



Free Training Transcript: Ways to Filter

Welcome to this video on the Ways to Filter. You can download the Exercise workbook to follow along in your own copy of Tableau.

Ways to Filter

There are a few basic ways to filter in Tableau: on the Filter Shelf, with an Interactive Filter, or in the view.

First, we can drag a field, such as Category, to the filter shelf directly, here we'll remove technology.

Second, if we want to let the user interact with the filter, we can use an interactive filter by right clicking on the field, we'll use Order Priority, and selecting "Show Filter", and here it is in the view. Note the filter does not have to be a field in the view, we added this interactive filter just by right clicking on the field in the data pane. Adding an interactive filter puts that field on the filter shelf.

Third, in the view itself, we can select a mark or group of marks, then click to bring up the command buttons in the tooltip, and keep only or exclude. We can also click on a header to see those same options. If you're on a view with headers, such as a bar chart, you can double click on a header to keep only that one. Keep only and exclude can also be done from some legends by right clicking.

Removing Filters

All of these types of filters put a pill on the filter shelf. To remove a filter, drag the pill off the shelf.

More Information

Filtering is a complex topic. For more information on using the filter shelf, including the options that are presented for dimensions, measures, and dates, check out the video "Using the Filter Shelf". There's also a video specifically on interactive filters, which covers how to create them, and options for customizing and formatting. Filtering can be done at the record or row level in the data source, on the aggregated view, or before data

even comes into Tableau. To learn more, watch the video “Where Tableau Filters”. Deeper concepts such as context filters, and include versus exclude, are covered in “Additional Filtering Topics” covers.

Conclusion

Thank you for watching this video on the basics of filtering! We invite you to continue with the Free Training videos to learn more about using Tableau.