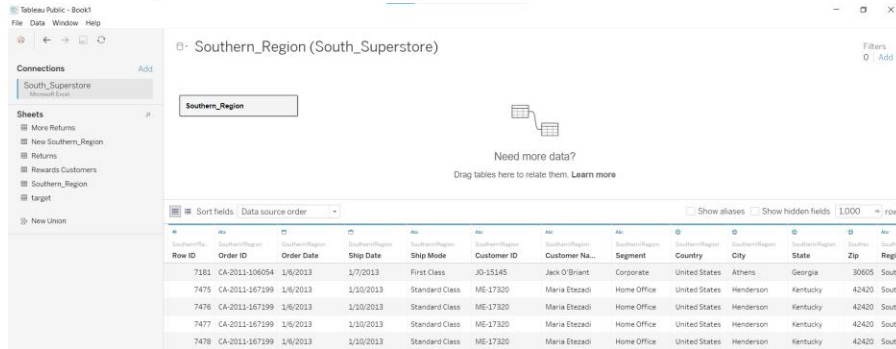


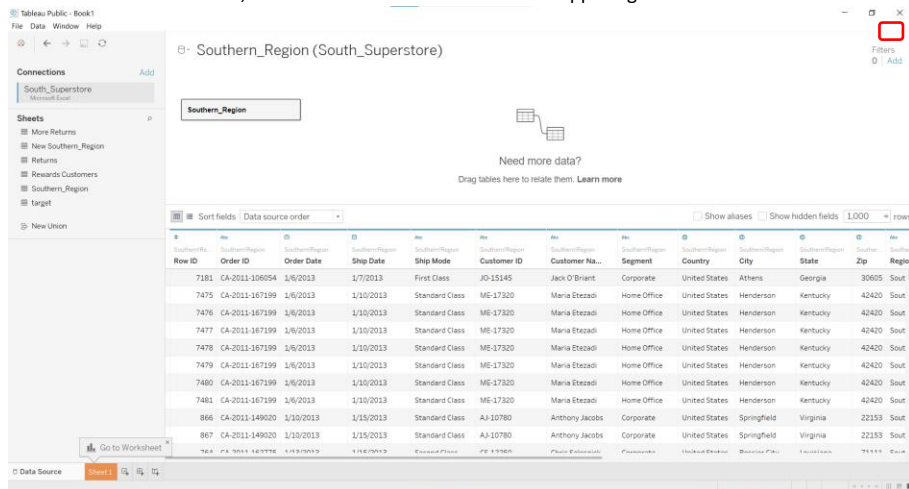
## Filters Context Filters and Date Filters Step by Step Guide

1. Import Southern\_Superstore file, add Southern\_Region sheet

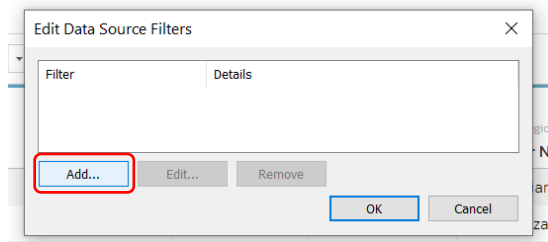


### Data Source Filters

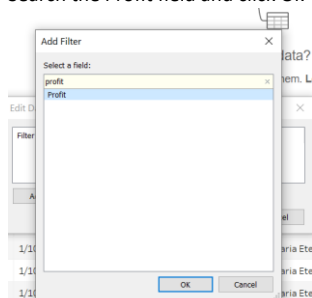
2. To add a Data Source Filter, from click the Add button from the upper right corner.



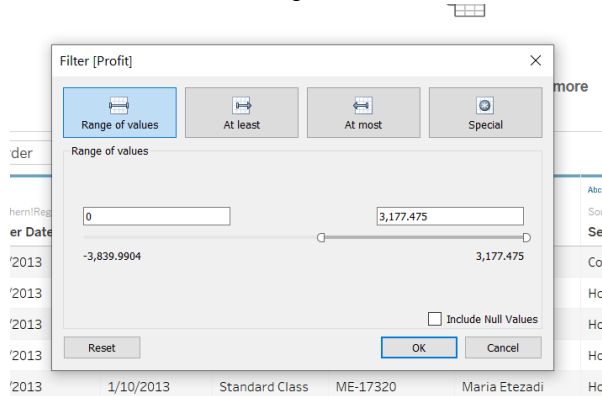
3. A pop-up menu should appear, click the Add button from the menu  
Drag tables here to relate them. Lear



