

Lesson 03 Demo 01

Extract Filter

Objective: To demonstrate efficient data management, apply an Extract filter to focus on the Central region, showcasing effective data handling

Tools required: Tableau Desktop

Prerequisites: None

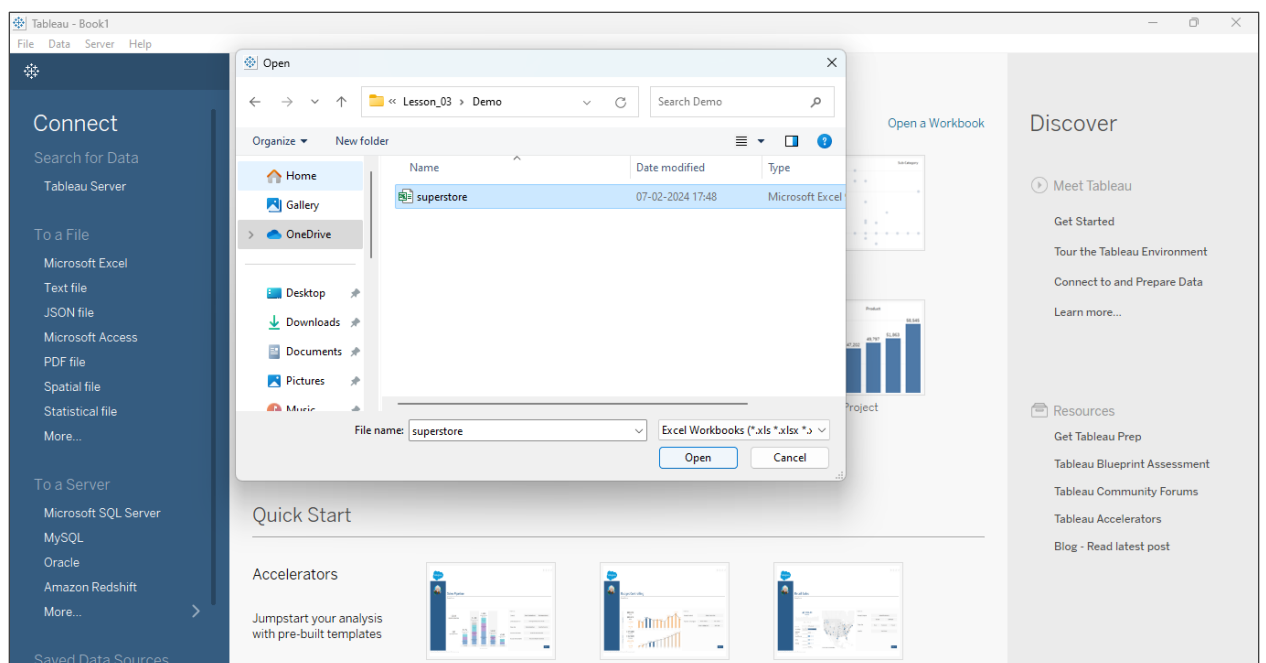
Note: Download the **superstore.xlsx** datasets from the Reference Material of the LMS

Steps to be followed:

1. Import and set up data
2. Apply Extract filter

Step 1: Import and set up data

1.1 Import the **superstore** dataset



1.2 In the **Data Source** view, drag the **Orders** table onto the white canvas

The screenshot shows the Tableau Desktop interface in the Data Source view. The left sidebar contains the 'Connections' pane with 'superstore' (Microsoft Excel) selected, and the 'Sheets' pane with 'Orders' selected. The main canvas displays the 'Orders (superstore)' table. Below the canvas, a metadata bar shows 'Orders' with 21 fields and 9994 rows. A 'Go to Worksheet' tooltip is visible. The bottom status bar shows 'Data Source' and 'Sheet 1'.

