

# Module 11: Exploring Tableau Online

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Demo Document VI

edureka!

**edureka!**

## Demo VI

Create a report showing profits in different regions, and apply the Row Level filter such that Site Admin has access to all the data, and South and Central Users have access to only South and Central Profit Data respectively

Refer the datasets: Coffee Chain.xlsx and User Access.xlsx

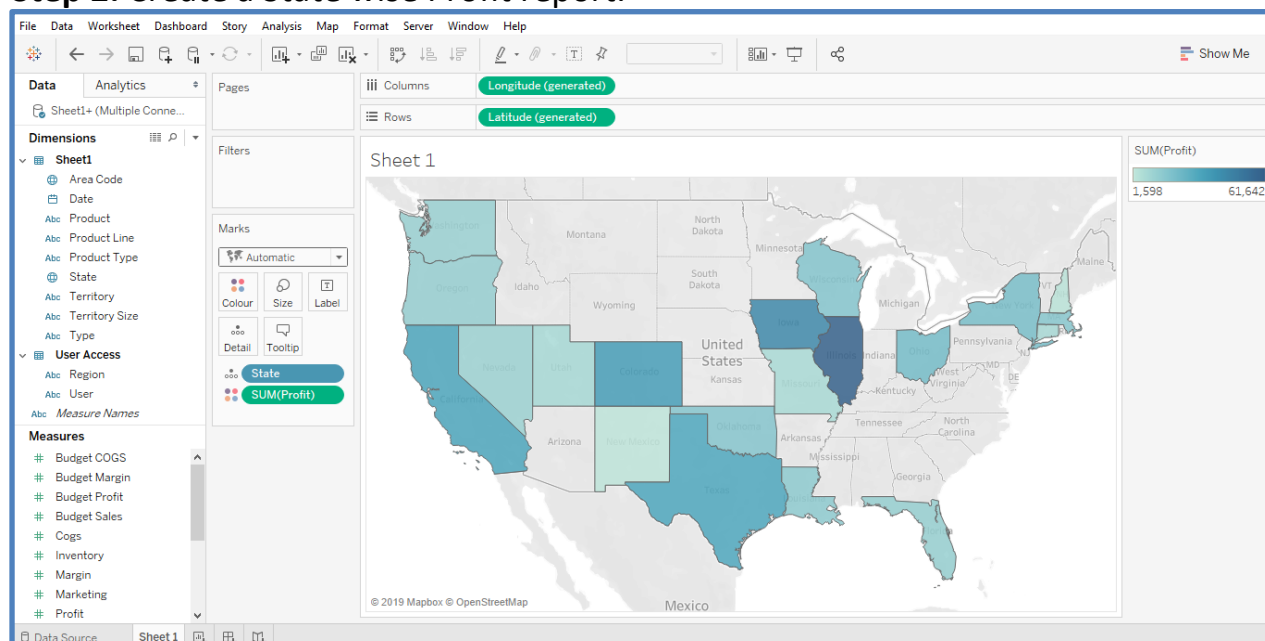
## Demo VI Solution

**Step 1:** Perform Cross Join on Coffee Chain Dataset and User Access data.

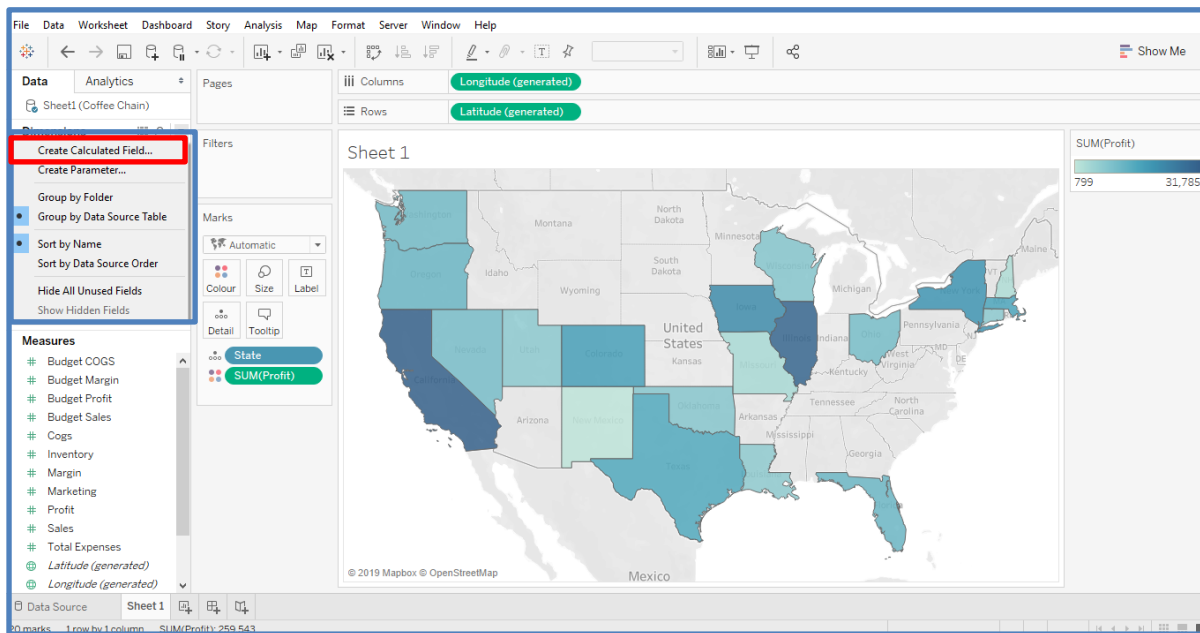
The screenshot shows the Tableau Desktop interface. On the left, the 'Connections' pane lists 'Coffee Chain' and 'User Access'. The 'Sheets' pane shows 'Sheet1'. The main view displays a cross-join of the two datasets. The 'Join' dialog box is open, showing 'Inner' join selected. The 'Data Source' is 'Coffee Chain' and the 'User Access' is 'User Access'. The 'Territory' field