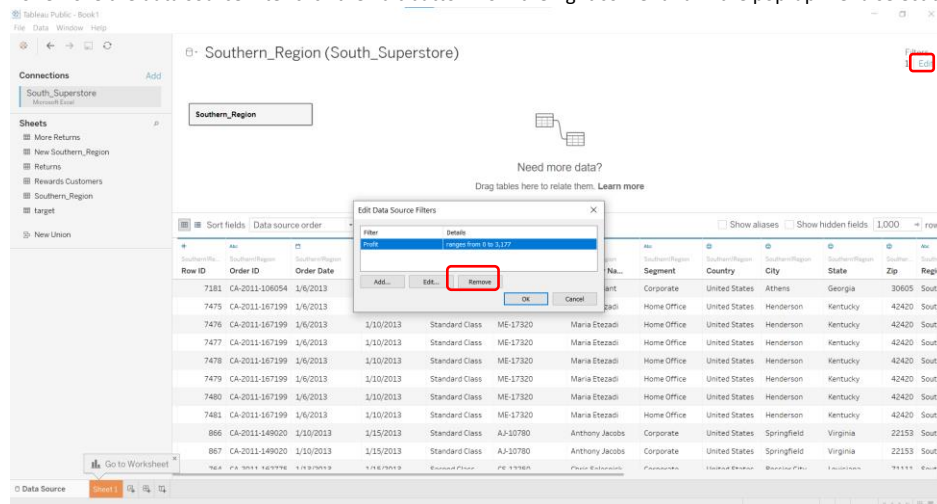
4. Search the Profit field and click Ok



5. From the Filter menu set the range of values to start from 0 and click OK.

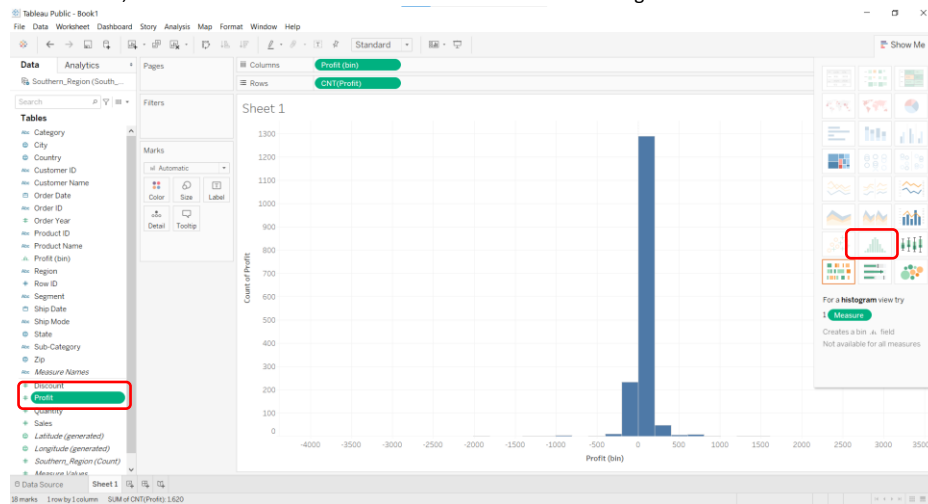


6. To remove the data source filter click the Edit button from the right corner and in the pop-up menu select the filter and click Remove

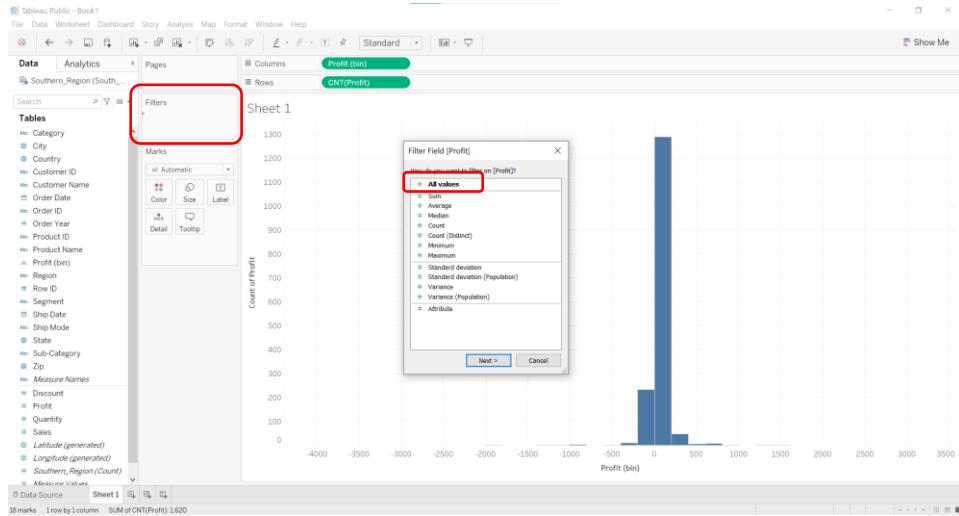


### Standard Filters

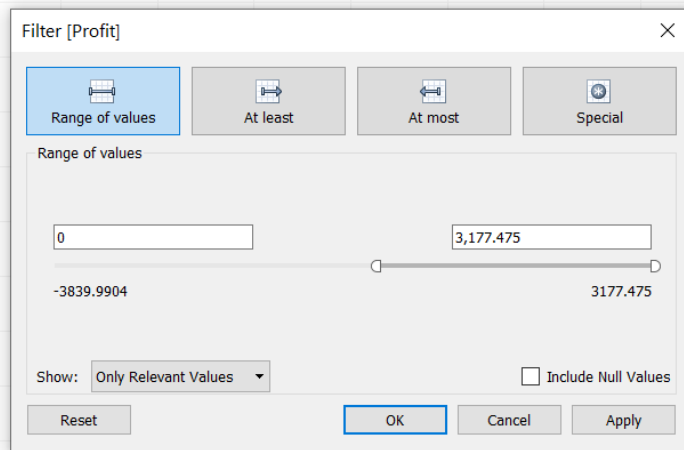
7. Go to Sheet1, select Profit and from the Show Me menu select the Histogram visual



