

Filtering Data - SKY Analytics

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Analyze data by filtering, displaying interactive filters, and formatting filters in the view.

Keep or Exclude

1. To filter marks from the view, choose a single mark (data point) or select and drag in the view to select several marks. Select **Keep Only** to keep only the selected marks in the view or **Exclude** to remove the selected marks from the view on the tooltip that appears.
2. To filter entire rows or columns of data, select the header in the view and choose to **Exclude** or **Keep Only** the selected data on the tooltip that appears.


Drag Dimensions, Measures, and Date Fields

Dragging a field directly from the *Data* pane to the *Filters* shelf will create interactive filters.

1. *Dimensions* contain discrete categorical data, so filtering this type of field generally involves selecting the values to include or exclude.
2. *Measures* contain quantitative data, so filtering this type of field generally involves selecting a range of values to include. The default *Aggregation* is *SUM*. To change, right-click the field, choose **Measure**, and select an *Aggregation*.
3. To change the type of quantitative filter in the view, select the filter card drop-down and choose from the following:
 - **Range of Values** – This sets the minimum and maximum values of the range to include.
 - **At Least** – This includes all values greater than or equal to a specified minimum value.
 - **At Most** – This includes all values less than or equal to a specified maximum value.
4. In web authoring, when dragging a date field from the *Data* pane to the *Filters* shelf, a date range filter appears in the view. To change the type of filter, choose the filter card drop-down and select from the following:
 - **Relative Date** – This defines a range of dates that update based on the date and time of opening the view.
 - **Range of Dates** – This defines a fixed range of dates to filter.
 - **Start Date** – This defines a fixed start date for filtering.
 - **End Date** – This defines a fixed end date for filtering.
 - **Browse Periods** – This identifies a time period to filter by, such as one day, one week, one month, one year, five years, etc.
5. To create a *Table Calculation Filter*, place a *Calculated Field* on the *Filters* shelf.
 - Filters based on table calculations do not filter out underlying data in the data set. Table calculations are evaluated in the view first, and then the table calculation filters are applied on the results in the current view.

- Apply the *Table Calculation Filter* to totals when showing totals in a view. Select **Apply to totals** from the *Filters* shelf in the drop-down menu for that filter to apply the *Table Calculation Filter* to all the results in the table, including the totals.

Set Options for Filter Card Interaction and Appearance

1. After showing a filter, select from options to control how the filter works and appears. Select the drop-down menu in the upper right corner of the *Filter* card in the view.
2. Customize how filters appear in the view and in dashboards with general *Filter* card options:
 - **Apply to worksheets** – This specifies if the filter applies to only the current worksheet or is shared across multiple worksheets.
 - **Only relevant values** – This specifies other filters are considered and only values that pass these filters display.
 - **All values in hierarchy** – This defaults when creating a filter from a hierarchical field. Filter values display based on relevance of the parent/child relationships in the hierarchy.
 - **All values in database** – This displays regardless of the filters on the view.
 - **Include values\Exclude values** – This includes or excludes values from the view by selecting in the *Filter* card.
3. Control the appearance and interaction of the *Filter* card in the view by selecting a *Filter Card Mode*. Choose the drop-down menu on the *Filter* card and select a mode from the list. The modes available depend on if the filter is a *Dimension* or a *Measure*. *Dimension* filter modes include:
 1. **Single Value (List)** – This displays radio options where only a single value can be selected.
 2. **Single Value (Drop-down)** – This displays a drop-down list where only a single value can be selected.
 3. **Single Value (Slider)** – This is a slider range where only a single value can be selected at a time. This option is useful for *Dimensions* with an implicit order, such as dates.
 4. **Multiple Values (List)** – This is a list of options where multiple values can be selected.
 5. **Multiple Values (Drop-down)** – This is a drop-down list where multiple values can be selected.
 6. **Multiple Values (Custom List)** – This displays a text field to type a few characters and search for the value. Alternatively, type or paste a list of values to create a custom list of values to include.
 7. **Wildcard Match** – This displays a text field to type a few characters. All values matching those characters are automatically selected. Use the asterisk character as a wildcard character. For example, type  select all values that begin with the letters tab.