

# Tableau

## (Business Intelligence)

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# Outlines

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- Creating Dashboard using Tableau Desktop
- Creating story
- Publishing the dashboard into Tableau online
- Workbook View Features in Tableau online
- Set user permissions
- Adding users
- Creating user groups
- Scheduled Refresh



# Introduction To Dashboards

# Why Dashboards?

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Dashboard is a collection of views, filters, parameters and images that work closely and are arranged on a single canvas



Allows to compare and monitor variety of data simultaneously

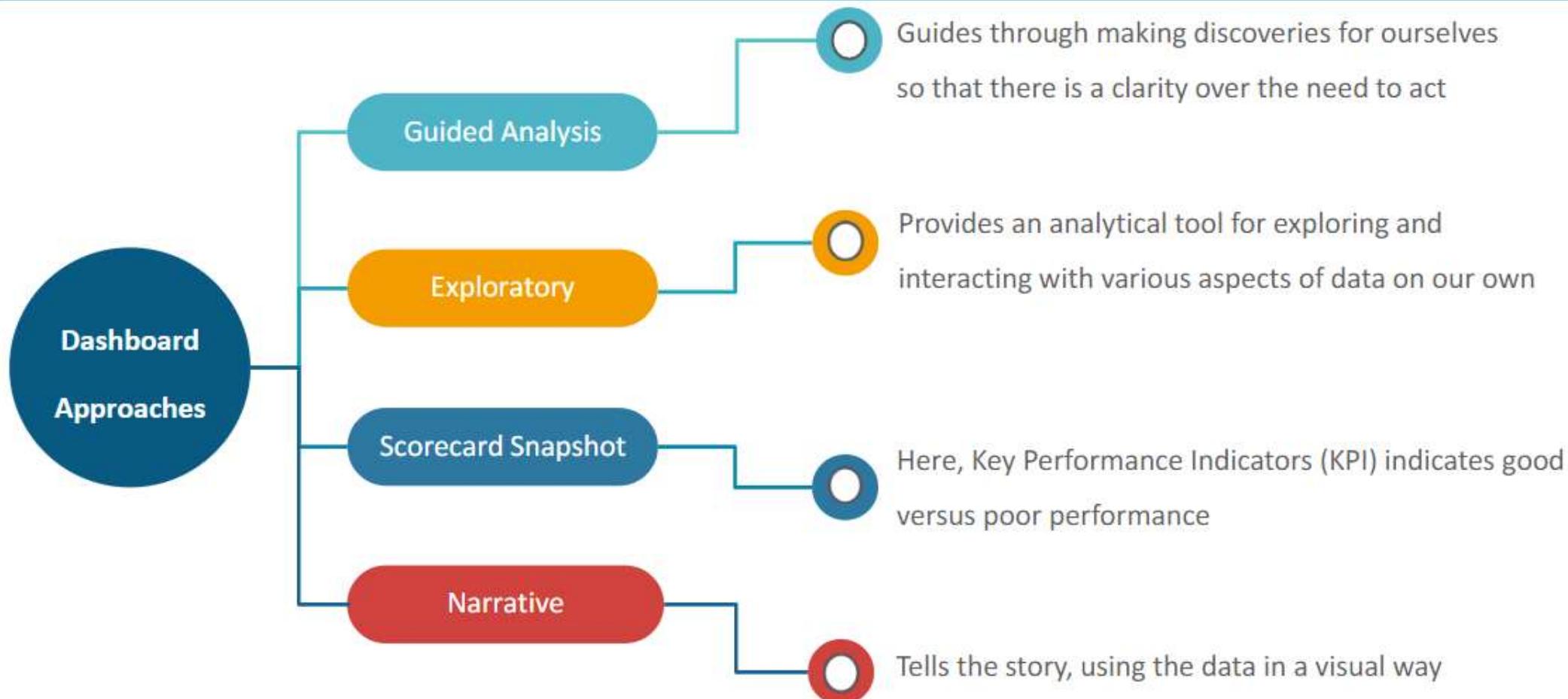


Highly interactive and allows to explore different aspects of data



Helps uncover key insights and thereby speeds up decision making

# Dashboard Approaches

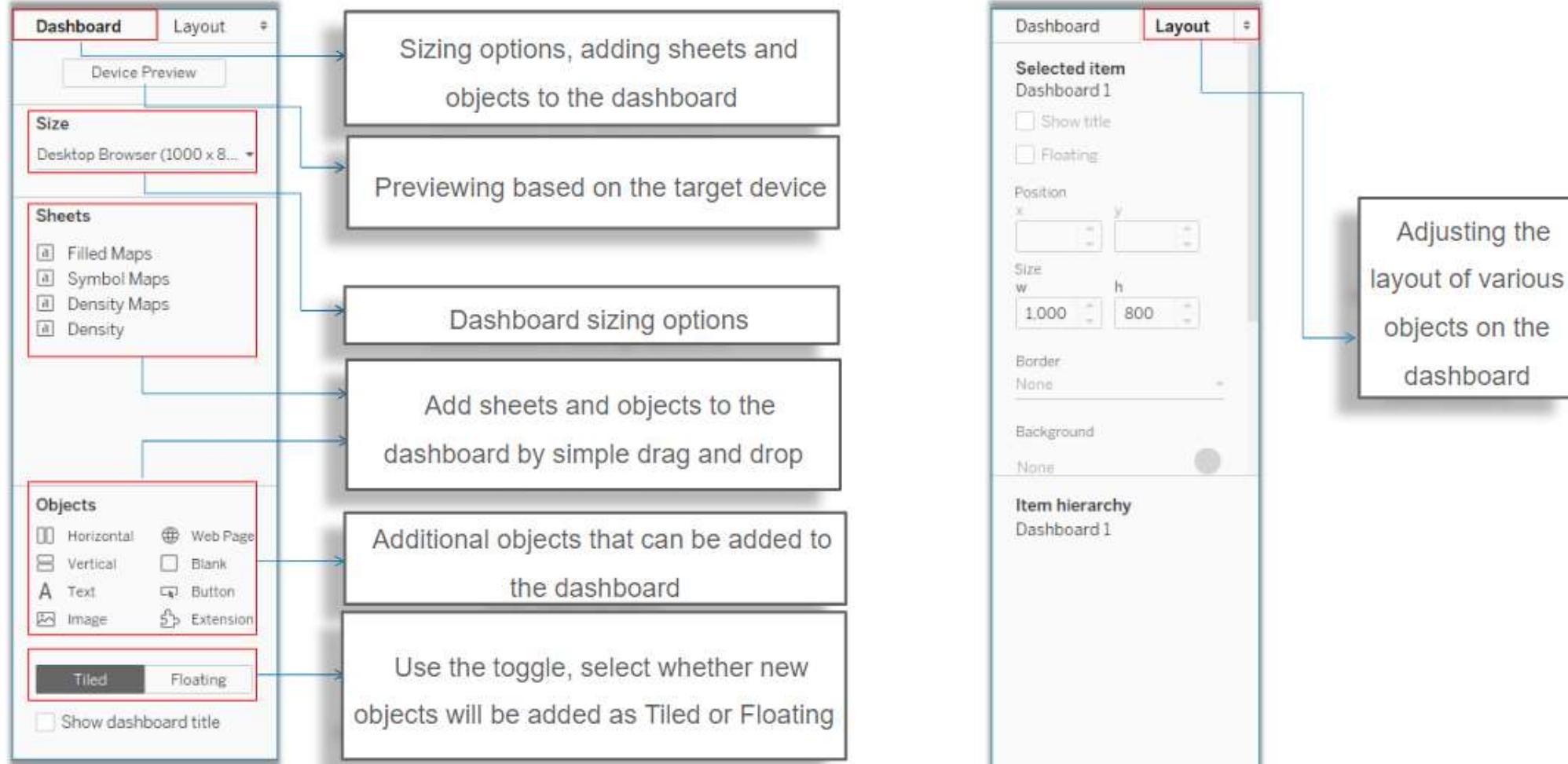


Dashboards may follow a hybrid approach, wherein we might have an exploratory dashboard that prominently displays some KPIs

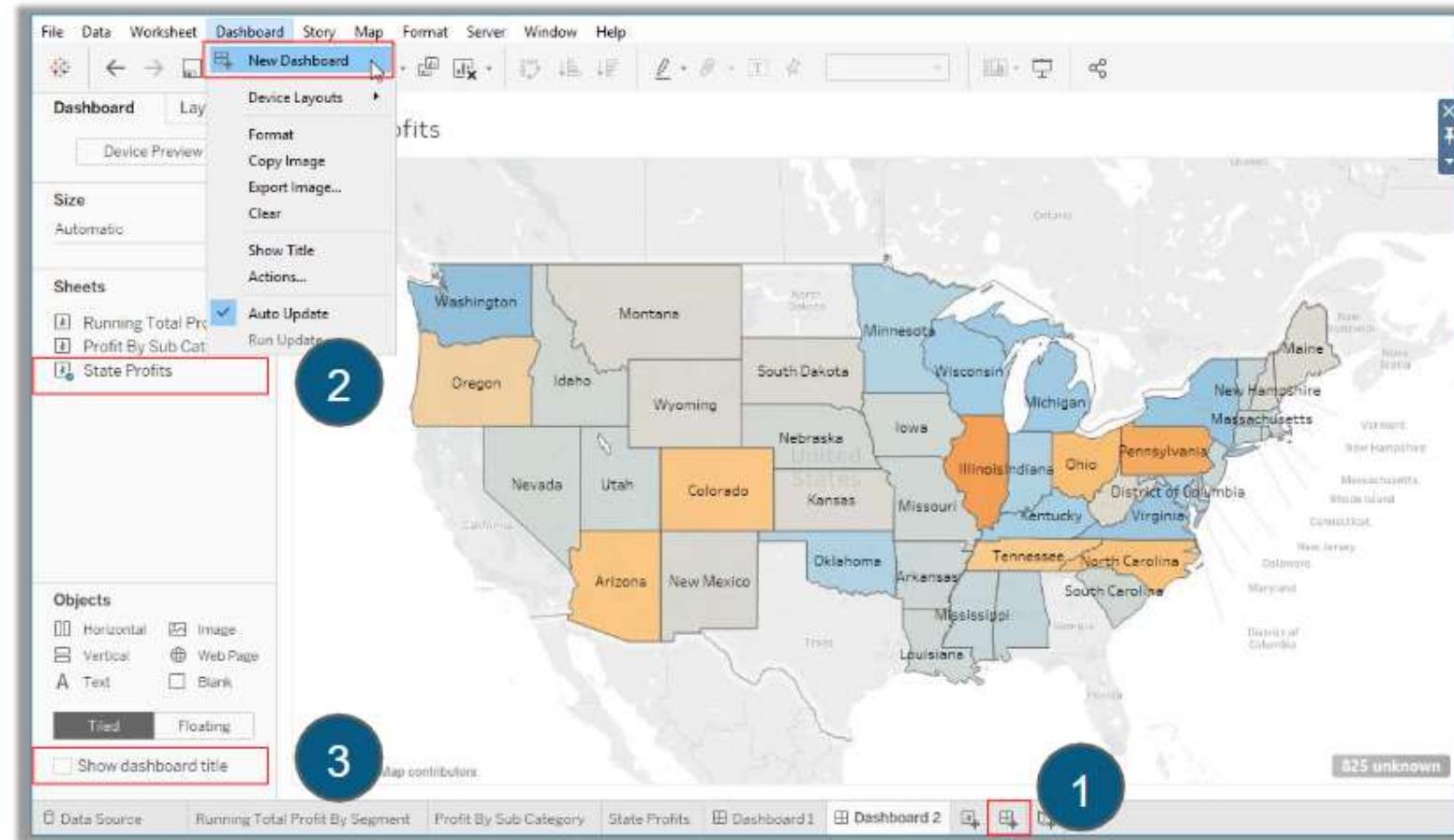


# The Dashboard Interface

# The Dashboard Interface



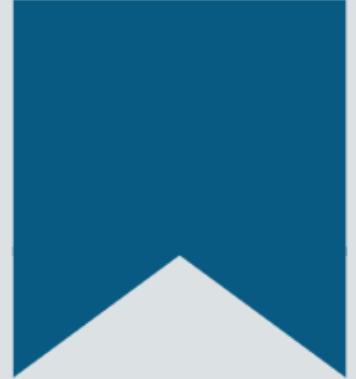
# The Dashboard Interface



1 Click on this icon to create a new dashboard. Alternatively, we can also select through the Dashboard menu option

2 Drag the sheet on to the view. Blue tick indicates that the sheet is dragged on to the dashboard

3 Select this option for displaying the dashboard title



# Dashboard Objects

# Dashboard Objects

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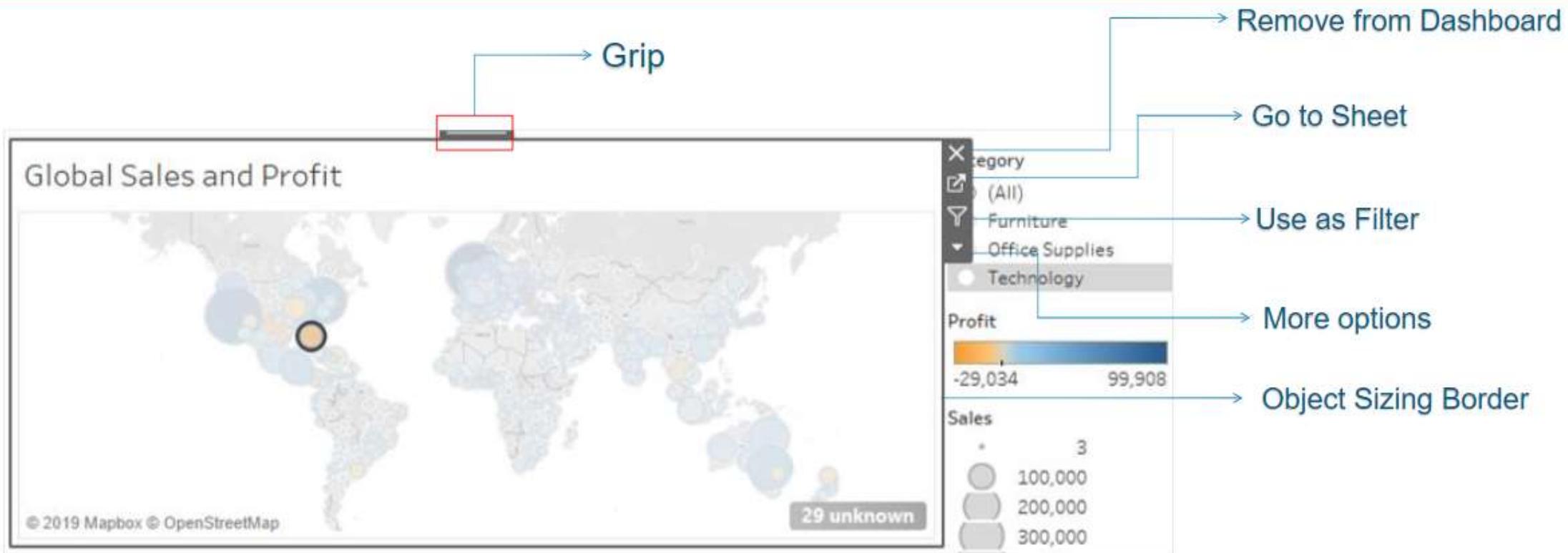
Object	Description
Horizontal	Layout Container within which other objects are arranged horizontally
Vertical	Layout Container within which other objects are arranged vertically
Text	Allows to include rich formatted text in the dashboard
Image	Allows to add image content that can be sized and positioned on the dashboard
Web Page	Allows to embed web content in the dashboard
Blank	Allows to preserve blank space in the dashboard and can be also used as a placeholder
Button	Allows to navigate between dashboards
Extension	Provides the ability to add third party controls and objects that in turn provides extended functionality

# Dashboard Objects (Contd...)

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Object	Description
Filters	Appears as controls for selecting values to filter
Parameters	Appears as controls for selecting a parameter option
Page Controls	Controls that provide options for paging through the data
Legends	Includes color, size, and shape legends for understanding the various visualizations
Highlighters	Allows to highlight various dimension values within views
Dashboard Title	A special text object that displays the dashboard name by default

# Manipulating Objects On The Dashboard



# Options For Manipulating Objects

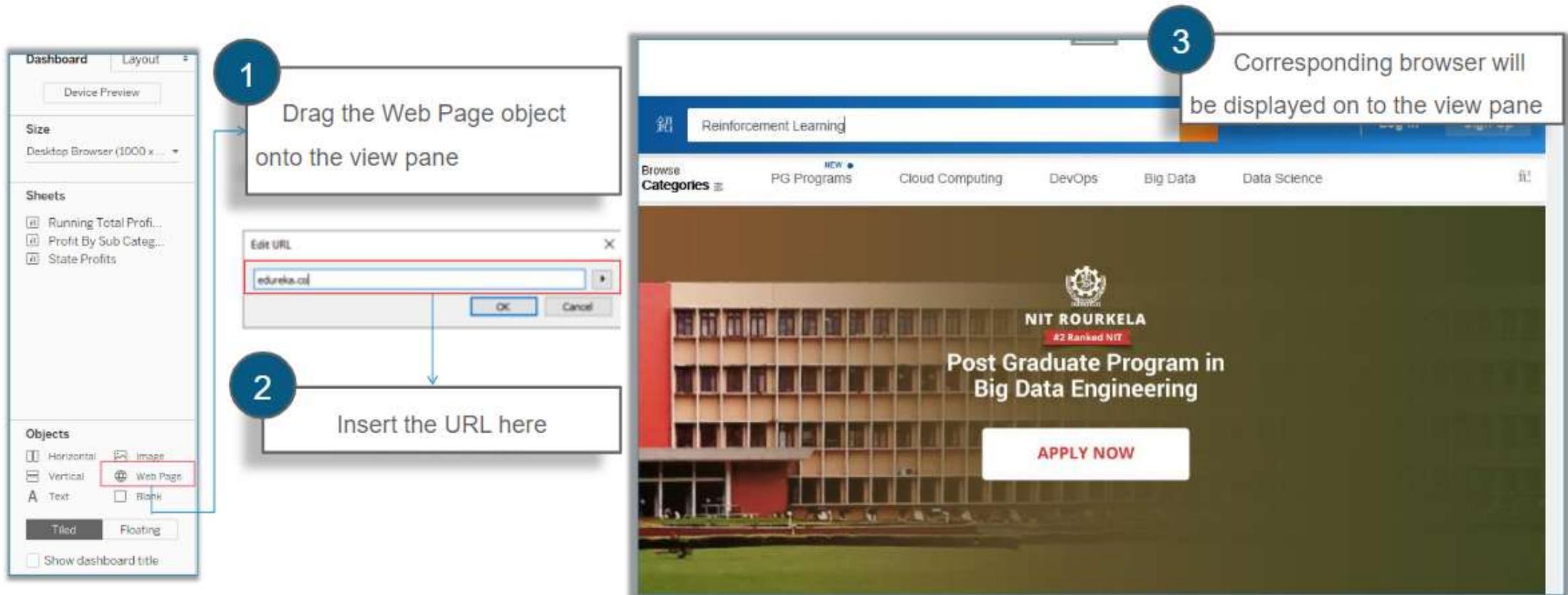
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Option	Explanation
Grip	Click and drag the Grip to move the object
Remove from Dashboard	Removes the object from the dashboard
Go to Sheet	Navigate to an individual sheet for editing a single visualization on a dashboard
Use as Filter	Enables the view to be used as a filter  Selecting a mark in the view filters other views in the dashboard
More Options	Drop down menu hosts options for the object such as control and display options for parameters, showing or hiding titles or captions on views
Object Sizing Border	Hovering over the border changes the cursor to a sizing cursor  Drag the border to adjust the size of the object