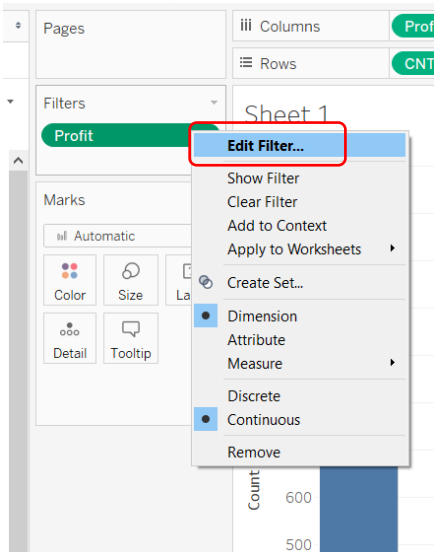
8. Drag and drop the Profit field to the Filters pane. A new pop-up menu will appear, select All Values and click OK



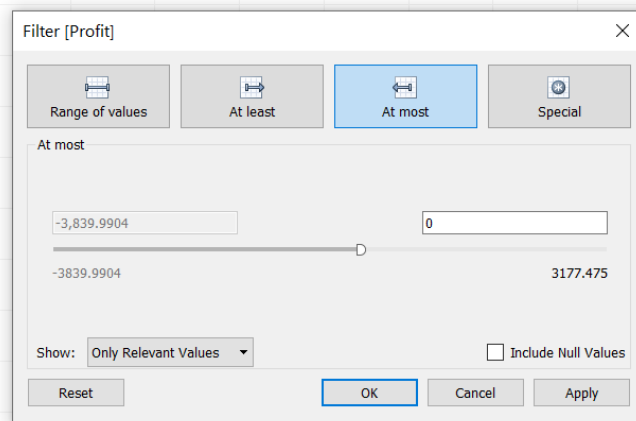
9. From the Filter menu set the range of values to start from 0 and click OK.



10. To edit the filter, right click the Profit field from the Filter pane and click Edit Filter

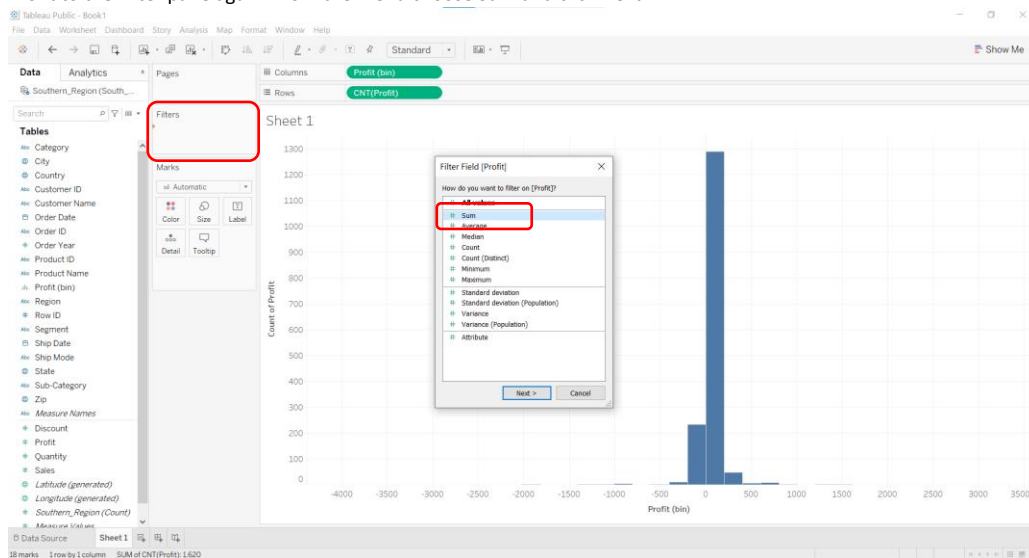


11. Set the new filter to be at most 0 and click OK

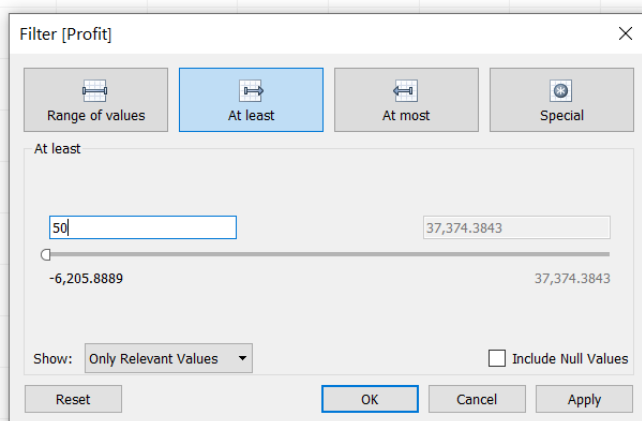


The 'Filter [Profit]' dialog box is shown. It has four tabs: 'Range of values', 'At least', 'At most', and 'Special'. The 'At most' tab is selected. Below the tabs, there are two input fields: the left one contains '-3,839.9904' and the right one contains '0'. A slider below these fields shows a range from -3839.9904 to 3177.475. At the bottom, there is a 'Show:' dropdown set to 'Only Relevant Values' and an unchecked 'Include Null Values' checkbox. Buttons for 'Reset', 'OK', 'Cancel', and 'Apply' are at the bottom.