Orders (superstore)

Connection: ☒ Live ☐ Extract Filters: 0 | [Add](#)

Orders

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

Orders 21 fields 9994 rows 100 rows

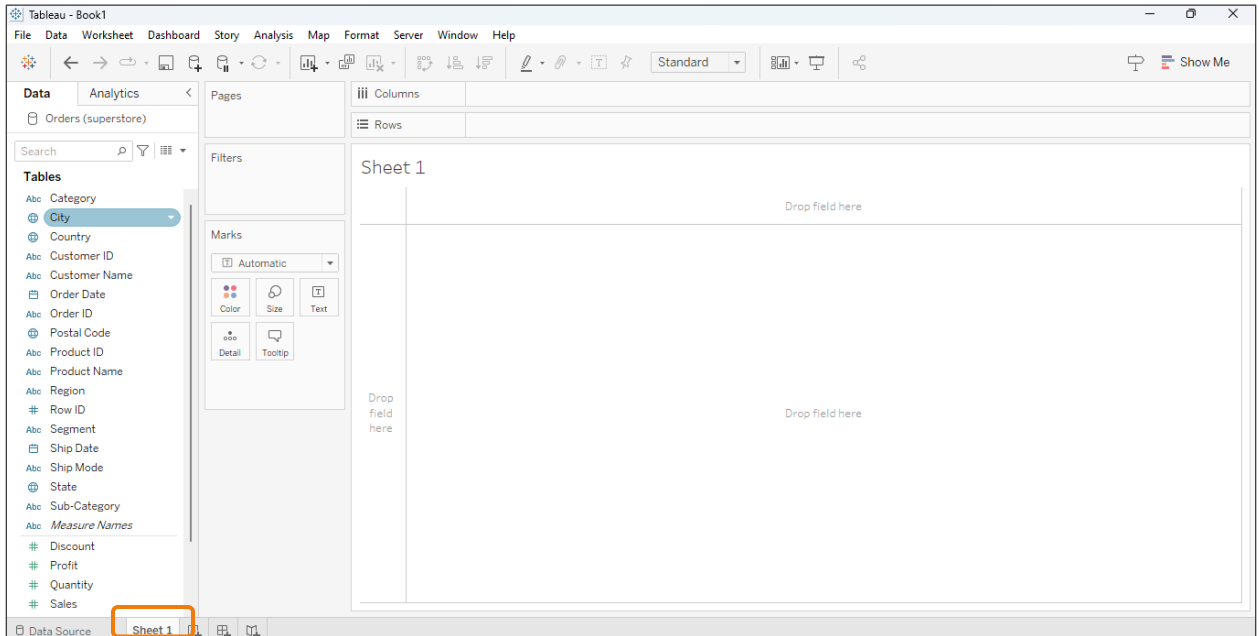
| # | Abc Orders | Orders | Abc Orders | Abc Orders |
|--------|----------------|------------|------------|----------------|
| Row ID | Order ID | Order Date | Ship Date | Ship Mode |
| 1 | CA-2016-152156 | 08-11-2016 | 11-11-2016 | Second Class |
| 2 | CA-2016-152156 | 08-11-2016 | 11-11-2016 | Second Class |
| 3 | CA-2016-138688 | 12-06-2016 | 16-06-2016 | Second Class |
| 4 | US-2015-108966 | 11-10-2015 | 18-10-2015 | Standard Class |
| 5 | US-2015-108966 | 11-10-2015 | 18-10-2015 | Standard Class |

