Lesson 03 Demo 03
Dimension Filter

Objective: To demonstrate the application and customization of dimension filters, focusing on filtering customer names via General and Wildcard tabs.

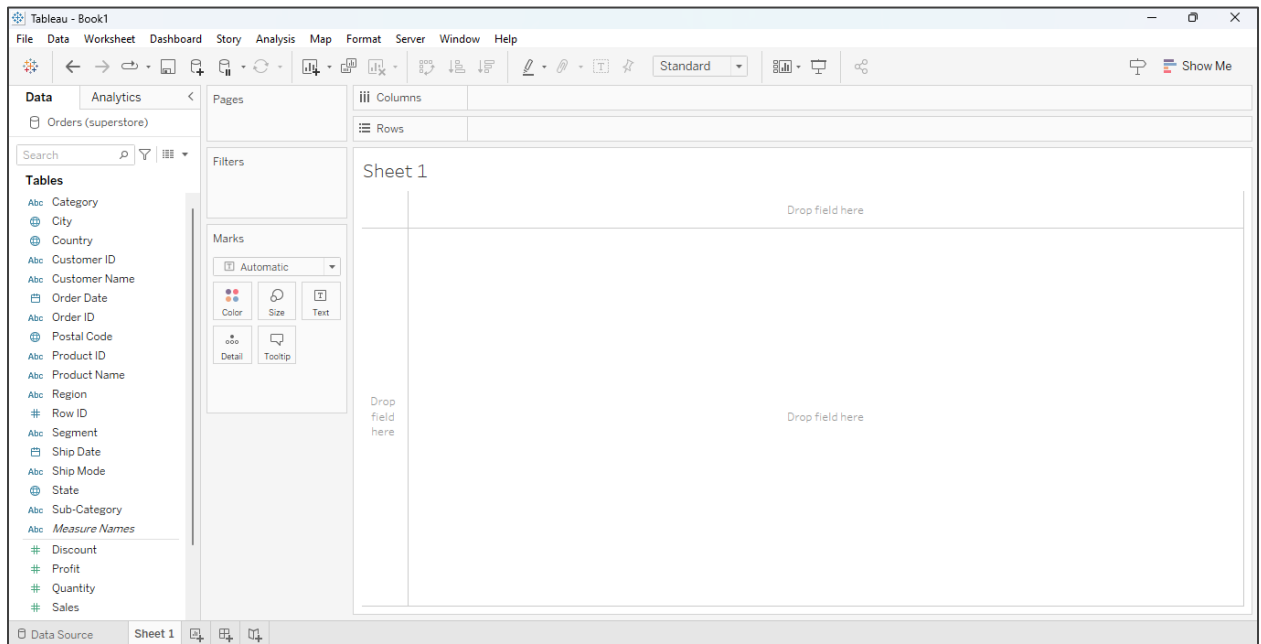**Tools required:** Tableau Desktop

Prerequisites: None

Note: Download the **superstore.xlsx** datasets from the Reference Material of the LMS.
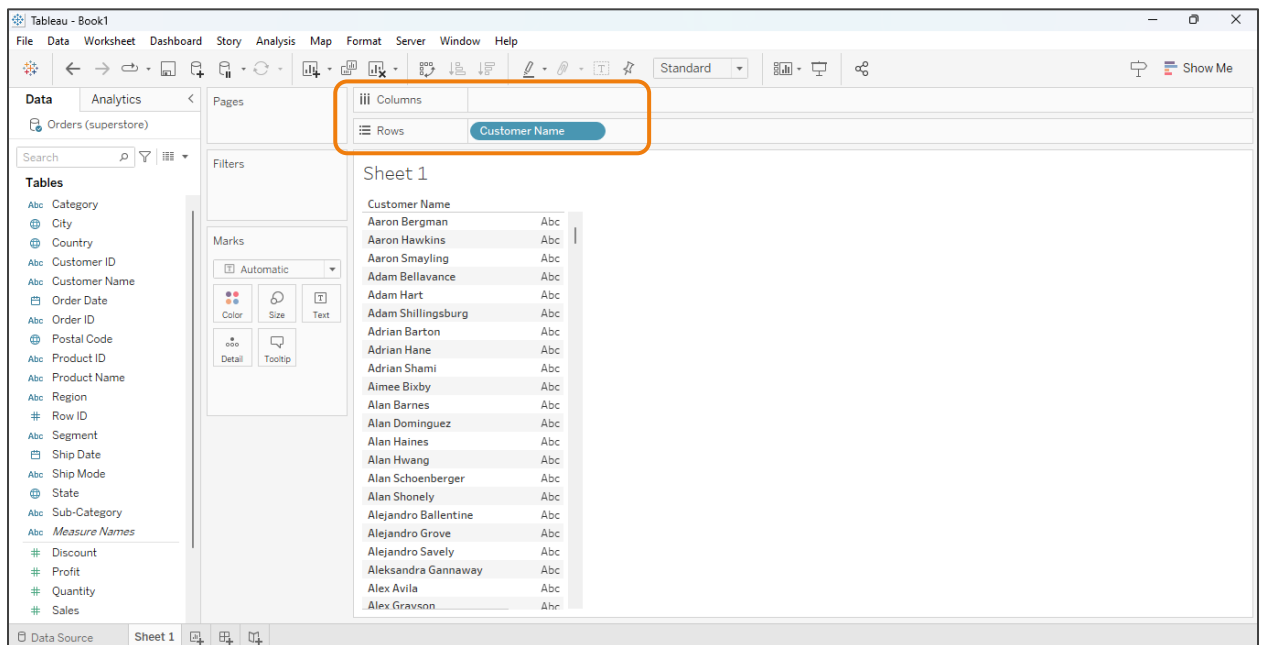
Steps to be followed:

