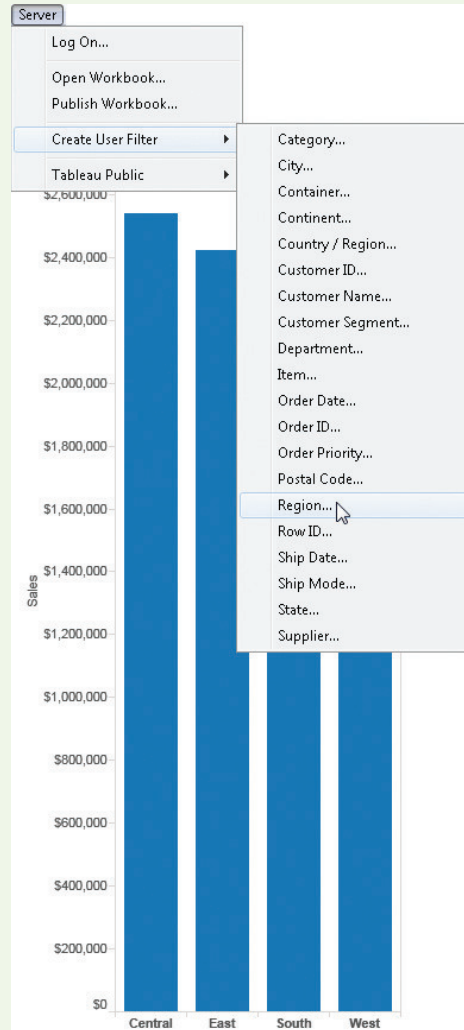


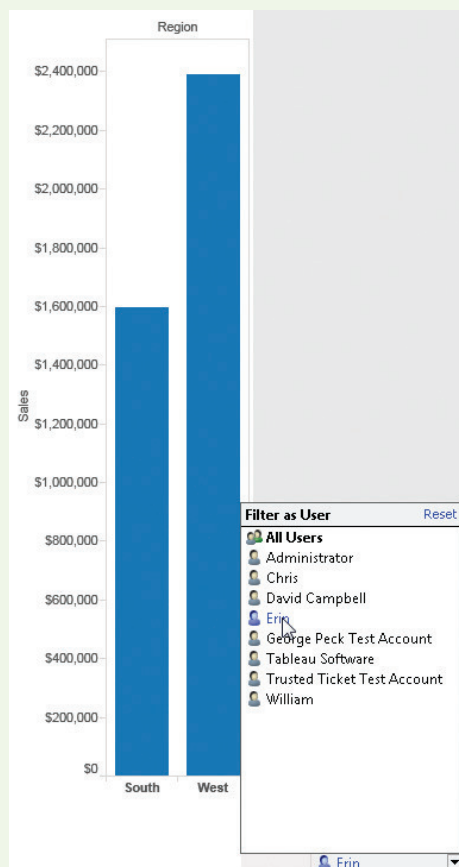
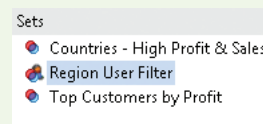
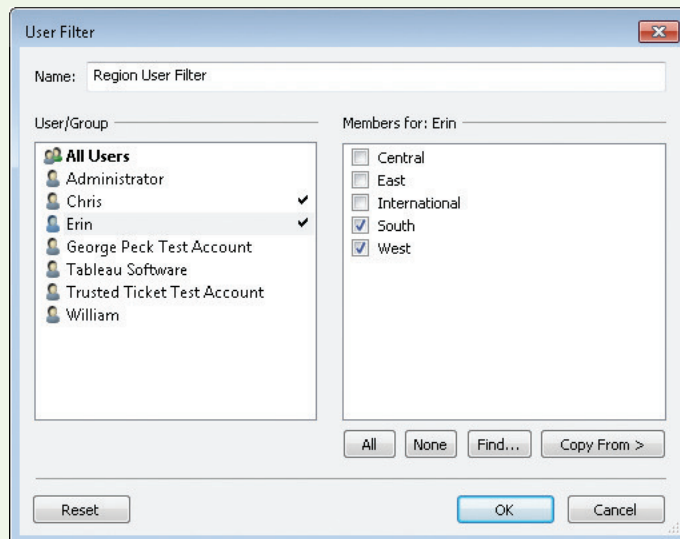
## Creating Tableau Server User Filters

One of the benefits of using Tableau Server is its built-in security system. Not only does this determine various rights and privileges granted or denied to users, it can also be used to provide a different view of data to the viewer based on their user ID. This is accomplished with *user filters*: a series of filter settings that are applied based on a Tableau Server user ID.

