

Lesson 04 Demo 04

Parameters with Filters

Objective: To demonstrate creating a static Top 10 Customers chart in Tableau, emphasizing effective filtering and aggregation techniques and introducing a dynamic Top N parameter for customizable analysis and title adjustments

Tools required: Tableau Desktop

Prerequisites: None

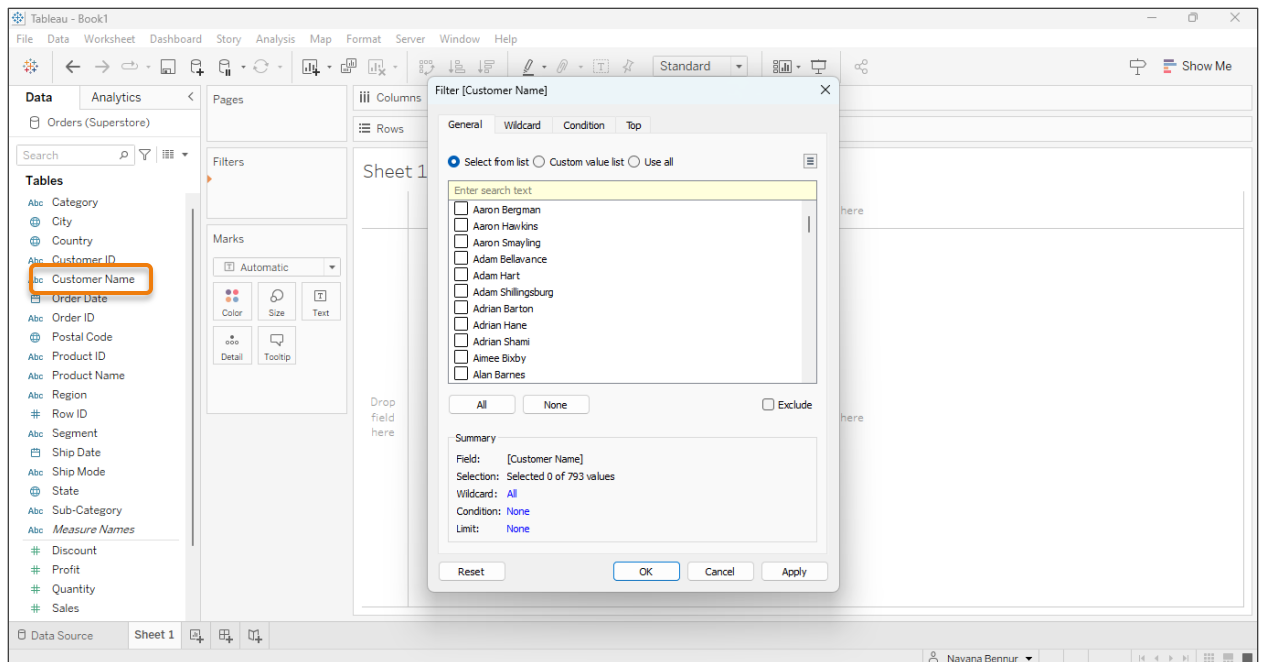
Note: Download the **Superstore.xlsx** datasets from the Reference Material section of the LMS

Steps to be followed:

1. Creating a Static Top 10 Customers chart
2. Adding a Top N Parameter
3. Connecting the Parameter with the Filter
4. Adding a Dynamic Title

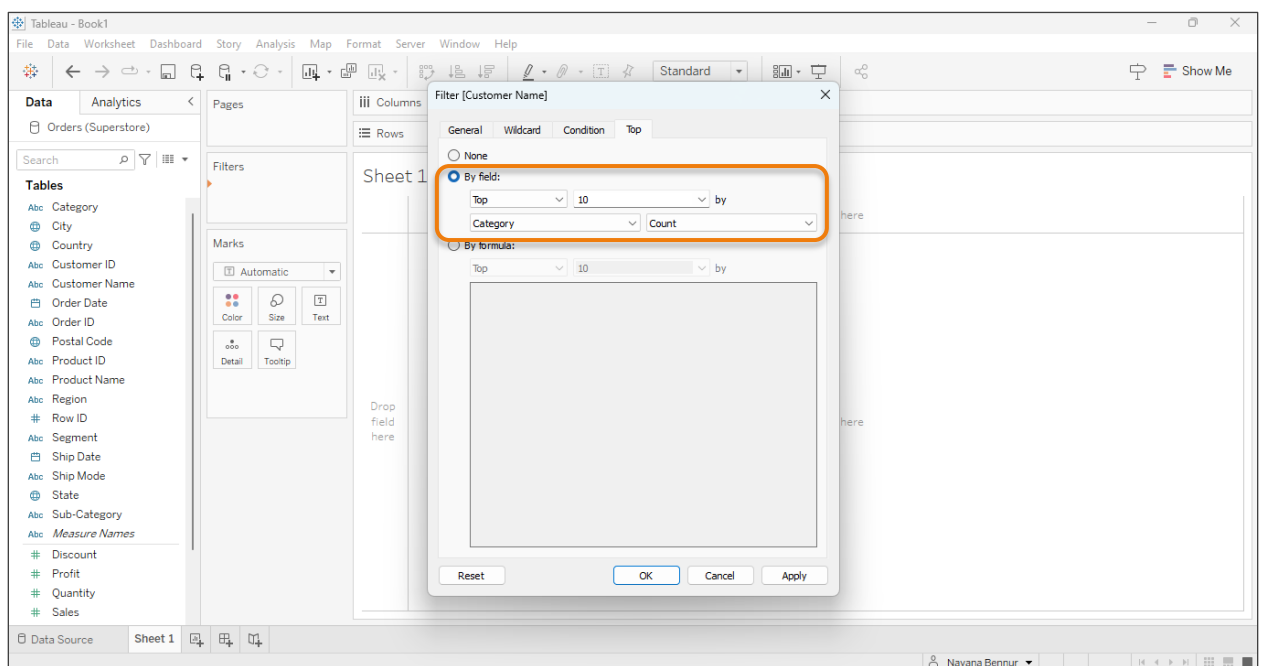
Step 1: Creating a Static Top 10 Customers chart