1. Prepare the worksheet
2. Configure General Tab filter
3. Utilize Wildcard searches
4. Reset filter

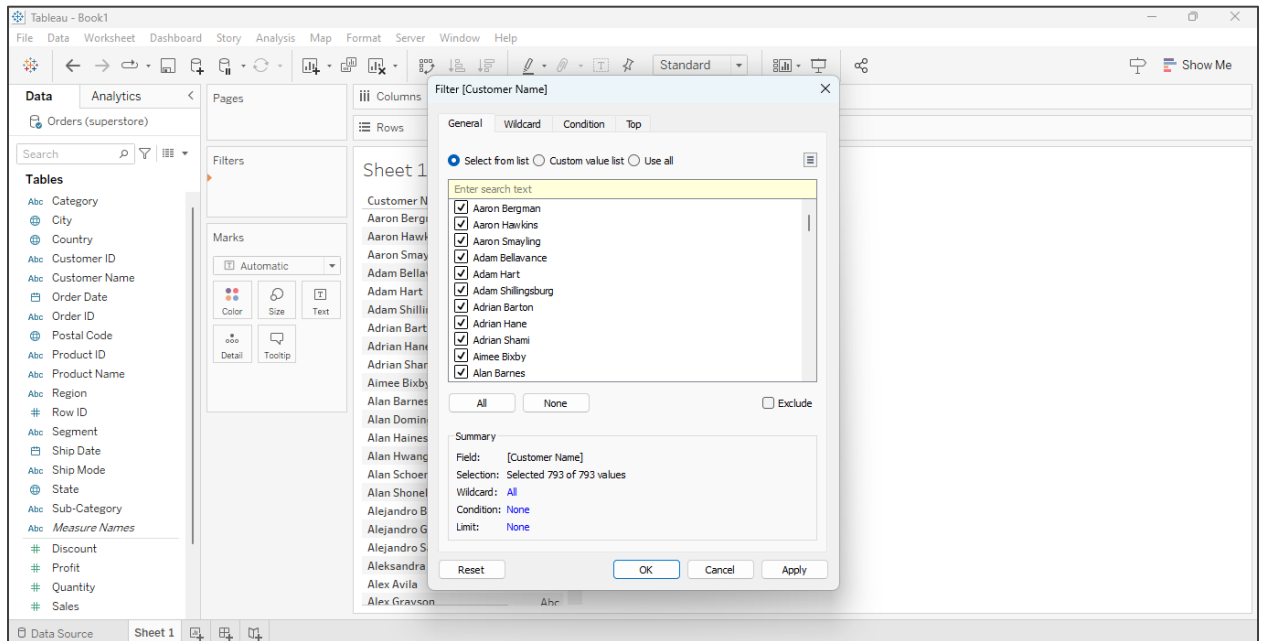**Step 1: Prepare the worksheet**

1.1   Open **Sheet 1** in Tableau

