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.
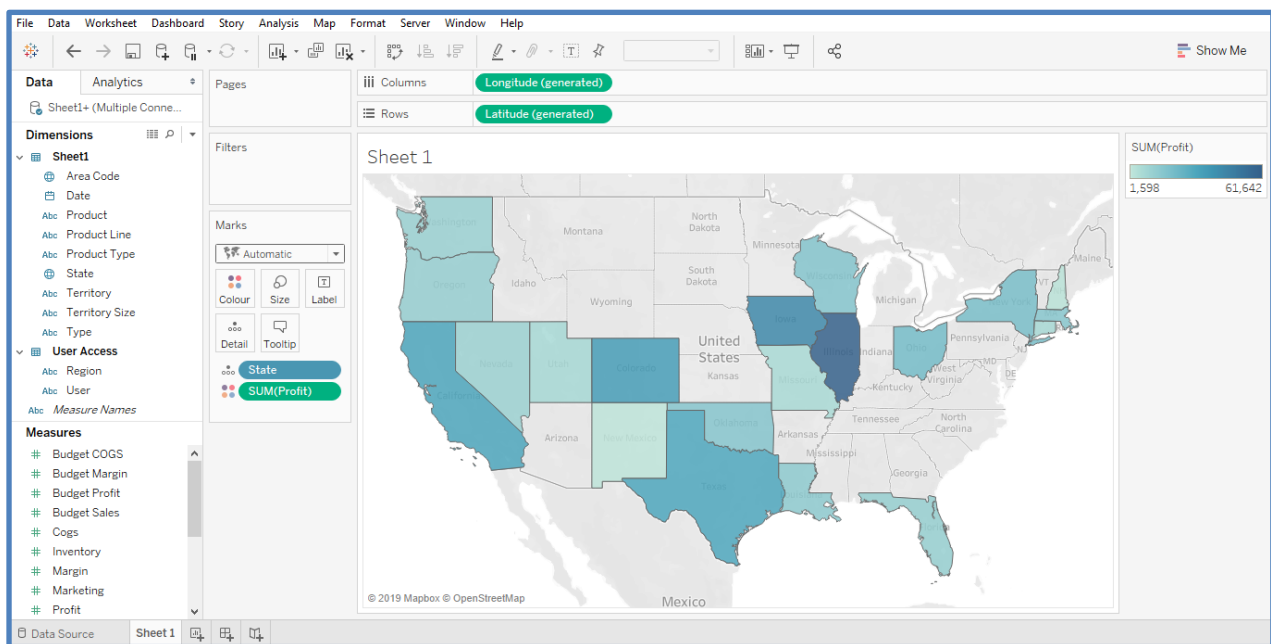Refer the datasets: Coffee Chain.xslx

Demo V Solution

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

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

Step 3: Connect to Tableau Online using your credentials, and create a User Filter:
