**Assignment: Data Security**

**Problem Statement:**

***Company wants you to publish a report on Tableau Online and create users with explorer and viewer accounts.***

***Refer the dataset: Superstore\_USA***

***Q1: Create an user account with the email id EMAIL ID 1 and EMAIL ID 2 and give user 1 as explorer access and user 2 as viewer access.***

***Q2: User 1 is a manager of Central region, he should only get access to Central region’s data.***

***Q3: User 2 is a higher management and he should have access to all the locations.***

We have "Superstore\_USA" excel dataset for this assignment.

**To connect to the data:**

Under "Connect" section, we need to click on "Microsoft Excel" option and browse through the folder path where the dataset exist, then click on open to load dataset into tableau desktop.

After connecting to "Superstore\_USA" excel data,

Drag and drop "Orders" , "Returns" and "Users" tables to Data Model section to make connections between the tables.

**Before making a report , Lets create hierarchy of geographical dimensions first.**

Since Region type is string. lets make it as geographic type:

step 1) Right click on "Region" dimension, click on "Geographic Role" and then click on " Create from" and select "State or Province".

Now a hierarchy with with "Region" and "State or Province" gets created.

step 2) To this hierarchy, add  "City" and "Postal Code" dimensions

step 3) Rename the hierarchy as "Location"

**Lets create a report which shows region wise sales and profits:**

step 1) Drag and drop "Region" dimension on to Rows Shelf and expand "Region" dimension to "State or Province" in the same shelf.

step 2) Drag and drop "Sales" and "Profit" measures to Columns shelf.

step 3) Right click on "Sales" measure under Tables section and set the currency type to 'English(United States)' and set the decimal places to 0.

step 4) Right click on "Profit" measure under Tables section and set the currency type to 'English(United States)' and set the decimal places to 0. Keep the negative profit in parenthesis.

step 5) Drag and drop "Sales" measure on to Color under "SUM(Sales)" Marks card.

step 6) Click on the downward arrow of "SUM(Sales)" color legend and click on "Edit Colors".

Apply Color palette of your choice and click on OK.

Here I selected "Sunrise-Sunset Diverging" so that higher sales are graded towards blue color and lower sales are graded towards red color.

step 7) Drag and drop "Profit" measure on to Color under "SUM(Profit)" Marks card.

step 8) Click on the downward arrow of "SUM(Profit)" color legend and click on "Edit Colors".

Apply Color palette of your choice and click on OK.

Here I selected "Sunrise-Sunset Diverging" so that positive profit are graded towards blue color and negative profit are graded towards orange color.

Save the workbook.

**Lets sign in to tableau online and create a new project:**

step 1) Sign into tableau online with your credentials.

step 2) Under menu pane, click on "Explore" then click on "New"--> "Project" as shown below:

Graphical user interface, application, Word

Description automatically generated

Give the name as "Sales and Profits Report" and click on "Create".

Now, this project folder gets created along with 'default' and 'Samples' folders.

***Q1: Create an user account with the email id EMAIL ID 1 and EMAIL ID 2 and give user 1 as explorer access and user 2 as viewer access.***

**Lets add two users on tableau online:**

step 1) Under menu pane, click on "Users".

Click on "Add Users" then click on "Add Users by Email".

I gave the Email ID 1 as kmr136279@gmail.com (in my case) and as per the requirement, gave explorer access to this user 1 as shown below:

Graphical user interface, text, application

Description automatically generated

step 2) Similarly, added Email ID 2 as mahi.mm889@gmail.com (in my case) and as per the requirement, gave viewer access to this user 2.

Now, we can see the users along with the site admin as shown below:

Graphical user interface, application

Description automatically generated

**Lets give specific region wise access to user 1 and user 2:**

In tableau desktop:

step 1) Click on "Server" on the top section and click on "Create User Filter" then select "Region" dimension from the options.

Then user filter window gets displayed.

step 2) Give the name as "region filter".

step 3) Since user 1 is manager of central region. Click on the user 1 email id and tick mark the "Central" region checkbox.

step 3) Since, user 2 is higher management, Click on the user 2 email id and tick mark all the regions checkboxes.

Click on OK.

Then "region filter" set gets created under dimensions.

step 4) Now, drag and drop "region filter" set on to Filters card.

***Q2: User 1 is a manager of Central region, he should only get access to Central region’s data.***

Here, we can test the user 1 role as shown below:

Chart, timeline

Description automatically generated

***Q3: User 2 is a higher management and he should have access to all the locations.***

Here, we can test the user 2 role as shown below:

Chart, timeline

Description automatically generated

**Lets publish our report to tableau online:**

Click on "Server" on the top section and click on "Publish Workbook".

Then a window pop ups. Fill the details such as project folder that you want to choose and name, description, permissions as shown below:

Graphical user interface, text, application, email

Description automatically generated

Click on "Publish".

Then you will be redirected to tableau online saying that publishing is complete.