

# Module 11: Exploring Tableau Online

---

Demo Document V

edureka!

**edureka!**

## Demo V

Create a report showing profits in different regions, and apply the User-Based 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

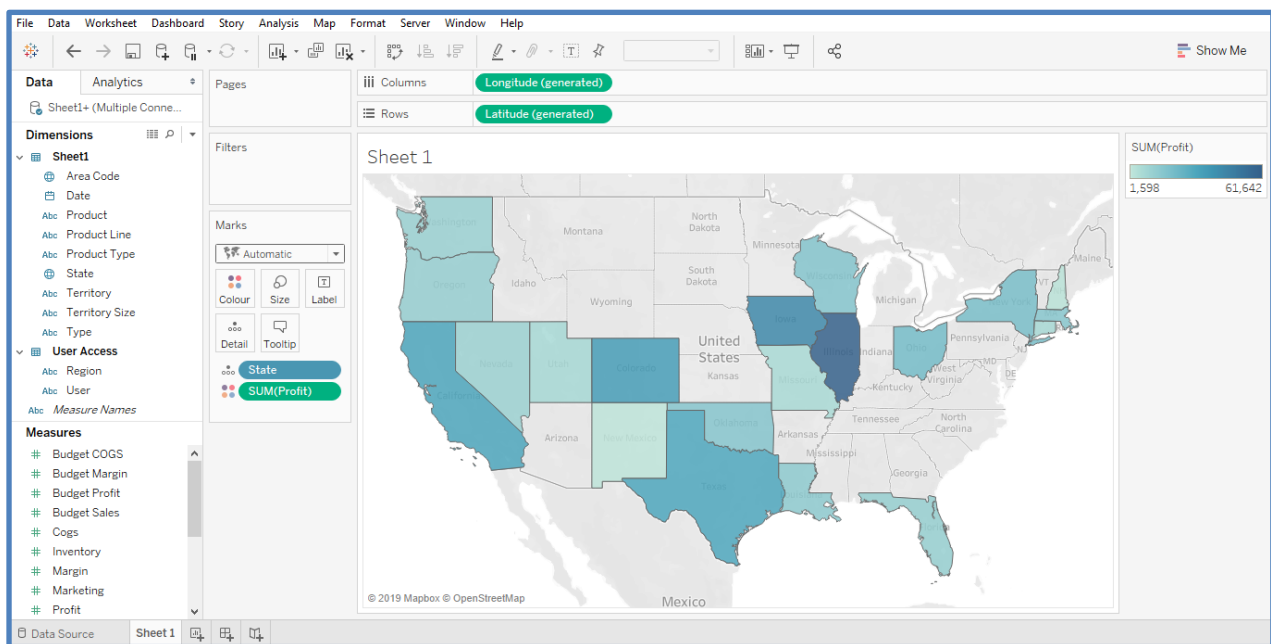
## Demo V Solution

**Step 1:** Click on To a File → Microsoft Excel → Select Coffee Chain.xlsx → Sheet 1

The screenshot shows the Tableau Desktop interface. On the left, the 'Connections' pane lists 'Coffee Chain' as a Microsoft Excel connection. Below it, the 'Sheets' pane shows 'Sheet1' selected. The main view displays the 'Sheet1 (Coffee Chain)' data source. The data is presented in a table with the following columns: Area Code, Date, Product, Product Line, Product Type, State, Territory, Territory Size, Type, and Budget. The data is sorted by 'Data source order'.