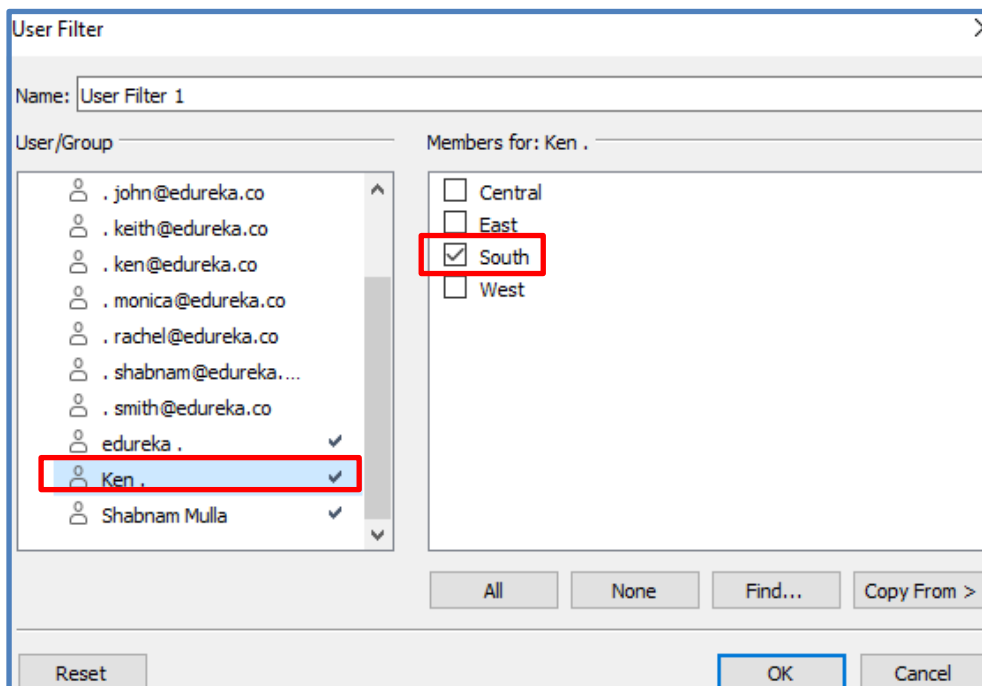
- ➢ Go to Server
- ➢ Click on Create User Filter
- ➢ Select Region
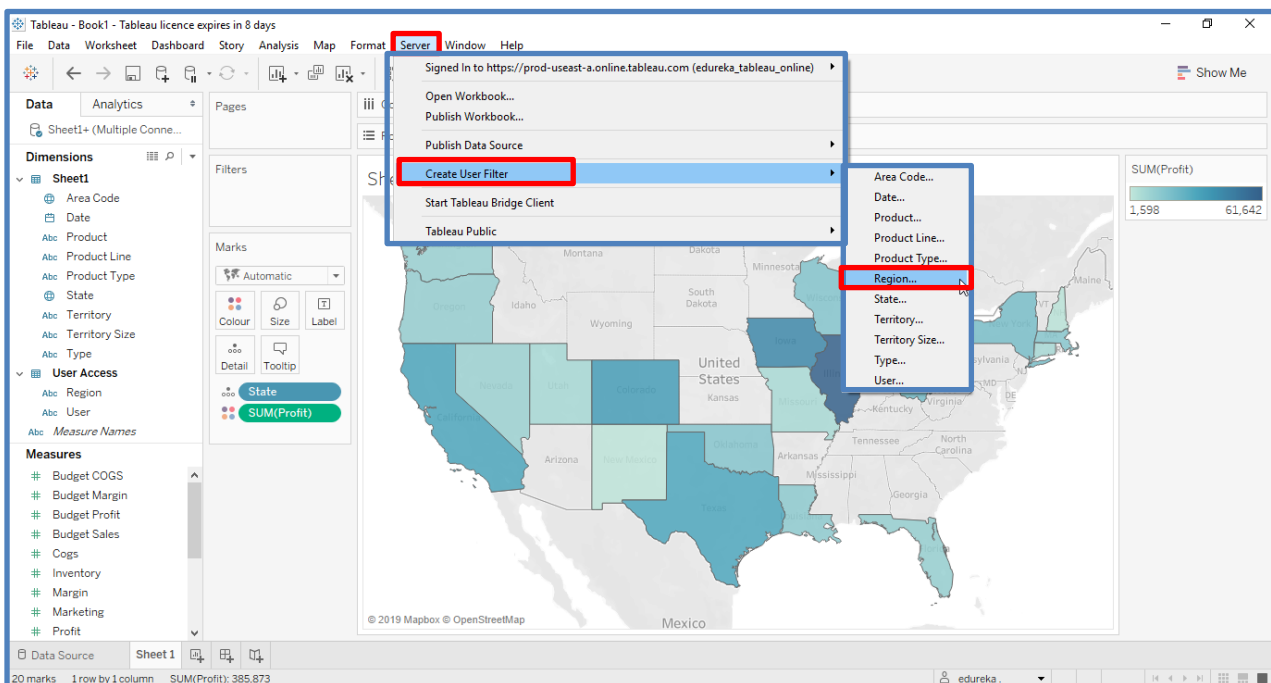
Step 4: Next a User Filter dialog box appears on the screen, where you can assign the data access to the Users or the Viewers. Here, we are assigning the profit data of all the regions to **edureka** (which is the Admin account).