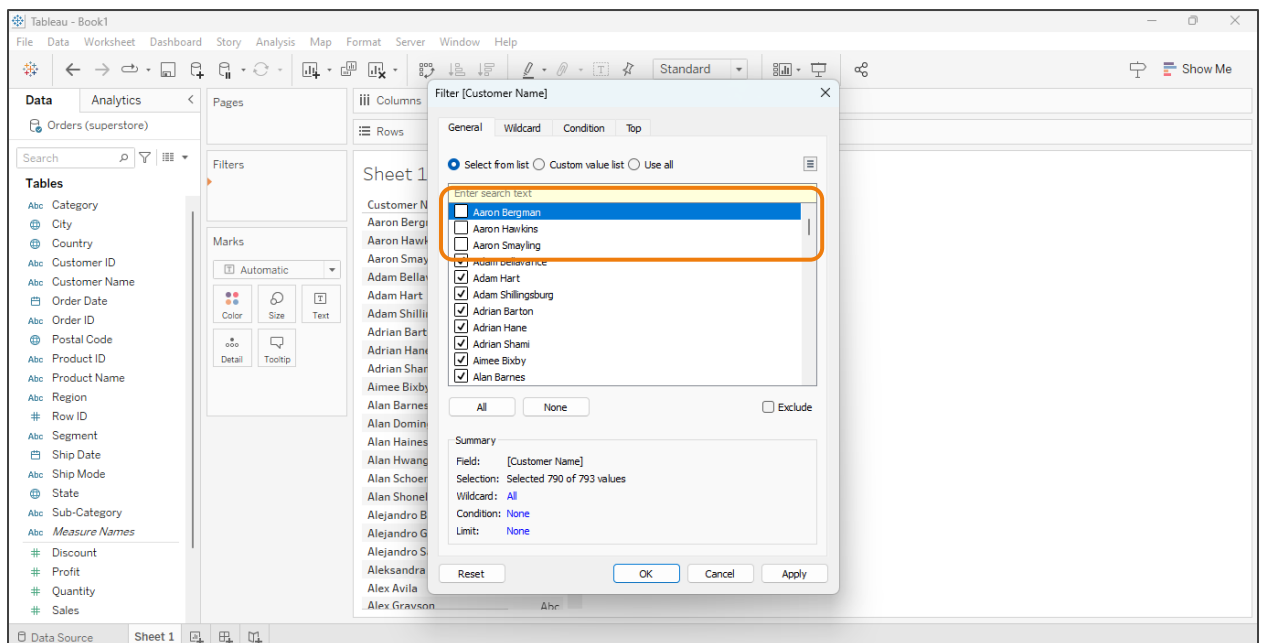## 1.2   Drag **Customer Name** to the **Rows**

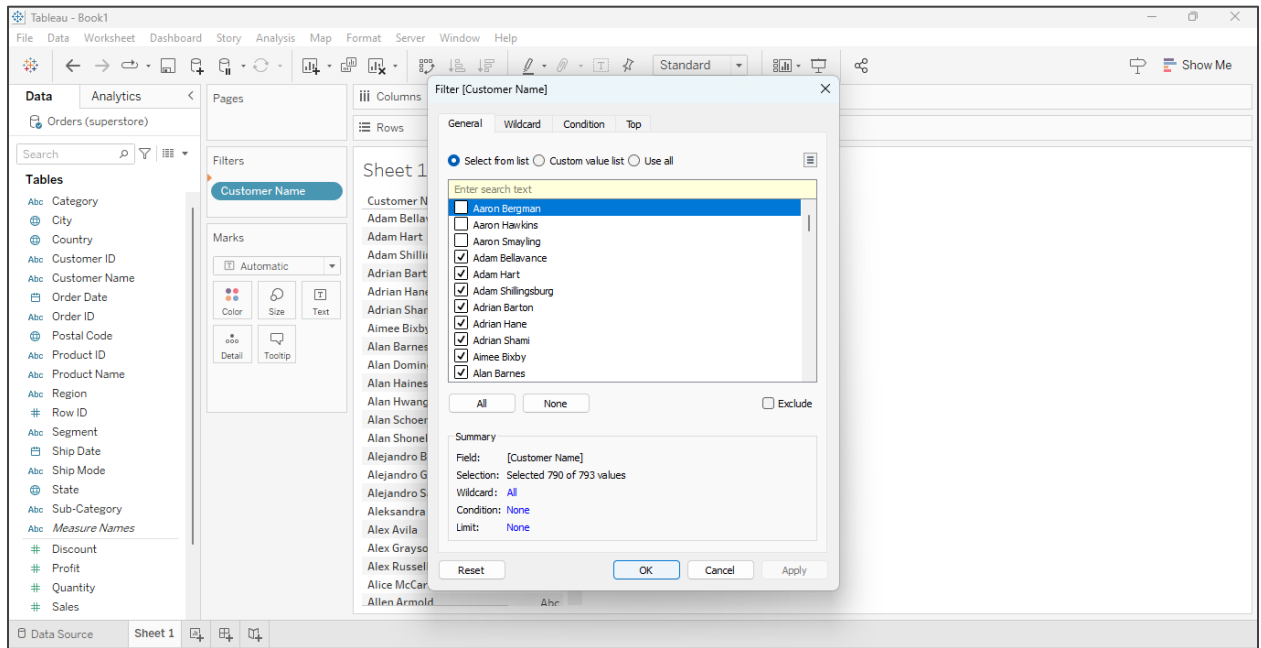## 1.3   Drag **Customer Name** to the **Filters** section