12. We can filter also on a sum of profit (aggregate or a measure). First remove all the filters from the visual and drag and drop the Profit to the Filter pane again. From the menu choose Sum and click Next.

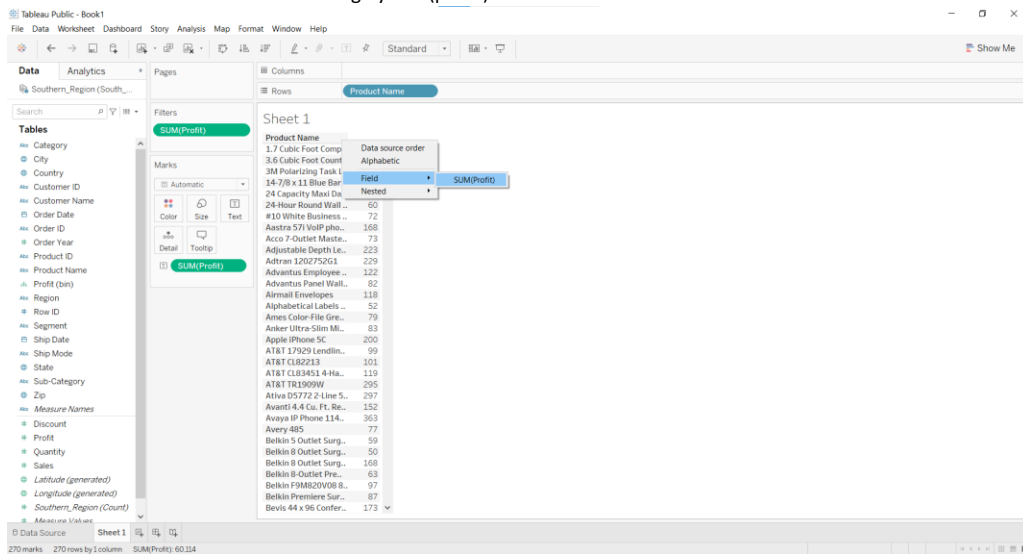


13. In the new menu, set the value range to be at least 50 and click Ok

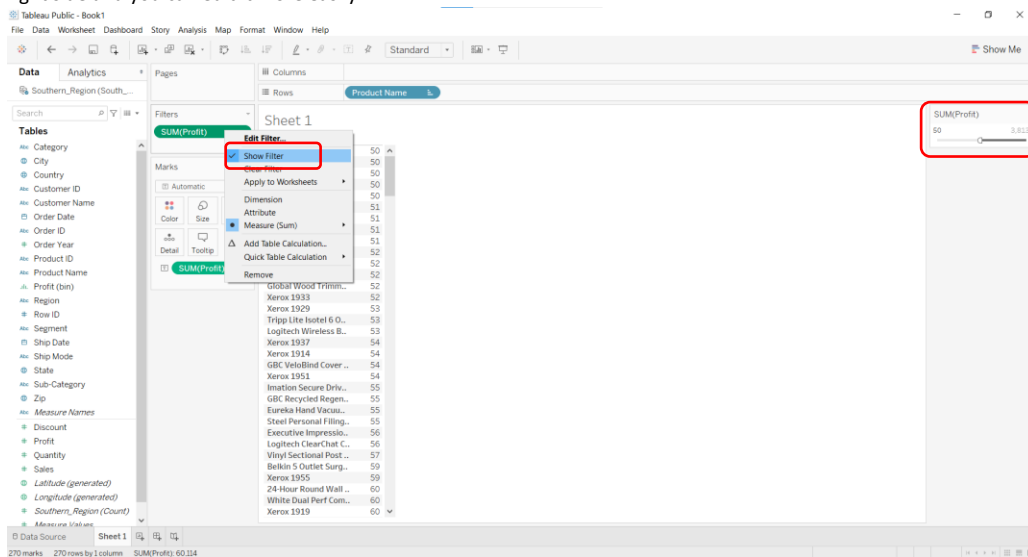


The 'Filter [Profit]' dialog box is shown. It has four tabs: 'Range of values', 'At least', 'At most', and 'Special'. The 'At least' tab is selected. Below the tabs, there are two input fields: the left one contains '50' and the right one contains '37,374.3843'. A slider below these fields shows a range from -6,205.8889 to 37,374.3843. At the bottom, there is a 'Show:' dropdown set to 'Only Relevant Values' and an unchecked 'Include Null Values' checkbox. Buttons for 'Reset', 'OK', 'Cancel', and 'Apply' are at the bottom.

