

Creating a Filter with Actions on Dashboards

When creating a dashboard, you may want to add a filter that applies to all the other views in the dashboard.

You could create a global quick filter. However, this will affect other worksheets and dashboard. If you want the filter to only work for this dashboard, you can use actions to limit the data on the other sheets in this dashboard.

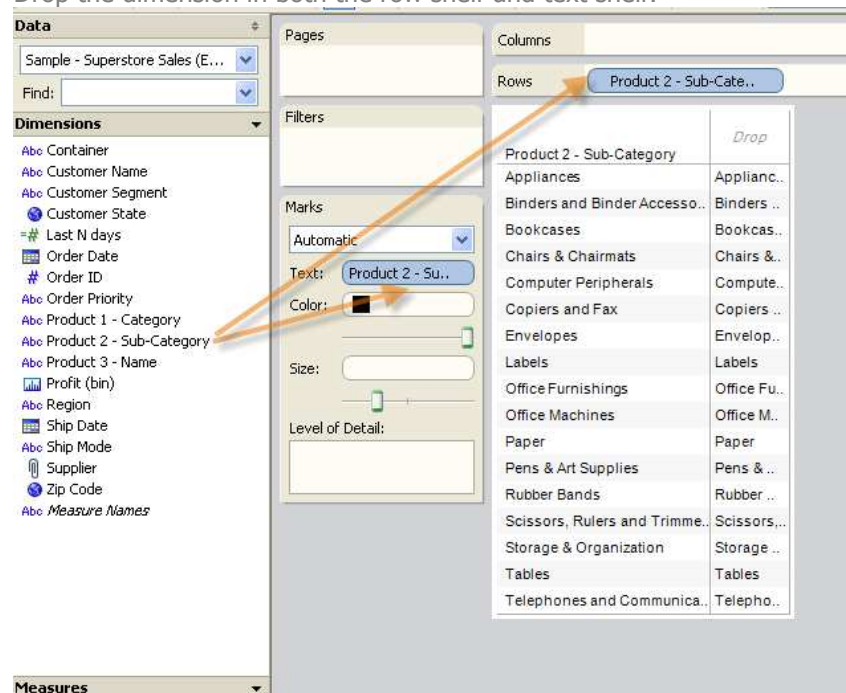
The advantage of a Filter Action is that it can filter across multiple relational data sources at the same time. Multi-dimensional data sources (cubes) may require additional steps.

One way to create this type of filter is to create a controlling worksheet and then add a Filter Action from this worksheet to the other views in the dashboard.

Creating a controlling worksheet

There are two reasons you will want a controlling worksheet. If the data you want to filter is not easily shown in the existing worksheets, you will need a controlling worksheet. You will also want a controlling worksheet if all the current views need to be filtered.

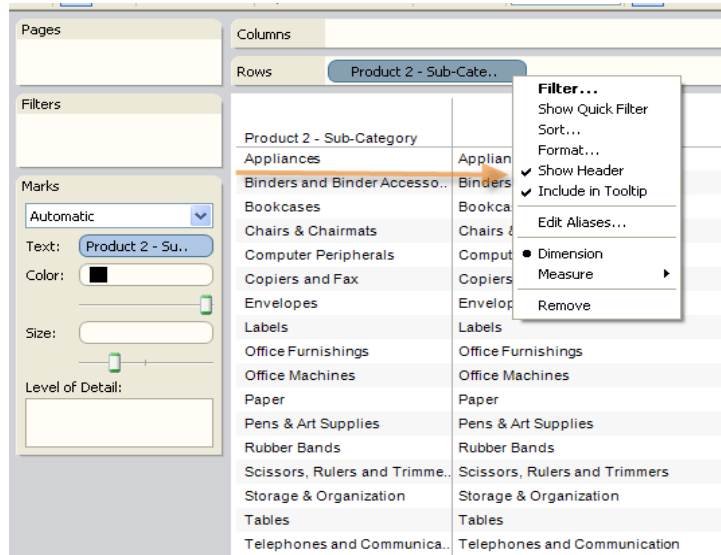
1. Drop the dimension in both the row shelf and text shelf.



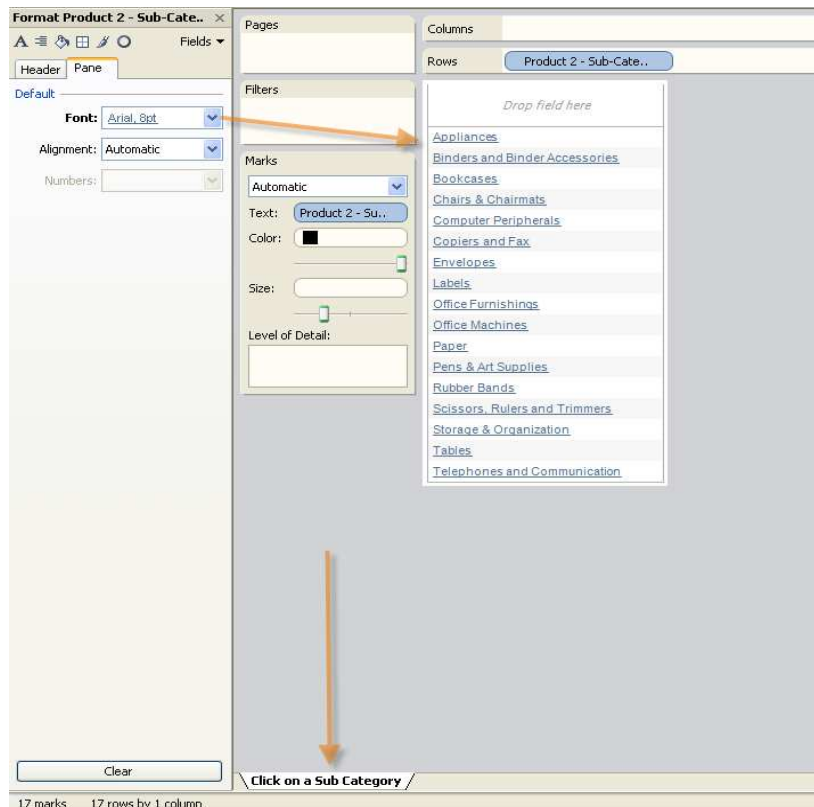
The screenshot shows the Tableau interface with the following components:

- Data**: Sample - Superstore Sales (E...)
- Dimensions**:
 - Abc Container
 - Abc Customer Name
 - Abc Customer Segment
 - Customer State
 - Last N days
 - Order Date
 - Order ID
 - Order Priority
 - Product 1 - Category
 - Product 2 - Sub-Category
 - Product 3 - Name
 - Profit (bin)
 - Region
 - Ship Date
 - Ship Mode
 - Supplier
 - Zip Code
 - Measure Names
- Marks**:
 - Automatic
 - Text: Product 2 - Su..
 - Color: [Black]
 - Size: [Empty]
 - Level of Detail: [Empty]
- Columns**:
 - Rows: Product 2 - Sub-Cate..
 - Product 2 - Sub-Category
 - Appliances
 - Binders and Binder Accesso..
 - Bookcases
 - Chairs & Chairmats
 - Computer Peripherals
 - Copiers and Fax
 - Envelopes
 - Labels
 - Office Furnishings
 - Office Machines
 - Paper
 - Pens & Art Supplies
 - Rubber Bands
 - Scissors, Rulers and Trimme..
 - Storage & Organization
 - Tables
 - Telephones and Communica..

- Then hide the header for the dimension in rows by selecting **Show Header** on the field menu. Hiding the header gets rid of the ABC placeholder on the dashboard.



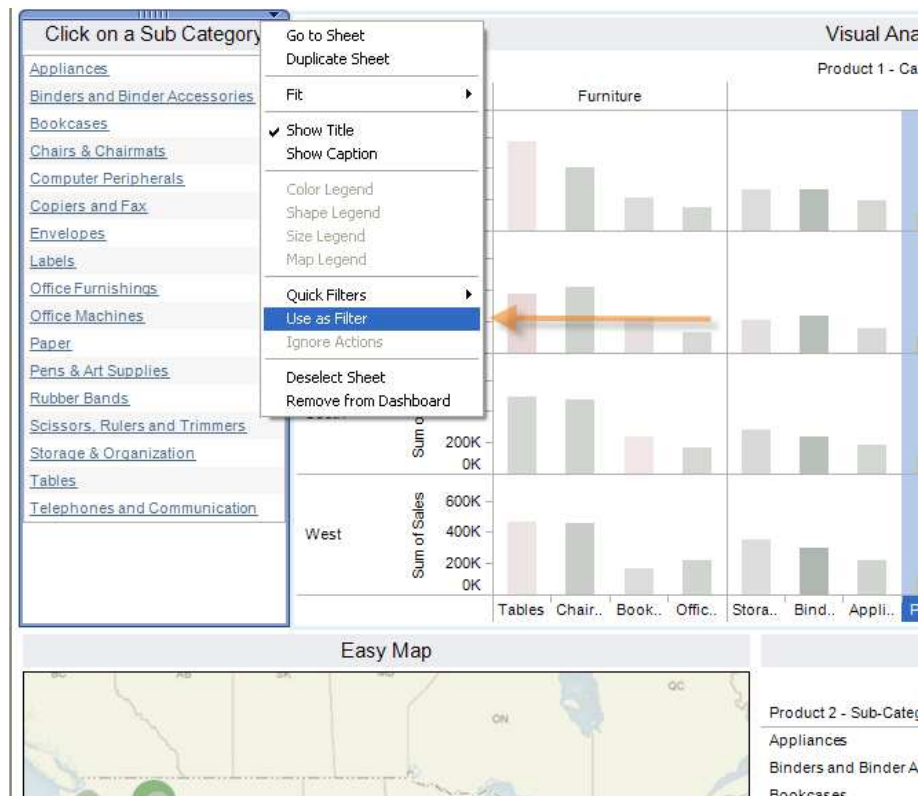
- Now format the text to encourage your end users to interact with it. You can format the text by selecting option on the Format menu. Also, give the worksheet an actionable title. For example, the title shown below is **Click on a Sub Category**



Creating the Filter Action on the Dashboard

You can either build a new dashboard with the new controlling sheet or add the controlling worksheet to your existing dashboard.

1. Make sure to put the controlling worksheet where the user will first look. Typically this is in the left upper portion of the screen.
2. Select the controlling worksheet in the dashboard so that it is highlighted. Open the View menu in the upper right corner of the view and select **Use as Filter**.



Now any selection on your controlling sheet modifies other views in the dashboard.

This type of Action Filter affects the underlying worksheets in Tableau Desktop. When the dashboard is published to Tableau Server, the action only applies to the dashboard and the other worksheets are not changed.