

# Tableau Filtering Documentation

## Filter Order of Operations

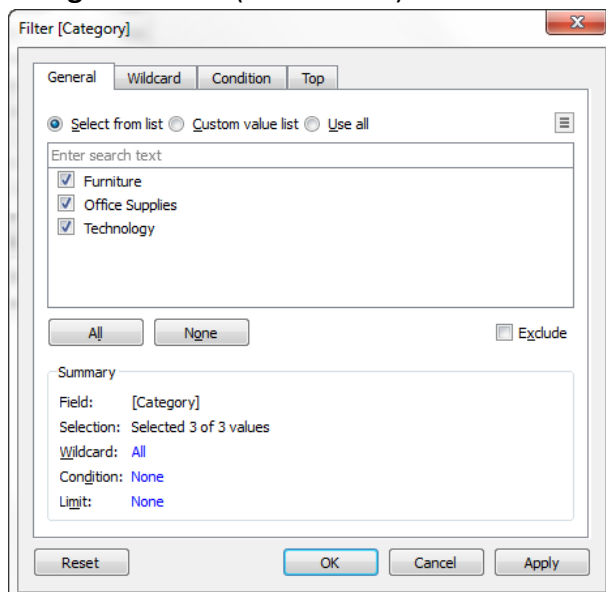
Tableau will apply filters in this order.

1. **Extract Filters** – If an extract (opposed to a live connection) is created from a data source that has been pre-filtered, the existing filters will be recommended as extract filters and will appear in the Extract dialog. They are not required and can be removed without affecting the existing filters.
2. **Data Source Filters** – Filters can be applied between tableau server and the data source. Once a live connection is made to a source (excel, SQL, Oracle, etc.) these filters get applied to the data and limit what is available to view in the worksheets. **NOTE:** Once a data source is published to Tableau server, the data source in its entirety is transported to the server and any filters applied to the data source cannot be altered or deleted.
3. **Context Filters** – Defined as an independent filter in the filter shelf and any other filters that are set in the shelf are defined as dependent filters and will only process data that passes through the context filter.
4. **Dimension Filters (Card or Shelf)** – Filter applied to fields in the Dimension data pane defined by the fields definition (see below).
5. **Measure Filters (Card or Shelf)** – Filter applied to fields in the Measure data pane defined by the fields definition (see below).