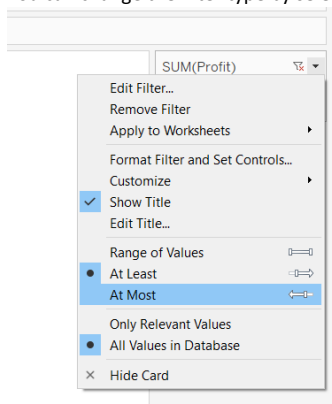
14. Remove the Profit(bin) and CNT(Profit) fields from the Rows and Column shelf. Add Product Name to the Rows shelf and Profit to the Label mark. Sort the visual ascending by sum(profit)



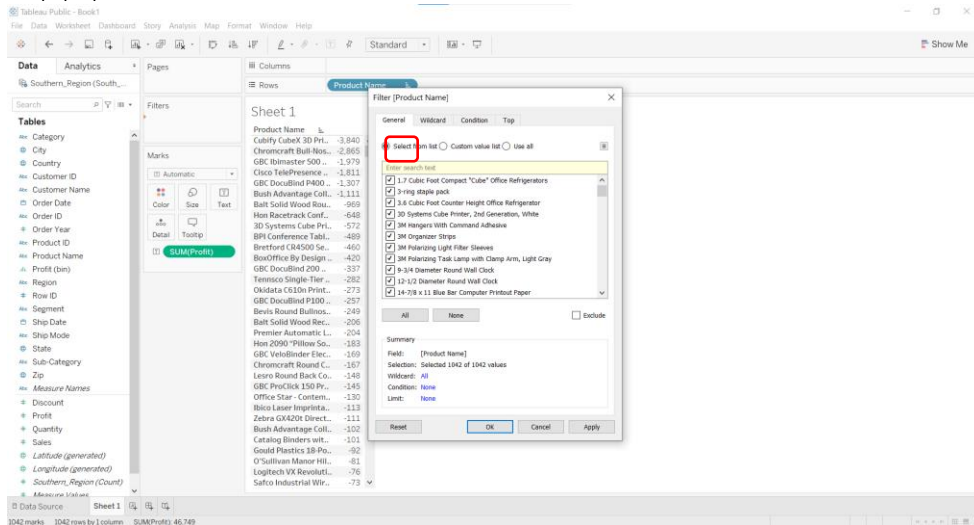
15. Right click on the Sum(Profit) field from the Filter pane and select Show Filter. Now you can noticed the filter has appeared in the right side and you can edit it more easily



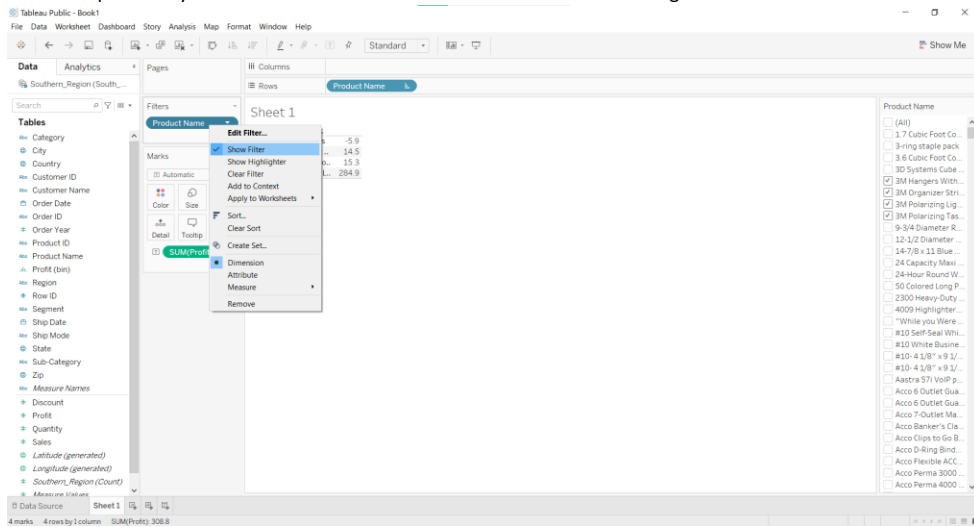
16. You can change the filter type by selecting the down arrow and choosing from Range of Value, At Most or At Least.



