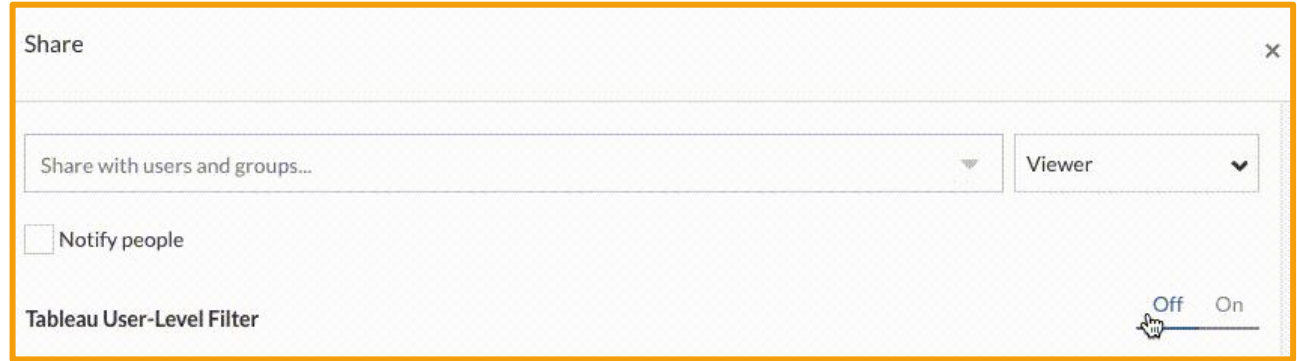# CIVIS

User-Level Filtering in Tableau

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- Creating a Report Viewer
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Tableau

What is User-Level Filtering?

User-level filtering gives you the ability to show viewers different versions of the same Tableau report. The version of the report that the viewer sees is based on the filter that is applied. The filter can be applied to a specific Tableau user or to a group of users.

User-Level Filtering is used when you need to show different versions of a report based on specific criteria such as location, security clearance, position, etc.

Tableau

Creating a Report Viewer

- Any user that you intend to add to a user-level filter will need to have a Tableau user that is associated with a Civis Platform account.
- For users that do not normally publish reports in Tableau, a report viewer user can be created by any Site Admin.
- The Report Viewer will not need access to this Tableau account. The account is only created because Civis Platform needs a 1:1 connection with a Tableau account.
- Users who already have a Tableau account for publishing will not need a report viewer account created for them.

Creating a Report Viewer

1. Connect to the Tableau site you wish to create the user on.
2. From the left-hand pane click on **Users**
3. At the top of the screen click **Add Users** > **New User**
4. Enter in the following information:
   a. **Username:** Platform Username
   b. **Displayname:** User's first and last name
   c. **Password & Confirmation:** Password can be randomized as it should not be shared with the user.
   d. **Email:** Leave blank
   e. **Site Role:** Viewer
5. Click **Add User** to Save

Why use groups?

Groups are a great way to organize the users viewing the report. You can apply a filter to a group of people rather than on a user-by-user basis.

Examples of the types of groups you can create

- Location
- Department
- Security Clearance Level
- Political Firewall
- Internal vs. External Stakeholders

New Group

Group Name

Illinois Report Viewers

☐ Grant role on sign in

Minimum Site Role

Explorer (can publish) ▼

Each site role has different capabilities. Learn more

Cancel   Create

Tableau

Creating a Group

1. From the left-hand pane click on **Groups**
2. At the top of the screen click **Add Group** > **Local Group**
3. Enter in the name of the group, making sure the name is descriptive of the intention of the group.
   a. Do not select the **Grant Role on Sign In** radio button
4. Click **Create** to save
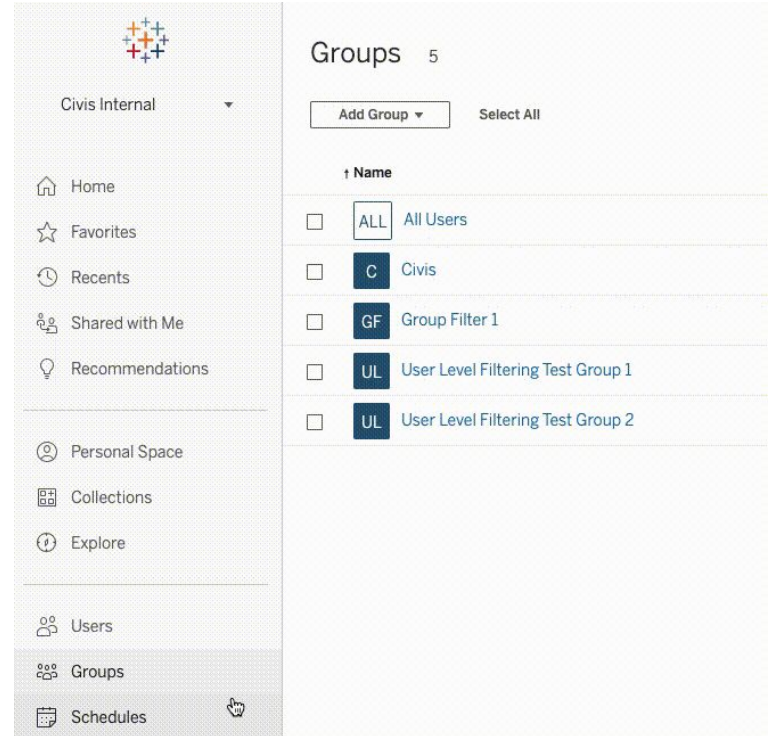
Adding a User to a Group