Go to Worksheet

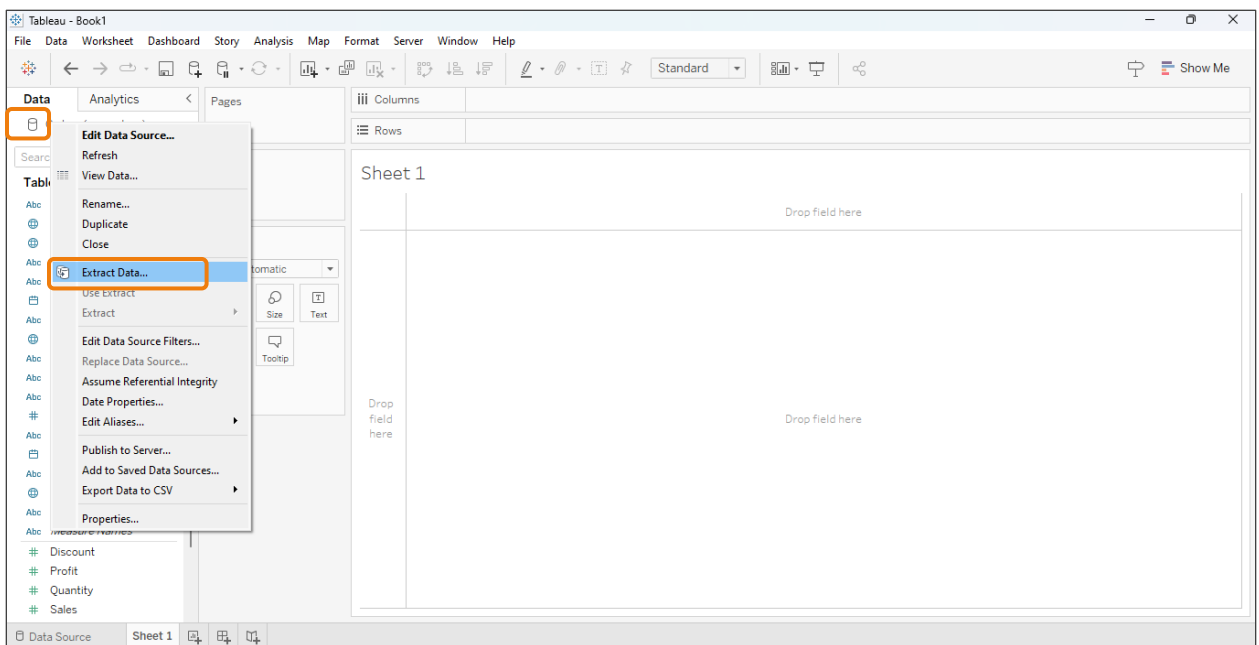
Data Source Sheet 1

Step 2: Applying Extract filter

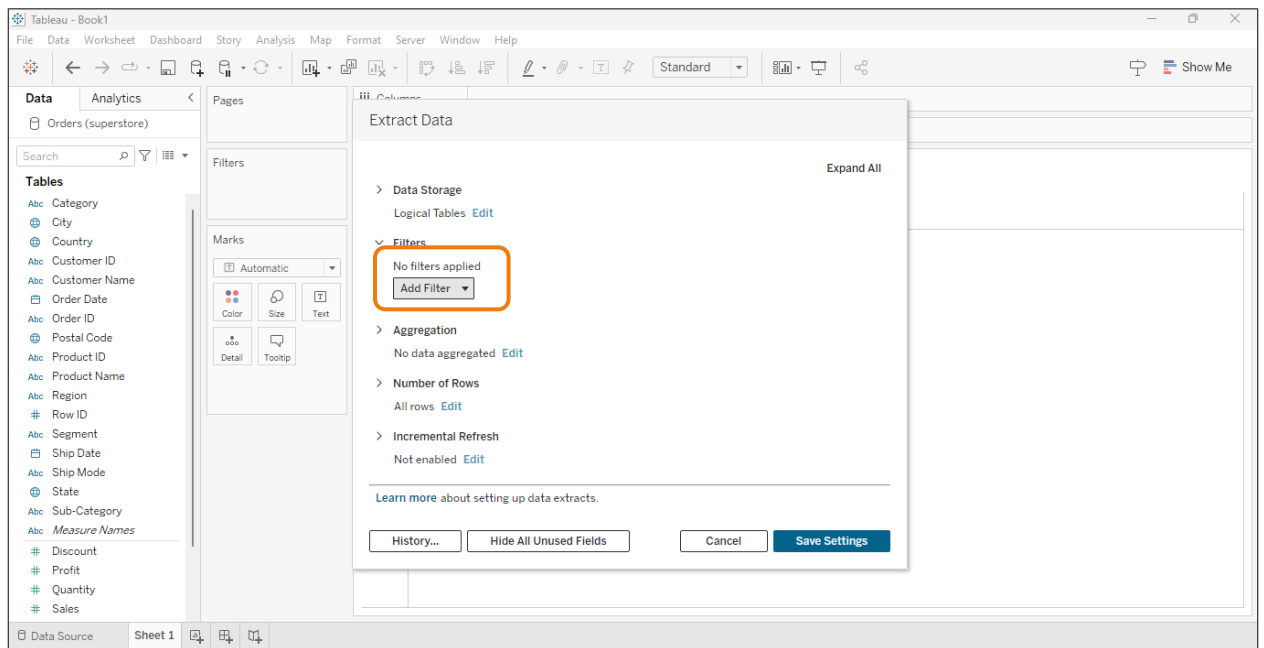