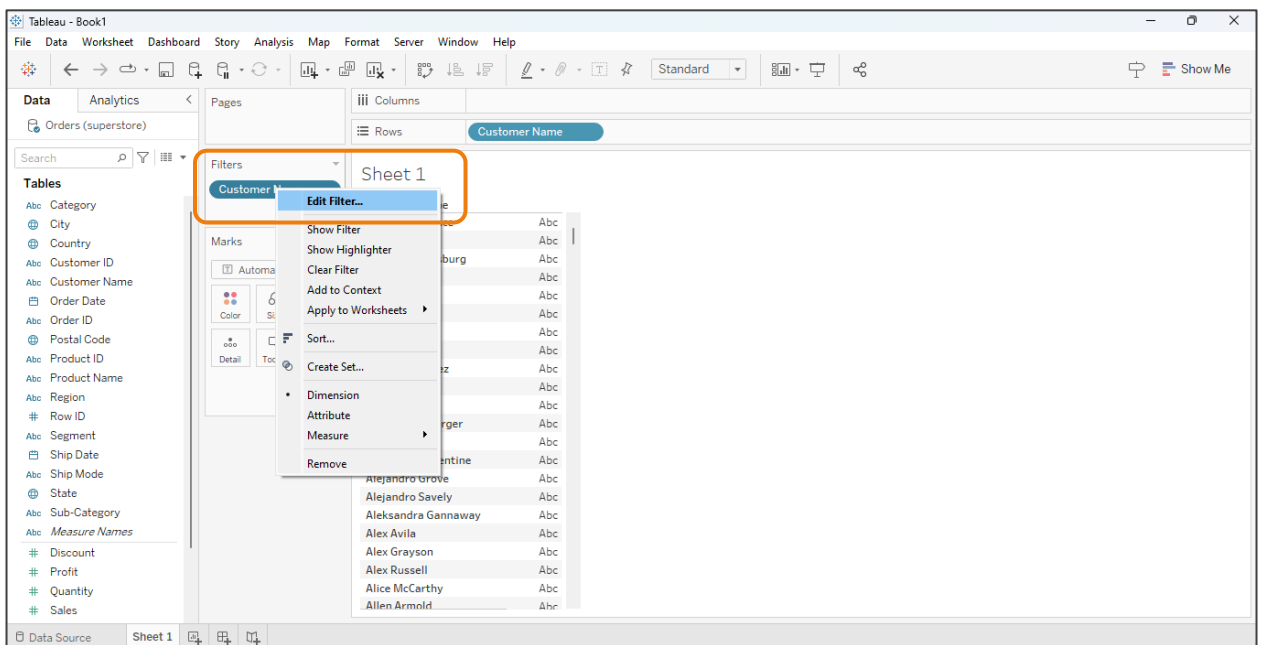## Step 2: Configure General tab filter

2.1   In the **General** tab, uncheck the first 3 names (**Aaron Bergman**, **Aaron Hawkins**, **Aaron Smayling**)
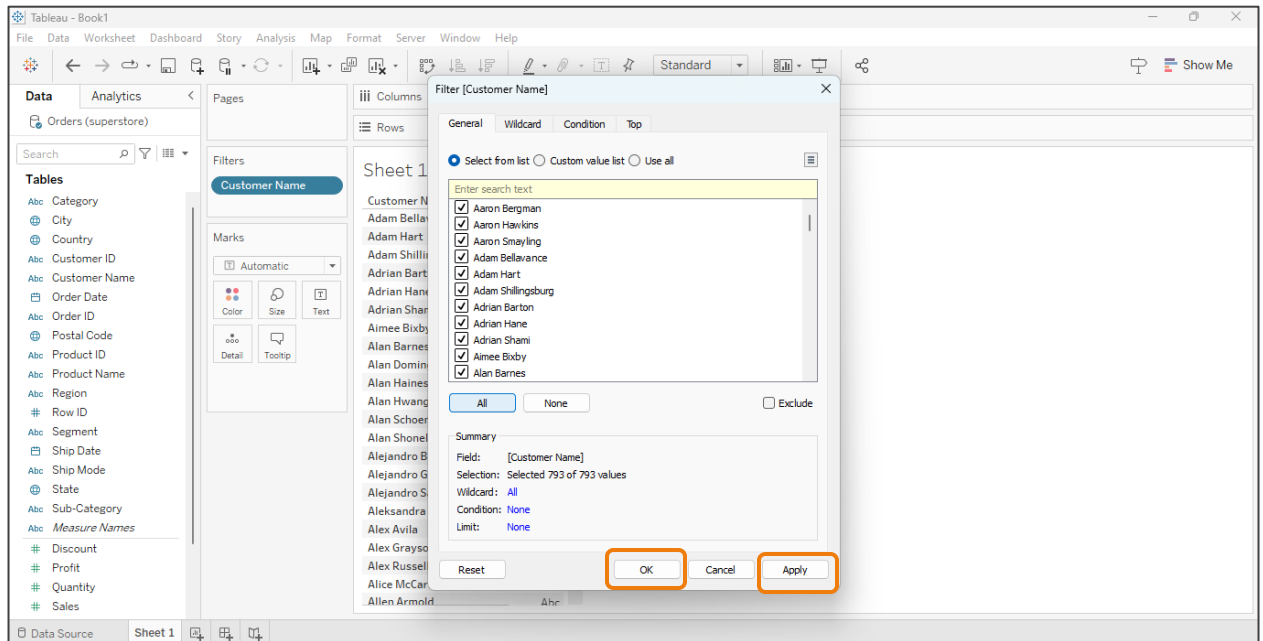
2.2 Click **Apply** and **OK** to exclude the unchecked names