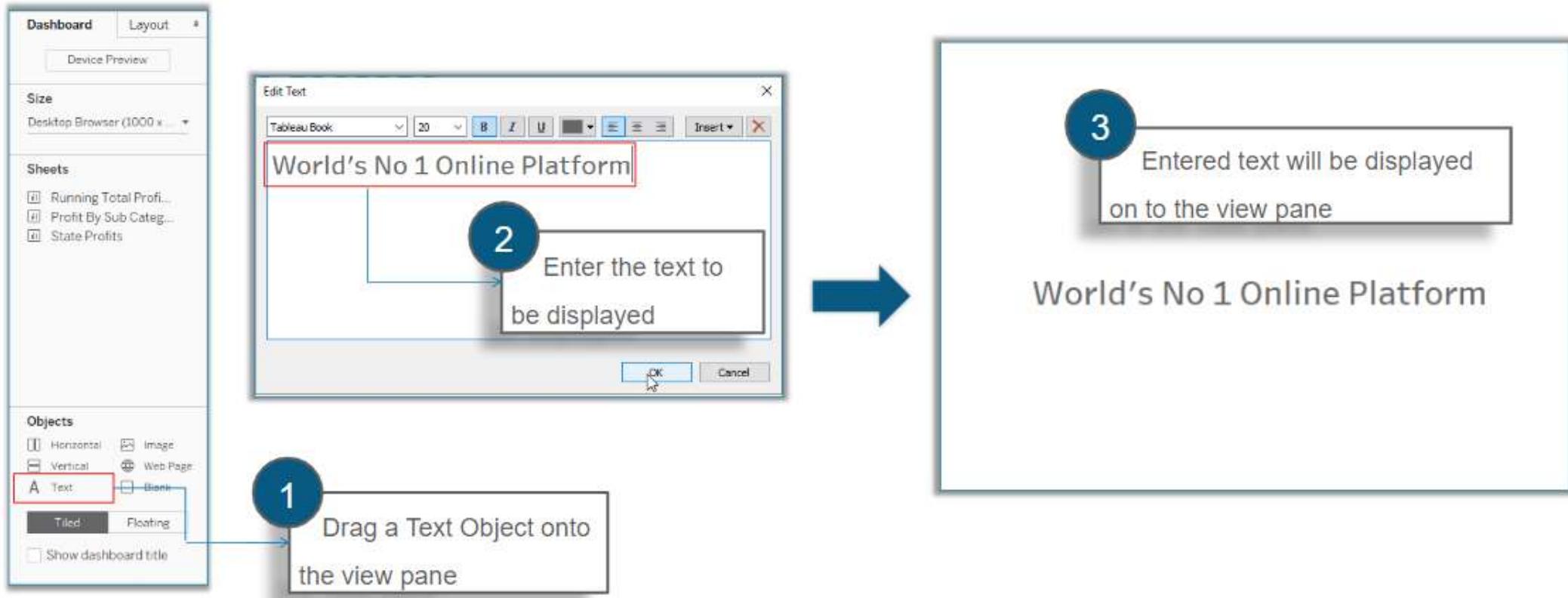


# Adding Objects To The Dashboard

# Adding A Web Page Object



# Adding A Text Object





# Dashboard Layouts And Formatting

# Dashboard Layout - Containers

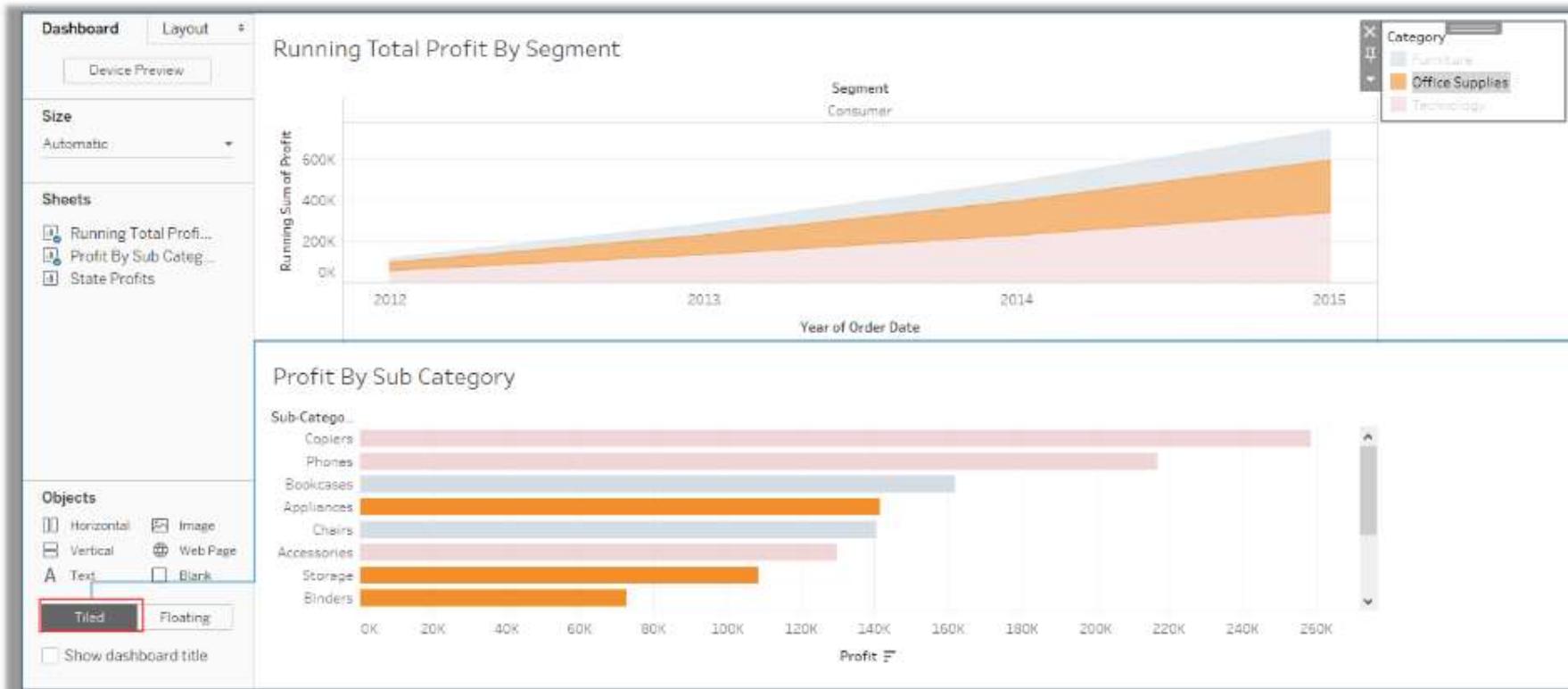
The screenshot shows a dashboard interface with three main components:

- Top Left Component:** A bar chart titled "Profit By Sub Category". The Y-axis lists sub-categories: Copiers, Phones, Bookcases, Appliances, Chairs, Accessories, Storage, Binders, Machines, Paper, and Art. The X-axis shows profit values from 0K to 260K. The chart uses red and blue bars to represent different categories.
- Bottom Left Component:** A line chart titled "Running Total Profit By Segment". The Y-axis shows profit from 0K to 500K. The X-axis shows years 2012, 2013, and 2014. The chart shows a steady upward trend with multiple colored lines representing different segments.
- Bottom Right Component:** A bar chart titled "Running Total Profit By Segment" (labeled "Segment Consumer" in the legend). The Y-axis shows profit from 0K to 700K. The X-axis shows years 2012, 2013, and 2014. The chart uses blue, orange, and red bars to represent Furniture, Office Supplies, and Technology respectively.

**Vertical Container (Top Right Callout):** A callout box with a blue arrow pointing to the top row of components (Profit By Sub Category and Running Total Profit By Segment) states: "Vertical container allows to group worksheets and dashboard components in a top to bottom manner".

**Horizontal Container (Bottom Right Callout):** A callout box with a blue arrow pointing to the bottom row of components (Running Total Profit By Segment and Profit By Sub Category) states: "Horizontal container allows to group worksheets and dashboard components in a left to right manner".

# Dashboard Layout - Tiled



Tiled object snaps into the dashboard or layout container where it is being dropped

# Dashboard Layout - Floating

The screenshot shows the Tableau desktop interface with a dashboard containing two main visualizations: a stacked area chart titled "Running Total Profit By Segment" and a horizontal bar chart titled "Profit By Sub Category". The dashboard has a floating object, a context menu, and a tooltip.

**Floating Object:** A floating object is shown on the right side of the dashboard, containing a copy of the "Profit By Sub Category" chart. It has a title "Profit By Sub Category" and a subtitle "Sub-Catego...". The floating object's context menu is open, with the "Floating" option highlighted.

**Context Menu:** A context menu is displayed over the floating object, listing options such as "Go to Sheet", "Duplicate Sheet", "Fit", "Title", "Caption", "Legend", "Filter", "Highlight", "Show Page Content", "View Toolbar", "Use as Filter", "Ignore Actions", and "Floating".

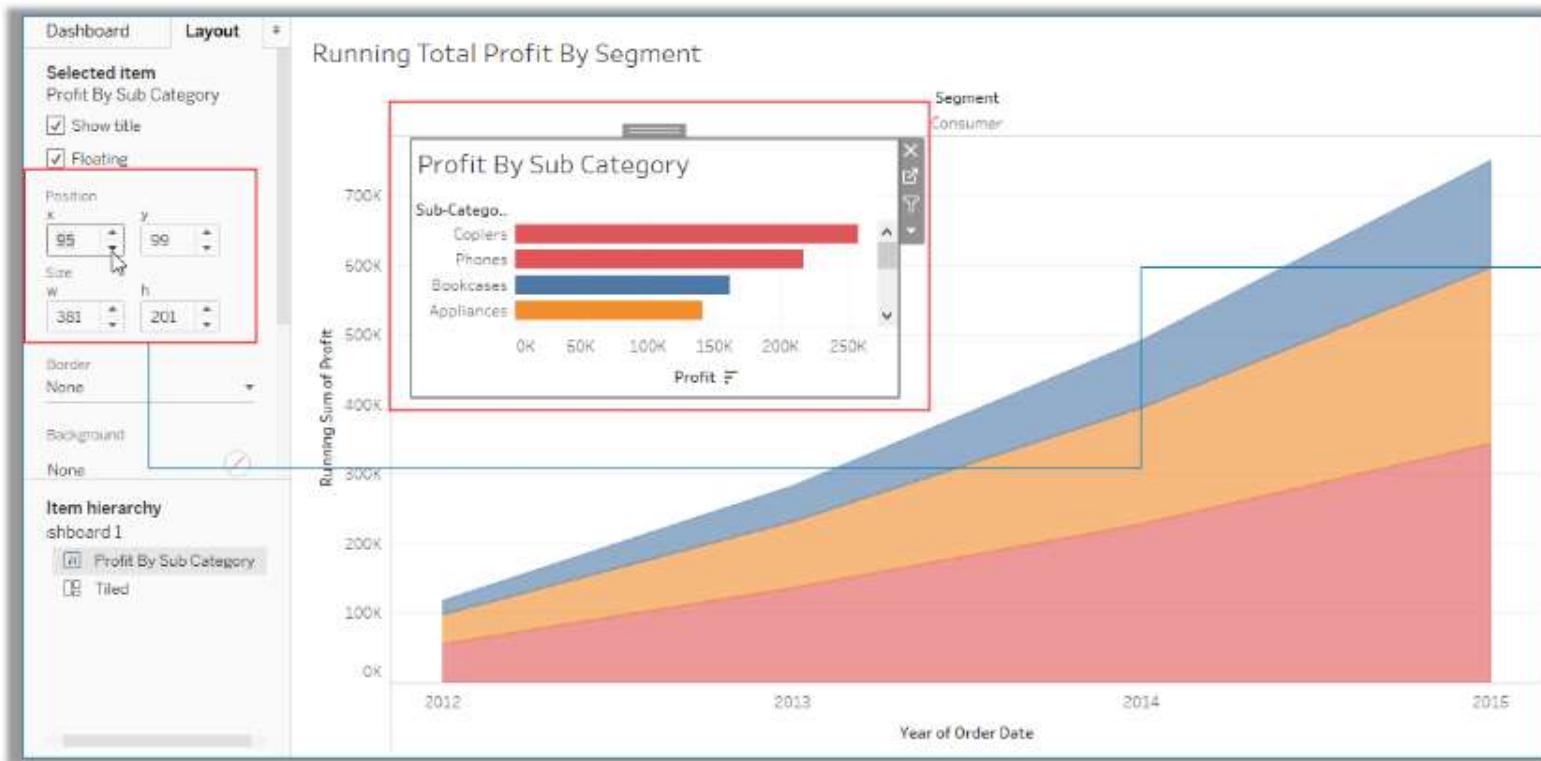
**Tooltip:** A tooltip provides information about floating objects: "A Floating object floats over the dashboard in layers wherein the order of the layers can be changed as well".

**Dashboard Layout Options:** On the left, the "Layout" tab is selected in the ribbon, and the "Objects" section of the pane shows the "Tiled" and "Floating" options are selected.

**Dashboard Structure:** The dashboard has a title "Running Total Profit By Segment" and includes a legend for segments: Consumer (blue), Office Supplies (orange), and Technology (red). The "Profit By Sub Category" chart shows data for categories like Copiers, Phones, Bookcases, and Appliances.

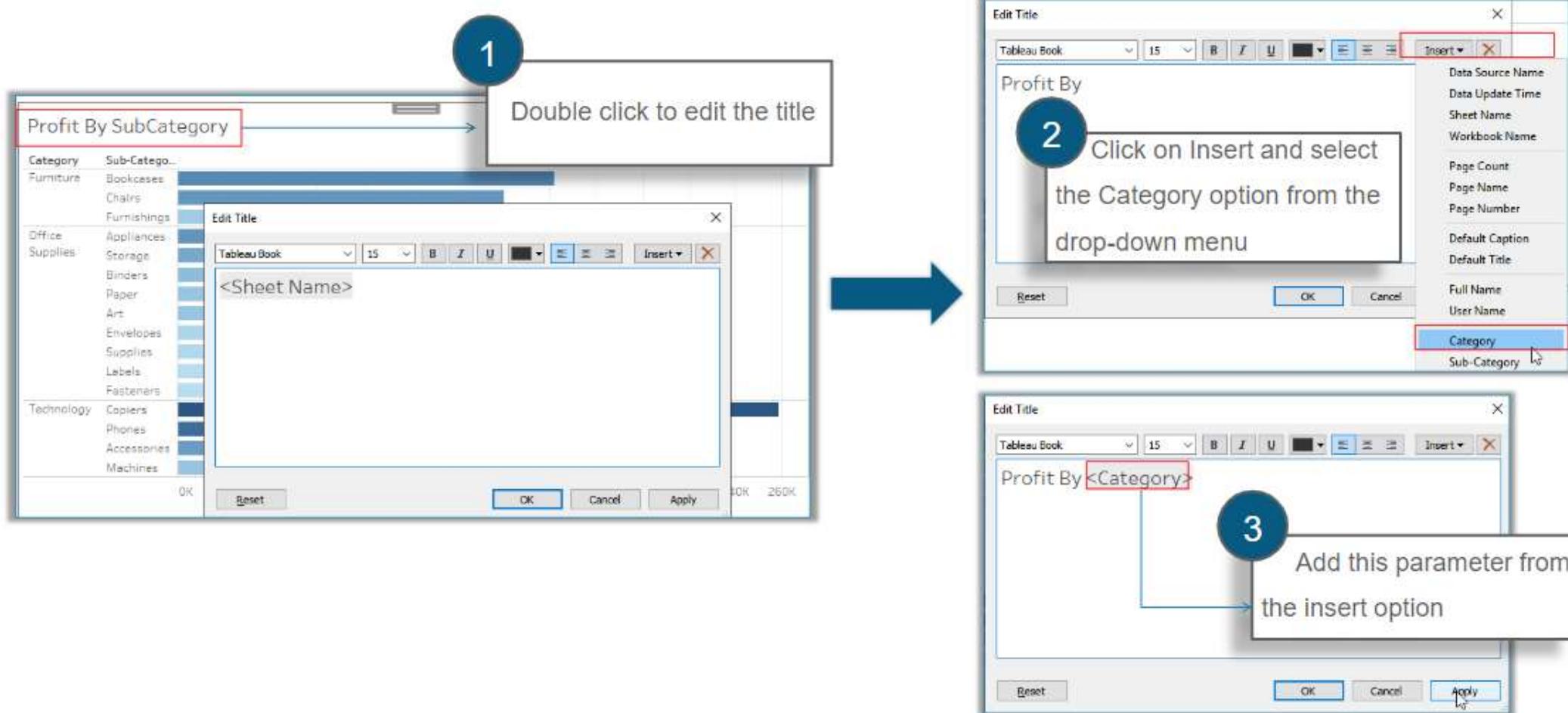
**Data Labels:** The "Running Total Profit By Segment" chart displays profit values for each year from 2012 to 2015, showing a consistent upward trend.

# Dashboard Layout - Positioning And Sizing

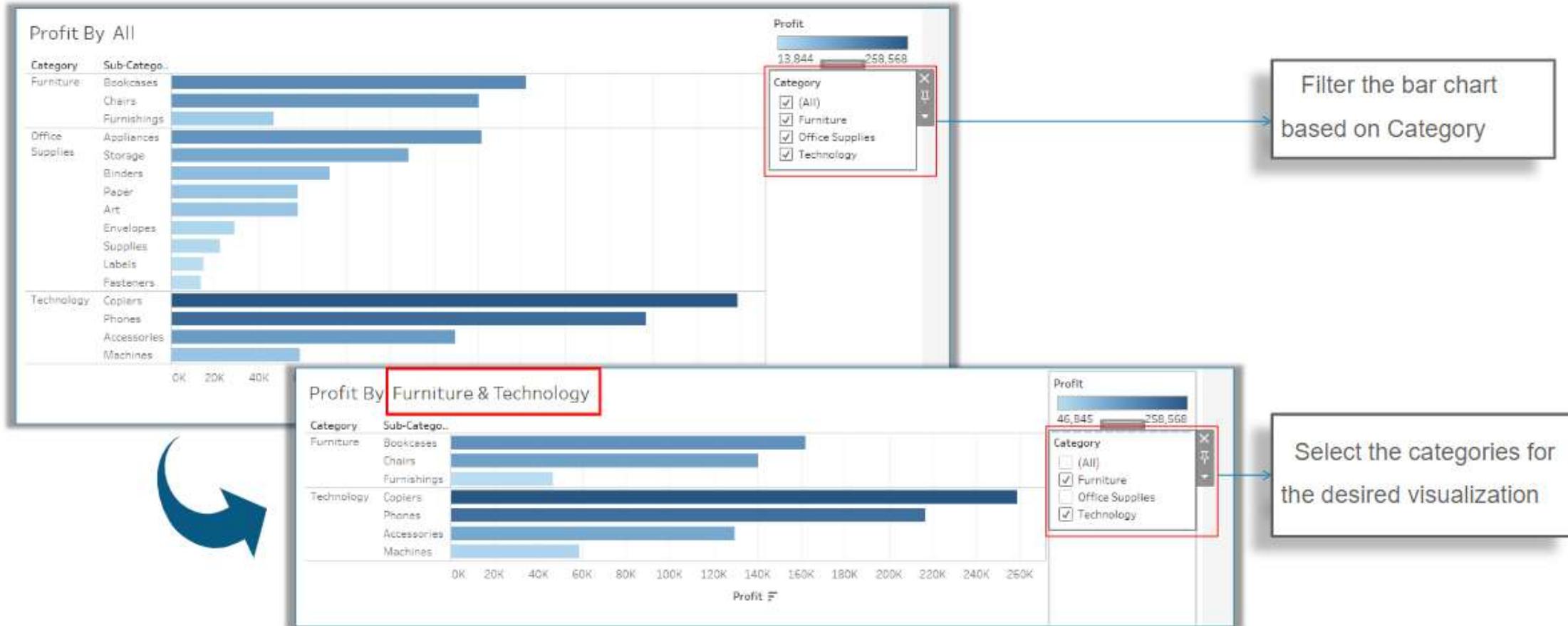


Choose the required position and size value of the selected object

# Dashboard Layout - Filtering



# Dashboard Layout - Filtering



# Dashboard Formatting

The screenshot illustrates the process of modifying dashboard views. On the left, a dashboard titled "Profit By All" is displayed. A context menu is open over a bar chart, with the "Format..." option highlighted. A callout box on the right instructs: "Right click on one of the views and select the Format option". A large blue arrow at the bottom points from the "Format..." option towards the "Format Category" dialog box on the right.

**Format Category**

**Header:**  Page

**Default**

- Font: Tableau Boo.
- Alignment: Automatic
- Numbers:
- Shading:

**Totals**

- Font: Tableau Boo.
- Alignment: Automatic
- Label: Total

**Grand Totals**

- Font: Tableau Boo.
- Alignment: Automatic
- Label: Grand Total

**Close**

**Profit By All**

Category	Sub-Categories	Profit (\$)
Furniture	Bookcases, Chairs, Furnishings	~100K
Office Supplies	Appliances, Storage, Binders, Paper, Art	~140K

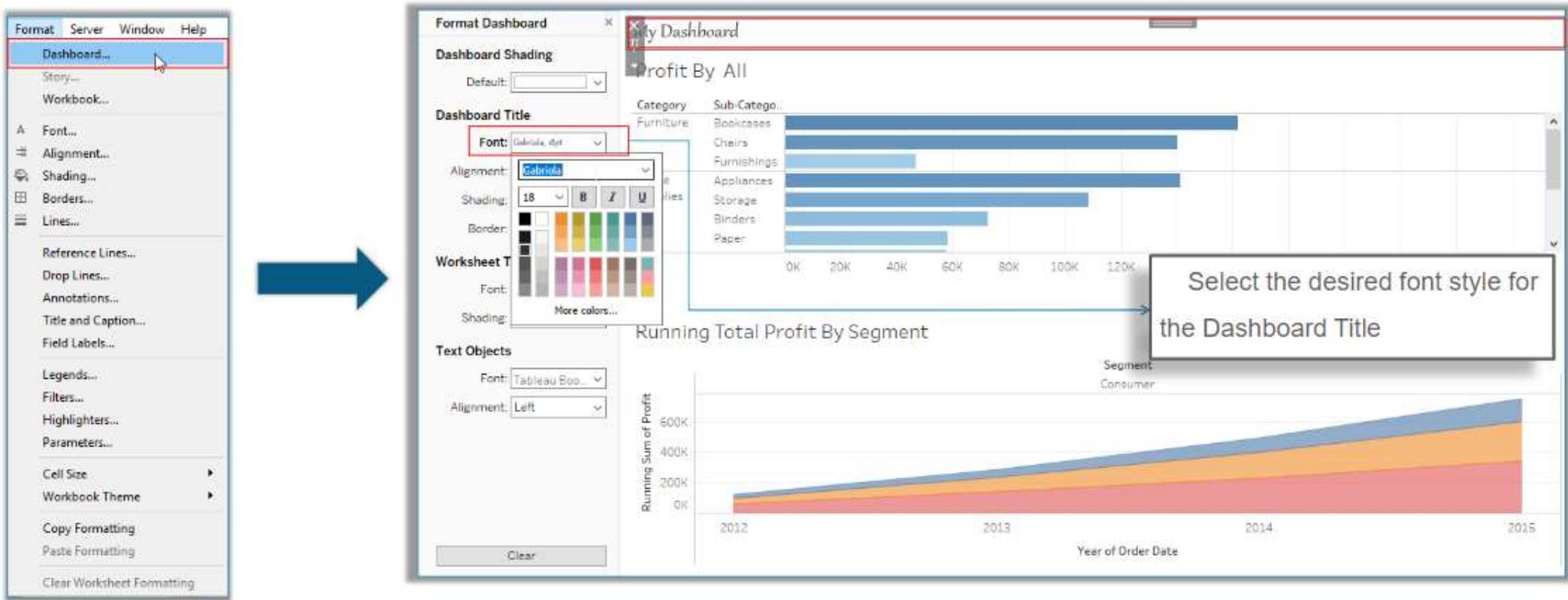
**Running Total Profit By Segment**

Segment: Consumer

The chart shows a cumulative increase in profit over time, segmented into five categories: Furniture, Office Supplies, Binders, Paper, and Art. The total profit grows from approximately 100K in 2012 to about 260K in 2015.