1. From the left-hand pane click on Users
2. Select the radio button for the user(s) you want to add to a group
3. From the **Actions** drop down select **Group Membership**
4. Choose the group(s) you want to add the user(s) to
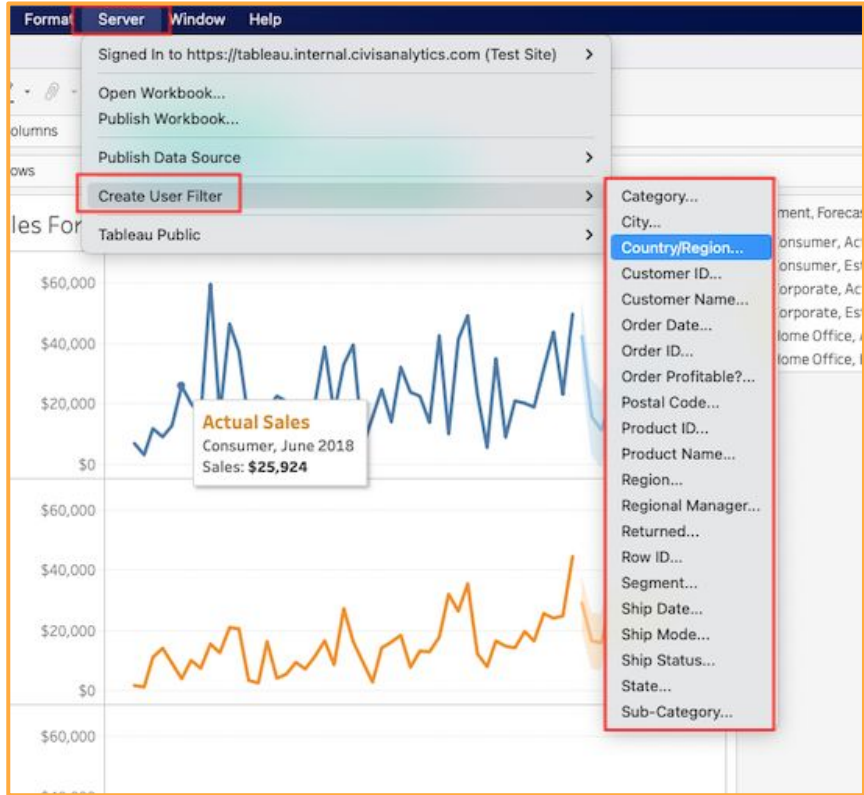5. Click **Save**

8
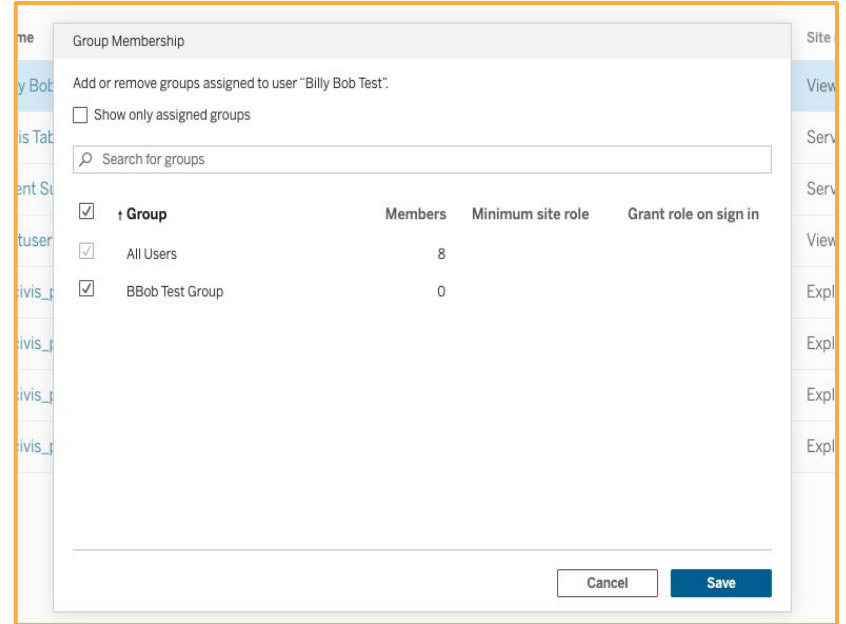
Applying the User-Level Filters

1. Navigate to your chosen workbook or create a new one
2. From the worksheet you want to apply the filter to click **Server** > **Create User Filter** > Select the filter you want to apply

