Free Training Transcript: Sorting

Welcome to this video on Sorting. You can download the Exercises workbook to follow along in your own copy of Tableau.

Ways to Sort

There are several ways to sort.

First, and perhaps easiest, is the Quick Sort on the axis. For views with an axis, hovering brings up the Quick Sort icon. One click sorts the bars descending, another click switches to ascending, and a third click clears the sort.

What if we wanted to sort by descending Profit? Profit is on color, not an axis, so there's no quick sort button. When we right click on the pill, there's no sort option in the menu. In this case, the toolbar buttons allow easy sorting. Click on the pill we want to sort by, in this case Profit, then select the appropriate sort from the toolbar.

However, sometimes sorting ascending or descending by a measure isn't the most helpful. Here, we have Order Priority assigned to specific colors, from Critical as red to Low Priority as green, and we want the bars sorted by Order Priority. To do this easily right from the view, we can drag the headers in the legend. If we also want to sort the Ship Mode, so Same Day is highest, we can drag the headers in the bar chart. For the most fine-tuned control, however, sort from the pill itself.

Sorting from the Pill

To control the sort from a pill, unlike when using the toolbar buttons, we don't click the pill of the field we want to sort by, we click the discrete pill that we want to have sorted. Here we want to sort our Sub-Categories, so we click that pill to get the dropdown menu and click Sort. We can fine tune exactly how we want to sort, such as alphabetic or manual, but we can also sort by field. And the field doesn't even have to be in the view – we can pick…. Quantity and set the aggregation, and set the sort order, I like descending.

Sorting Across Panes

If we have multiple dimensions in the view, such as Category and Sub-Category, we have

to think carefully about how we want to sort.

Here, quick sorting when we're expanded to Sub-Category sorts the Sub-Categories WITHIN each Category pane. Sorts do not break the ordered context of pills set by the Rows and Columns shelves, meaning: If we want to sort the Sub-Categories independently of their Category, we need to change the order of the pills on the columns shelf . Here, the sort isn't wrong, it's just that our view is set up so that Category is the overall organization. If we move Category to the back, we still see those labels, now at the bottom, but the Sub-Categories can move around and sort independently of Category. It's also possible to sort different pills different ways. We could sort Category by descending Sum of Sales, and sort Sub-Categories by ascending Average of Profits.

Clearing Sorts

A sorted pill has this icon on the right side – so it's always easy to tell if there are sorts in the view. Perhaps the handiest thing of all, though, is the ability to clear the sorts – come to the clear sheet icon, here, and in the dropdown, select "Clear Sorts".

Pill Type and Sorting Options

Not all pills will have all sorting options. Continuous (green) pills like Profit can be sorted by, using the quick sort on the axis or toolbar sort buttons, but they have no sort option in the pill's dropdown. Discrete (blue) pills can be sorted. Dimensions, like Ship Mode, have the full sorting options. Discrete measures, such as AVG(Discount), offer only source or manual sorting.

Conclusion

Thank you for watching this video on how to Sort in Tableau. We invite you to continue with the Free Training videos to learn more.