

Tableau Day 3 – Filters: Short Notes

✓ Overview of Filters

- Filters in Tableau limit the data displayed using dimensions or measures.
 - Help visualize focused, actionable insights.
 - Filters can be simple (field-based) or complex (calculations/context).
 - The **order of operations** affects how filters are applied — top to bottom priority.
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Types of Filters in Tableau

1. Extract Filter

- Filters data *at the extract level*.
- Works only with *Extract* connections.
- Available in *Professional* and *Public*.
- Affects *all worksheets* using the extract.

2. Data Source Filter

- Filters data *at the data source level*.
- Works with *both Live and Extract*.
- Secures data before it enters the workbook.
- Applied to *all worksheets*.

3. Context Filter

- Acts as a *parent filter*.
- Other filters become *dependent* on it.
- Used to improve *query performance*.
- Right-click a filter → **Add to Context**.
- *Example*: Top 3 Sub-Categories for selected Category.

4. Dimension Filter

- Applied on *categorical fields*.
- 4 Tabs:
 - **General**: Include/Exclude values
 - **Wildcard**: Pattern-based filtering (Contains, Starts with, etc.)
 - **Condition**: Apply formulas (e.g., SUM(Sales) > 25000)

- **Top:** Top/Bottom N items based on a measure

5. Measure Filter

- Applied on *continuous fields*.
- Allows setting *value ranges* (e.g., Sales between 15K–20K).
- Can filter *Null values*.

6. Quick Filter

- Adds *interactive filter controls* (Dropdown, Checkboxes, etc.).
- Right-click field → Show Filter
- Supports **Cascading filters** (e.g., Cities based on selected State).

Apply Filters to Multiple Worksheets

- **All Using Related Data Sources**
 - Applies filter to all worksheets using *related data sources*.
- **All Using This Data Source**
 - Applies filter to all worksheets using the *same data source*.
- **Selected Worksheets**
 - Choose specific worksheets to apply the filter to.