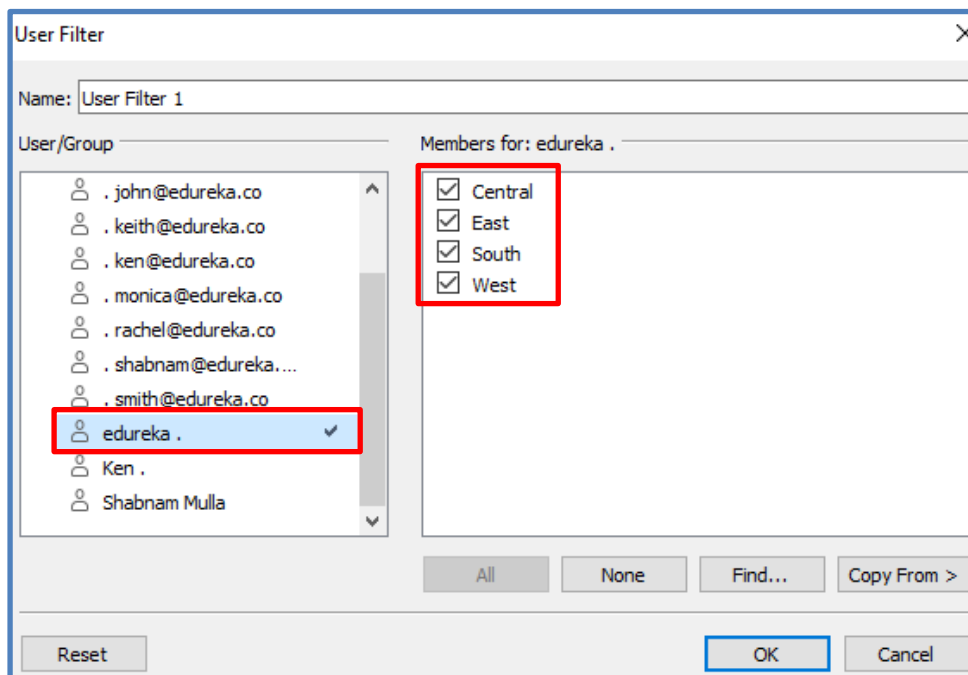
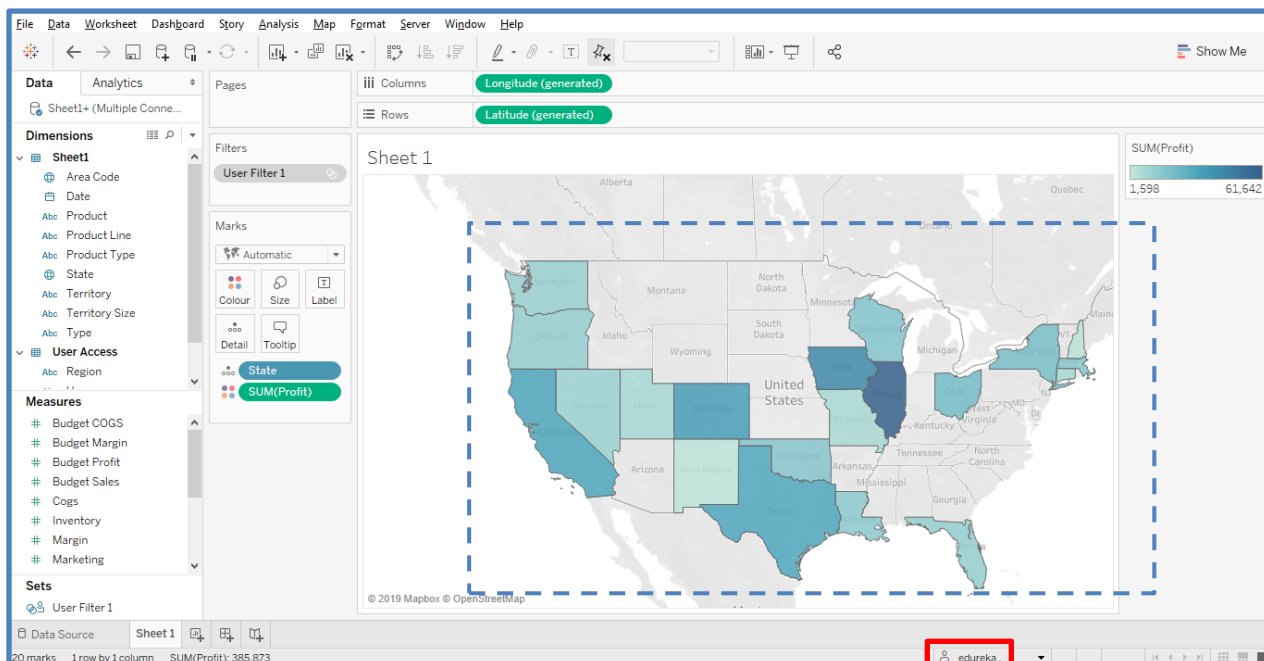Assigning **Ken** the data access of only **South** Region.

Assigning **Shabnam Mulla** the data