Year	Furniture	Office Supplies	Binders	Paper	Art	Total
2012	~40K	~10K	~5K	~5K	~5K	~100K
2013	~45K	~12K	~5K	~5K	~5K	~110K
2014	~50K	~14K	~5K	~5K	~5K	~120K
2015	~55K	~16K	~5K	~5K	~5K	~130K

# Dashboard Formatting (Contd...)



# Dashboard Formatting (Contd...)

The screenshot illustrates the process of applying dashboard shading in Tableau. It shows two instances of the 'Format Dashboard' dialog box over a 'My Dashboard' containing three visualizations: a bar chart, a horizontal bar chart, and a stacked area chart.

**Top Dialog:** Shows the 'Dashboard Shading' tab selected. A color swatch is highlighted with a red box, and a callout bubble says: "Select the desired color for the Dashboard".

**Bottom Dialog:** Shows the 'Dashboard Shading' tab selected. The color swatch has changed to a light blue, indicating a selection. A large blue arrow points from the top dialog to the bottom one, indicating the progression of the task.

**Visualizations in the Dashboard:**

- Profit By All:** A horizontal bar chart showing profit by category. The categories are Bookcases, Chairs, Furnishings, Appliances, Storage, Binders, and Paper. The total profit is 258,568.
- Running Total Profit:** A bar chart showing the running total profit over time from 2012 to 2015. The Y-axis ranges from 0K to 500K.
- Running Total Profit By Segment:** A stacked area chart showing the running total profit by segment (Consumer) from 2012 to 2015. The segments are Furniture (blue), Office Supplies (orange), and Technology (red).

**Legend:**

- Category:** (All), Furniture, Office Supplies, Technology
- Segment:** Consumer

# Dashboard Formatting (Contd...)

The screenshot illustrates the process of applying dashboard-level styling. On the left, a dashboard titled "My Dashboard" contains two views: "Profit By All" (a bar chart) and "Running Total Profit By Segment" (a stacked area chart). A context menu is open on the area chart, with the "Format..." option highlighted and surrounded by a red box. A callout bubble points to this menu item with the text: "Right-click on the view and select the Format option". An arrow points from this callout to the "Format..." option in the menu. To the right of the dashboard is the "Format Font" dialog box, which is divided into sections for "Default", "Total", and "Grand Total", each with dropdown menus for "Worksheet", "Pane", "Header", "Tooltip", and "Title". The "Format Font" tab is selected at the top of the dialog.

My Dashboard

Profit By All

Category	Sub-Categories	Profit
Furniture	Bookcases	120K
	Chairs	80K
	Furnishings	50K
Office Supplies	Appliances	90K
	Storage	70K
	Binders	40K
	Paper	60K

Running Total Profit By Segment

Year of Order Date

Format Font

Right-click on the view and select the Format option

Format Font Dialog:

- Default:**
  - Worksheet: Tableau Book
  - Pane: Tableau Book
  - Header: Tableau Book
  - Tooltip: Tableau Book
  - Title: Tableau Book
- Total:**
  - Pane: Tableau Book
  - Header: Tableau Book
- Grand Total:**
  - Pane: Tableau Book
  - Header: Tableau Book

Clear

# Dashboard Formatting (Contd...)

The screenshot illustrates the process of applying a color scheme to a dashboard. It shows two versions of the same dashboard side-by-side, separated by a blue circular arrow icon.

**Left Dashboard (Original):**

- Format Shading Panel:** Shows the 'Worksheet' pane set to 'None'. Other panes like 'Header' and 'Total' show color swatches.
- Profit By All Bar Chart:** Categories include Furniture, Bookcases, Chairs, Furnishings, Appliances, Storage, Binders, and Paper. The chart uses a blue color scheme.
- Running Total Profit By Segment Stacked Area Chart:** Segments include Furniture, Office Supplies, and Technology. The chart uses a blue, orange, and red color scheme.

**Right Dashboard (Formatted):**

- Format Shading Panel:** Shows the 'Worksheet' pane set to a specific color (blue). Other panes like 'Header' and 'Total' show color swatches.
- Profit By All Bar Chart:** Categories include Furniture, Bookcases, Chairs, Furnishings, Appliances, Storage, Binders, and Paper. The chart uses a blue color scheme.
- Running Total Profit By Segment Stacked Area Chart:** Segments include Furniture, Office Supplies, and Technology. The chart uses a blue, orange, and red color scheme.

**Legend:**

- Category:** Furniture (Blue), Office Supplies (Orange), Technology (Red).
- Sub-Categories:** Bookcases, Chairs, Furnishings, Appliances, Storage, Binders, Paper.
- Profit:** 844, 258,568.

# Dashboard Formatting (Contd...)

Dashboard Layout

My Dashboard

Profit By All

Category	Sub-Catego...	Profit
Furniture	Bookcases	180K
	Chairs	140K
	Furnishings	60K
Office Supplies	Appliances	120K
	Storage	100K
	Binders	60K
	Paper	60K

Running Total Profit By Segment

Year	Furniture	Office Supplies	Technology	Total
2012	10K	10K	10K	30K
2013	20K	20K	20K	60K
2014	30K	30K	30K	90K
2015	40K	40K	40K	120K

Profit

Category

- (All)
- Furniture
- Office Supplies
- Technology

Category

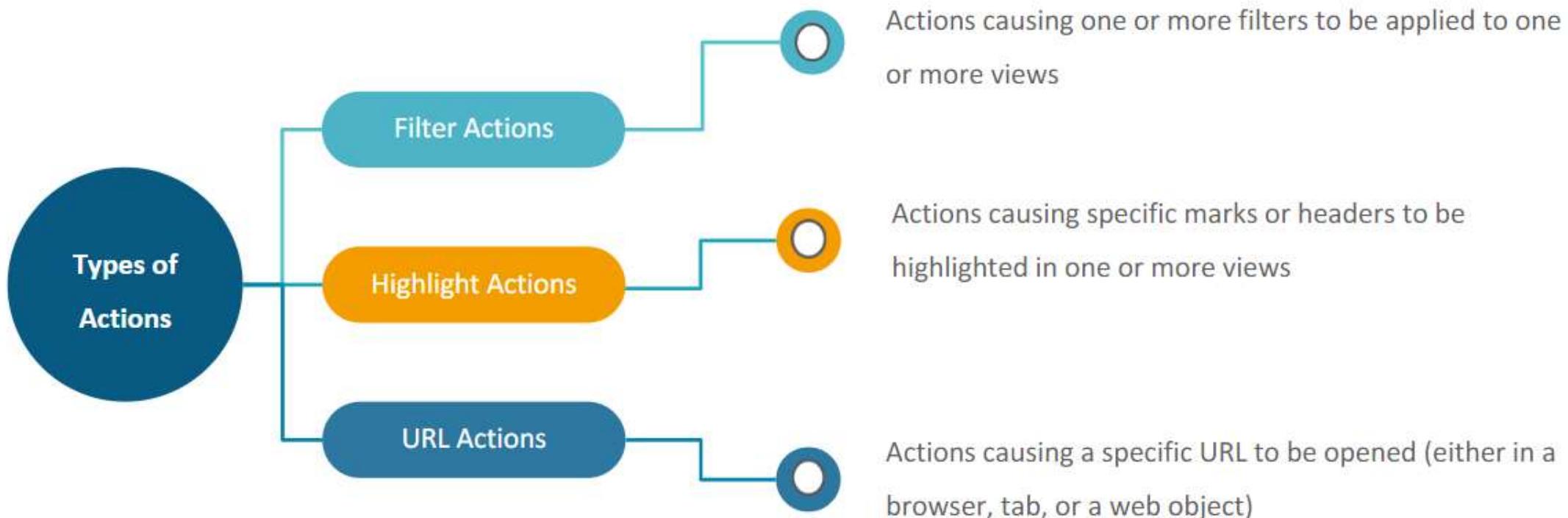
- Furniture
- Office Supplies
- Technology



# Interactive Dashboards Using Actions

# Types Of Actions

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# Add A Filter Action

The screenshot shows a dashboard interface with two charts: a horizontal bar chart titled "Sub-Catego..." and a line chart titled "Profit £". The bar chart lists categories like Copiers, Phones, Appliances, etc., with their respective profits. The line chart shows fluctuating profit over time.

A context menu is open at the top right of the dashboard area, with the "Actions..." option highlighted. Two callout boxes provide instructions:

- Click on Dashboard->Actions
- Click on Add Action->Filter

Below the dashboard, a modal window titled "Actions" is displayed, showing options to connect sheets to external web resources or other sheets in the same workbook using URL actions or Filter actions. The "Add Action > Filter..." option is also highlighted with a red box.

# Adding A URL Action

1 Drag the State Profits sheet on to the view pane

2 Drag the Web Page object on to the view pane

3 Enter the Wikipedia URL here to find information on a given state

4 Relevant information on a state will be displayed here

The dashboard has a sidebar with 'Dashboard' and 'Layout' tabs, 'Device Preview' button, 'Size' set to 'Automatic', and a 'Sheets' section with 'Running Total Profit', 'Profit By Sub Categ...', and 'State Profits' selected. The 'Objects' section shows 'Horizontal', 'Image', 'Vertical', 'Web Page' (selected), 'Text', and 'Blank' options. Buttons for 'Tiled' and 'Floating' are shown, along with a checkbox for 'Show dashboard title' which is unchecked.

The main area shows a map of the United States with states colored according to their profit levels. An 'Edit URL' dialog box is overlaid on the map, containing the URL 'https://en.wikipedia.org/w/index.php?title=New\_Mexico&action=edit'. The 'OK' and 'Cancel' buttons are visible at the bottom of the dialog.

To the right of the map, a callout box contains the text 'Relevant information on a state will be displayed here'. Below the map is a screenshot of the Wikipedia article for 'New Mexico'. The article title is 'New Mexico' and it is from Wikipedia, The Free Encyclopedia. It includes a summary, navigation links like 'Main page', 'Contents', 'Featured content', etc., and a detailed description of the state.

# Adding A URL Action (Contd...)

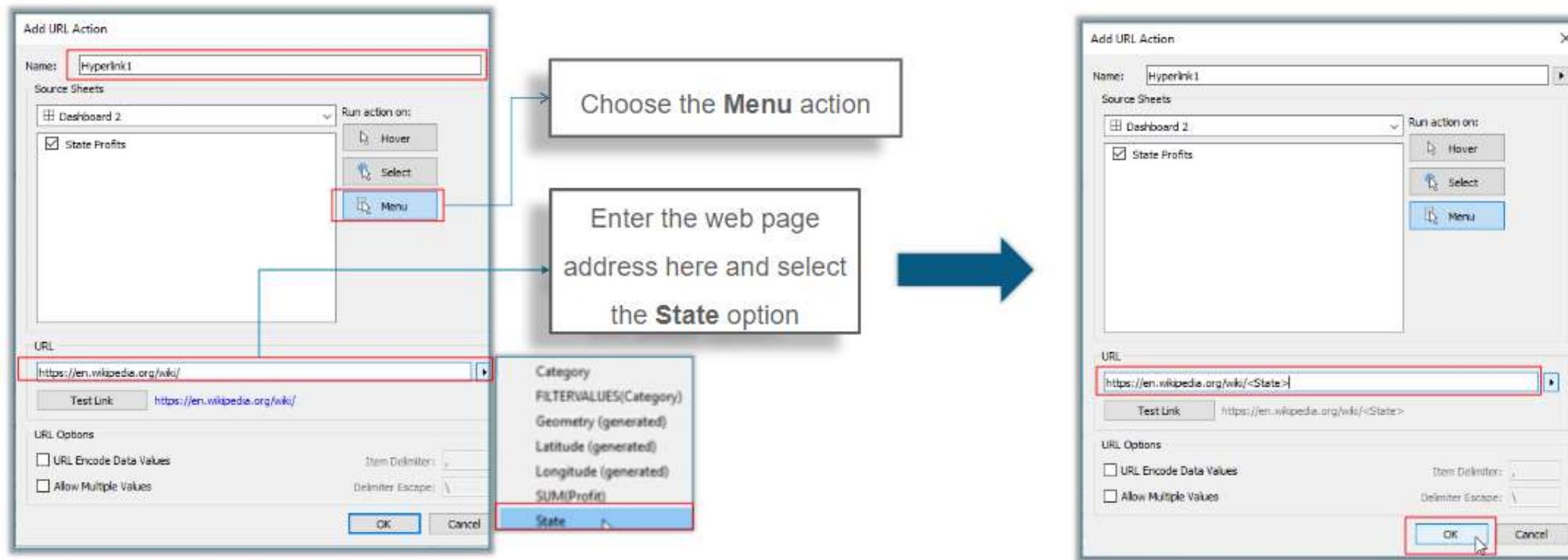
URL Actions creates a hyperlink to a webpage

The screenshot shows a dashboard application with a map of the United States where several states are highlighted in orange. Below the map is a Wikipedia article titled "New Mexico". The dashboard has a menu bar with options like Dashboard, Story, Map, Format, Server, Window, Help, and a toolbar with various icons. A context menu is open on the map, with the "Actions..." option highlighted by a red box and circled with a blue number 1.



The screenshot shows the "Actions" dialog box. It contains instructions: "Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions." There is a table with columns for Name, Run On, Source, and Fields. At the bottom, there are buttons for Add Action >, Filter..., Highlight..., Show action (unchecked), Go to URL... (highlighted by a red box and circled with a blue number 2), Edit..., Remove, OK, and Cancel.

# Adding A URL Action (Contd...)



# Adding A URL Action (Contd...)

State Profits



Click on Hyperlink1 to get the relevant information to be displayed on to the view pane

State Profits



Hyperlink1

State: Colorado  
Profit: -2,690

Article Talk Read Edit

New Mexico

From Wikipedia, the free encyclopedia

This article is about the U.S. state of New Mexico. For other uses, see [New Mexico \(disambiguation\)](#). For the country at North America, see [Mexico](#).

New Mexico (Spanish: [Nuevo México](#) Spanish pronunciation: [nweβo̯ ˈmexiko] ( listen), Navajo: Yoołó Hahoodzó pronounced [joo̯ lo̯ xáːn̥o̯ tsó̯]) is a state in the Southwestern region of the United States of America; its capital and cultural center is Santa Fe, which was founded in 1610 as capital of Nuevo México (itself established as a province of New Spain in 1598); while its largest city is Albuquerque with its accompanying metropolitan area. It is one of the Mountain States and

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Coordinates: 39°00'N 105°30'W

Colorado

From Wikipedia, the free encyclopedia

This article is about the U.S. state of Colorado. For the river, see [Colorado River](#). For the physiographic region, see [Colorado Plateau](#). For other uses, see [Colorado \(disambiguation\)](#).

Colorado ( / kələʊ ˈrɛdəʊ , -rə dɔʊ / ( listen), other variants: ( listen)) is a state of the Western United States encompassing most of the southern Rocky Mountains as well as the northeastern portion of the Colorado Plateau and the western edge of the Great Plains. It is the 8th most extensive and 21st most populous U.S. state. The estimated population of Colorado was 5,695,564 on July 1, 2018, an increase of 13.25% since the 2010 United States Census ( listen).

Colorado

U.S. state

State of Colorado





# Designing Dashboards For Devices

# Designing A Dashboard for Tablets

The screenshot illustrates the process of designing a dashboard for tablets in Tableau. It shows two views of the same dashboard being edited.

**Top View:** The dashboard is set to preview on an iPod (1024 x 768). The "Layout" tab is selected. A red box highlights the "Add Tablet Layout" button. A callout box to the right explains: "Adds a layout under the Dashboard tab that appears towards the left sidebar".

**Bottom View:** The dashboard is set to preview on a tablet. The "Tablet" option is selected in the "Layout" dropdown. A red box highlights the "Default" button in the "Layout - Tablet" section. A callout box provides instructions: "The content and layout of the dashboard on all devices will match the Default dashboard. Click "Custom" to change how the dashboard will look for the devices."

**Dashboard Content:**

- Running Total Profit By Segment:** A stacked area chart showing profit by segment (Furniture, Office Supplies, Technology) from 2012 to 2015. The legend indicates segments: Furniture (blue), Office Supplies (orange), and Technology (red).
- Profit By Sub Category:** A horizontal bar chart showing profit by sub-category. The categories listed are Copiers, Phones, Bookcases, Appliances, Chairs, Accessories, Storage, and Binders. The legend indicates sub-categories: Copiers (red), Phones (blue), Bookcases (blue), Appliances (orange), Chairs (blue), Accessories (red), Storage (orange), and Binders (orange).

# Designing A Dashboard For Mobile Phones

The screenshot shows the Tableau mobile app interface. At the top, there's a navigation bar with 'Dashboard' and 'Layout' tabs, followed by 'Device Preview' which is currently selected. Below it, 'Device type' is set to 'Phone' and 'Model' is set to 'iPhone 7 Plus (414 x 736)'. There's also a checked checkbox for 'Tableau Mobile app'. The main area displays a dashboard titled 'Running Total Profit By Segment'. It features a stacked area chart showing profit from 2013 to 2015 across three segments: Furniture (blue), Office Supplies (orange), and Technology (red). A legend on the right lists categories: Furniture, Office Supplies, and Technology. Below the chart is another visualization titled 'Profit By Sub Category', showing horizontal bars for Copiers, Phones, Bookcases, Appliances, Chairs, Accessories, and Storage. A legend on the left lists sub-categories: Copiers, Phones, Bookcases, Appliances, Chairs, Accessories, and Storage. On the left side of the dashboard, there are sections for 'Size - Phone' (with 'Fit all' selected), 'Layout - Phone' (with 'Default' selected), and some descriptive text about matching the default dashboard layout. Three numbered callouts point to specific features: 1 points to the 'Device Preview' tab; 2 points to the device selection controls at the top; and 3 points to the 'Fit all' sizing option in the 'Size - Phone' section.

1 Preview the dashboard on various devices

2 Select the Device type and Model, and get a visualization for the iPhone

3 Various sizing options. Select the "Fit all" option that fits the entire visualization in the required resolution



# Story Points

# Story Points

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Story Points are snapshots of dashboards and views that narrates a story