1.1 Open a new Tableau sheet and drag the **Customer Name** dimension onto the **Filter shelf**, after which the Filter window appears



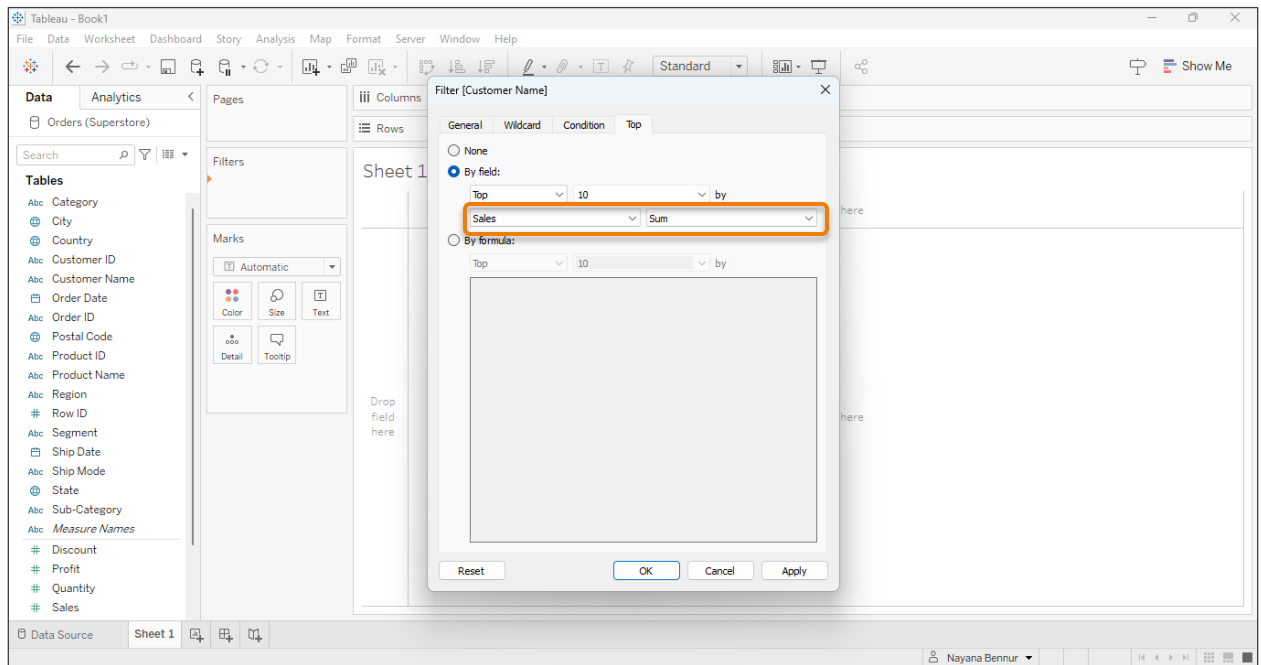
1.2 In the Top tab:

- Select **By Field** to **Top 10**

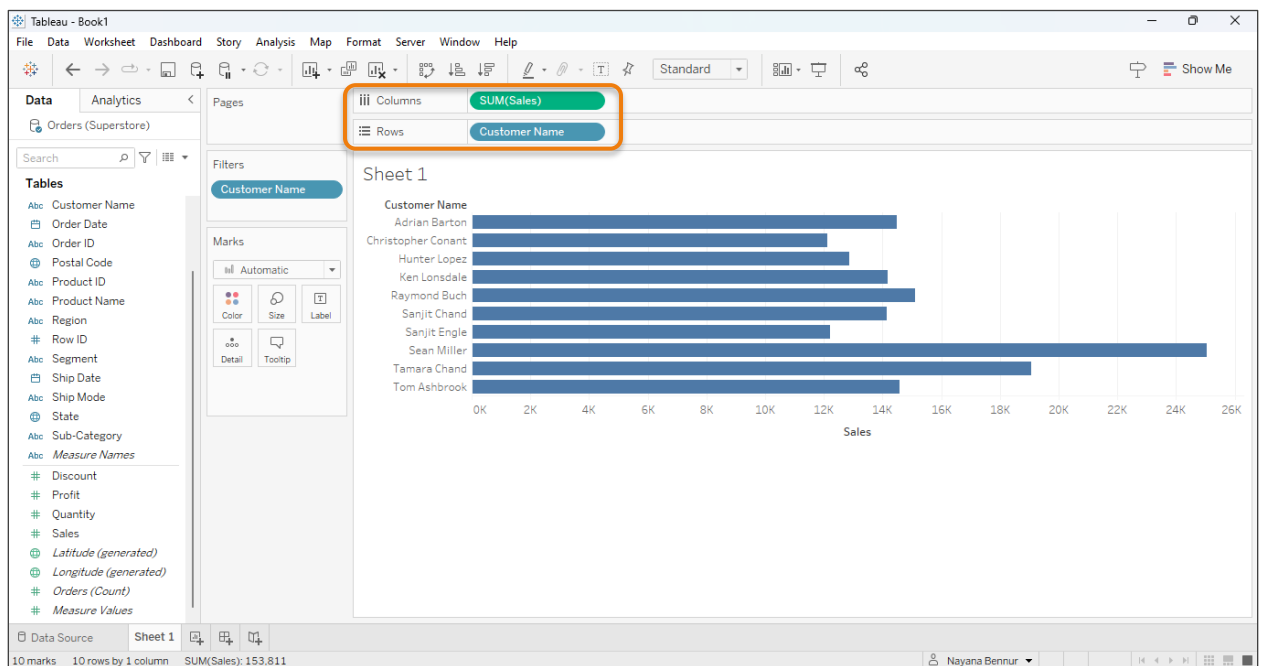


- Choose **Category** for **Sales**

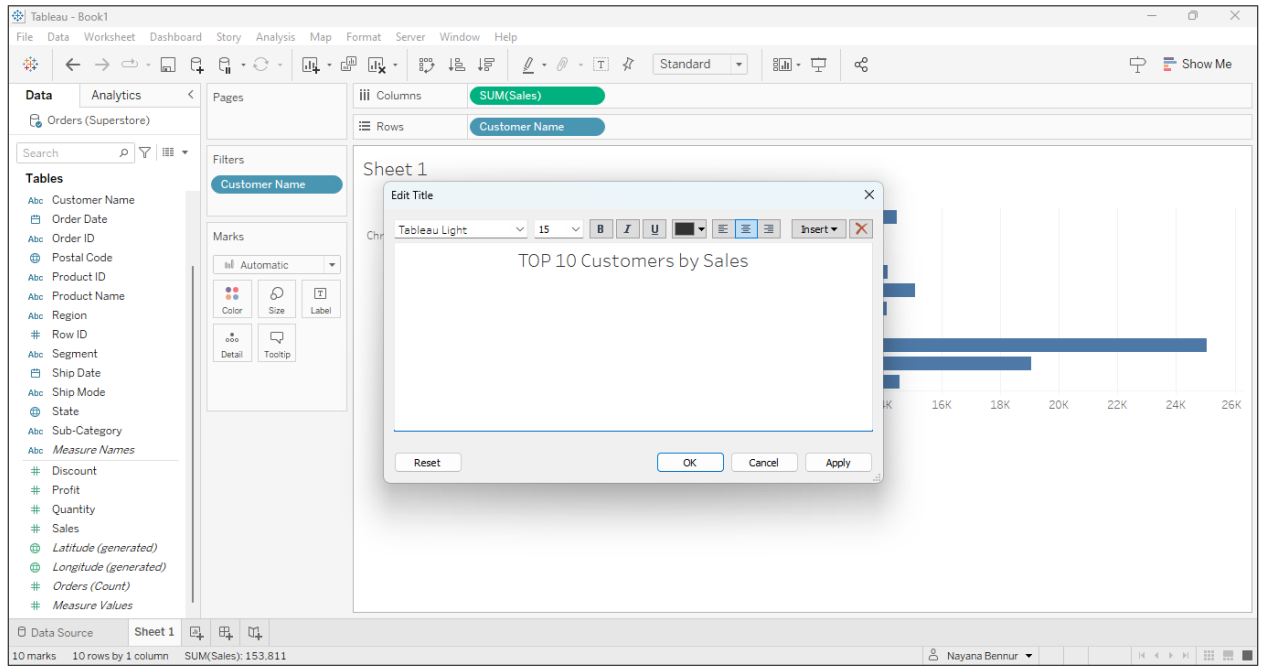
- Select **SUM** for Aggregation and click on **Apply** and **OK**