from 'User Access' is being joined to the 'Region' field from 'Coffee Chain'. The resulting data table shows columns: Area Code, Date, Product, Product Line, Product Type, State, Territory, Territory Size, Type, and Budget.

Area Code	Date	Product	Product Line	Product Type	State	Territory	Territory Size	Type	Budget
970	01-01-2012	Decaf Irish Cream	Beans	Coffee	Colorado	Central	Major Territory	Decaf	
970	01-01-2012	Decaf Irish Cream	Beans	Coffee	Colorado	Central	Major Territory	Decaf	
309	01-01-2012	Decaf Irish Cream	Beans	Coffee	Illinois	Central	Major Territory	Decaf	
309	01-01-2012	Decaf Irish Cream	Beans	Coffee	Illinois	Central	Major Territory	Decaf	
614	01-01-2012	Decaf Irish Cream	Beans	Coffee	Ohio	Central	Major Territory	Decaf	
614	01-01-2012	Decaf Irish Cream	Beans	Coffee	Ohio	Central	Major Territory	Decaf	
754	01-01-2012	Decaf Irish Cream	Beans	Coffee	Florida	East	Major Territory	Decaf	
325	01-01-2012	Decaf Irish Cream	Beans	Coffee	Texas	South	Major Territory	Decaf	