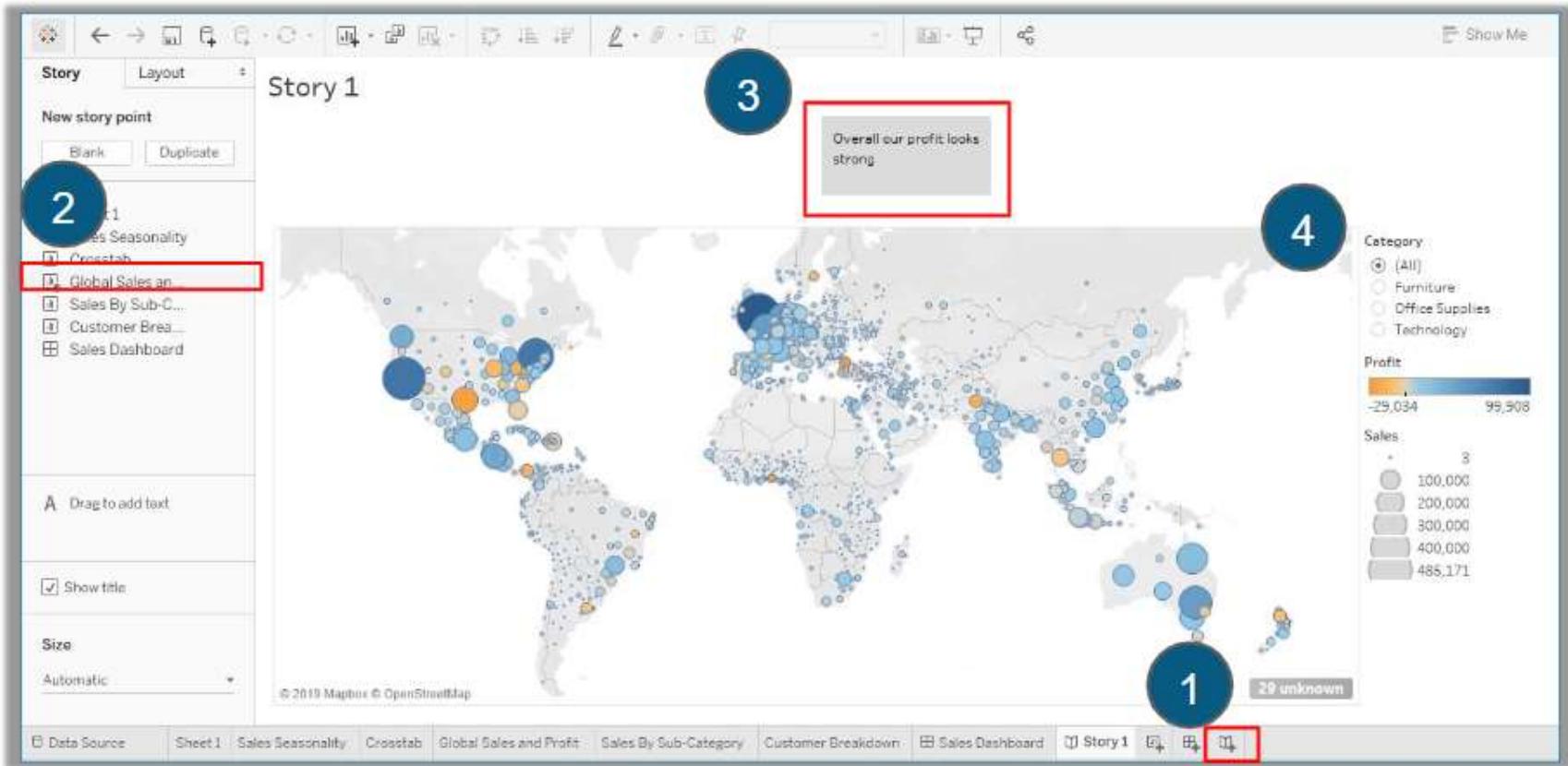


Allows to construct a guided narrative

Provides context and demonstrates the relation between facts

Demonstrates how decisions relates to outcomes

# Create A Story Point



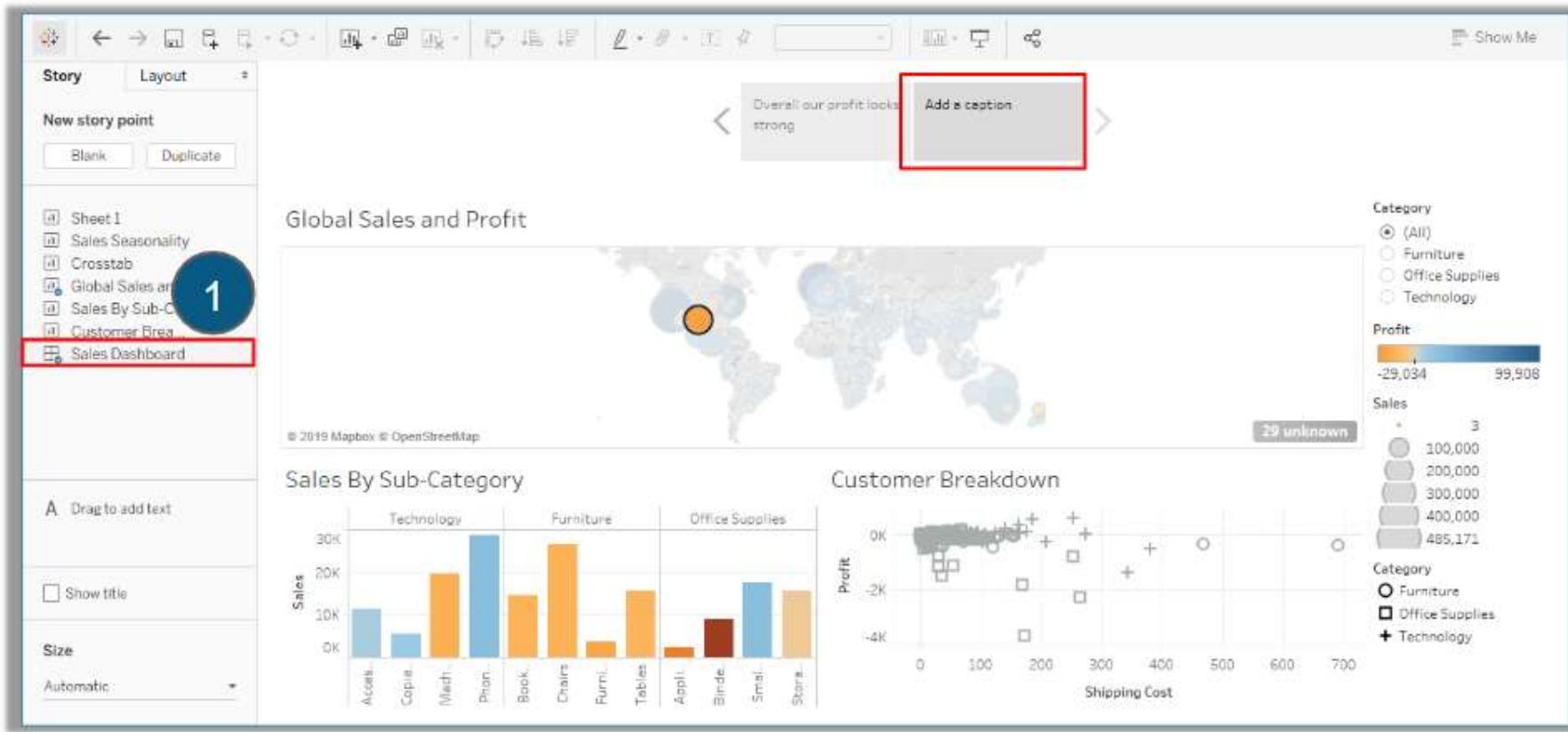
1 Click on this icon to create a new story

2 Drag and drop the selected sheet on to the view pane

3 Add a caption to narrate a story

4 Filter By Category

# Create A Story Point (Contd...)



1 Drag and drop the Sales Dashboard on to the view pane

# Create A Story Point (Contd...)

The screenshot shows a data visualization interface with the following components:

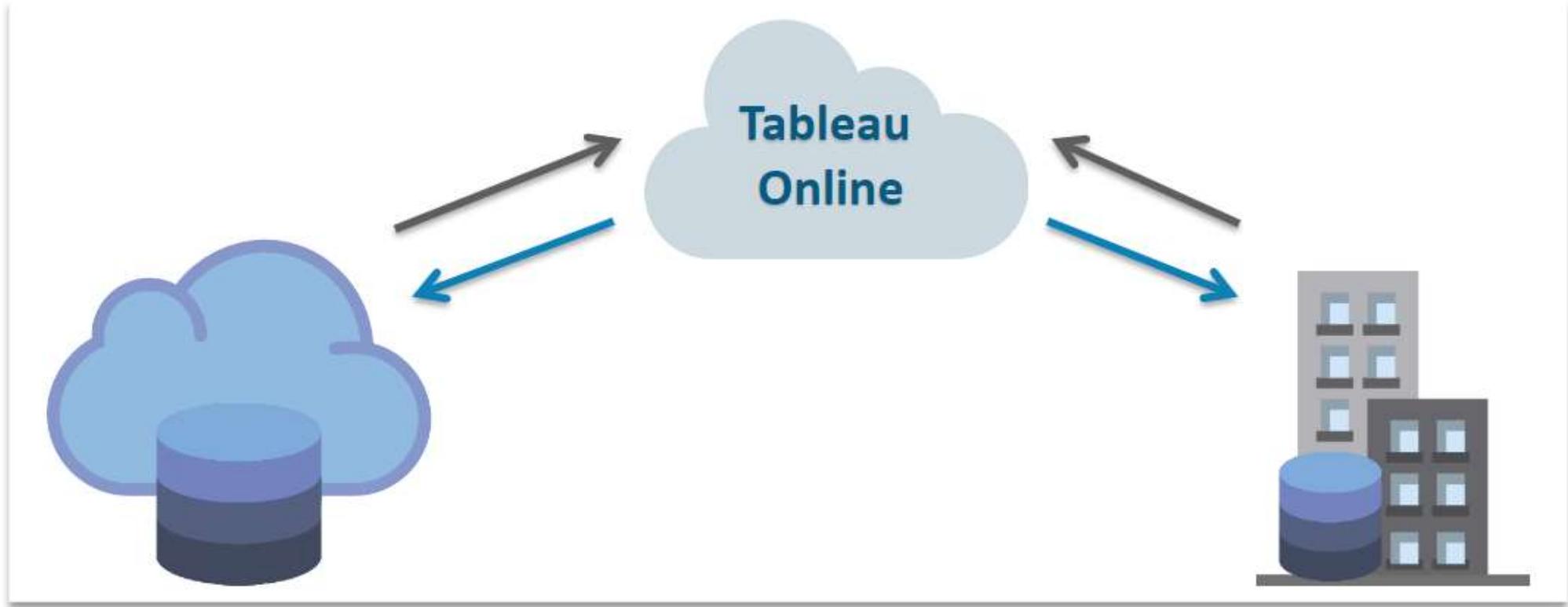
- Top Bar:** Includes standard application icons like back, forward, search, and file operations.
- Left Sidebar (Story View):** Shows a list of available stories:
  - Sheet1
  - Sales Seasonality
  - Crosstab
  - Global Sales an...
  - Sales By Sub-C...
  - Customer Brea...
  - Sales Dashboard
- Central Content Area:**
  - Global Sales and Profit:** A world map with a red dot over Asia, overlaid with a scatter plot. Text above the map says "Overall our profit looks strong" and "But there are problem areas".
  - Sales By Sub-Category:** A bar chart titled "Office Supplies" showing sales for four categories: Appliances, Binders, Small Office Supplies, and Storage.
  - Customer Breakdown:** A scatter plot showing Profit vs. Shipping Cost for customers categorized under "Office Supplies".
- Right Sidebar (View Pane):** Displays filtering options:
  - Category:** Radio buttons for (All), Furniture, Office Supplies (selected), Technology.
  - Profit:** A color scale from -18,595 (red) to 37,806 (blue).
  - Sales:** A color scale from 3 (light gray) to 162,242 (dark gray).
  - Customer Breakdown:** A legend indicating the category for the data points in the scatter plot.
- Callout Box:** A callout box on the right side states: "Based on the selected Category, corresponding sheets on the view Pane will be displayed".



# Introduction To Tableau Online

# What Is Tableau Online?

Tableau Online is a secure cloud-based solution for sharing, distributing and collaborating on content created in Tableau  
It allows to work with data stored in the cloud and on-premises



# Features Of Tableau Online

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1

Securely share and collaborate in cloud



2

Connect to any data from anywhere



3

Web Authoring  
(Edit and Author)



4

Tableau Catalog  
(Data management)



5

Explain Data  
(AI -Driven)



6

Ask Data  
(Auto-Visualizations)

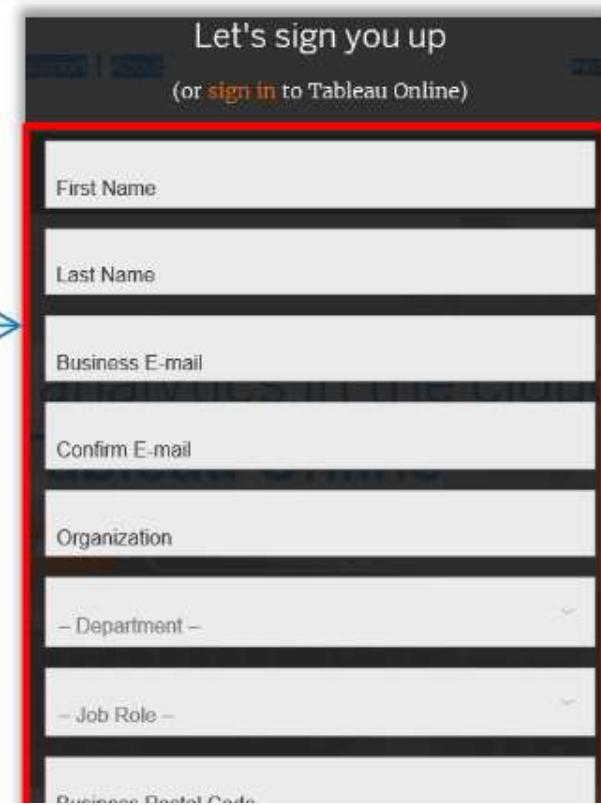
# Create An Account On Tableau Online

Sign in to https://online.tableau.com



The screenshot shows the Tableau Online sign-in page. It features a logo with three orange plus signs followed by the word "tableau". Below the logo, there's a "Sign in to Tableau Online" heading. Two input fields are present: "Email address" and "Password". Underneath these fields are two buttons: "Remember me" and "Forgot password?". A large blue "Sign In" button with a white arrow is positioned below the password field. To its right, a smaller "Sign Up" button is highlighted with a red box and a pointing arrow. At the bottom of the page, a copyright notice reads "© 2003-2010 Tableau Software. All Rights Reserved".

Go to <https://online.tableau.com>. Click on the Sign Up link and fill up your details



The screenshot shows the Tableau Online sign-up form. The title "Let's sign you up" is at the top, followed by "(or [sign in](#) to Tableau Online)". The form consists of several input fields: "First Name", "Last Name", "Business E-mail", "Confirm E-mail", "Organization", "Department" (a dropdown menu), "Job Role" (another dropdown menu), and "Business Postal Code". A vertical red box highlights the entire column of input fields from "First Name" down to "Job Role".

# Create An Account On Tableau Online (Contd...)

Sign In

Remember me

SIGN IN

[FORGOT PASSWORD](#)

[CREATE AN ACCOUNT](#)

First Name

Last Name

Email

Password

Confirm Password

Passwords are case sensitive, 8-100 characters long, at least one letter, and at least one number (0-9). You may use symbols and spaces.

CREATE MY ACCOUNT

ALREADY HAVE AN ACCOUNT? [SIGN IN](#)

Click on the “CREATE AN ACCOUNT” link to create an account on Tableau Online

Fill up your details and click on the “CREATE MY ACCOUNT” button



# Administer A Site On Tableau Online

# Site Administrator Responsibilities

---

A Site Administrator creates a framework enabling users to publish, share, manage and connect to data sources and workbooks

01

Creating project hierarchies to organize the site's data sources and workbooks

02

Creating groups and assigning permissions that allow users to access the content

03

Adding and removing users, and assigning site roles to the users

04

Managing the site's extract and subscription schedules

05

Monitoring the site's activities

# Adding Users To The Site

Anyone who needs to access Tableau Online (browse, publish, edit content or administer the site) must be added as a User

The screenshot shows the 'Site Users' page with 11 users listed. A red box highlights the 'Add Users' button at the top left. Another red box highlights the 'Enter Email Addresses' input field on the left side of the main panel. A third red box highlights the 'User' icon in the sidebar.

**Add Users to this Site**

**Enter Email Addresses**

**Import From File**

**Import users from a CSV file.**

	Site role	Groups	Authentication	Last signed in
1	Explorer (can publish)	2	Tableau	2023-07-10 10:00:00

**Add Users**

Add users for Tableau authentication  
Users will receive an invite email that contains a link to the site and instructions to set up their Tableau ID.  
Configure additional authentication methods...

Enter email addresses

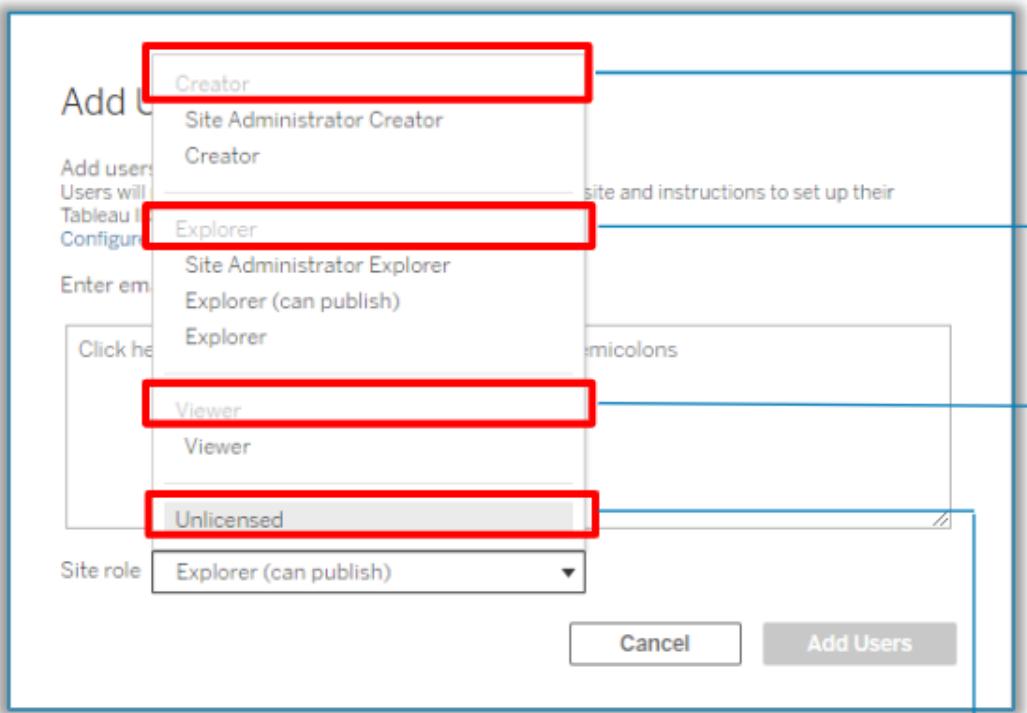
Click here and type email addresses separated by semicolons.

Site role: Explorer (can publish)

Add Users

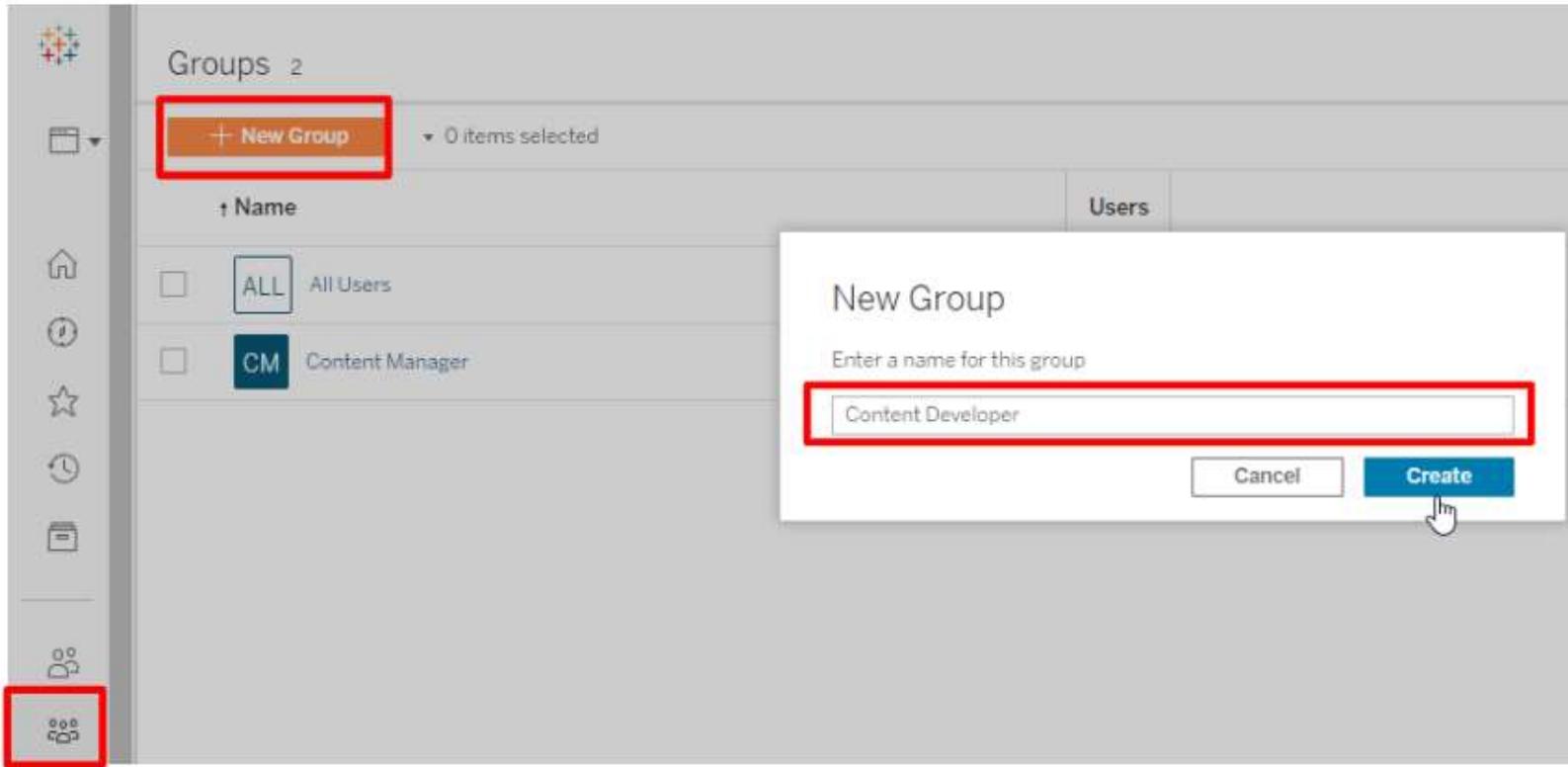
- On the Users page, click on the “Add Users” button
- Click on the “Enter Email Addresses” button
- Enter the users email addresses
- To add more than one user, separate each address with a semicolon

# Assigning Site Roles To The Users



- **Site Administrator Creator** Role offers unrestricted access to content at site level
- **Creator** Role offers non administrators the maximum level of content access
  
- **Site Administrator Explorer** have capabilities just like a Site Administrator Creator, however they cannot connect to external data from the web editing environment
- **Explorer (can publish)** can publish workbooks from the web, browse and interact with published views and use the various interaction features. However, they cannot connect to external data and create new data sources
- **Explorer** can browse and interact with published views, but cannot save their work
  
- **Viewer** can see published views and use most of the interaction features however, they do not have editing and publishing capabilities
  
- **Unlicensed** users cannot sign in to Tableau Online
- Users are assigned this role when we import them from a CSV file or when we remove a user who owns the content on the site