1.3 Drag **Customer Names** into **Rows** and **Sales** into **Columns** to create a bar chart for the Top 10 Customers

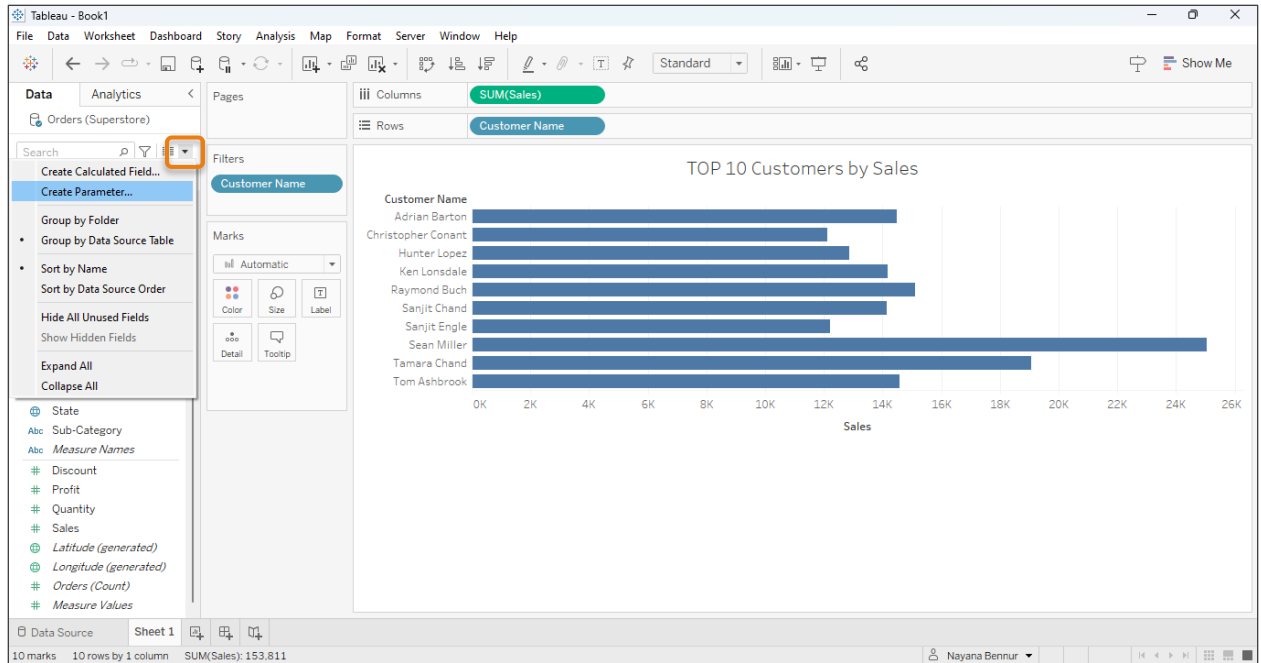


1.4 Add a title to the sheet by double-clicking on the title and entering **Top 10 Customers by Sales** and click on **Apply** and **OK**



