



On-Demand Training: Quick Filters Transcript

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

Dragging a field to the filter shelf is an easy way to filter, but what if we want to be able to modify the filter selection directly from the view? If we right click anywhere we see the Sub-Category field and select “Show Quick Filter”, the field is automatically added to the filter shelf, and we get a Quick Filter in the view.

We can edit the appearance and functionality of the Quick Filter by clicking on the caret to bring up the menu.

- Quick filters can be applied across specific worksheets, or even all using that data source.
- Under Customize, we can control if the option to select “all” is showing, as well as those floating control buttons like search, or we can even add an “apply button”
- The title can be toggled on/off or edited
 - It’s often good to put in an action word in the title, something like “Choose a Sub-Category”
- Format brings up options for formatting the font and shading – for more information on formatting, check out the other videos in this section
- In the menu, we can also change whether selections made in the quick filter are included or excluded by the filter

Layout Mode for Quick Filters

- The mode, or visual layout, of the Quick Filter depends on what type of field is being filtered.
 - There are lots of options for discrete fields, including single value, multiple value, dropdowns, lists, and wildcard matches
 - How the Quick Filter is laid out can impact things like space and interactivity on a dashboard – dropdowns save space, but lists may be more intuitive to click through
- The Quick Filter for a continuous field, such as Shipping Cost, has different layout options including a slider or at least/at most
- If we create a quick filter from a continuous date field, we get some cool options such as relative date, starting date, browse periods....
- Picking a filter layout should be based on both the screen real estate and space considerations, but also thinking about how the filter will be used.
 - The filter layout should mesh with the purpose of the dashboard

Cascading Quick Filters

Another useful option in the menu is “Only relevant values” versus “all values in database”. All values will always show every option for the field, regardless of any other filters.

A good example of when this is useful is something like cascading filters on a map

- If we add a quick filters for Country

- see how long that list is?
- Let's open the menu, note that "Only relevant Values is selected?"
- So, when we then pick a Market from the filter
 - the list of countries shortens considerably, because it includes only countries for a selected market,
 - let's make this a dropdown
- Note that the Market filter collapsed – it only shows the relevant market to the Country selected in the country filter
 - That's because it is also set to "only relevant values"
 - If we want to always be able to select any market at any time, we can go to the menu and select "all values in database"

Cascading quick filters are a great way to get interactivity into your analysis, or to tidy up long lists of values to make it more intuitive for the end user

- However, they do require more work for the queries back to the database and may impact performance

As a note, hiding the quick filter control does not remove the filter; it's necessary to remove the filter or from the menu of the Quick Filter menu.

That's an overview of Quick Filters and how to use them. Quick Filters are a great way to let an end user interact with a visualization. Do note, however, that excessive numbers of Quick Filters may slow down the performance of a dashboard or workbook.

Conclusion

Thank you for watching this video on quick filtering. We invite you to continue with more On-Demand Training videos to learn more.