2.1 Go to Sheet 1



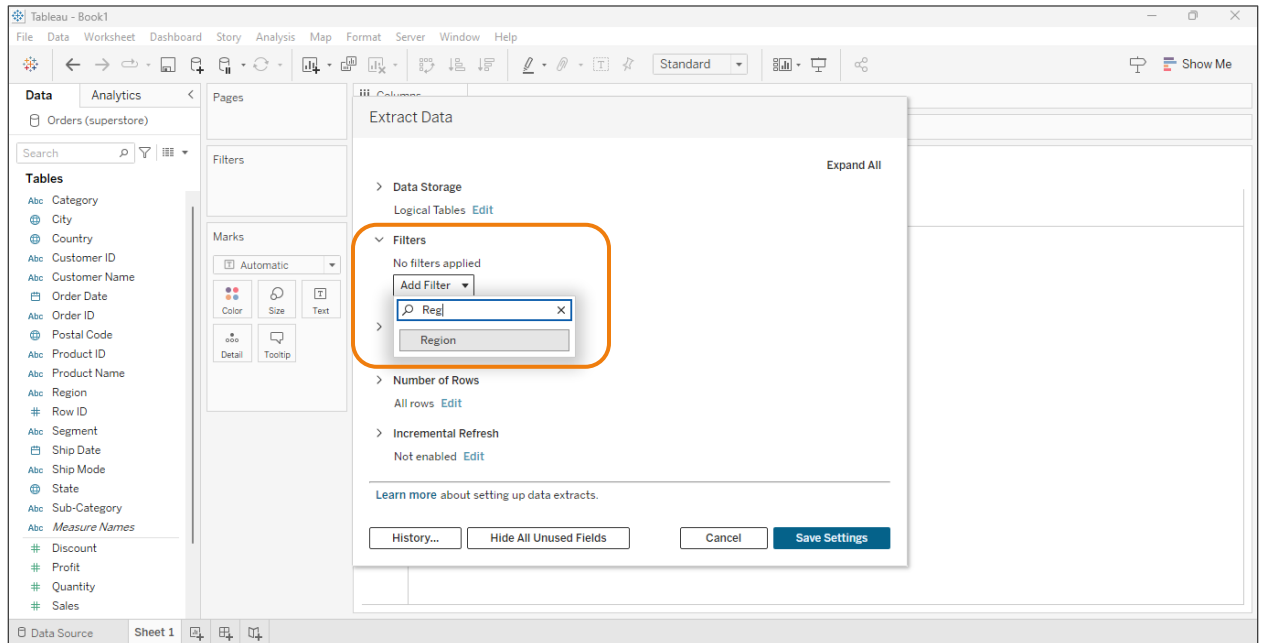
2.2 Right-click on the **Data** icon and select **Extract Data**