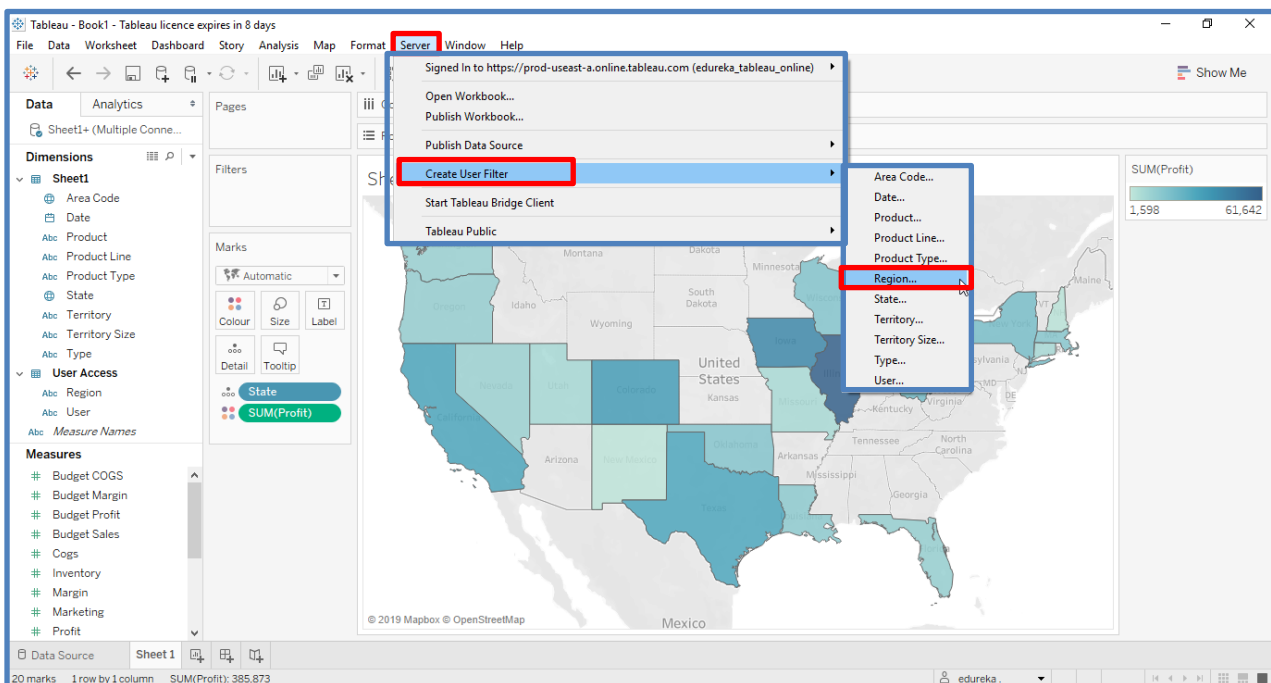
Area Code	Date	Product	Product Line	Product Type	State	Territory	Territory Size	Type	Budget
970	01-01-2012	Decaf Irish Cream	Beans	Coffee	Colorado	Central	Major Territory	Decaf	
309	01-01-2012	Decaf Irish Cream	Beans	Coffee	Illinois	Central	Major Territory	Decaf	
614	01-01-2012	Decaf Irish Cream	Beans	Coffee	Ohio	Central	Major Territory	Decaf	
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	
650	01-01-2012	Decaf Irish Cream	Beans	Coffee	California	West	Major Territory	Decaf	
720	01-01-2012	Decaf Espresso	Beans	Espresso	Colorado	Central	Major Territory	Decaf	
620	01-01-2012	Decaf Espresso	Beans	Espresso	Illinois	Central	Major Territory	Decaf	