2.3 To include all names, access the Filter options by right-clicking on the **Customer Name** in the Filters shelf and select **Edit Filter**
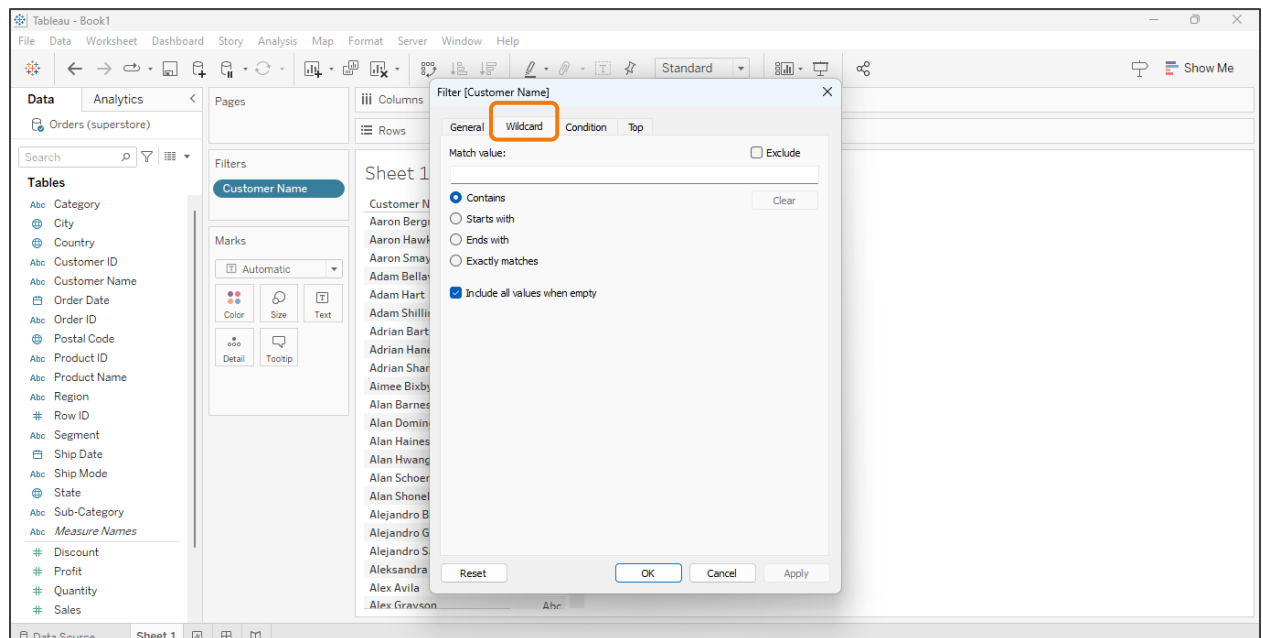