access of only **Central** Region.
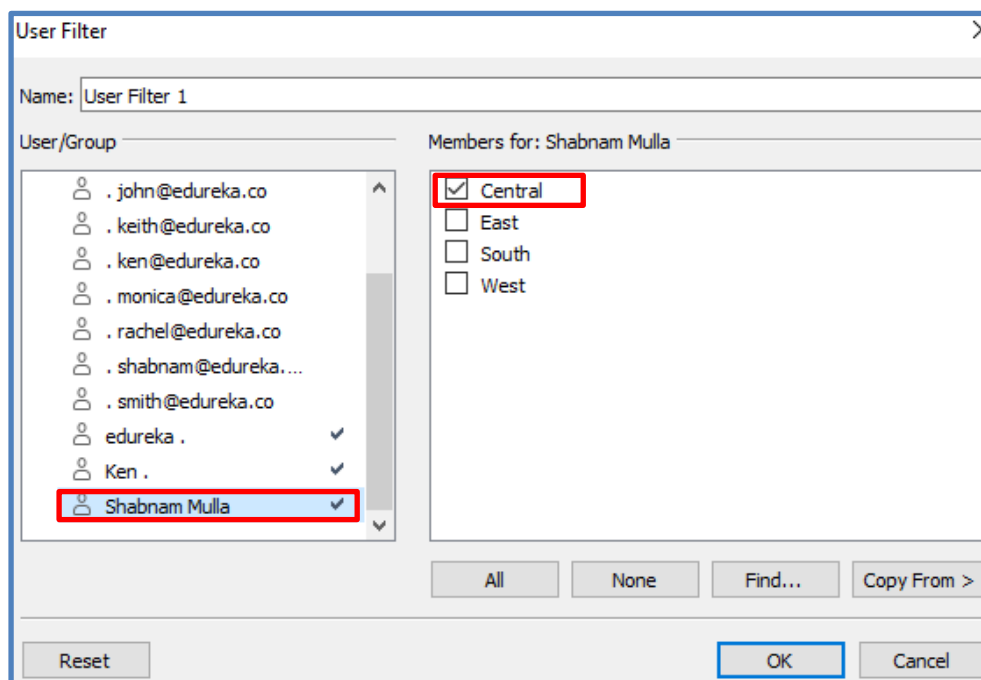
Step 4: Drag the User Filter 1 to Filters shelf

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.