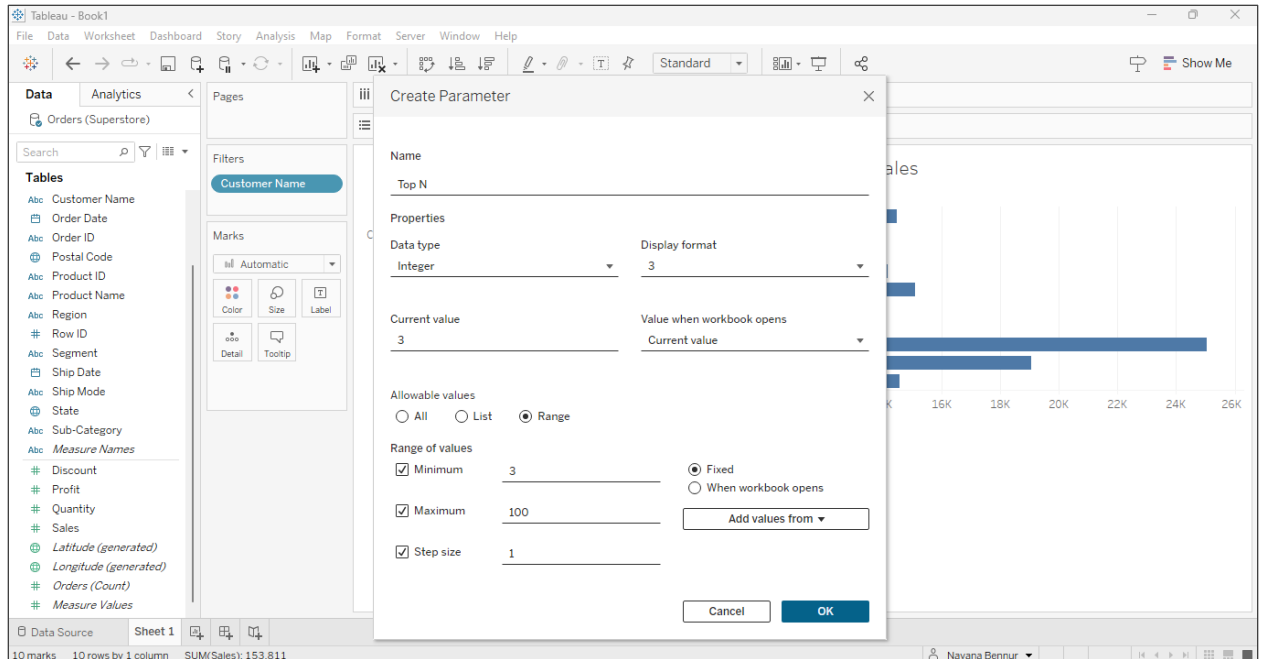
Step 2: Adding a Top N Parameter

2.1 Click on the down arrow next to the dimension head in the Data pane and select **Create Parameter**

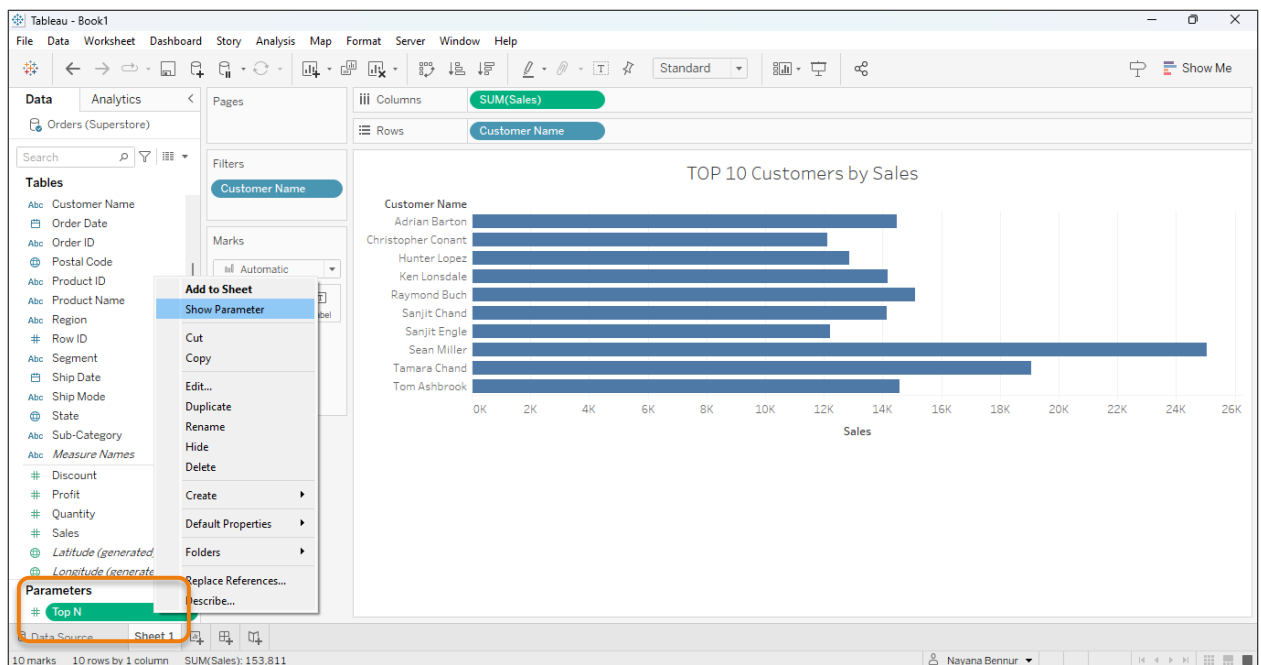


2.2 In the **Create Parameter** window, fill in the details as given below and click on **OK**:

- Name: **Top N**
- Data Type: **Integer**
- Allowable Value: **Range**
- Minimum: **3**
- Maximum: **100**
- Step Size: **1**