# Create A Group On The Site

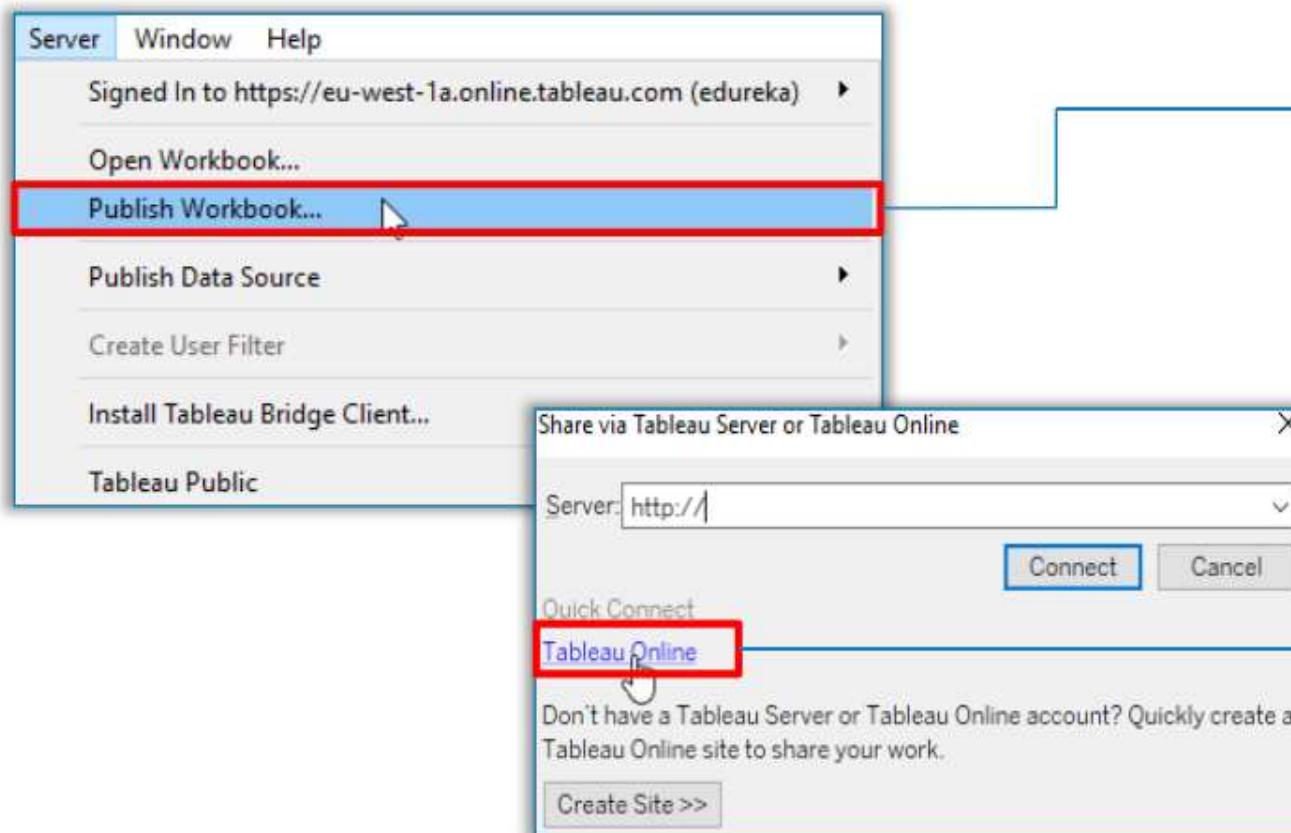


- Click on the “Groups” icon and then click on the “New Group” button
- Enter a name for the newly created Group and click on the “Create” button



# Publishing A Workbook To Tableau Online

# Publishing A Workbook To Tableau Online



Click on “Server” and select the Publish Workbook option from the drop-down menu

Click on the link to login to your account on Tableau Online

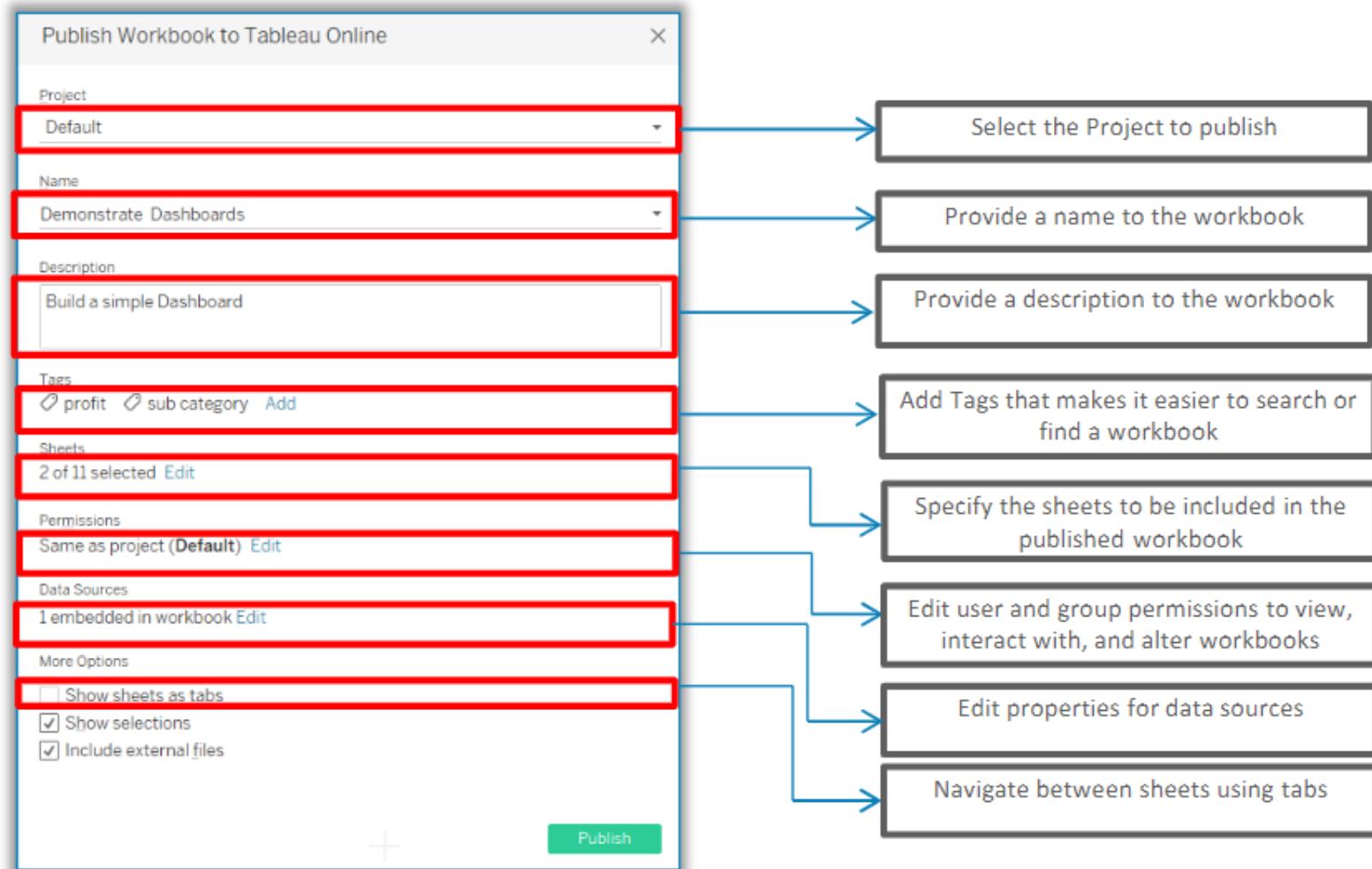
# Publishing A Workbook To Tableau Online (Contd...)

The screenshot shows two overlapping windows. The background window is the 'Sign in to Tableau Online' page, featuring a logo with four colored dots (orange, blue, green, red) followed by the text '+ a b | e a u'. It has fields for 'Email address' (containing 'edureka2019@gmail.com') and 'Password', both with clear text. Below these are 'Remember me' and 'Forgot password?' links, and a 'Sign In →' button. The foreground window is a 'Share via Tableau Server or Tableau Online' dialog. It has a 'Server:' dropdown menu set to 'https://eu-west-1a.online.tableau.com/#/site/edu/home'. Below it are 'Connect' and 'Cancel' buttons, with a hand cursor hovering over 'Connect'. The dialog also includes 'Quick Connect' and 'Tableau Online' sections, a note about creating a site, and a 'Create Site >>' button.

Enter your login credentials and click on the Sign In button

Alternatively, enter the URL or IP address of the Tableau Online URL, and click on the Connect button

# Publishing A Workbook To Tableau Online (Contd...)





# Interacting With Content On Tableau Online

# Interacting With Content On Tableau Online

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<b>Undo and Redo</b>	Provides the ability to step backward and forward through interactions
<b>Revert</b>	Provides the ability to undo all changes and revert to the original dashboard
<b>Refresh</b>	Reloads the dashboard and refreshes the data. However, extracts of data are not refreshed
<b>Pause</b>	Allows to pause the refreshing of the dashboard based on actions, filter selections, or parameter value changes

# Interacting With Content On Tableau Online (Contd...)

---



<b>View</b>	Allows to save the current state of the dashboard based on selections, filters and parameter values
<b>Alerts</b>	Allows to set up a conditional alert that will be received through email
<b>Subscribe</b>	Allows to schedule periodic emails of a screenshot of the dashboard
<b>Edit</b>	Allows to edit the dashboard
<b>Share</b>	Provides options for sharing the workbook
<b>Download</b>	Allows to download the data, images of the dashboard, pdf or the workbook
<b>Comments</b>	Provides the ability to collaborate by sending or responding to the comments on the view
<b>Full Screen</b>	Allows to view the dashboard or view in full screen mode

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows a Tableau Online dashboard with several visualizations: a bar chart 'Profit By Region', a map 'Profit By State', a donut chart 'Profit By Segment', and a bar chart 'Segment VS Region'. A tooltip box on the right contains the following text:

Click on the “View” option to save the current state of the dashboard and toggle between different views as well

The 'View: Original' button in the top navigation bar is highlighted with a red box.

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows the Tableau Online interface with various navigation and interaction buttons at the top:

- View: Original
- Alerts** (highlighted with a red box)
- Subscribe
- Edit
- Share
- Download
- Comments
- Full Screen

The main content area displays four visualizations:

- Profit By Region: A bar chart showing profit by region.
- Profit By Segment: A bubble chart showing profit by segment.
- Profit By State: A map of the US showing profit by state.
- Profit By Product: A bar chart showing profit by product category.

A modal window titled "Create Alert" is open over the dashboard, allowing users to set conditions for sending emails. The "Condition" dropdown is set to "Above or equal to" with the value "8400". The "When the condition is true, send email" dropdown is set to "Daily at most". The "Recipients" field contains "Eduka twenty twenty-X". A checkbox for "Make visible to others" is unchecked. At the bottom right of the modal is a blue "Create Alert" button, which is also highlighted with a red box.

A callout box on the right side of the interface provides instructions:

Click on the "Create Alert" button in order to set up a conditional alert that will be received through an email

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows a Tableau dashboard titled "Supersite Workbook / Dashboard". The top navigation bar includes "View: Original", "Alerts", a red-bordered "Subscribe" button, "Edit", "Share", "Download", "Comments", and "Full Screen". A tooltip for the "Subscribe" button says: "Click on the 'Subscribe' button in order to schedule periodic emails of a screenshot of a view". A modal window titled "Subscribe" is open, showing options to "Include This View" (with a checked checkbox for "Don't send if view is empty"), "Format" (set to "Image"), "Subject" (set to "Dashboard"), "Message (Optional)" (containing "Add a custom message"), and "Schedule" (set to "5 days a week at 20:00"). At the bottom of the modal is a red-bordered "Subscribe" button. The dashboard itself contains several visualizations: a bar chart "Profit By Region" with categories West, East, South, Central; a sunburst chart "Profit By Segment"; a bar chart "Segment VS Region"; a map "Profit By State" showing state-level data; and a bar chart "Category".

Click on the  
“Subscribe” button in  
order to schedule  
periodic emails of a  
screenshot of a view

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows the Tableau Online interface with a dashboard titled "Superstore". The dashboard contains five main visualizations:

- Profit By Region**: A bar chart showing profit by region. The "Central" region has a value of approximately 35K.
- Profit By Segment**: A bubble chart showing profit by segment. The segments are Consumer (blue, ~8.5K), Corporate (red, ~18.7K), and Home Office (green, ~12.4K).
- Segment VS Region**: A horizontal bar chart comparing segments across regions. Consumer is in Central, Corporate is in Central, and Home Office is in Central.
- Profit By State**: A map of the United States where states are colored based on profit. Values are labeled on the map: Minnesota (~10.8K), North Dakota (~10.4K), South Dakota (~8.4K), Iowa (~1.1K), Missouri (~2.0K), Kansas (~1.1K), Nebraska (~1.1K), Texas (~25.7K), and Florida (~4.8K).
- Profit By Category and Sub-Category**: A bar chart showing profit by category and sub-category. Categories include Furniture, Office Supplies, and Technology. Sub-categories include Chairs, Bookcases, Tables, and so on.

The top navigation bar includes links for "View: Original", "Alerts", "Subscribe", "Edit" (which is highlighted with a red box), "Share", "Download", "Comments", and "Full Screen". The left sidebar shows the "Superstore" dashboard, its layout, size, and sheets. The bottom sidebar shows objects and their properties.

Click on the “Edit” icon in order to make changes to the dashboard

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows a Tableau dashboard titled "Explor / default / Superstars / Dashboard". The dashboard contains four visualizations: "Profit By Region" (bar chart), "Profit By Segment" (bubble chart), "Segment VS Region" (bar chart), and "Profit By State" (map). A "Share" button in the top navigation bar is highlighted with a red box. A "Share View" dialog box is open over the dashboard, also highlighted with a red box. The dialog box has the title "Dashboard" and includes fields for "Share with people" (with a placeholder "Enter a username...") and "Share using a link" (with a URL and a "Copy Link" button). A callout arrow points from the text in the adjacent box to the "Share" button.

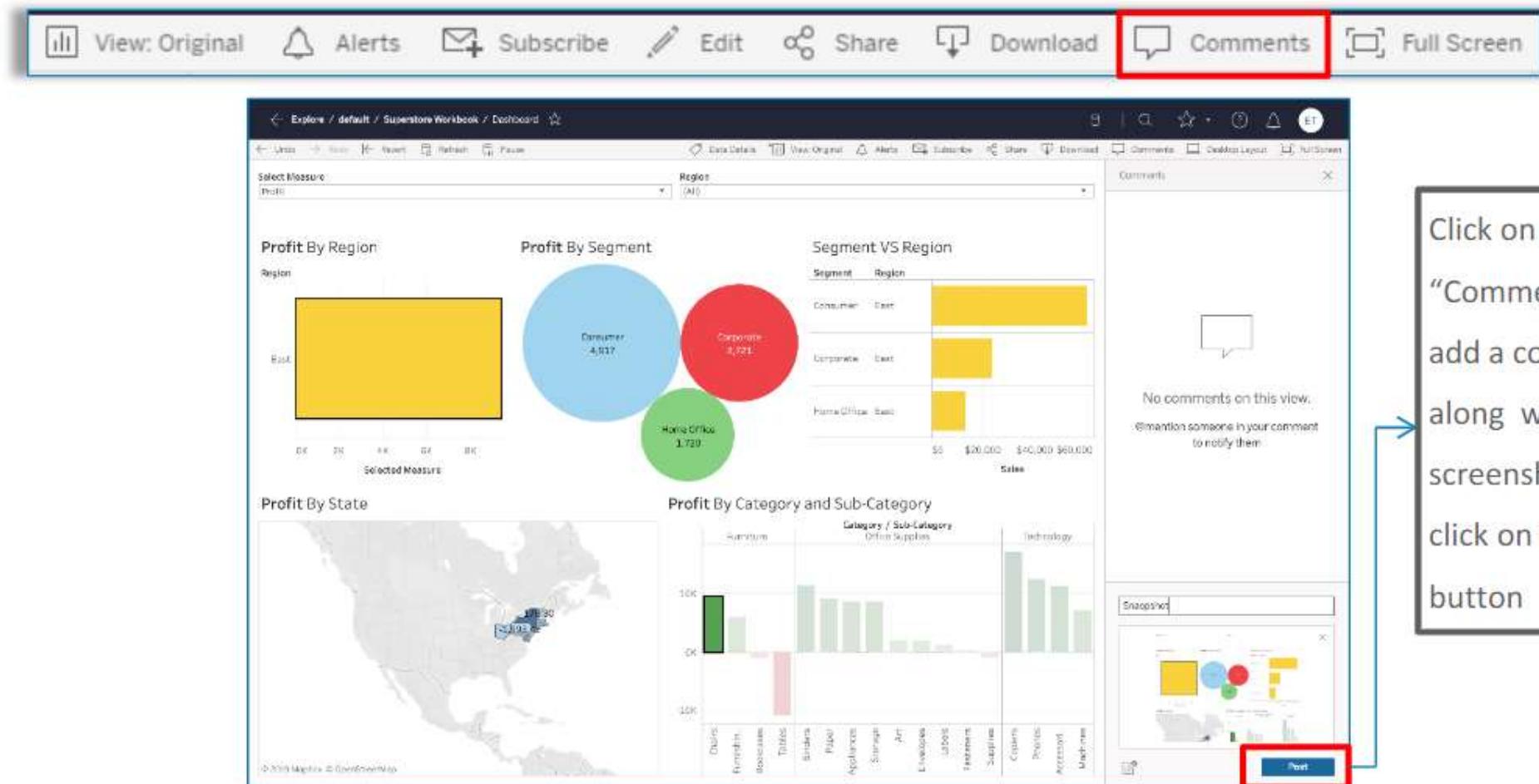
Click on the “Share” icon in order to share the view with other users

# Interacting With Content On Tableau Online (Contd...)

The screenshot shows the Tableau Online interface. At the top, there's a toolbar with several icons: 'View: Original', 'Alerts', 'Subscribe', 'Edit', 'Share', 'Download' (which is highlighted with a red box), 'Comments', and 'Full Screen'. Below the toolbar, a 'Download' dialog box is open. The dialog has a title 'Download' and a sub-instruction 'Select your file format.' It lists seven options: 'Image', 'Data', 'Crosstab', 'PDF', 'PowerPoint', 'Tableau Workbook', and 'Cancel'. Arrows from each option point to a corresponding explanatory box:

- 'Image': 'Images are exported in .png format and the dashboard is rendered in its current state'
- 'Data': 'Exporting Data exports data for the active view in the dashboard'
- 'Crosstab': 'Exporting Crosstab exports Crosstab for the active view in the dashboard'
- 'PDF': 'Exporting a .pdf document provides the users with various options, including layout, scaling, and printing the sheets in the current dashboard as well as sheets in the workbook'

# Interacting With Content On Tableau Online (Contd...)



The screenshot shows a Tableau Online dashboard titled "Explore / default / Superstore Workbook / Dashboard". The top navigation bar includes "View: Original", "Alerts", "Subscribe", "Edit", "Share", "Download", a red-bordered "Comments" button, and "Full Screen". The dashboard features five visualizations: "Profit By Region" (yellow bar chart), "Profit By Segment" (bubble chart with segments Consumer, Corporate, and Home Office), "Segment VS Region" (bar chart showing Sales for Consumer, Corporate, and Home Office across East, West, and Central regions), "Profit By State" (map of North America with state-level profit data), and "Profit By Category and Sub-Category" (bar chart showing sales for various product categories like Furniture, Bedding, and Technology). A "Comments" sidebar is open on the right, showing a placeholder message: "No comments on this view. @mention someone in your comment to notify them." A blue arrow points from the sidebar to a callout box.

Click on the  
“Comments” icon,  
add a comment  
along with a  
screenshot and  
click on the “Post”  
button



# Data Management Through Tableau Catalog

# Why Tableau Catalog?

---

Tableau Catalog automatically ingests the data in Tableau environment into one central list



Provides better visibility to data

Provides relevant information for making better decisions

Helps in understanding data relationships in a better way

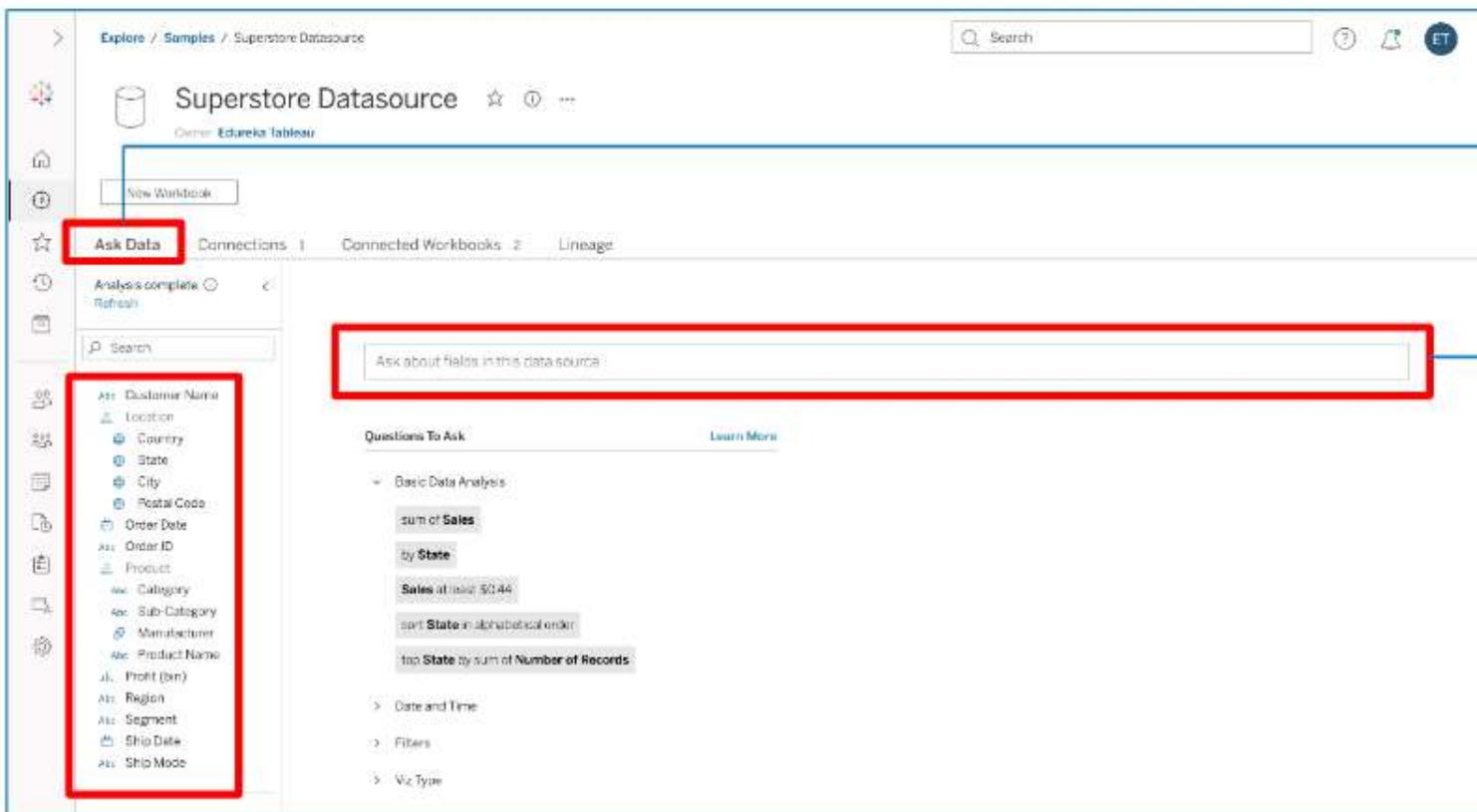
Assists in finding the right data for analysis