2.4   Click on **All**, then again on **Apply** and select **OK**
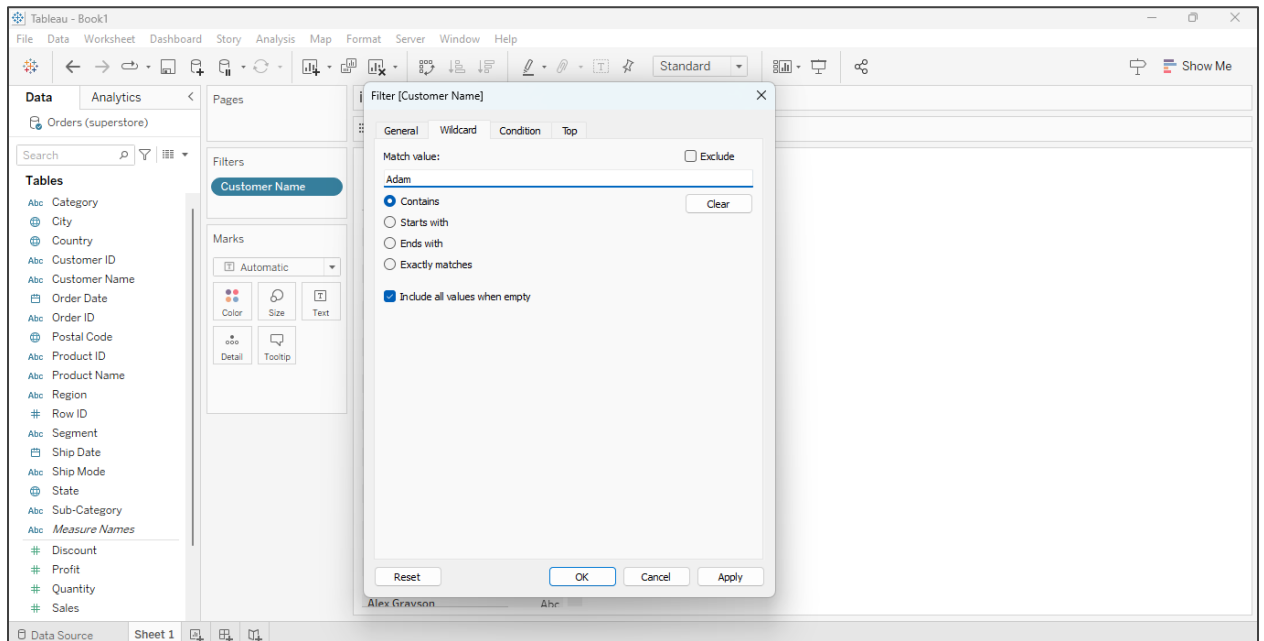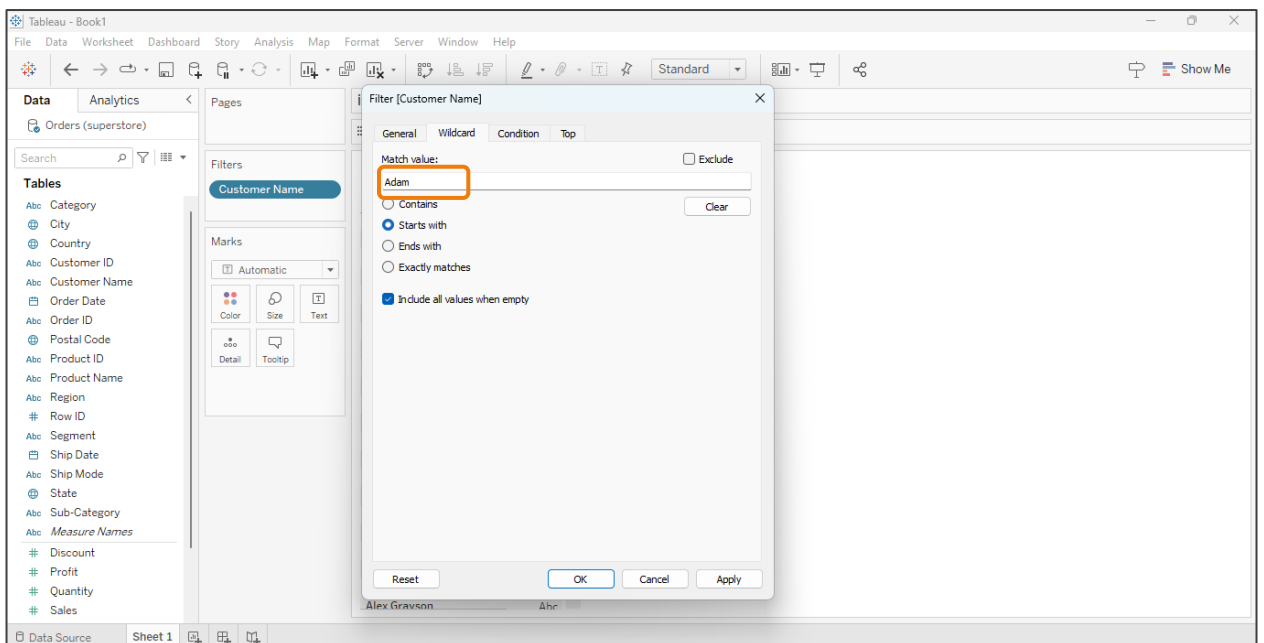