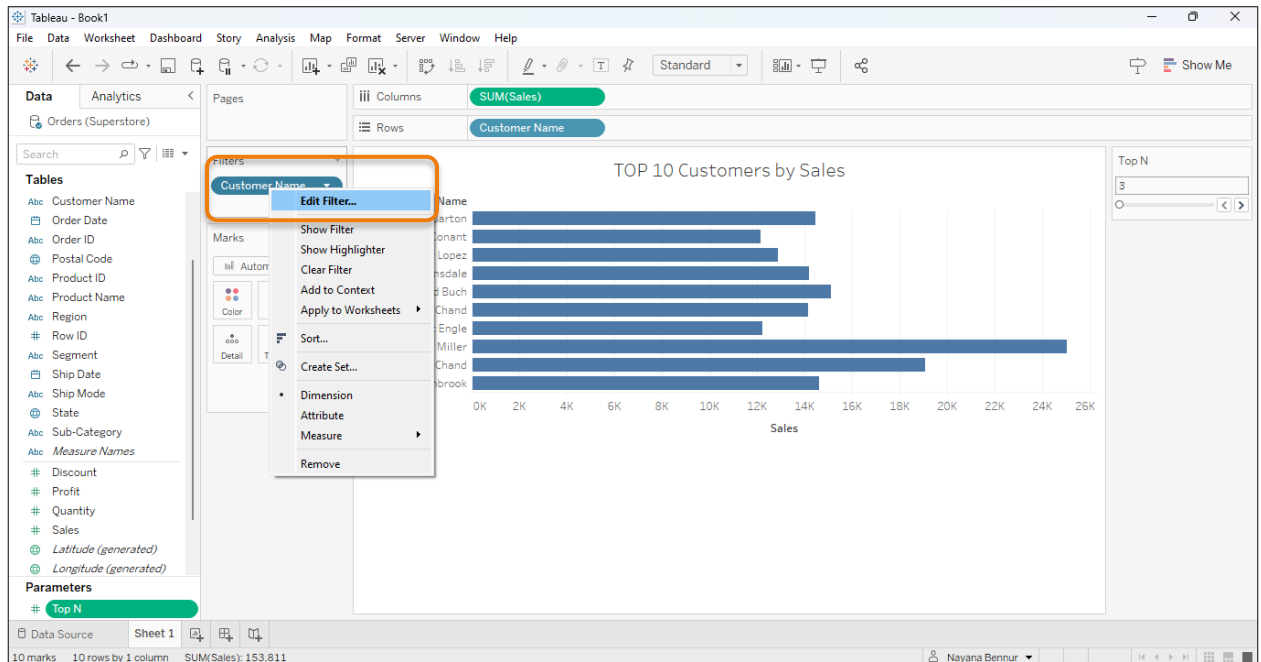


2.3 Right-click on **Parameters** and select **Show Parameter**. The Parameter control appears.

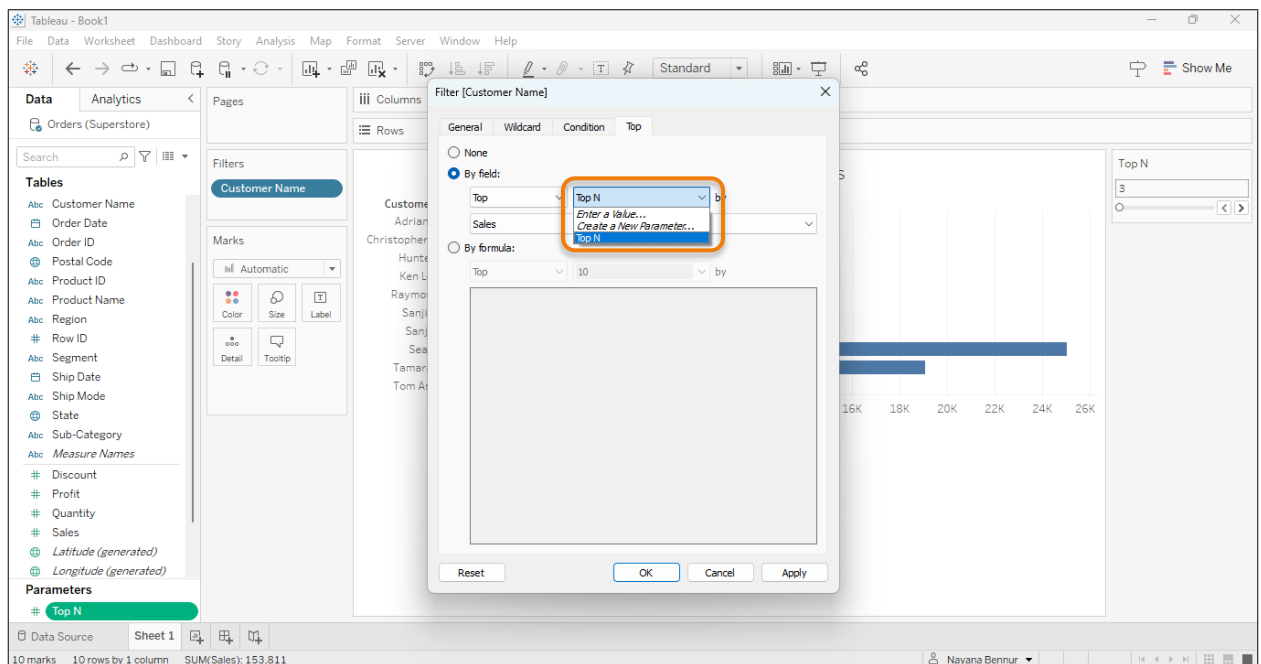


Step 3: Connecting the Parameter with the Filter

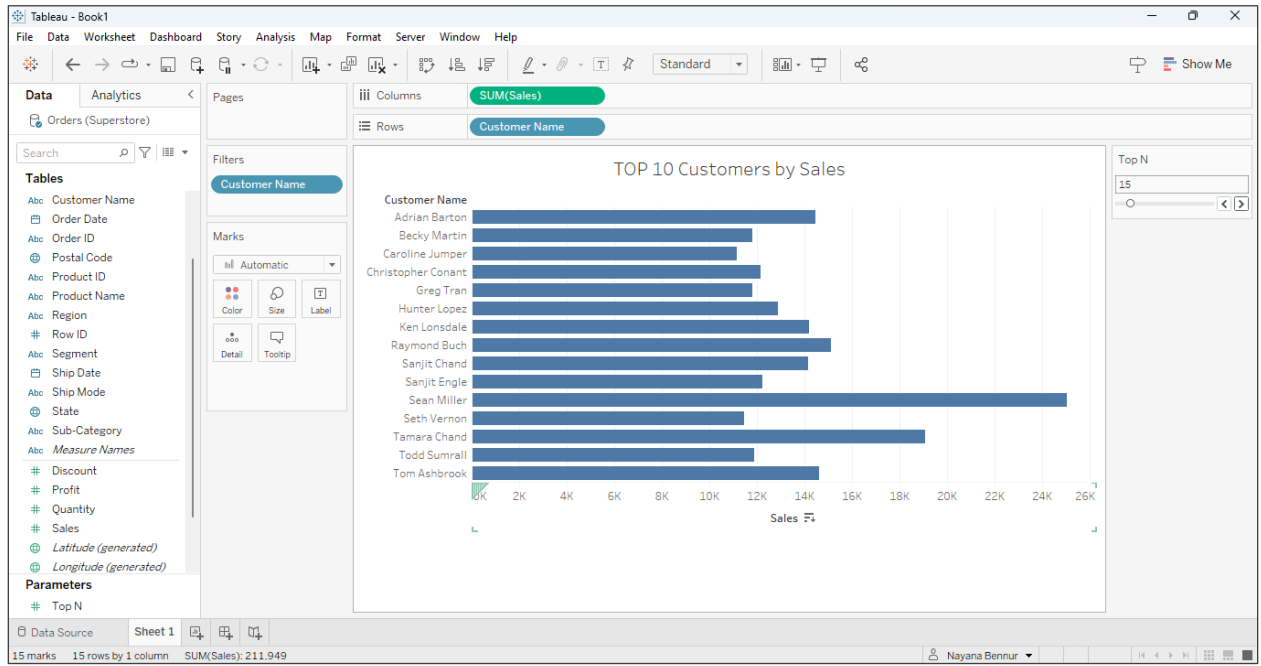
3.1 Right-click on the **Customer Name** filter, click **Edit Filter**, and go to the Top section