**Step 2:** Create a State wise Profit report.

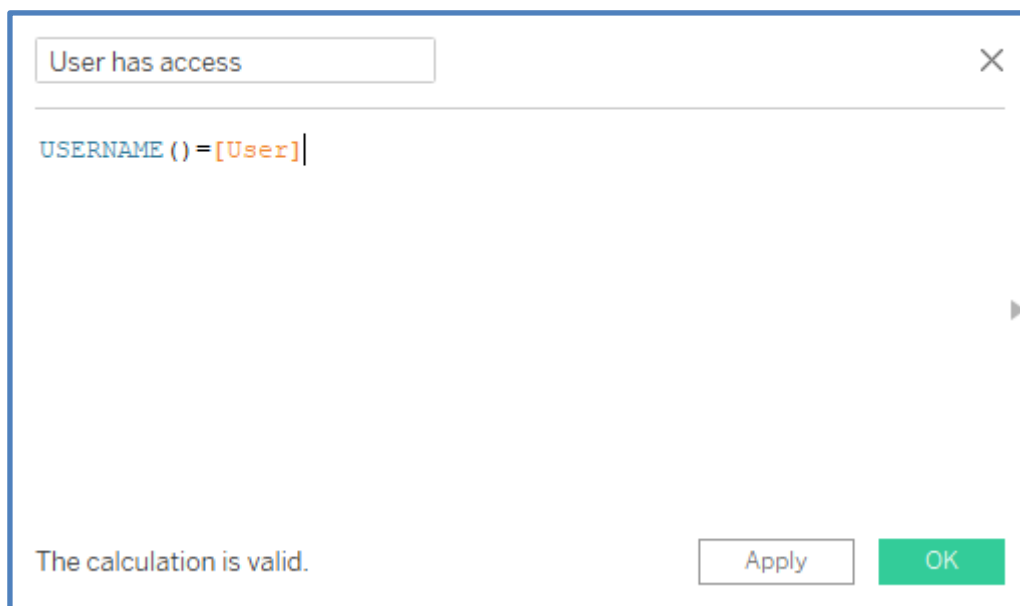


### Step 3: Create a User Access calculated field

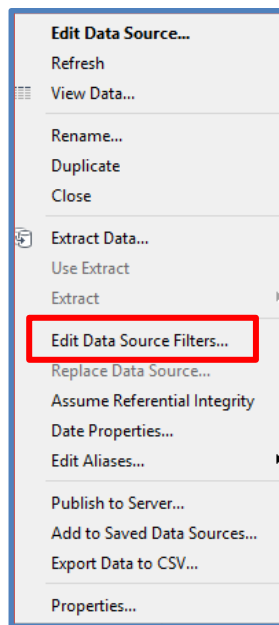


**Step 4:** Rename the calculated field as **User Has Access** and enter the following expression:

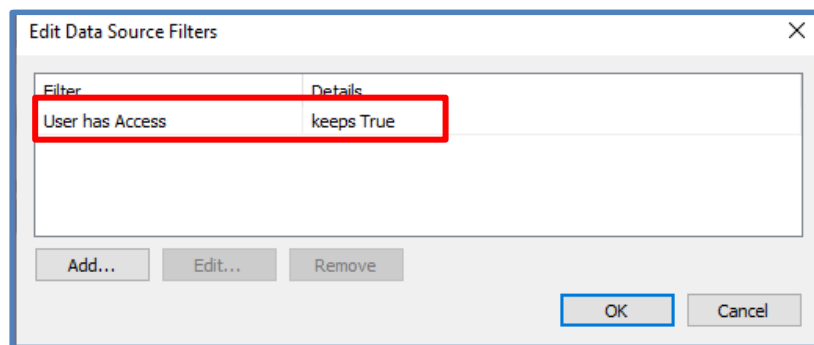
**USERNAME()=[User]**



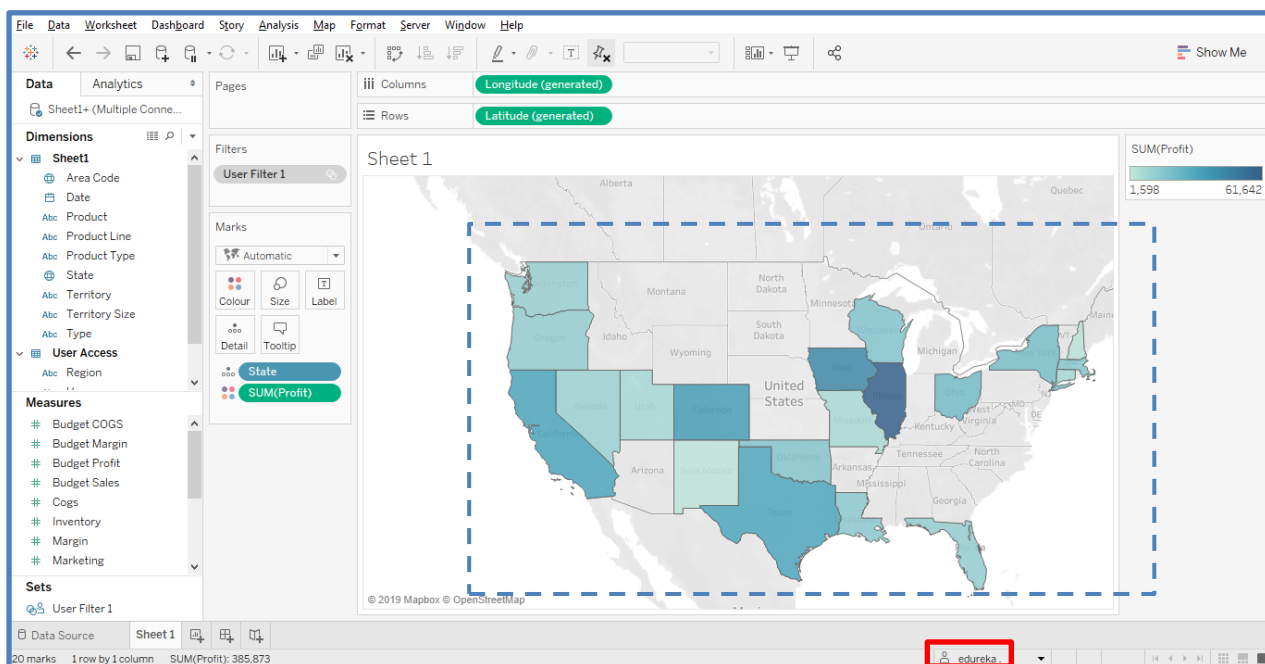
**Step 5:** Right-click on the data source name and select Edit Data Source Filters



