SUM(Sales): \$10,985,639.

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