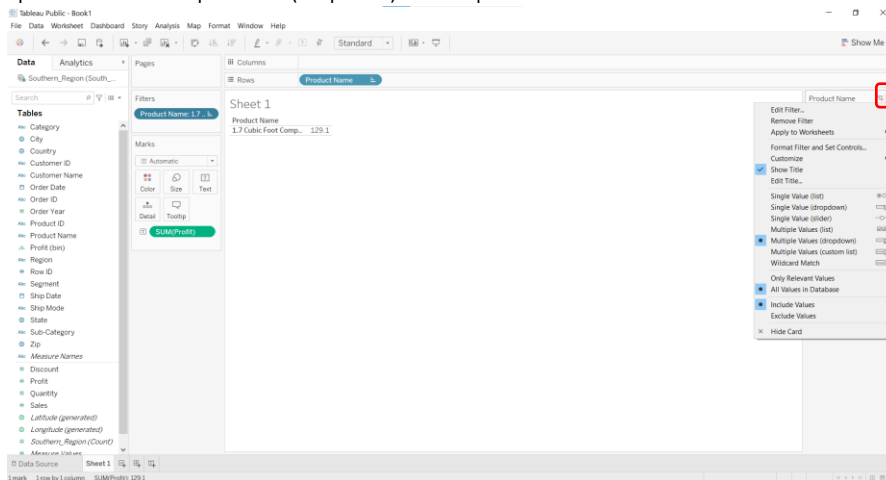
17. We can also add a dimension as a filter. Remove the current filters and drag and drop Product Name field to the Filter pane. From the pop-up menu choose Select from list



18. Select the products you want to see in the visual and click Ok. You can also right click and choose Show Filter for an easier use

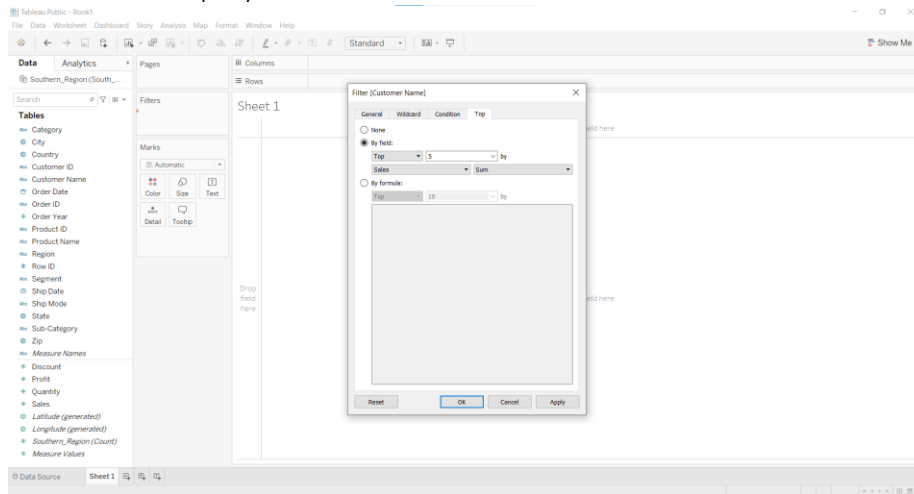


19. For a dimension filter we have more options than the dimension filter. Click the arrow from the right upper corner to view all the options. Choose Multiple Values (Dropdown) to save space.

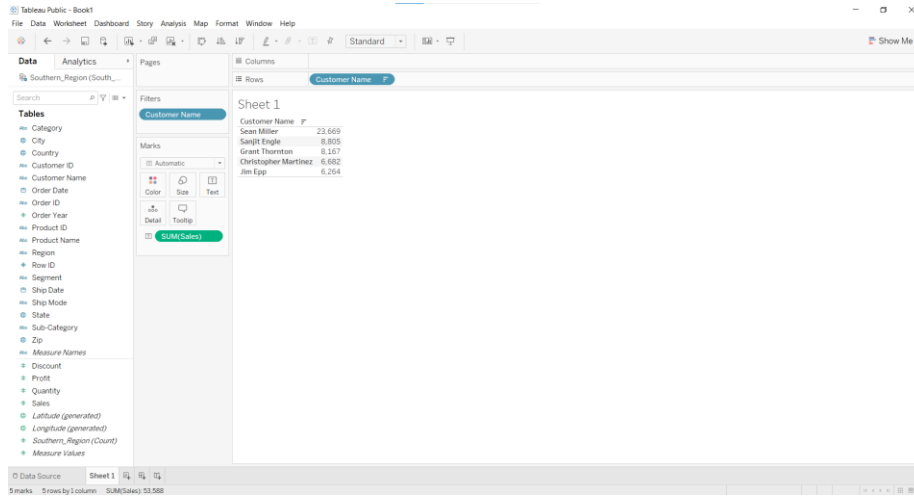


## Context Filters

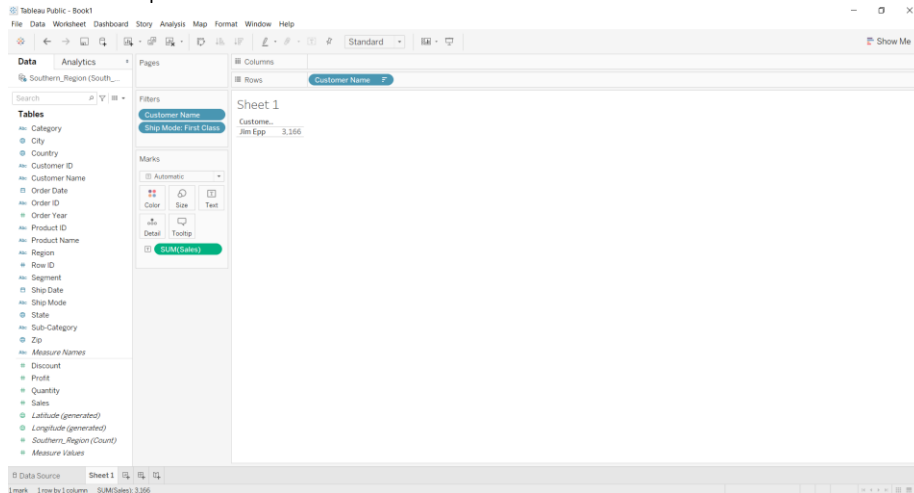
20. To understand better the Context filters we will first build a Top 5 filter. Drag Customer Name to the Filter pane, select the Top tab and set the filter to Top 5 by Sales Sum