## Filter Definitions

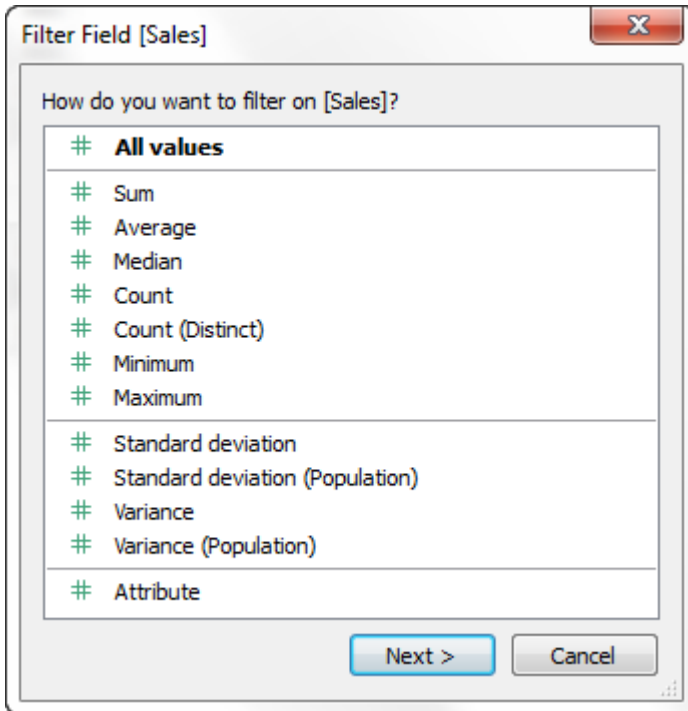
Data Pane definitions for filtering

1. **Categorical Data (Dimensions)**



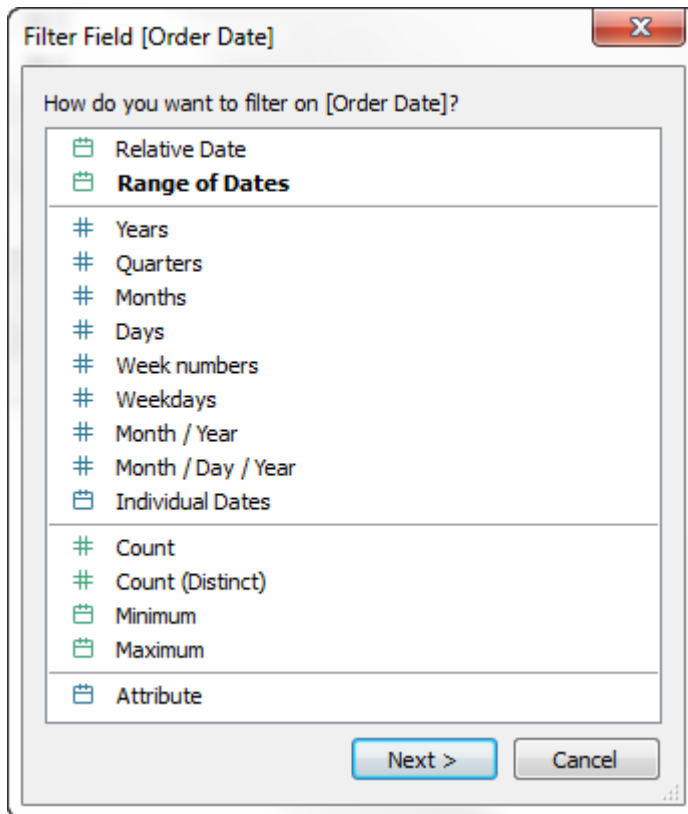
- a. **General** – Select values from a list to include or exclude
- b. **Wildcard** – Define keyword to filter data on
- c. **Condition** – Define a rule to filter data on
- d. **Top** – Specifies the number of records to return

2. **Quantitative Data** (Measures)



- a. **Range of Values** – Include values between specified min and max values (ex. 1 to 100)
- b. **At Least** – Include values greater than or equal to specified min value (ex.  $\geq 50$ )
- c. **At Most** – Include values less than or equal to specified max value (ex.  $\leq 50$ )
- d. **Special** – Specifies NULL values

### 3. Dates

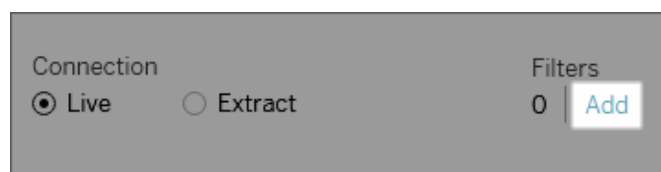


- a. **Filter Relative Dates** – Specify a range of dates that updates based on the date and time the view is opened.
- b. **Filter a Range of Dates** – Define a fixed range of dates to filter (ex. March 1 to April 1)
- c. **Filter Discrete Dates** – Define a discrete date value to include entire date levels (ex. Quarter1, Quarter2, Quarter3 regardless of Year)
- d. **Filter Individual Dates** – Dates specific to the date field in a view
- e. **Additional Date Filter Options** – Define start date and end date or specify NULL values.

### Data Source Filtering

Steps to filtering a data source

1. On the data source page, click **Add** in the Filters section in the upper right corner. This will open an “Add Filter” dialog box listing all fields in the data source.



To create a data source filter on a worksheet, right-click on the data source and choose **Edit Data Source Filters**.

2. Click to select a field to filter then specify how the field should be filtered based on the definitions (see above).

## Workbook Filtering

Steps to filtering fields

1. To filter a field, drag the field to the Filters shelf.