Using the drop-down menus, choose Server | Create User Filter, and then select the dimension you wish to filter based on user ID. If you're not already logged on to a Tableau Server, you'll be prompted for logon credentials. The User Filter dialog box will appear, displaying a list of Tableau Server users and groups on the left and the members of the selected dimension on the right. Select each user or group on the left, and then check the members of the dimension that the selected user or group should be able to see in the worksheet.

The All and None buttons under the Members list will select all or no members as a starting point. If you have many users and you wish to copy settings from one user to another, click the Copy From button and select an existing user to copy to the currently selected user. When finished setting user/member combinations, click OK to save the filter. It will initially appear in the Data window in the Sets category (with a slightly different icon than traditional sets). The user filter will not take effect until dragged to the Filters shelf.



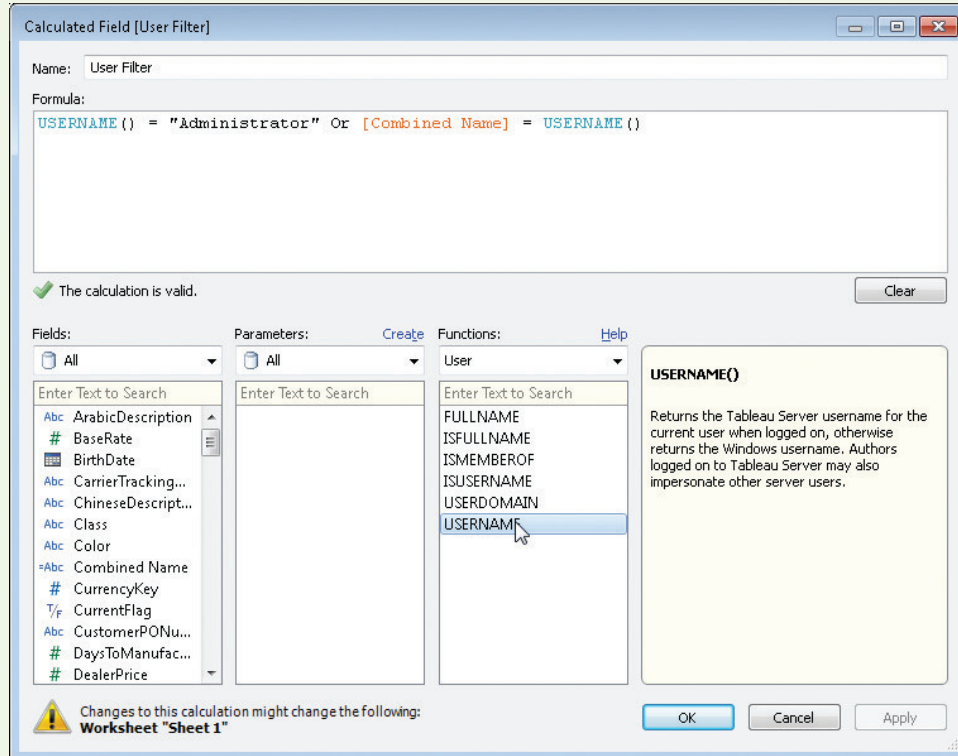


You may now test the application of the user filter by selecting a user from the pop-up user list at the bottom of the Tableau screen (initially showing the user ID you logged in with). When you select a user from the list, the filter will be applied and will limit the worksheet accordingly. If you need to modify the filter (perhaps you have narrowed the filter too far and some users, such as yourself, cannot see any data), right-click the user filter in the Sets portion of the Data window and choose Edit from the context menu.

