



## EXERCISE 01: Data Source Filter

**Purpose:** Optimize performance & enforce row-level filtering

**Scenario:**

Limit all analysis to data from the **West Region** only.

Perform the following steps to complete the exercise:

- 1) Connect to **Sample-Superstore.xls** and load the **Orders** table.

The screenshot shows the Tableau Desktop interface. On the left, the 'Connections' pane lists 'Sample-Superstore' as a Microsoft Excel connection. Below it, the 'Sheets' pane shows a list of tables: 'Orders', 'People', and 'Returns'. The 'Orders' table is selected. On the right, the main view displays 'Orders (Sample-Superstore)' with a blue box labeled 'Orders'.

- 2) On the top right corner, under **Filters**, Click **Add**.

The screenshot shows the same Tableau Desktop interface as before. In the top right corner, the 'Filters' button is highlighted with a red box. The button text reads 'Filters 0 | Add'.

- 3) On the new window, **Edit Data Source Filters** by clicking **Add** button.

The screenshot shows the 'Edit Data Source Filters' dialog box. It has a title bar with a close button. Inside, there is a table with two columns: 'Filter' and 'Details'. Below the table, there are three buttons: 'Add...', 'Edit...', and 'Remove'. At the bottom, there are 'OK' and 'Cancel' buttons.



4) Choose Region

Add Filter

Select a field:

Search

Postal Code

Product ID

Product Name

Profit

Quantity

Region

Row ID

Sales

Segment

Ship Date

Ship Mode

State

Sub-Category

OK

Cancel

5) Select **East** and **West** (explore other options in the new window). Then click **Ok** and **Ok** again.

**Note: you can add filters as much as you can.**

Filter [Region]

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

☐ Central

☒ East

☐ South

☒ West

All None ☐ Exclude

Summary

Field: [Region]

Selection: Selected 2 of 4 values

Wildcard: All

Condition: None

Limit: None

Reset OK Cancel

6) Proceed to create visualizations.