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

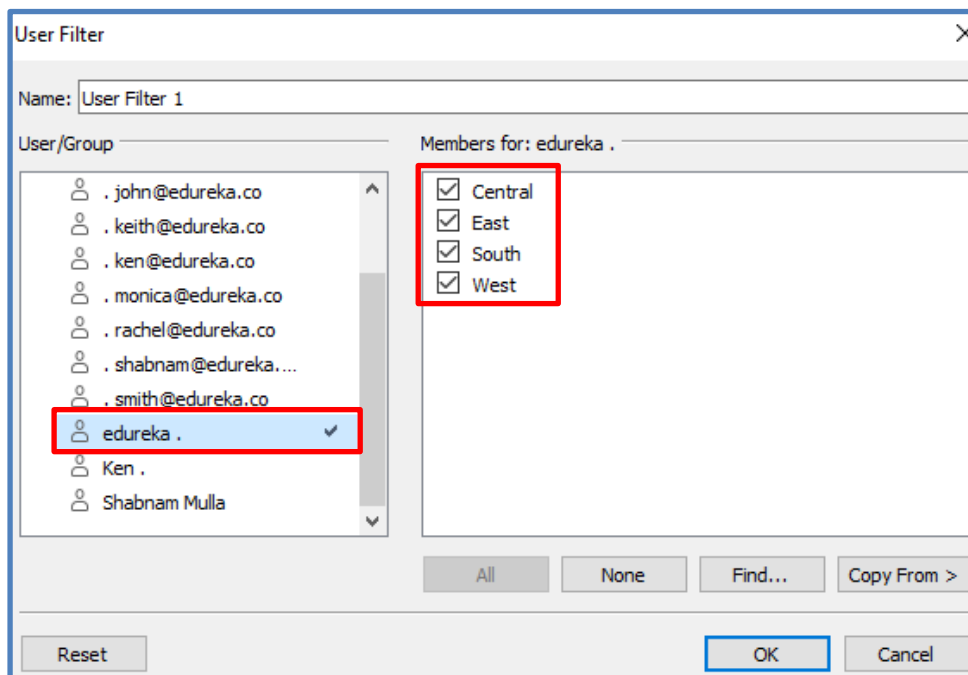


## Step 3: Connect to Tableau Online using your credentials, and create a User Filter:

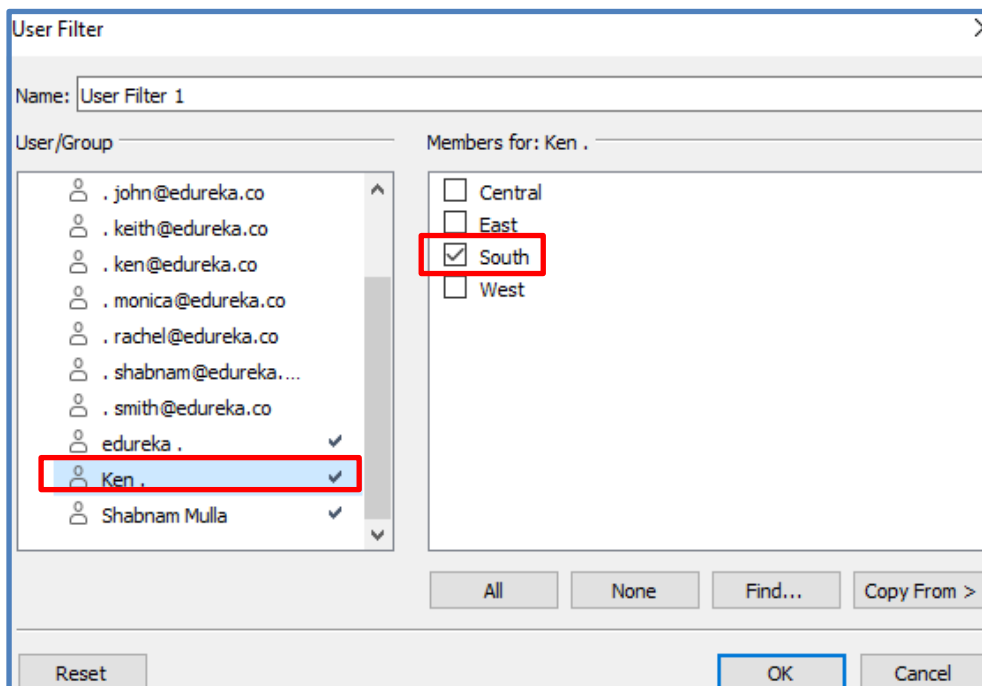
- Go to Server
- Click on Create User Filter
- Select Region



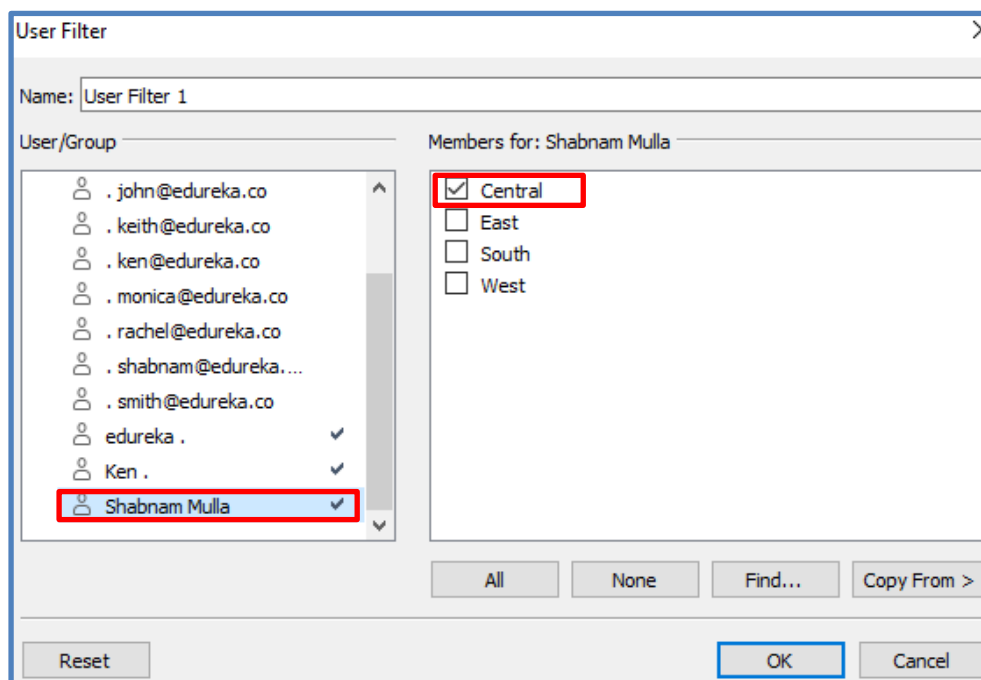
**Step 4:** Next a User Filter dialog box appears on the screen, where you can assign the data access to the Users or the Viewers. Here, we are assigning the profit data of all the regions to **edureka** (which is the Admin account).