Step 3: Utilize Wildcard searches

3.1   Right-click on the **Customer Name** in the Filters shelf and select
       Edit Filter, then navigate to the **Wildcard** tab within the filter
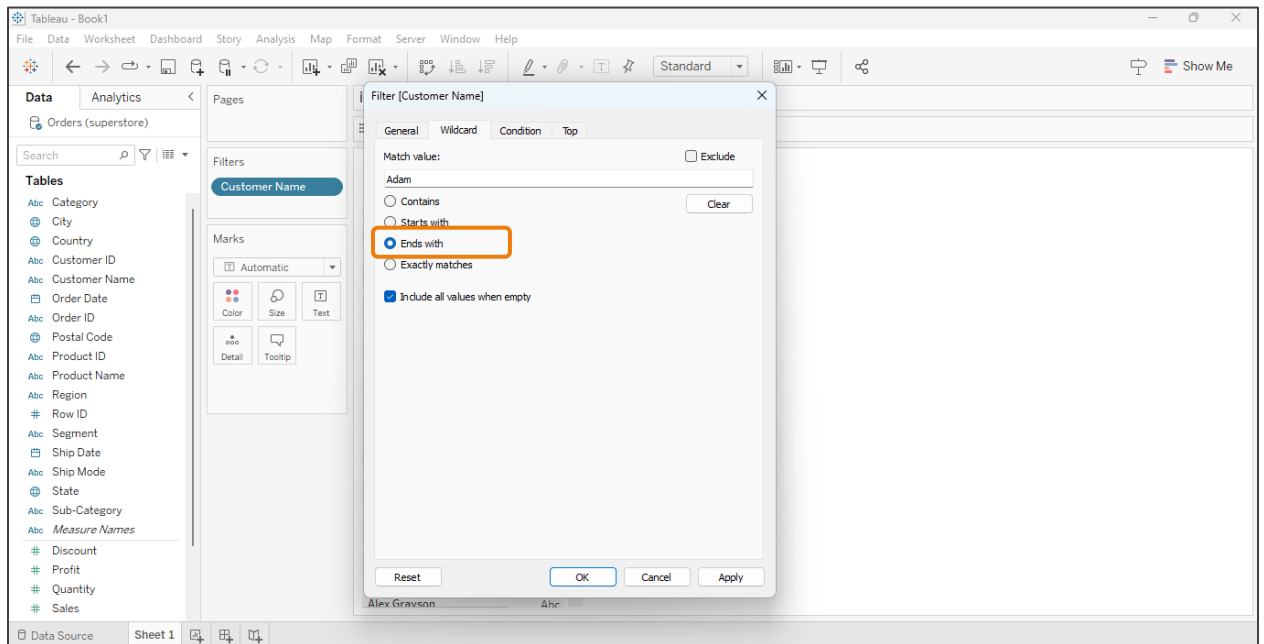   configuration

3.2 To find names containing **Adam**, enter **Adam** and select **Contains**, Click on **Apply** and **OK**
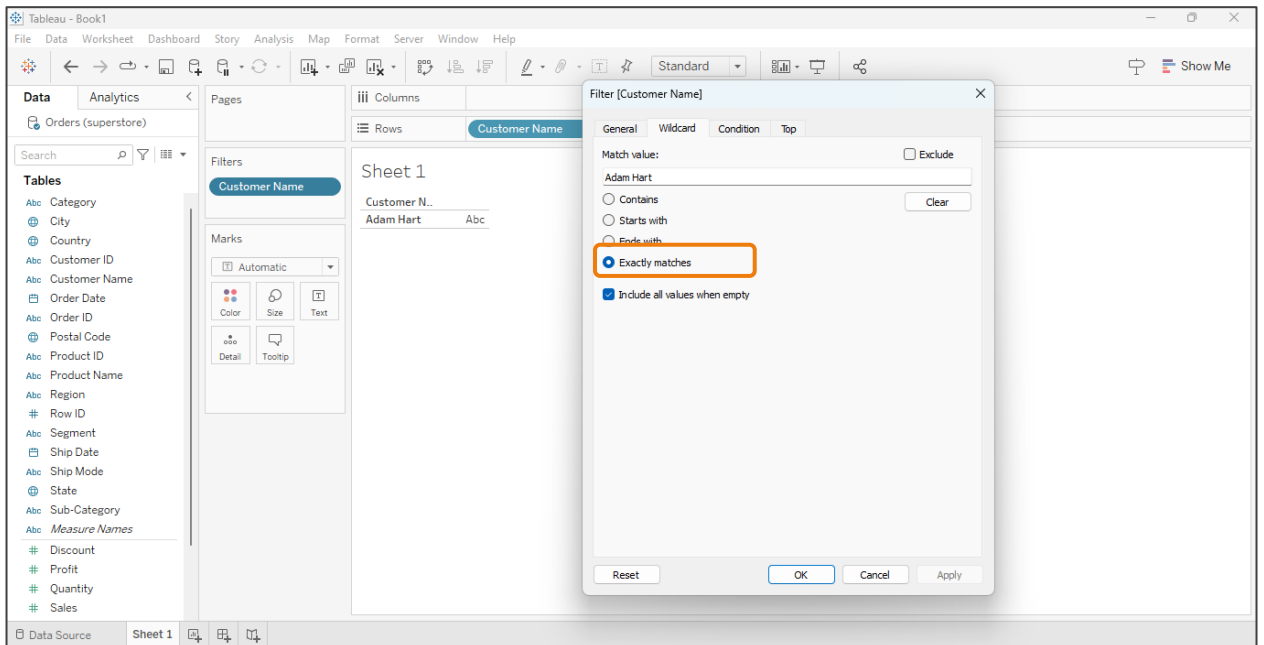