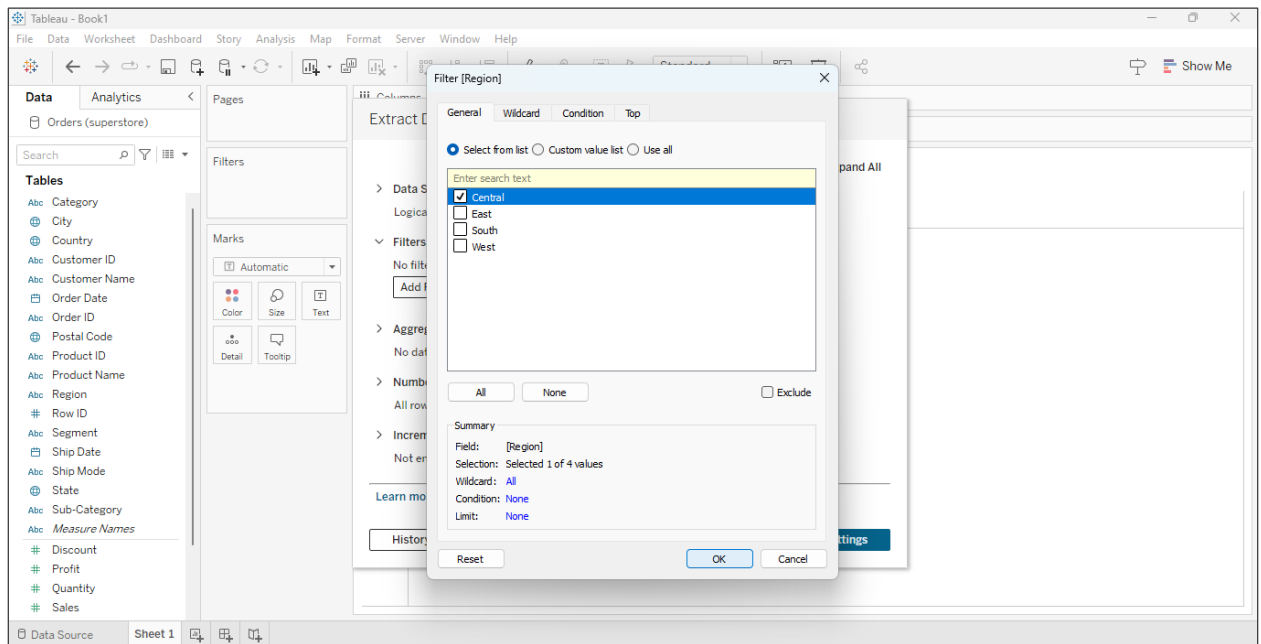
2.3 In the **Extract Data** window, click on **Filters** and then select **Add Filter**