3.2 In the **By Field**, replace 10 with **Top N** Parameter using the drop-down option

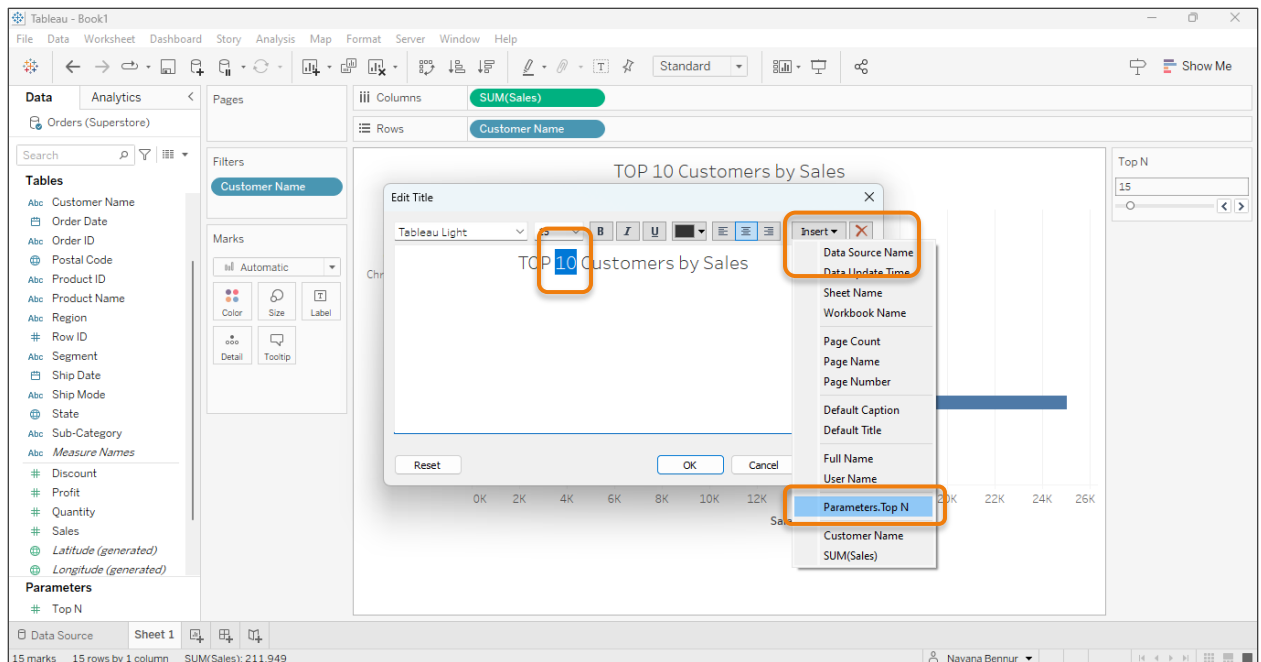


The Filter becomes dynamic and controls the number of customers visible in the chart.