# AI-Powered Features In Tableau Online

# Ask Data Feature In Tableau Online

Ask Data is an AI-Powered feature that allows you to type a question and get an instant response in the form of automatic data visualizations

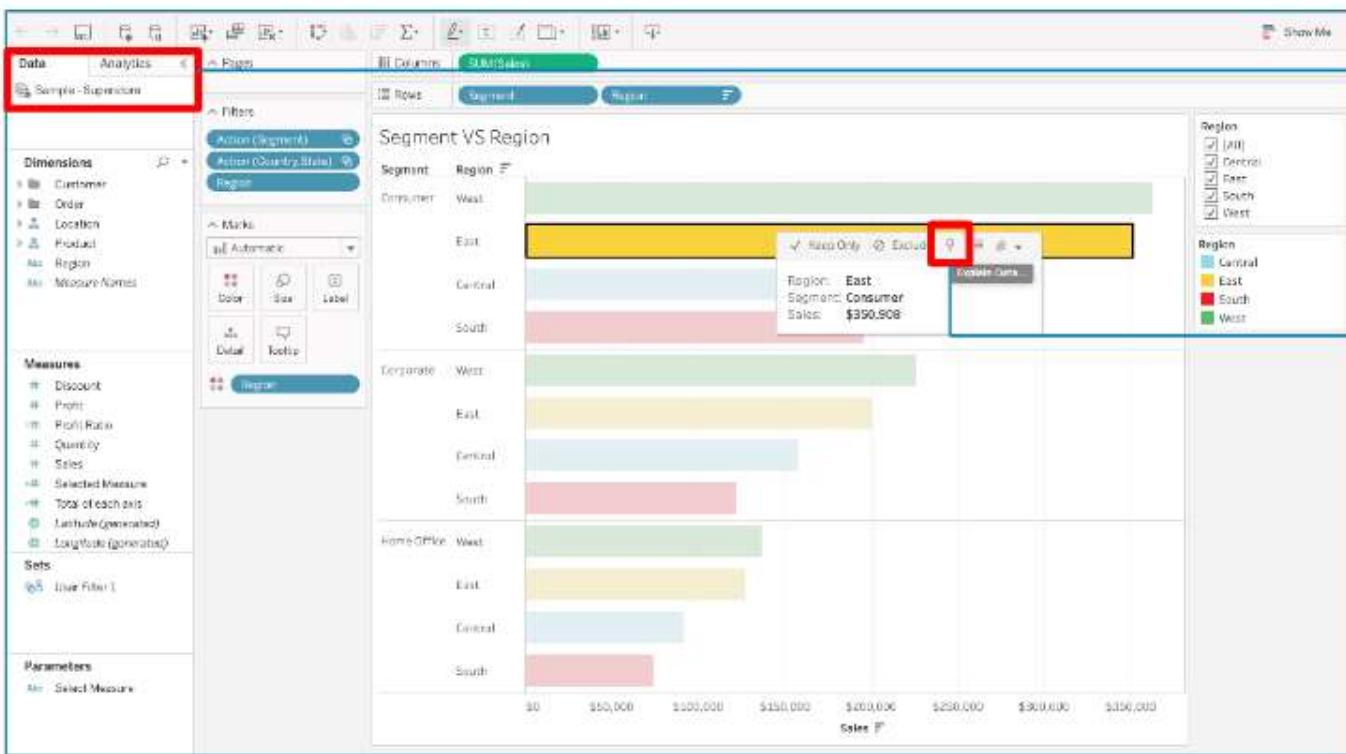


Navigate to the "Superstore" Data source and click on "Ask Data"

Enter the terms from the data source fields listed towards the left

# Explain Data Feature In Tableau Online

Explain Data is an AI-powered feature that helps in understanding “the why” in your data  
It provides explanations for the unexpected values in your data



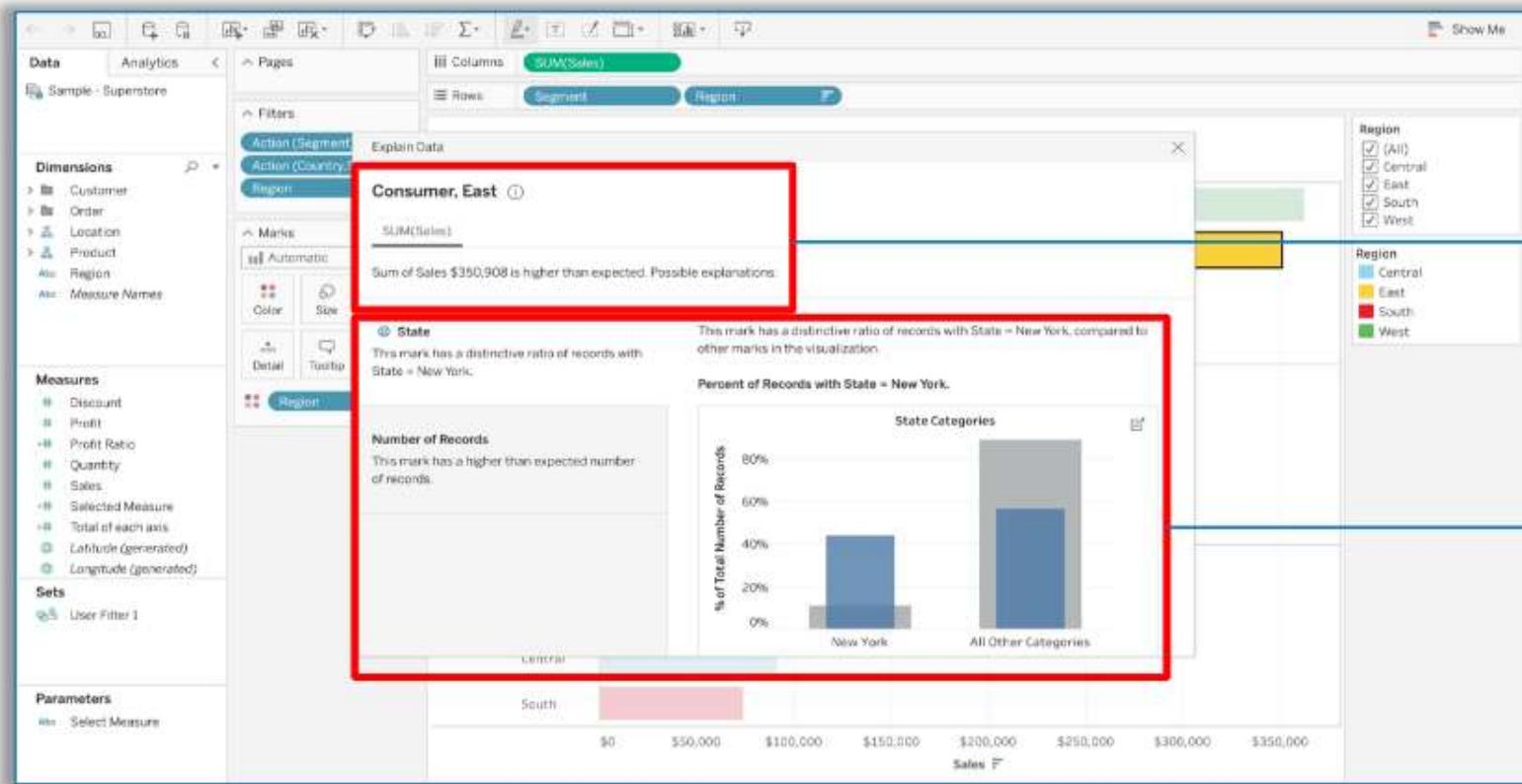
Open a Workbook in Edit mode in Tableau Online

Select a mark on the view and click on the “Explain Data” icon

# Explain Data Feature In Tableau Online (Contd...)

Explain Data uncovers hidden insights

Explain Data option is available to users with Creator and Explorer access



- Name of the selected mark
- Measure in use
- Summary

Explanations and visualizations generated by Tableau



# Understand Scheduling

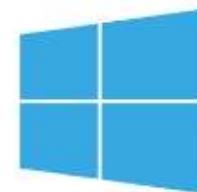
# Understand Scheduling

---

Scheduling is used to refresh tasks directly on Tableau Online for the extracts of cloud hosted data. It includes the extracts of following types:



Google  
BigQuery



Microsoft  
Azure



amazon  
REDSHIFT



Google  
Cloud Platform

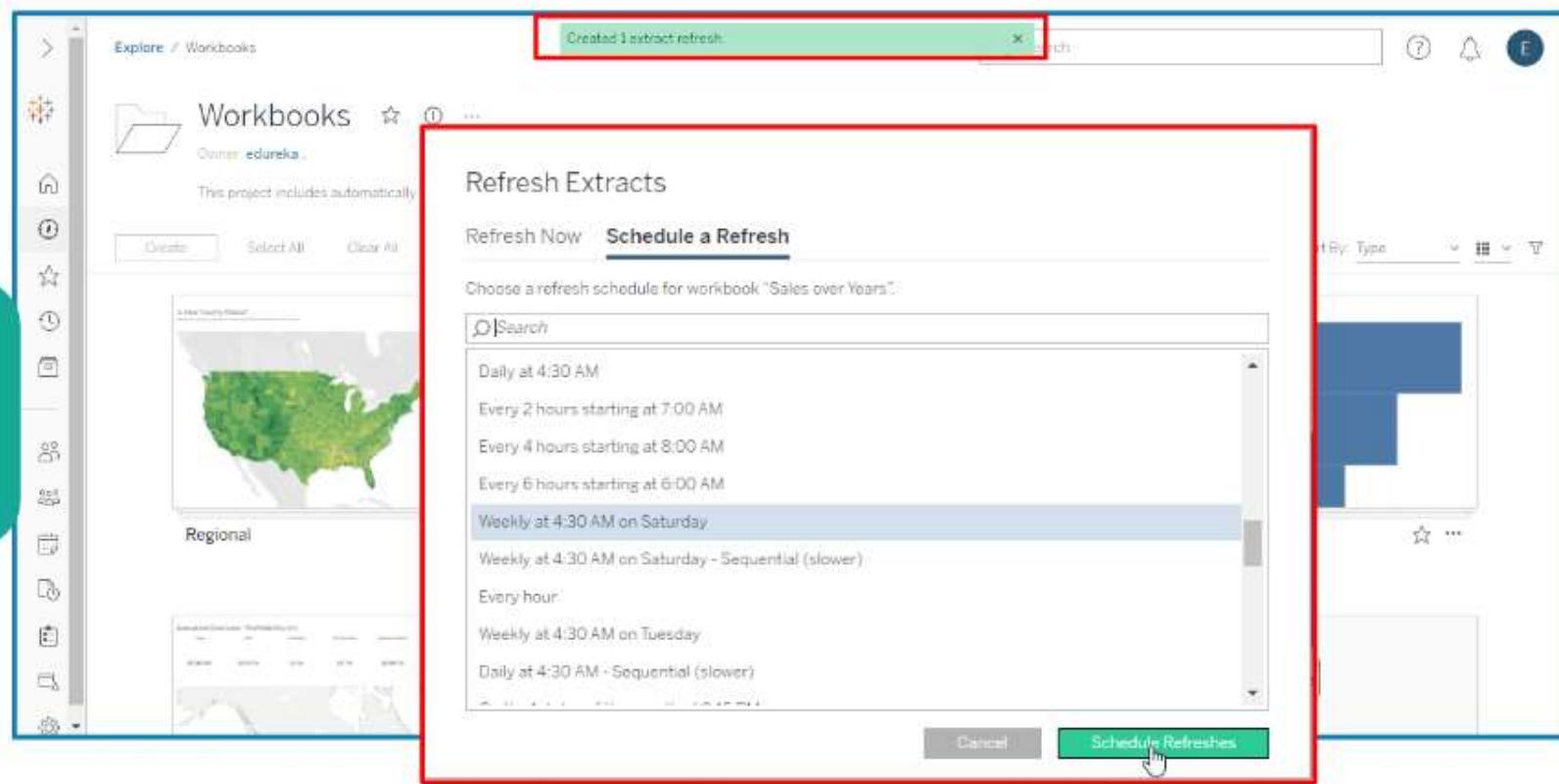
# How To Create A Refresh Schedule?

The screenshot shows the Tableau Online interface. On the left, there's a sidebar with icons for Home, Recent, Favorites, and Refresh (which is highlighted with a red box and a black arrow pointing to it). The main area is titled 'Explore / Workbooks' and shows a folder named 'Workbooks' owned by 'edureka'. Below the folder are two visualizations: 'Sales over Years' and another unnamed visualization. A context menu is open over the first visualization, with a red box highlighting the 'Actions' dropdown. Within the actions menu, the 'Refresh Extracts' option is also highlighted with a green box.

➤ Log in to Tableau Online account  
➤ Go to Explore  
➤ Select checkbox of the workbooks and the data sources which you want to refresh  
➤ Select Action → Refresh Extracts

# How To Create A Refresh Schedule? (Contd...)

- In the Refresh Extracts dialog box, click on **Schedule a Refresh**
- Select the schedule you want
- Click **Schedule Refreshes**



- Scheduled refreshes run on Tableau Online even if you are not signed in
- The refresh tasks are queued at the selected time and run once resources are available to execute the tasks



# Managing Permissions On Tableau Online

# What Are Licences In Tableau Online?

Licences determine the maximum site role a user can have on a server or a site.

When a user is created on the Tableau Server or Tableau Online site, **licenses** are assigned to them. Users are usually licensed as a **Creator**, **Explorer**, or **Viewer**.

01

Server Administrator, Site Administrator Creator, and Creator site roles need a Creator license.

02

Site Administrator Explorer, Explorer (can publish), and Explorer site roles need at least an Explorer license.

03

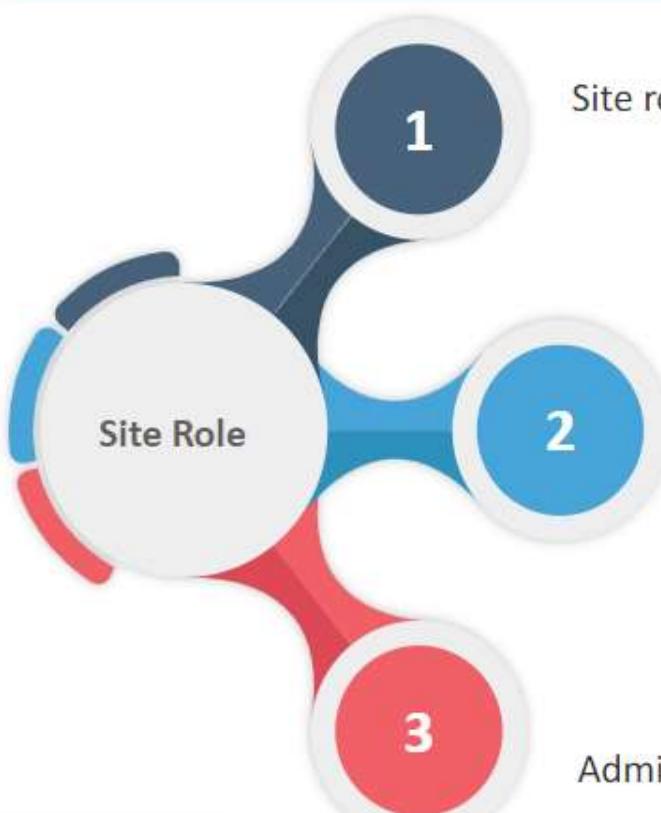
Viewer site role needs at least a Viewer license.

A user can acquire only **one license per site** and their required license level is determined by their highest site role.

# What Are Site Roles?

---

**Site roles** are assigned to a user when the user is created, and when they are added to another site.



Administrators always have all capabilities applicable to their license level

# What Are Permissions On Tableau Online?

Permissions define what capabilities a user is allowed or denied, controlling what they can see and do with content such as workbooks and data sources that are published on Tableau Online and Tableau Server.

The screenshot shows the 'Permissions' dialog box for a workbook named 'World Indicators'. The title bar is labeled 'Permissions'. A search bar at the top says 'Search for a user to view their permissions'. A note indicates that 'Permissions for views are controlled independently'. The main area is a table:

User / Group	Permissions	View	Interact/Edit	Edit
All Users (9)	Custom	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓

Below the table are buttons for '+ Add a user or group rule' and 'Search for a user or select a permission rule above to view user permissions.'

# Permissions

# Permissions

- For each user, there are certain allowed or denied capabilities, known as effective permissions.
  - The interplay between license level, site role, and permission rules also factor into the final determination of what capabilities a user is allowed and denied
  - Some tasks such as creating new workbooks from a browser (web authoring) or moving content or web authoring might require specific configurations of several capabilities rather than being captured in a single capability.

# Permissions: Project

---

Capabilities of different site roles in context to Projects:

Capability	Creator	Explorer( Can Publish)	Explorer	Viewer
 View				
 Save				
 Project Leader				

# Permissions: Workbooks

---

Capabilities of different site roles in context to Workbooks:

Capability	Creator	Explorer(Can publish)	Explorer	Viewer
View	✓	✓	✓	✓
Download Image/ PDF	✓	✓	✓	✓
Download Summary Data	✓	✓	✓	✓
View Comments	✓	✓	✓	✓
Add Comments	✓	✓	✓	✓
Filter	✓	✓	✓	✓
Download Full Data	✓	✓	✓	✗

# Permissions: Workbook (Contd...)

---

Capabilities of different site roles in context to Workbooks:

Capability	Creator	Explorer(Can publish)	Explorer	Viewer
Share Customised	✓	✓	✓	✗
Web Edit	✓	✓	✓	✗
Save	✓	✓	✓	✓
Download Workbook / Save As	✓	✓	✓	✗
Move	✓	✓	*	✗
Delete	✓	✓	✗	✗
Set Permissions	✓	✓	✗	✗

\* The Move capability is not possible for Explorer site roles as they do not have the Save capability

# Permissions : Datasources

---

Capabilities of different site roles in context to Datasources:

Capability	Creator	Explorer(Can publish)	Explorer	Viewer
 View	✓	✓	✓	✓
 Connect	✓	✓	✓	✓
 Save	✓	✓	✗	✗
 Download Data Source	✓	✓	✓	✗
 Delete	✓	✓	✗	✗
 Set Permissions	✓	✓	✗	✗

# Permissions: Flows

---

Capabilities of different site roles in context to Flows:

Capability	Creator	Explorer(Can publish)	Explorer	Viewer
 View	✓	✓	✓	✓
 Run Flow	✓	✓	✗	✗
 Save	✓	✓	✗	✗
 Download Flow	✓	✓	✓	✗
 Move	✓	✓	*	✗
 Delete	✓	✓	✗	✗
 Set Permissions	✓	✓	✗	✗

\* The Move capability is not possible for Explorer site roles as they do not have the Save capability

# Permissions: Data Roles

---

Capabilities of different site roles in context to Data Roles:

Capability	Creator	Explorer(Can publish)	Explorer	Viewer
 View				
 Save				
 Move			*	
 Delete				
 Set Permissions				

\* The Move capability is not possible for Explorer site roles as they do not have the Save capability on a project and therefore no place to move content to.\*

# Set Permissions

Permissions can be set only for existing users, groups, or content and managing permissions becomes easier when permission rules are established for groups instead of individuals.

Permissions

Edit permissions for the project "default".

Search for a user to view their permissions

Content permissions are currently unlocked. Edit Content Permissions

User / Group	Project	Workbooks	Data Sources	Flows	Data Roles
All Users (10)	Publisher	Editor	Connector	Runner	None
Content Manager (7)	Publisher	Editor	Connector	Runner	Interactor

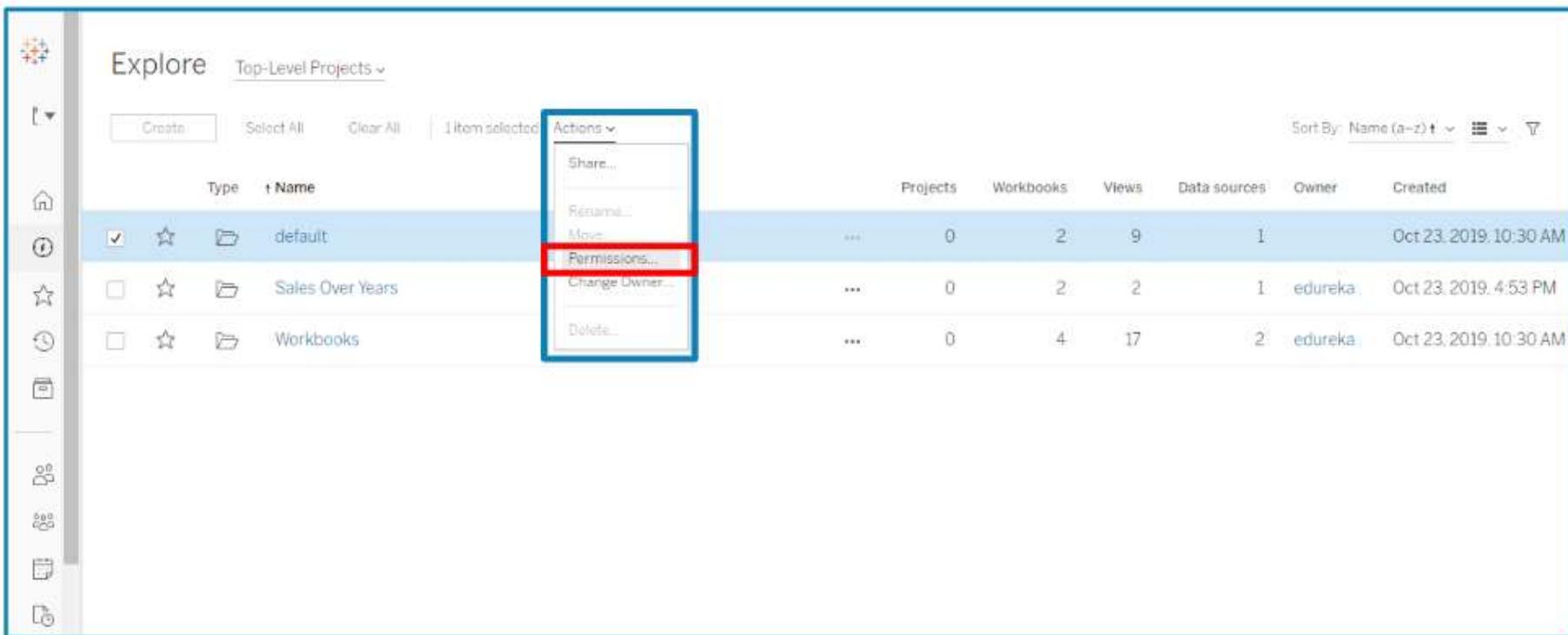
+ Add a user or group rule

User Permissions Content Manager (7)

User	Role	Editor	Connector	Runner	Interactor
alex@edureka.co	Publisher	Editor	Connector	Runner	Interactor
john@edureka.co	Viewer	Custom	Connector	Custom	Interactor
ken@edureka.co	Publisher	Editor	Connector	Runner	Interactor
rachel@edureka.co	Viewer	Custom	Connector	Custom	Interactor
shabnam@edureka.co	Publisher	Editor	Connector	Runner	Interactor
smith@edureka.co	Publisher	Editor	Connector	Runner	Interactor

# How To Set Permissions?

- Go to Explore
- Check the project to which you want to set permission
- Go to Actions and select Permissions



# How To Set Permissions? (Contd...)

- To establish the permission to a User/ Group, click on the three dots “...” and select Edit
- Click on the Drop Down of Project, Workbooks, Data Sources, Flows and Data Roles → Specify the permissions for Users/ Groups → Save
- You can even add New users or Groups

Permissions

Edit permissions for the project "default".

