**Assignment: Tableau Online**

**Problem Statement:**

***Business wants to publish the report in Tableau Online and need to create users who can explore and view account. Create the accounts using the email ids and help users to get the desired accesses.***

***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: Try to publish the reports using both the users and see the difference***

***Q3: Create a group called iNeuron and add these users to the group. Give the custom access to the group and see what happens to the user access level once they are added to the group.***

***Q4: With the Admin access, try to explore the Ask Data option in the Tableau Online.***

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) Hold ctrl and select "Region" dimension, "Sales" and "Profit" measures then select tree map visual from Show Me section.

step 2) Drag and drop "Sales" and "Profit" measures on to Label under Marks card.

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

step 4) Right click on "Profit" measure under Tables section and set the currency type to 'English(United States)' and keep the decimal places to 0 then set prefix as $.

**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".

Give the name as "tableau online 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***

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.

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.

**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.

**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.

***Q2: Try to publish the reports using both the users and see the difference***

user 1 role can see only central region sales and profit as shown below:

Shape, rectangle

Description automatically generated

user 2 can see sales and profits of all the regions:

Chart, treemap chart

Description automatically generated

***Q3: Create a group called iNeuron and add these users to the group. Give the custom access to the group and see what happens to the user access level once they are added to the group.***

In Tableau Online:

step 1) Under menu pane, Click on "Groups" and click on "Add Group" then select 'Local Group'.

A window gets displayed.

Give the group name as "iNeuron".

Tick mark "Grant role on sign in" checkbox.

Set the "Minimum Site Role" as "Explorer(can publish)".

Then click on "Create".

Now, Click on the created group and click on "Add Users".

Tick mark the two users which are already there and click on Add Users(2) button.

Graphical user interface, application

Description automatically generated

**User access level of the group:**

Graphical user interface, application

Description automatically generated

**Q4: With the Admin access, try to explore the Ask Data option in the Tableau Online.**

Before exploring Ask Data option, we need to publish data source from tableau desktop to tableau online.

step 1) Click on "Server" and click on "Publish Data Source"

Graphical user interface, text, application, email

Description automatically generated

Check mark the box under More options.

Click on Publish. Then it redirects to Ask Data section.

Graphical user interface, text, application

Description automatically generated

Lets select the suggestion "top 10 Product Sub-Categories by count of Orders".

Then the resultant visual can be seen as shown below:

Chart, bar chart

Description automatically generated