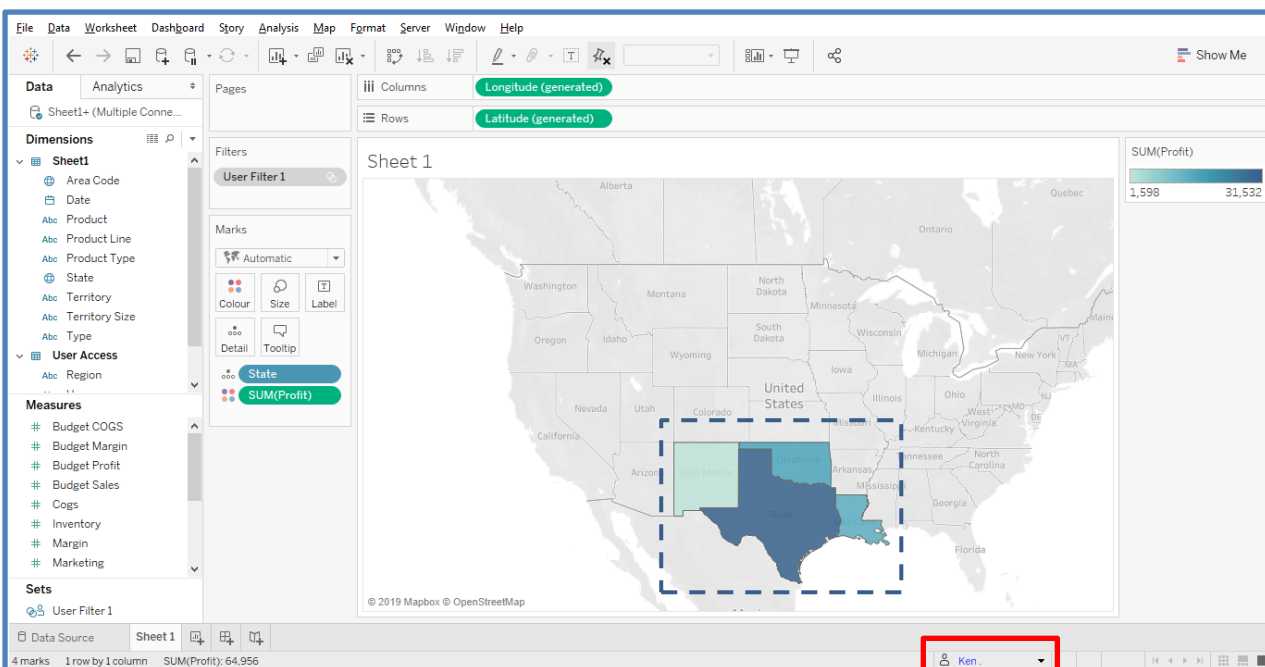
**Step 6:** Add the User has Access Calculated Field and Select from list → True → OK



**Step 7:** You can test the row-level filter by selecting different users on Tableau Online with the bottom menu. Since **edureka** is selected at the bottom, it reflects only the data to which it has access (as per the User Access dataset).



**Step 8:** Similarly, on selecting Ken or Shabnam from bottom, only the data to which they have been given access to can be visualized by them.



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