Search for a user to view their permissions.

Content permissions are currently unlocked. Edit Content Permissions

User / Group	Project	Workbooks	Data Sources	Flows	Data Roles
All Users (10)	Publisher	Managed by the owner			
Content Manager (7)	Publisher	Editor	Connector	Runner	None
Cancel	Save	Editor	Connector	Runner	Interactor

+ Add a user or group rule

User Permissions Content Manager (7)

User	Project	Workbooks	Data Sources	Flows	Data Roles
alex@edureka.co	Publisher	Custom	Connector	Runner	Interactor
john@edureka.co	Viewer	Custom	Connector	Custom	Interactor
ken@edureka.co	Publisher	Editor	Connector	Runner	Interactor
rachel@edureka.co	Viewer	Custom	Connector	Custom	Interactor
shabnam@edureka.co	Publisher	Editor	Connector	Runner	Interactor
smith@edureka.co	Publisher	Editor	Connector	Runner	Interactor
...	...	...	...	...	...

The screenshot shows the 'Permissions' section for a project named 'default'. It includes dropdown menus for 'User / Group' and various project components like 'Project', 'Workbooks', 'Data Sources', 'Flows', and 'Data Roles'. A modal window is open for 'Content Manager (7)', showing a dropdown menu for 'Editor' permissions with options: 'Viewer', 'Interactor', 'Editor' (selected), 'None', and 'Denied'. A red box highlights the '+ Add a user or group rule' button. Below the modal, a table lists 'User Permissions' for 'Content Manager (7)' with columns for 'User', 'Project', 'Workbooks', 'Data Sources', 'Flows', and 'Data Roles'. The table shows several users with different roles assigned, such as 'Publisher', 'Viewer', 'Custom', 'Editor', 'Runner', and 'Interactor'.

# How To Set Permissions? (Contd...)

- To edit the permissions, click on the arrows next to an element (Project, Workbooks, Data Sources, and flows)
- You get the detail and the possibility to edit each permission individually
- Each permission can be allowed (green), denied (red), or unspecified (grey).
- To edit an individual permission, click on its box.

Permissions

Edit permissions for the project "default".

Search for a user to view their permissions

Content permissions are currently unlocked. Edit Content Permissions

User / Group	Project	Workbooks	View	Interact/Edit	Edit	Data Sources	Flows
All Users (10)	Publisher	Editor	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Connector	Runner
Content Manager (7)	Publisher	Custom	✓ ✓ ✓ ✗ ✓	✓ ✓ ✗ ✗ ✓	✓ ✗ ✗ ✗ ✓	Connector	Runner

Add a user or group rule

User Permissions Content Manager (7)

User	Role	Custom	Connector	Custom		
john@edureka.co	Viewer	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓		
kern@edureka.co	Publisher	Editor	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Connector	Runner
rachel@edureka.co	Viewer	Custom	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Connector	Custom
shabnam@edureka.co	Publisher	Editor	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Connector	Runner
smita@edureka.co	Publisher	Editor	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Connector	Runner
edureka	Administrator	Administrator	✓ ✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓	Administrator	Administrator

# List Of Permissions, Grouped By The Elements

---

Be aware that not all options are available for all elements. Here's the complete list of permissions, grouped by the elements where they appear:

## Global Permissions:

 View	Specifies whether a user can see the element
 Save	Overwrites the existing element on the server

## Project Leader:

 Project Leader	A project leader has all the permissions on that project
--	--

# List Of Permissions, Grouped By The Elements (Contd...)

---

## Workbook, Data Sources, and Flows Permissions:

 Delete	Removes the element from the server
 Set Permissions	Gives us the ability to change and define the permissions
 Move	Changes the project of a Workbook or Flow
 Download	Downloads the file
 Connect/Run	Gives us the ability to connect to the Data Source or run Tableau Prep Flow

# List Of Permissions, Grouped By The Elements (Contd...)

---

## Workbook Permissions:

 View Comments	Sees the comments posted under a visualization
 Add Comments	Adds comments under a visualization
 Filter	Uses the filters available and the <b>Keep Only</b> and <b>Exclude</b> features
 Download Image/ PDF	Downloads an image of the visualization
 Download Summary Data	Downloads a summary of the data in a visualization
 Download Full Data	Downloads the complete data used in a visualization, with all the rows and columns
 Share Customised	Gives us the ability to create and share a customized view
 Web Edit	Opens the Tableau Server edition window where a user can modify the visualization or create new ones



# Data Security Using Filters

# Data Security Using Filters

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When you share workbooks with others by publishing them to Tableau Server or Tableau Online, by default, all users who have access to the workbooks can see all of the data shown in the views.  
You can restrict access by applying:



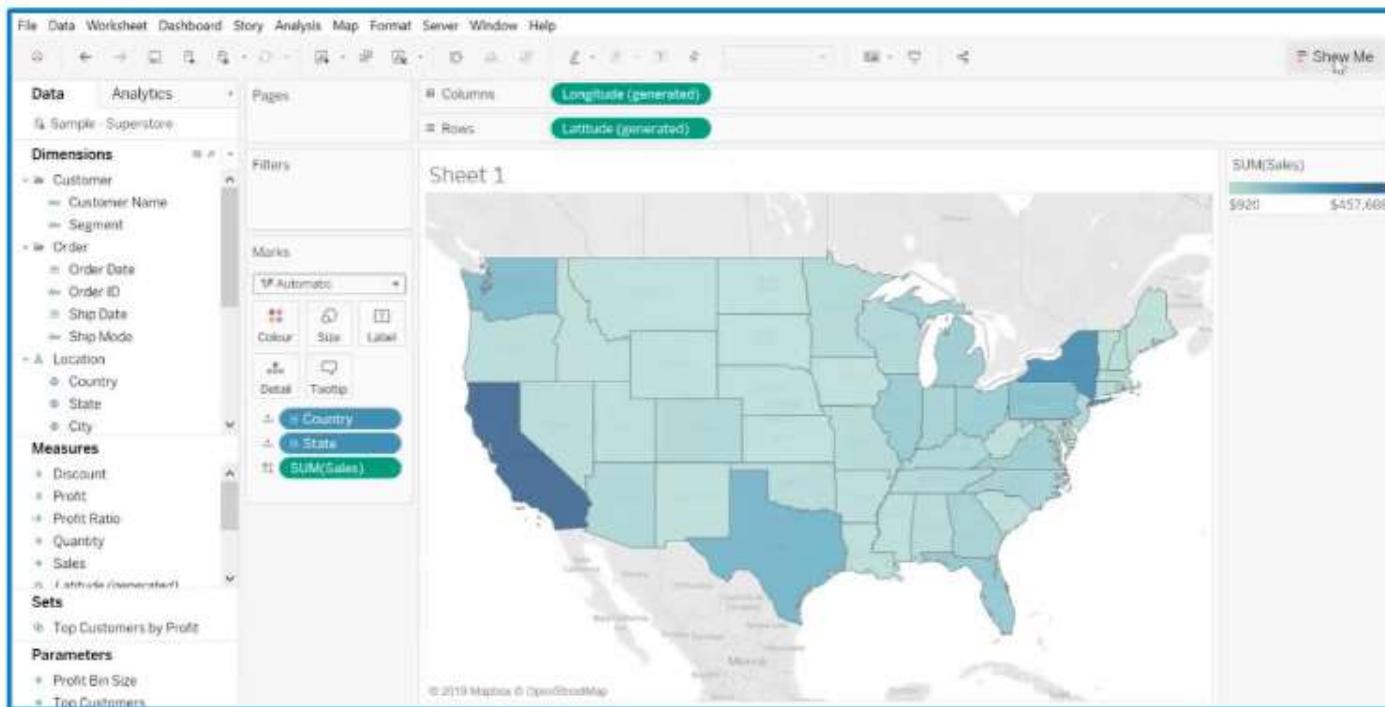
User Based Filter



Row Level Filter

# User Based Filter

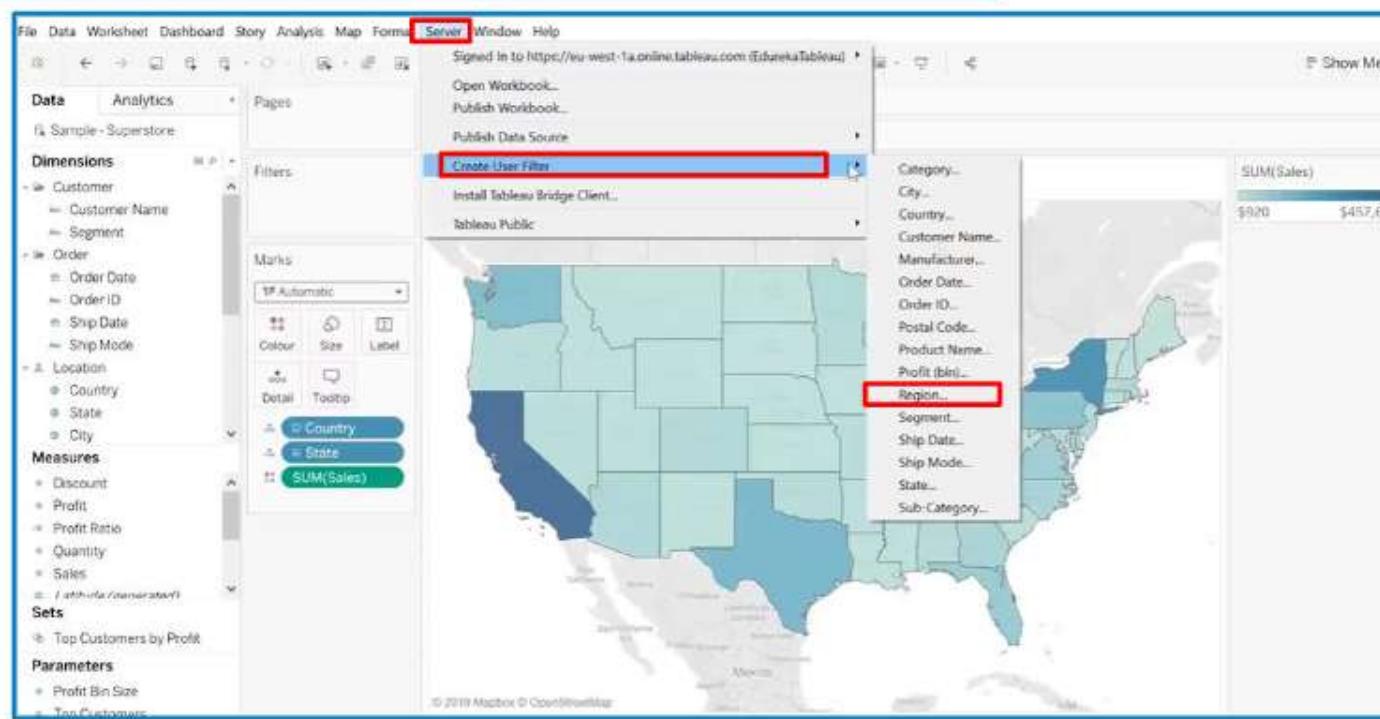
User filters allows you to specify what data any given person signed in to the Tableau Online or Tableau Server can see in the view.



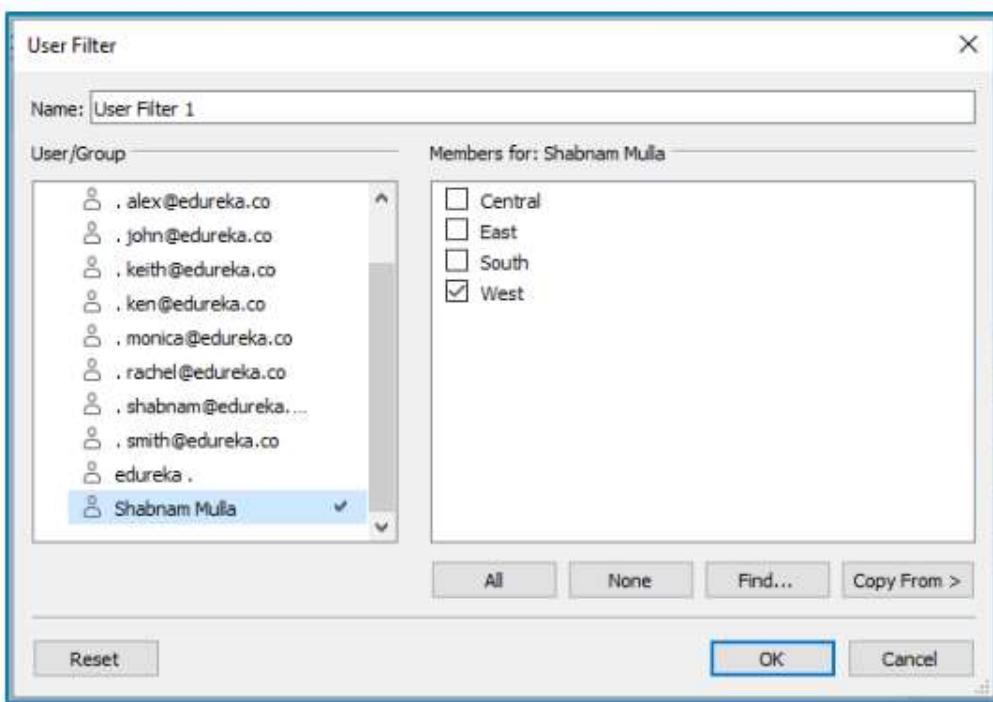
Publish this report on Tableau Online such that West Users have access to only West Region Sales data.

# User Based Filter (Contd...)

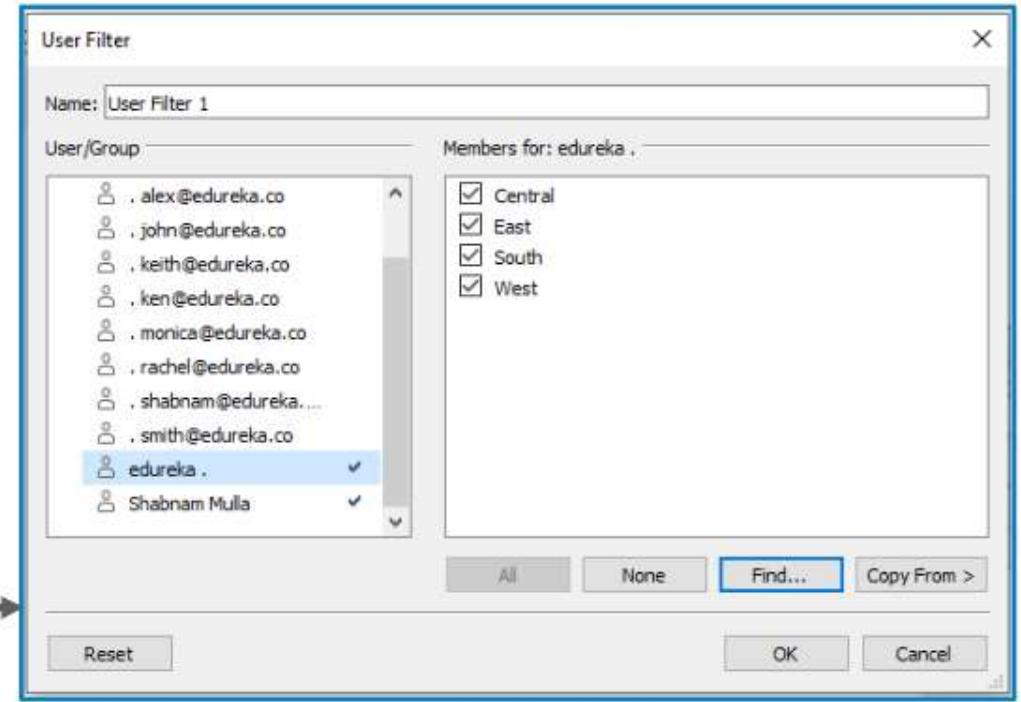
- To create a User Filter: Go to server → Create User Filter → Region
- Next you will get a User Filter Dialog Box