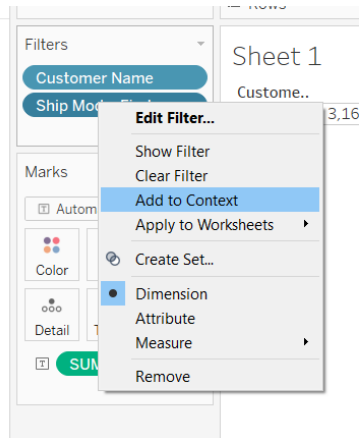
21. Drag Customer Name to the Rows shelf and Sales to Label mark and Sort them ascending



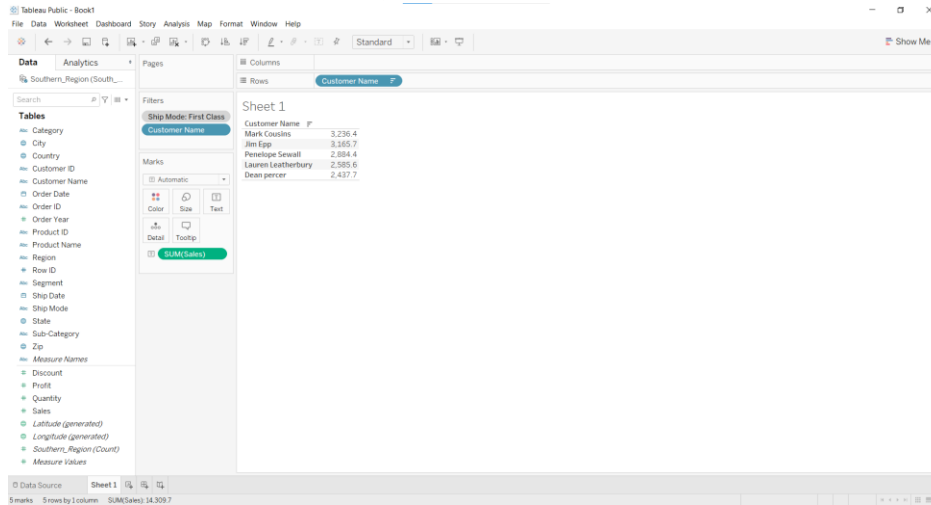
22. Drag Ship Mode to the Filter pane and select First Class. Notice how we have only 1 customer in the view. This is happening because in the order of operations Set filters are executed before dimension filters.



23. To bypass this issue we have to set the Ship Mode filter as a Context filter. Right click the Ship Mode field from the Filter pane and select Add to Context