3.3 For names starting with **Adam**, select **Starts with**, then **Apply**

3.4   To attempt finding names ending with **Adam**, select **Ends with** and
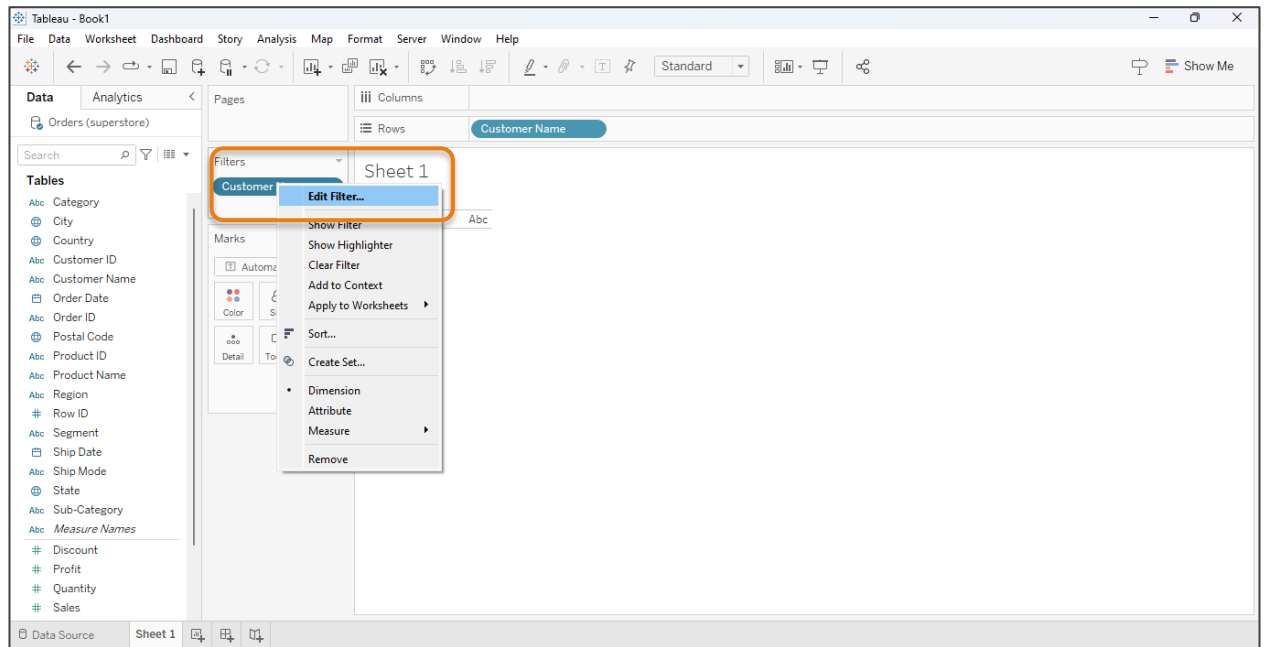   **Apply** (likely finding no matches)

3.5   Clear previous searches, search for **Adam Hart** specifically, select
Exactly Matches, and apply to filter solely for **Adam Hart**

Step 4: Reset filter

4.1   To reset the filter, right-click on the **Customer Name** filter and choose **Edit Filter**

4.2   In the **Wildcard** tab, remove any specific criteria (example, **Adam Hart**) by clearing the search field

4.3   Click on **Apply**, and **OK** to reset the filter, displaying the entire list of customer names

By applying strategic filters and using wildcard searches, you can achieve targeted data analysis tailored to your specific requirements.