# User Based Filter (Contd...)



For Shabnam, give access to West region because she works in West

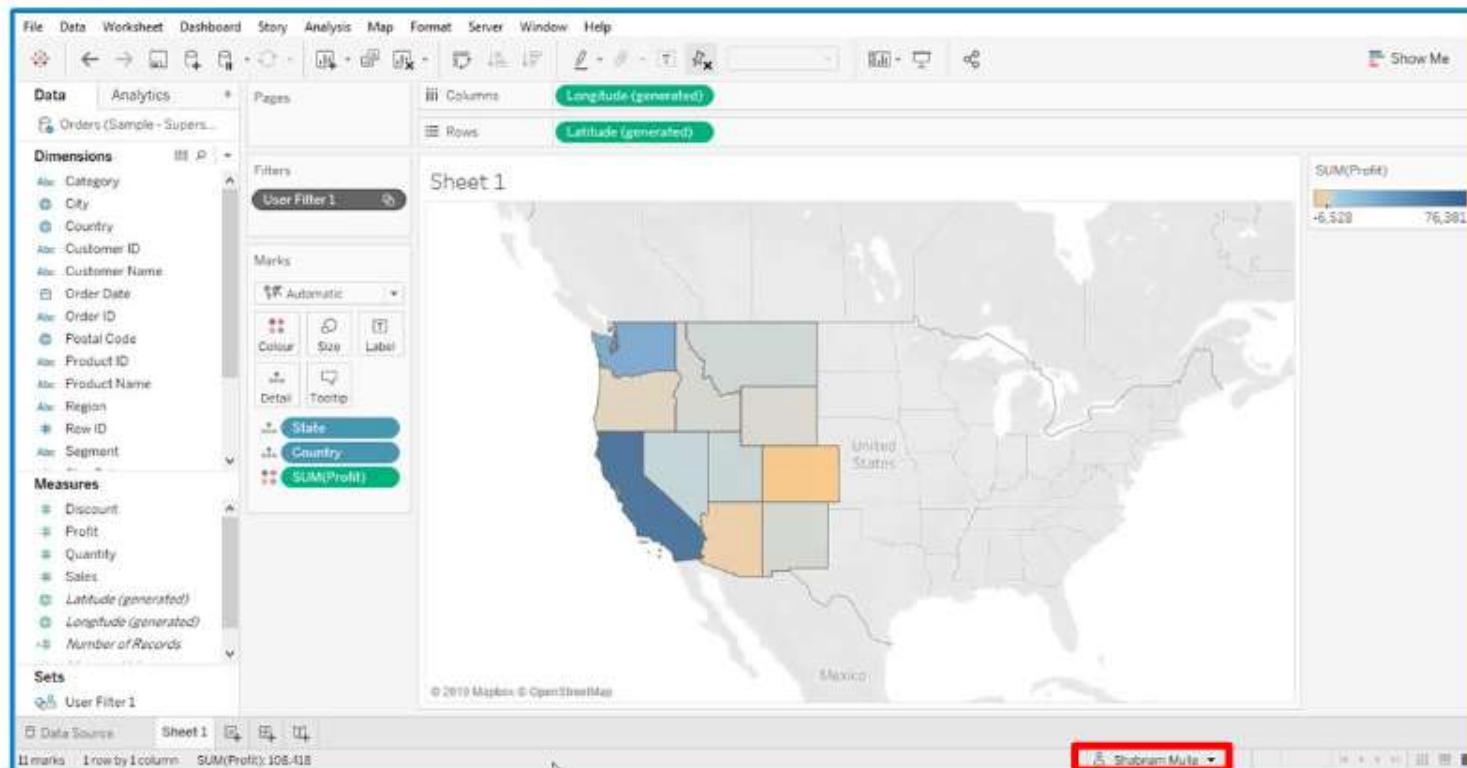


For edureka, give access to All regions because that is the Admin

➤ Drag and drop User Filter to Filter Shelf

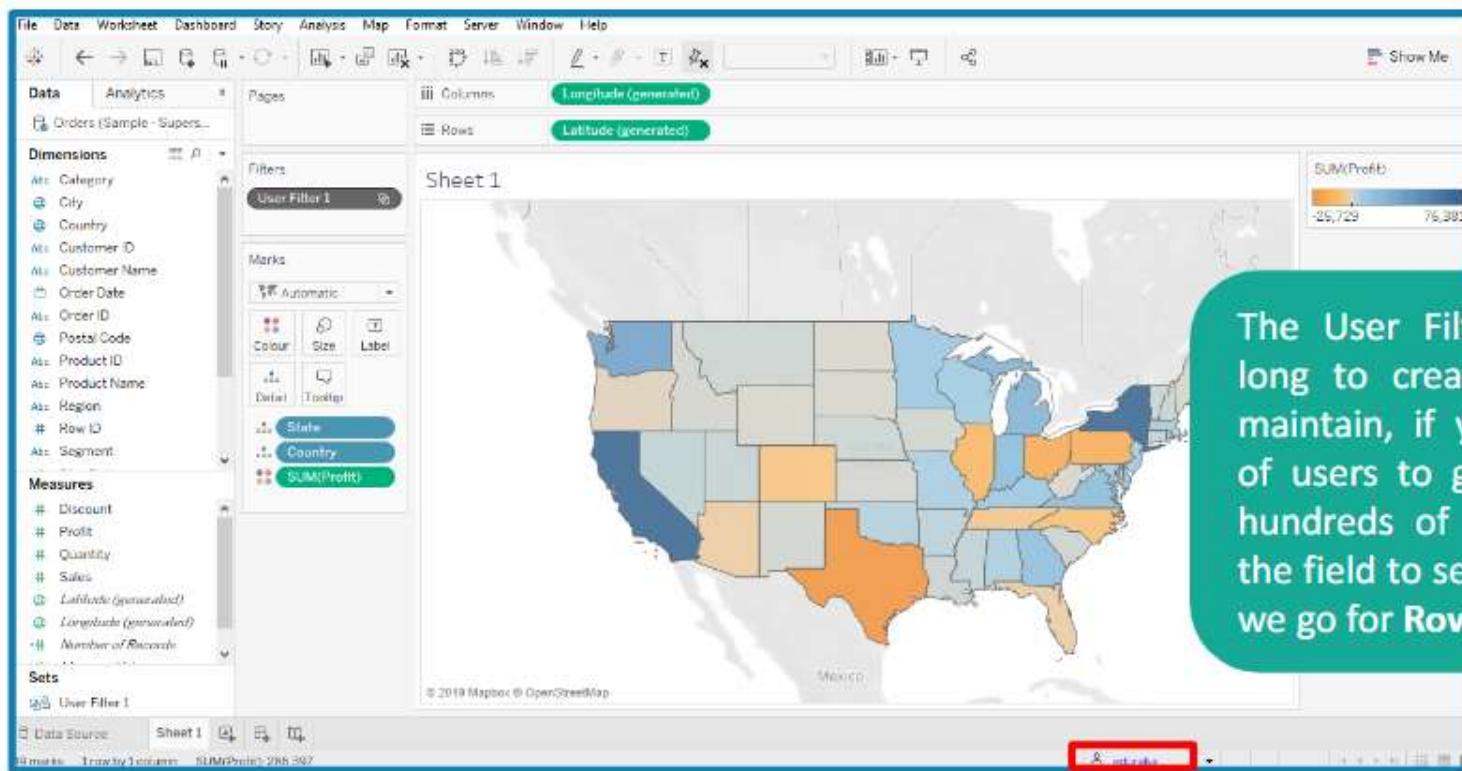
# User Based Filter (Contd...)

You can see that only West Region data is being shown as we are signed in as Shabnam to Tableau Online



# User Based Filter (Contd...)

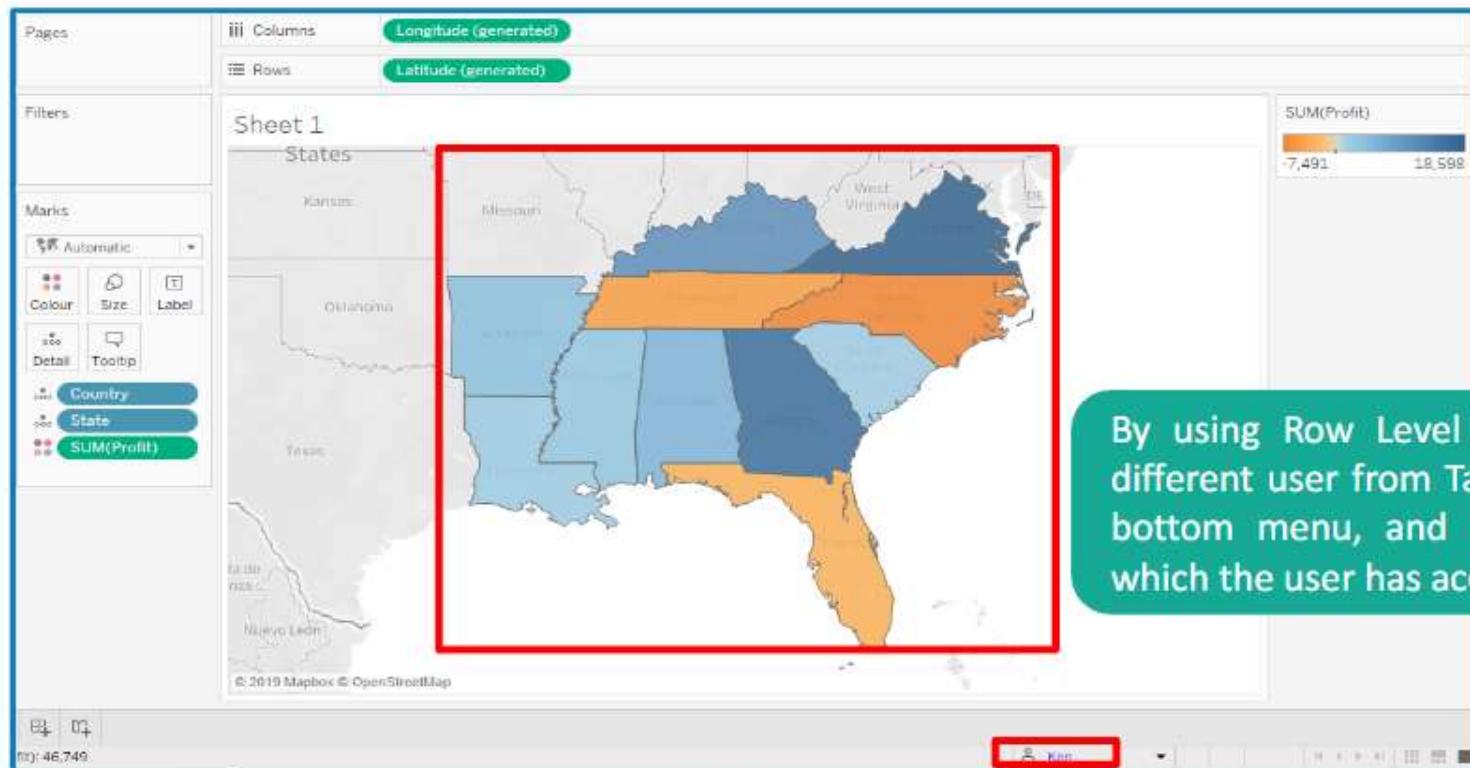
Now, you can see that only All Region data is being shown as we are signed in as edureka to Tableau Online.



The User Filters are extremely long to create and difficult to maintain, if you have hundreds of users to give access to, and hundreds of different values in the field to secure. In such cases, we go for Row Level filter.

# Row Level Filter

Row level filter allows you to apply filter using which you can specify which data “rows” any given person signed in to the Tableau Server or Tableau Online can see in the view



# Row Level Filter Example

- Establish a Cross Join between Sample Superstore dataset and User Access Dataset
- In User Access Dataset, we mention which user has access to which region

↳ Orders (Sample - Superstore)

Orders



User Access

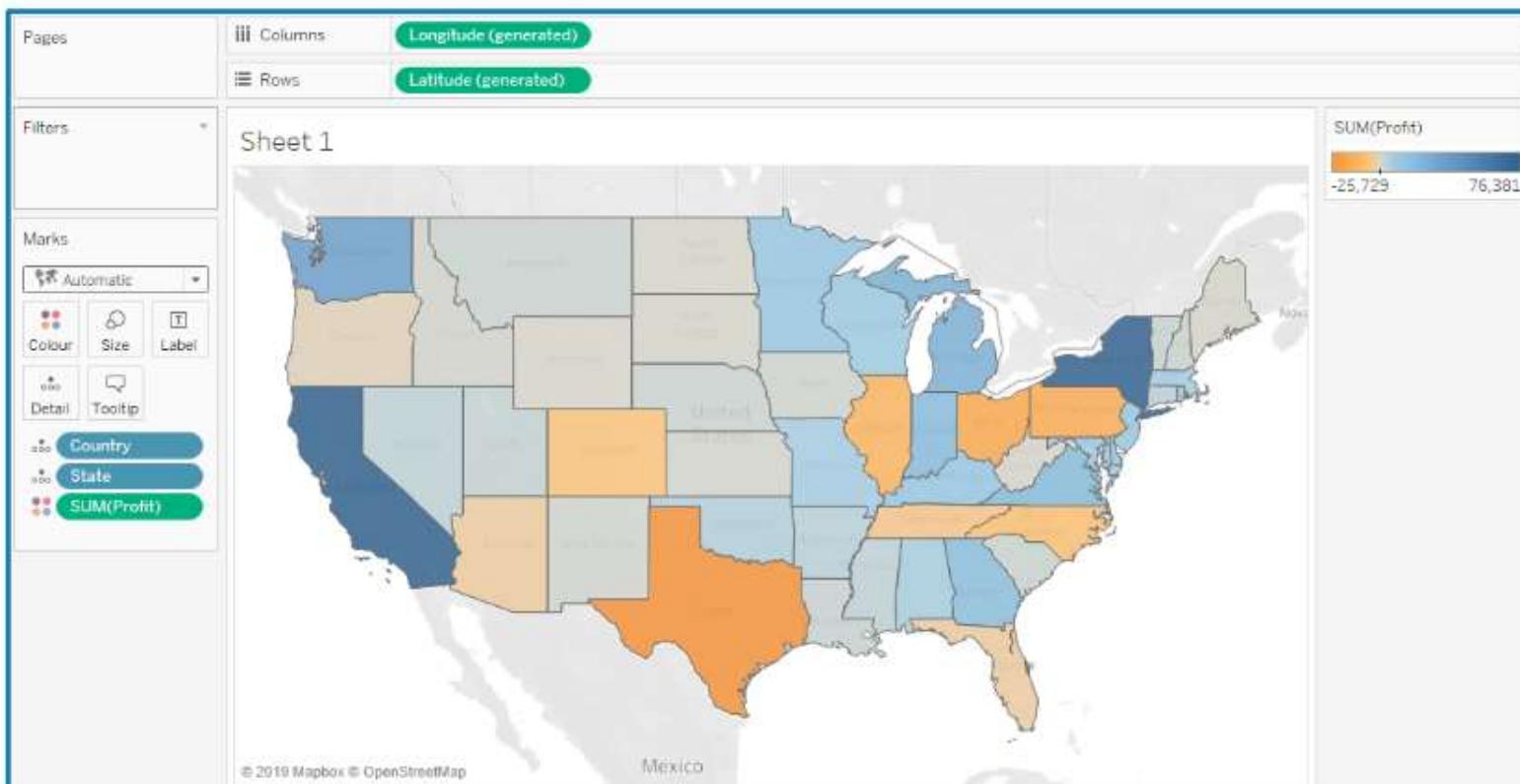
Cross Join Between Sample Superstore  
dataset and User Access Dataset

Region	User		
Central	<a href="mailto:edureka1234@gmail.com">edureka1234@gmail.com</a>		
South	<a href="mailto:edureka1234@gmail.com">edureka1234@gmail.com</a>		
East	<a href="mailto:edureka1234@gmail.com">edureka1234@gmail.com</a>		
West	<a href="mailto:edureka1234@gmail.com">edureka1234@gmail.com</a>		
South	<a href="mailto:ken.edureka@gmail.com">ken.edureka@gmail.com</a>		
Central	<a href="mailto:shabnam.edureka@gmail.com">shabnam.edureka@gmail.com</a>		

User Access Data

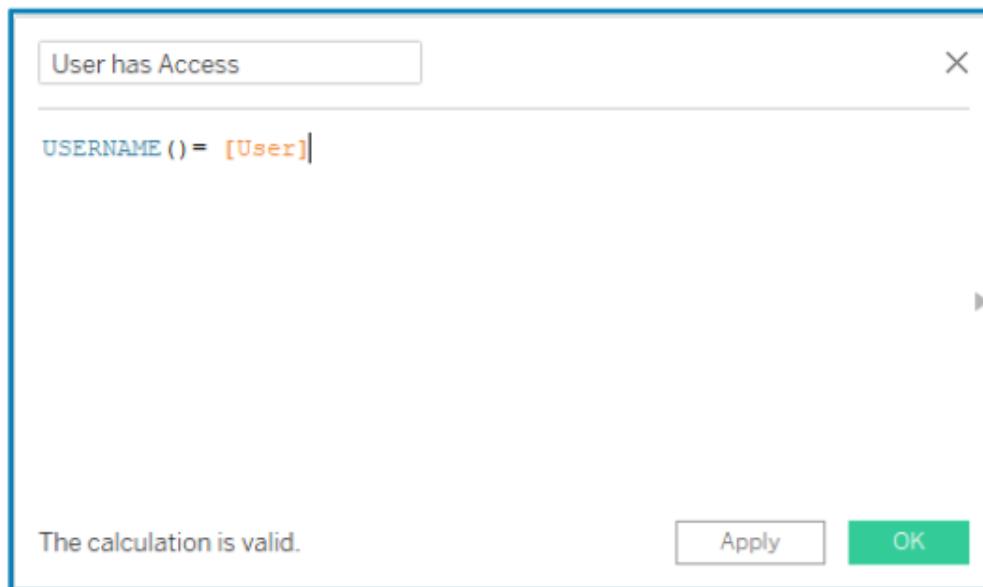
# Row Level Filter Example (Contd...)

- Create a State V/S Profit map



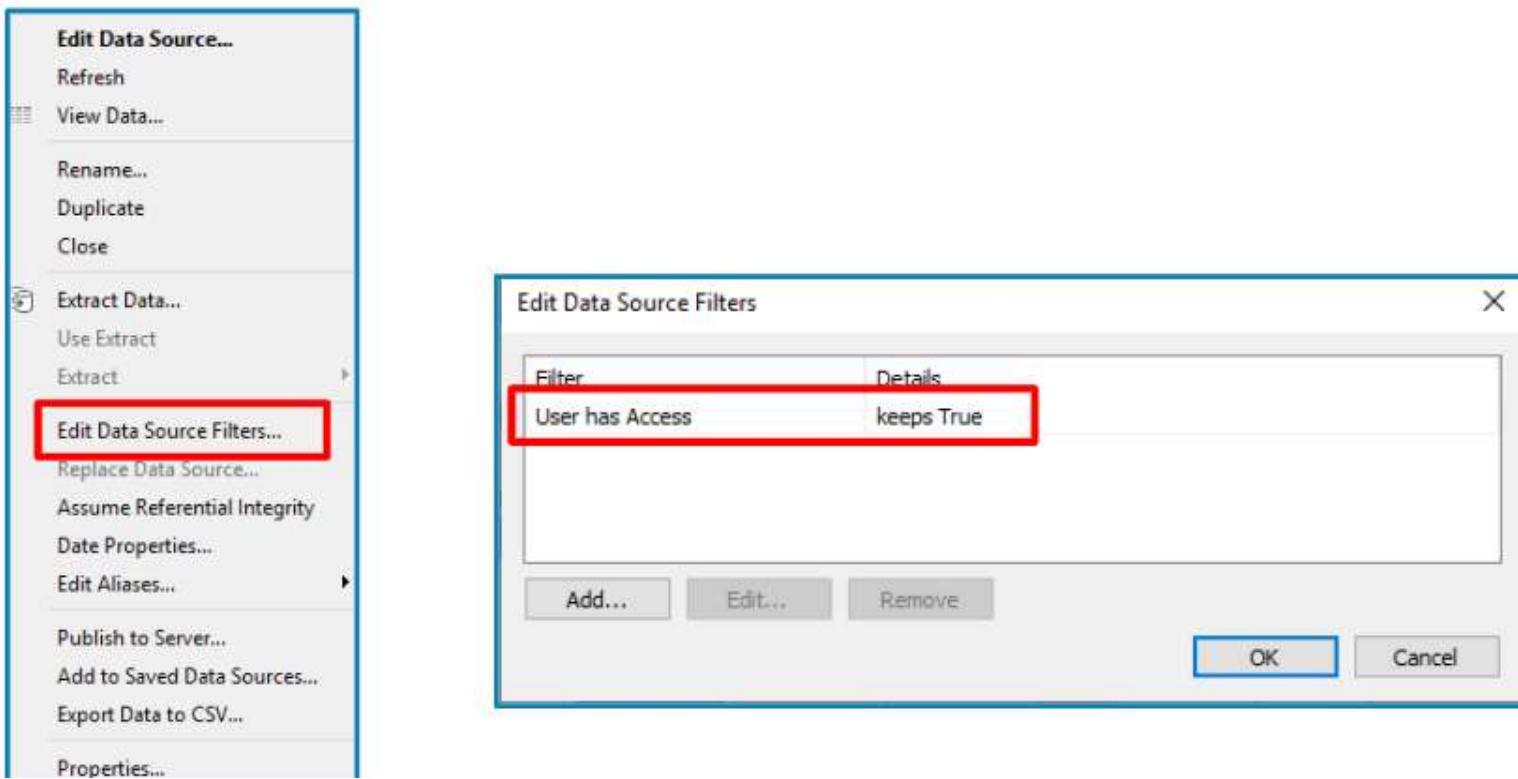
## Row Level Filter Example (Contd...)

- Create a Calculated field and name it as “User has Access” and write **USERNAME()=User[]**
- This calculation will turn **True**, if the currently logged in user is the same as the User filed in the data source



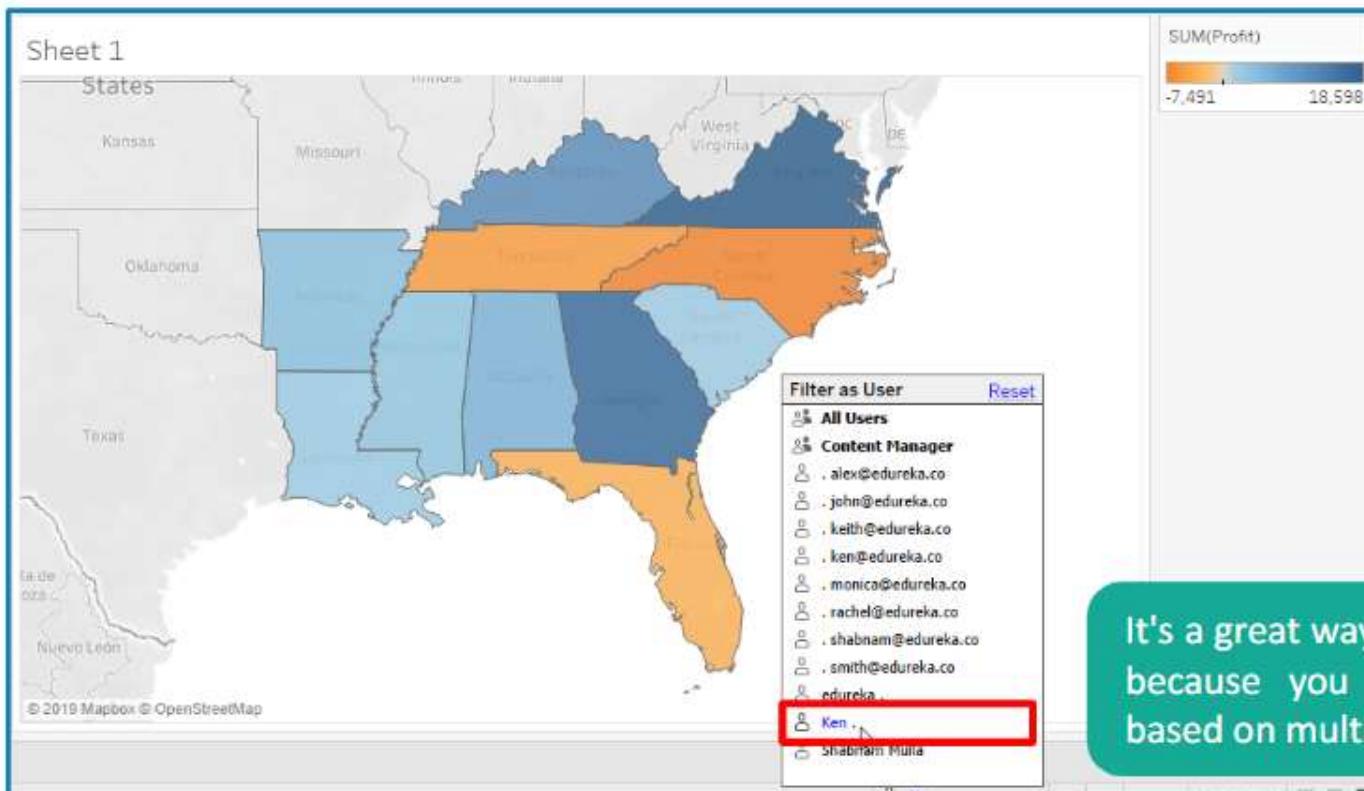
## Row Level Filter Example (Contd...)

- Right-click on the data source name and select **Edit Data Source Filters**
- Add the **User has Access** Calculated Field and Select from list → True



## Row Level Filter Example (Contd...)

- Log in to Tableau Online site
- You can test the row-level filter by selecting different users on Tableau Online with the bottom menu.
- Here is, for example, the result for Ken, who only has access to the South regions:



It's a great way to handle complex situations because you can create row-level filters based on multiple fields.



**Thank you !!**