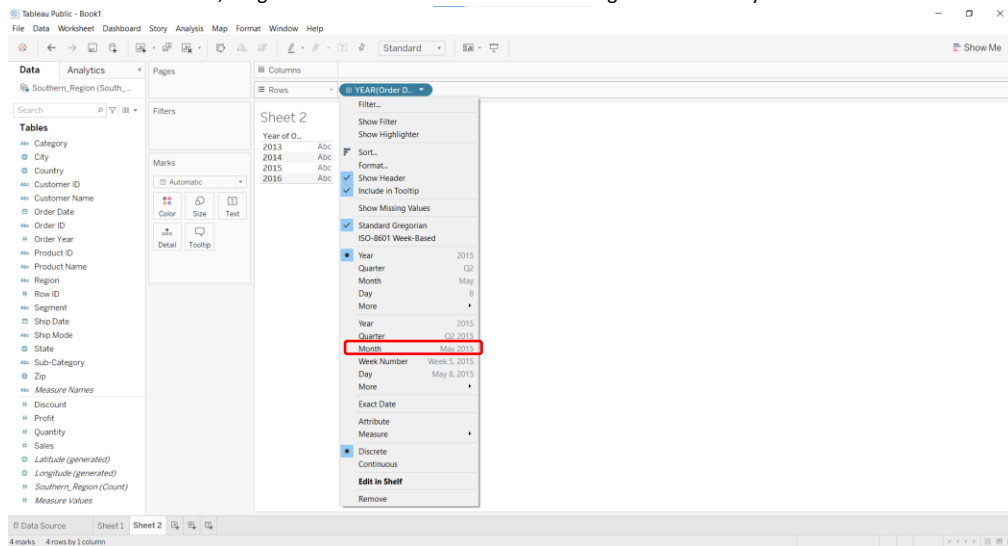


24. The Context filter is executed before the top 5 filter, so now we have 5 customers in the view as expected



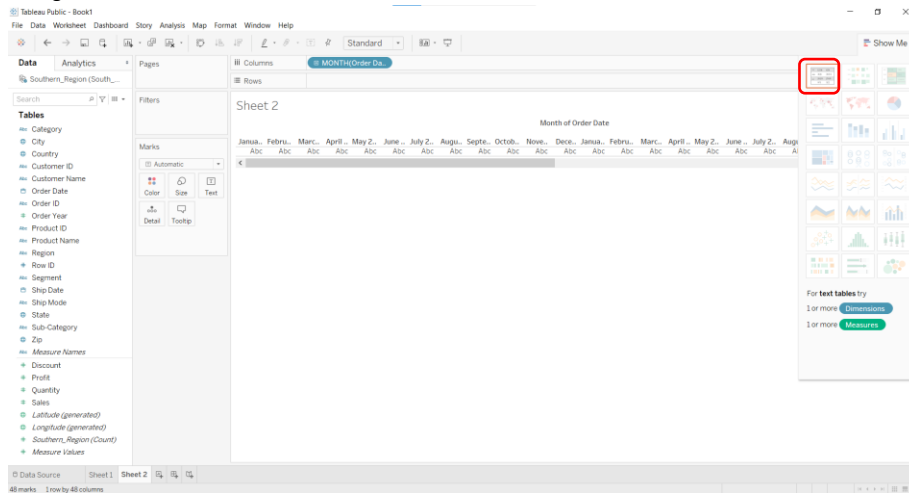
## Date Filters

25. Create a new worksheet, drag Order Date to the Rows shelf and change it to a month year

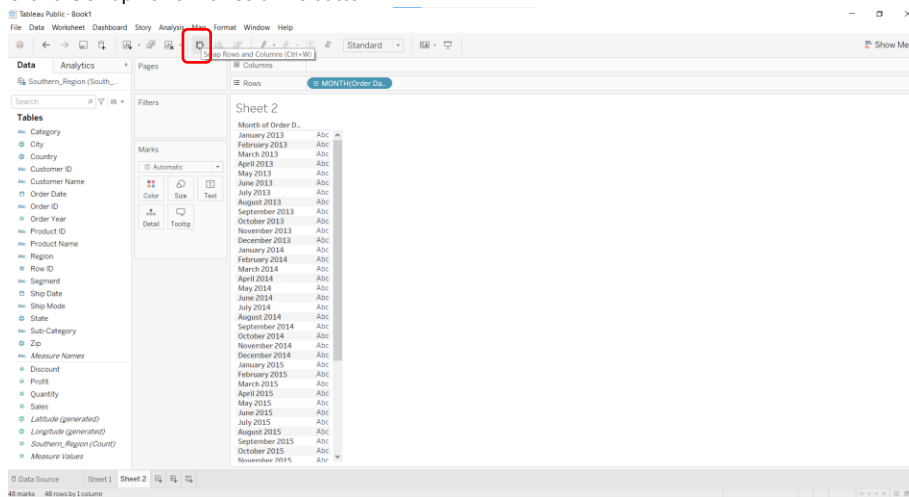




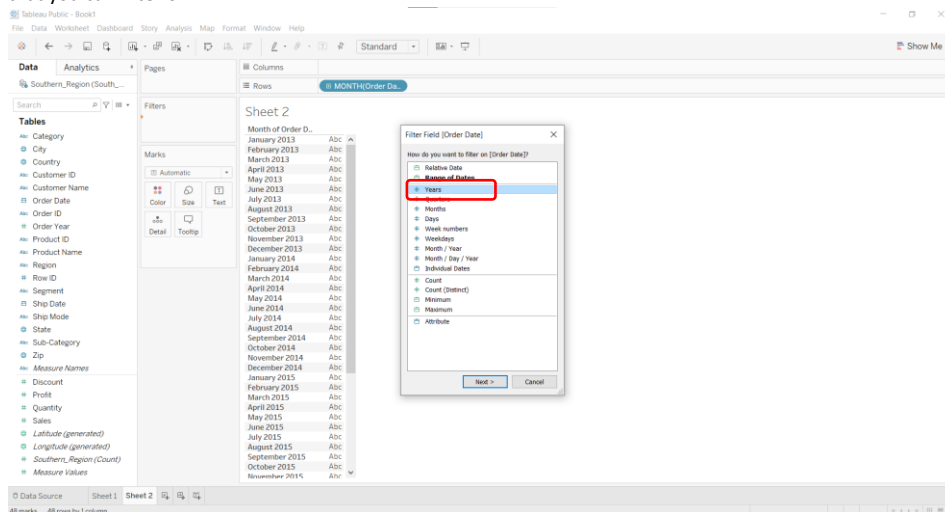
## 26. Change the visual to a Text Table/Crosstab



## 27. Click the Swap Rows with Columns button



## 28. Drag Order Date to the Filter pane and select Year from the options available and click Ok. After this you will have the list of years that you can filter on



29. You can select other options from the filter type – Range of Dates, Relative Dates etc. If you try Range of Dates you should have this view, where you can set the starting date and end date.