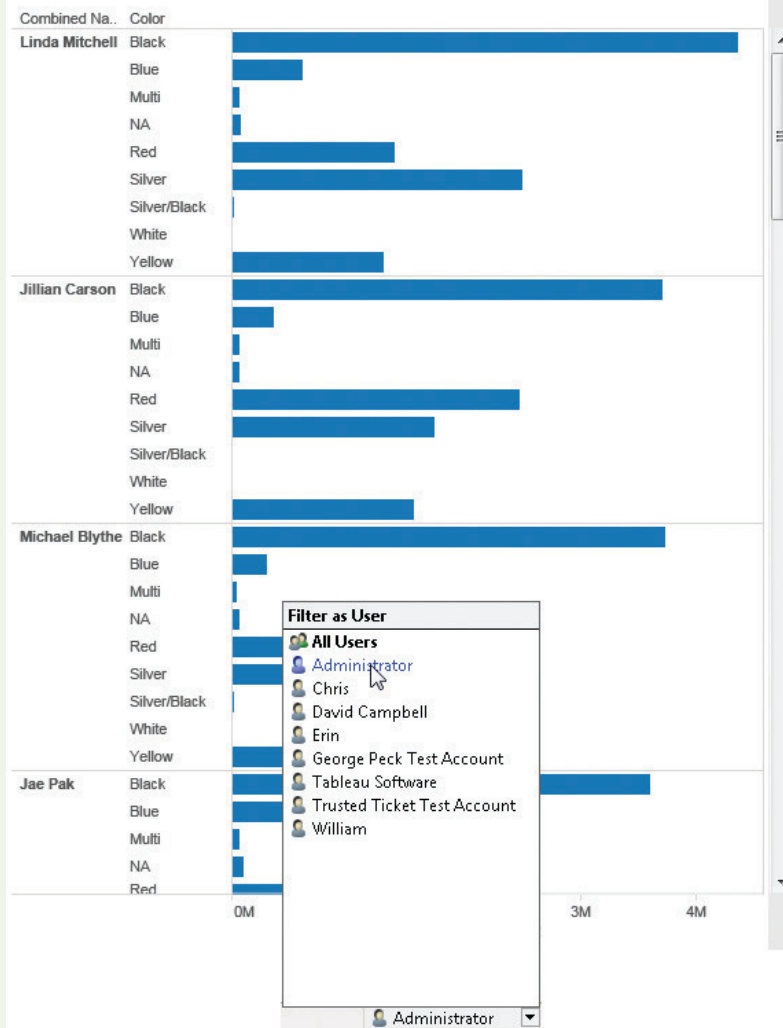
Another way to filter based on a Tableau Server user ID is available if a data source used in your worksheet contains (or can derive) matching user IDs. Because the currently logged-on Tableau user ID is available in a Tableau calculated field, you can create a calculated field that compares a user name from a data source (or other calculated field) to the currently logged-on Tableau Server user. The filter will return only data that matches the currently

(continued)

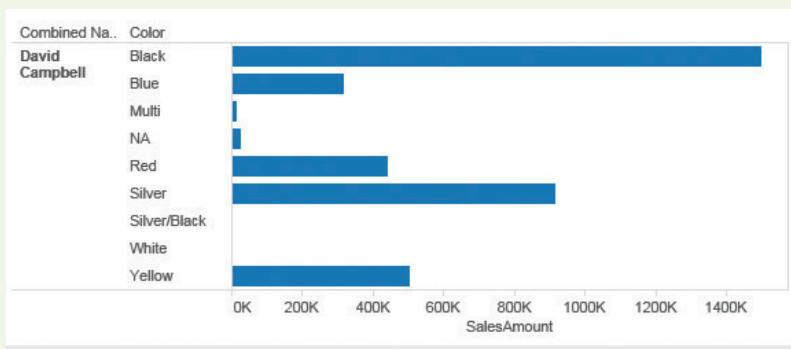
logged-in user. In this example, the Administrator account will return all data, whereas another user will only return data that matches their user ID. As with other filters, place the calculated field on the Filters shelf and choose the True value.



As with user filters described previously in this section, the filter may be tested by selecting different users from the pop-up list at the bottom right of the Tableau screen.



(continued)



**Filter as User** [Reset](#)

**All Users**

Administrator

Chris

David Campbell

Erin

George Peck Test Account

Tableau Software

Trusted Ticket Test Account

William

David Campbell