Assigning **Ken** the data access of only **South** Region.

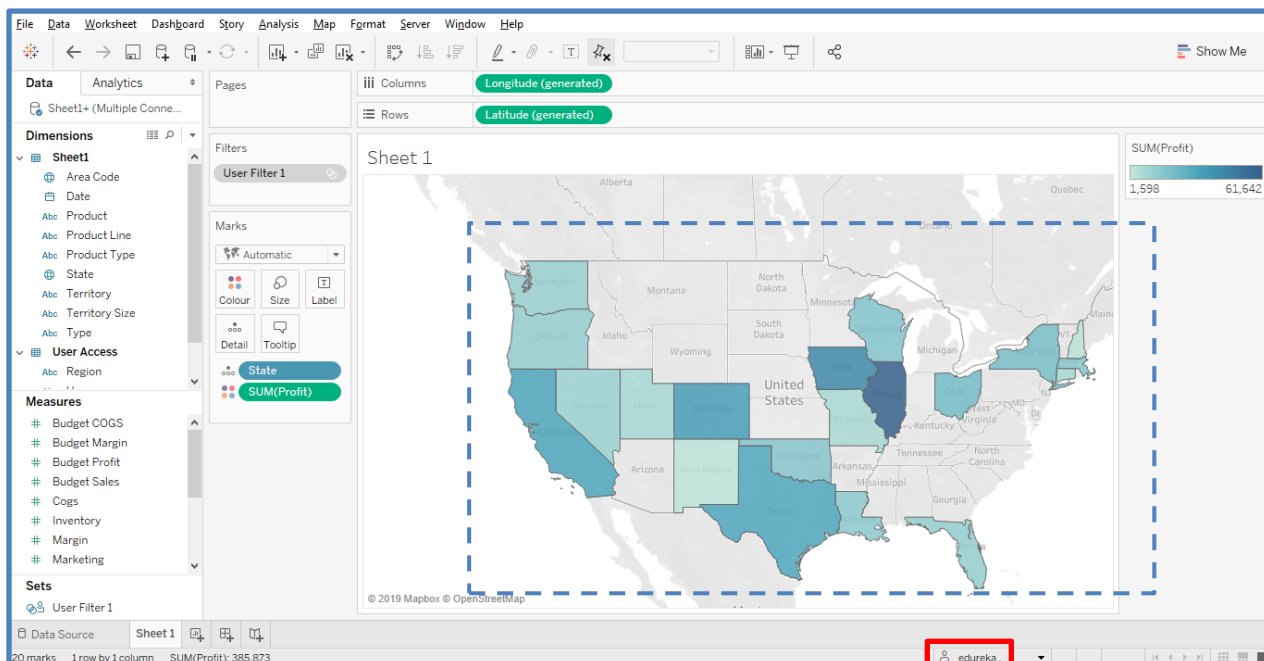


Assigning **Shabnam Mulla** the data access of only **Central** Region.



**Step 4:** Drag the User Filter 1 to Filters shelf

**Step 5:** Since **edureka** is selected at the bottom, it reflects only the data to which it has access.



**Step 6:** Similarly, for Ken and Shabnam, they can visualize only the data to which they have been given access.