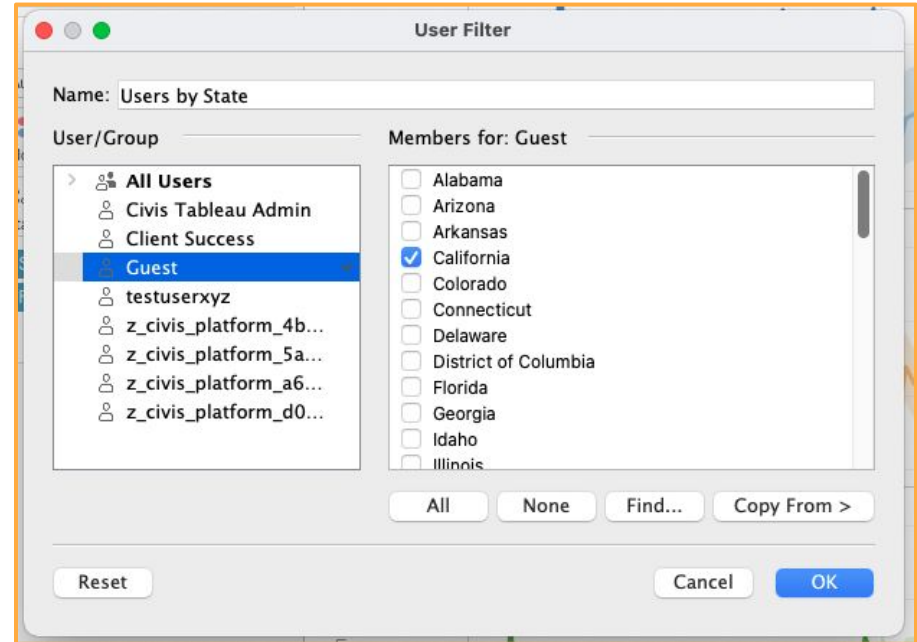See Tableau documentation for how to create a filter here.

Applying the User-Level Filters

3. In the box that comes up, name your filter

4. In the list on the left, select a user or group. On the right, select the individual member(s) that you want the selected user(s) to be able to see

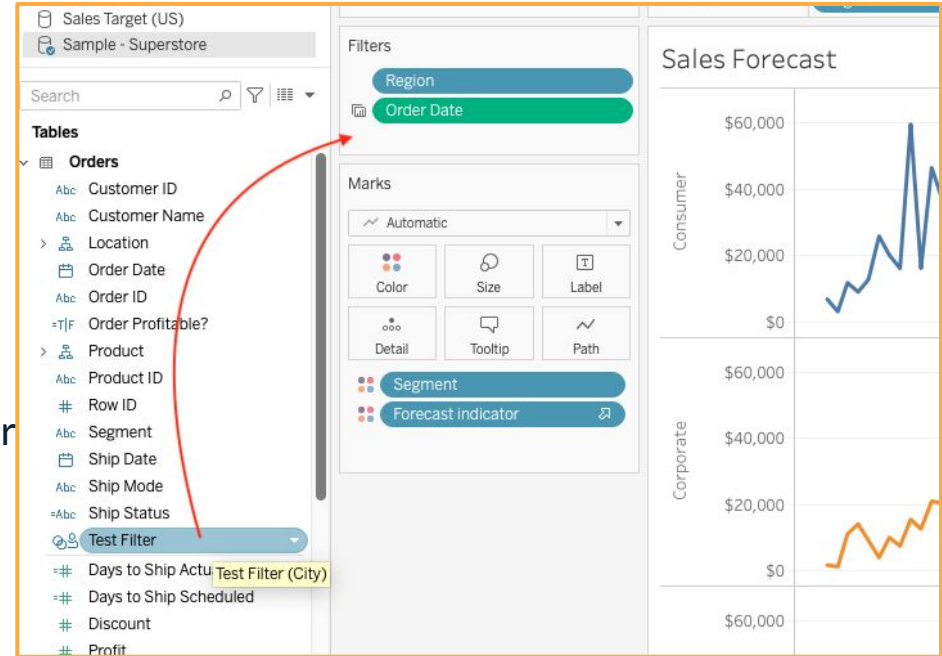You can select multiple users by holding shift and clicking.

Applying the User-Level Filters

5. Repeat this process for each user or group and click **OK** when you're done mapping users to values

6. Find your filter in the left **Data** pane

7. Drag and drop your filter in the **Filters** shelf

Enabling User-Level Filters in Platform

Tableau User-Level Filter   Off   On

1. Once you have applied your filter and published the report, locate the report in Platform:
    1. **Publish** tab
    2. Click on the **Reports** header
    3. Filter by report type Tableau and/or the author of the report
2. Click the 3-dot menu and select **Share**
3. Turn on the **Tableau User-Level Filter** option
4. Share the report with your intended audience

Additional Sources

- Create a User Filter and Secure it for Publishing
- Applying User Filter Sets to Published Data Sources
- Creating a New Workbook