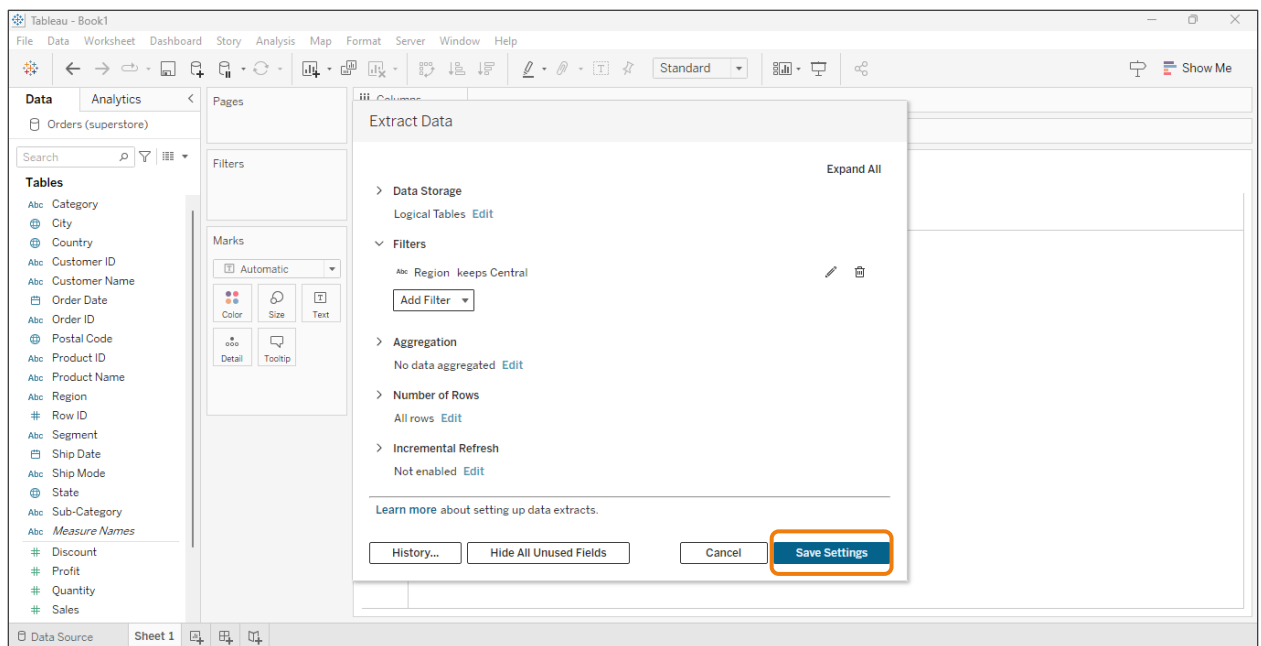
2.4 Search for **Region** and select it



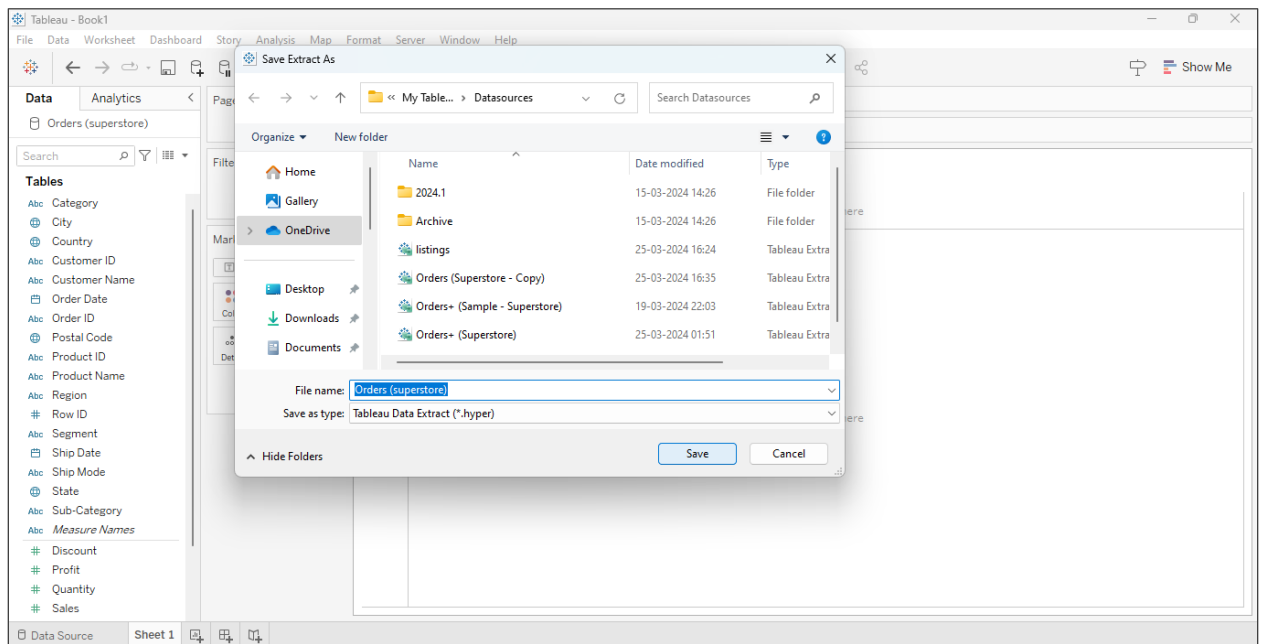
2.5 Check **Central** in the Region filter window and click **OK**



2.6 Click on **Save Settings**



2.7 Save the Tableau Extract file with the applied filter on to your system



With these steps, you have successfully applied the filter to the Tableau extract file, ensuring that only data related to Central Region transactions is included.