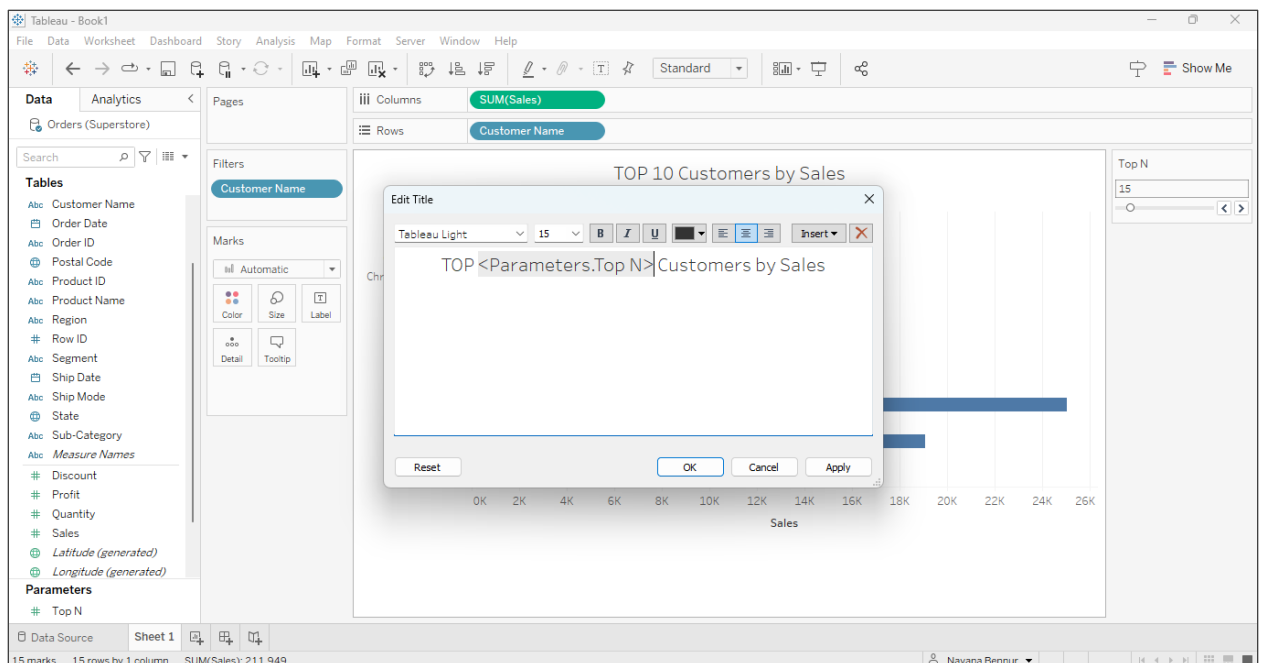


Step 4: Adding a Dynamic Title

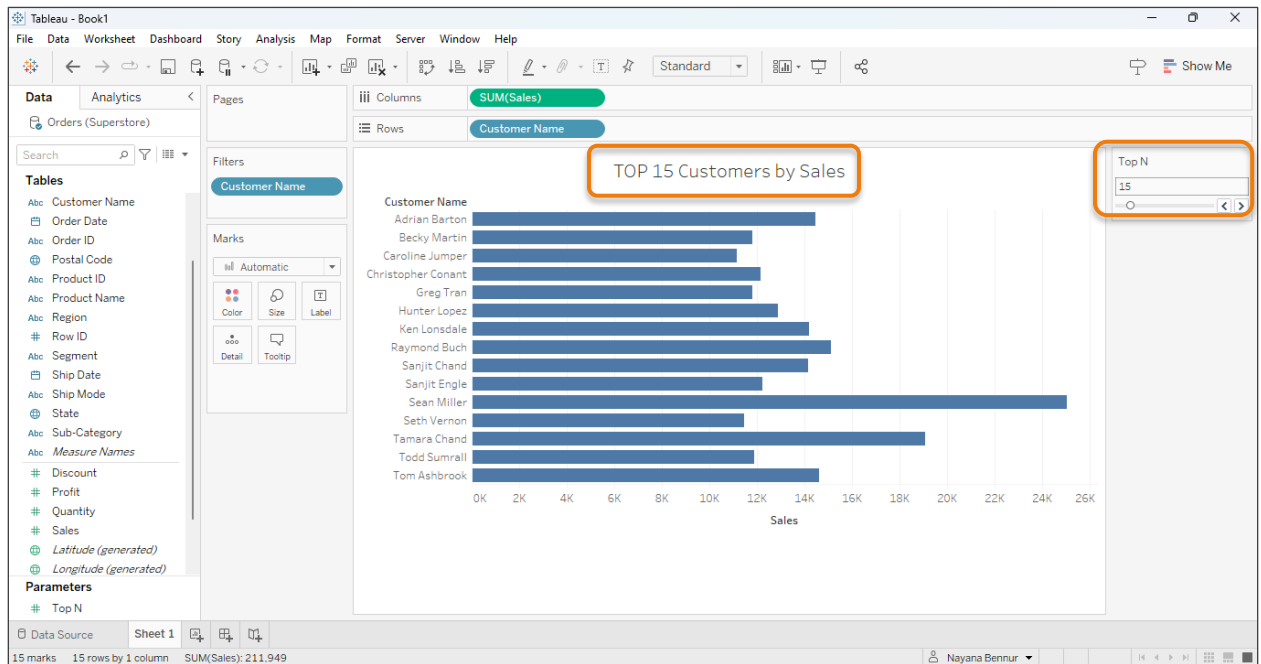
4.1 Double-click on the title of the chart to open the Edit title window, select **10**, click on **Insert**, and select **Parameters Top N**



4.2 Edit the title to include the Parameter value, such as **Top N Customers by Sales: [Top N]**, and click on **Apply** and **OK**



Now, as the number of customers changes from the Parameter, the title adjusts accordingly.



By following these steps, you have successfully created a dynamic chart that displays the Top N customers by sales, with a parameter control that allows you to easily change the number of customers displayed.