**Web Editing Tool**

**Issue / Amendment Record**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Project ID** | | BCBS – Credit Risk FDSF 15002321 | | | |
| **Project Name** | | FDSF Wholesale/ Structured Finance Templates Automation | | | |
| **Document Status** | |  | | | |
| **Version** | **Date** | **Author** | **Reviewer** | **Approver** | **Version Summary** |
| 0.1 | 19/11/2015 | Marc Freixa | Marc Freixa |  | Initial draft |

**Contents**

[1. User Roles and Permissions 3](#_Toc435707888)

[2. Restrictions using Web Editor Tool 3](#_Toc435707889)

[3. Navigation 4](#_Toc435707890)

[a. Data and Analytics pane. 4](#_Toc435707891)

[1.1.1 Data Pane 5](#_Toc435707892)

[1.1.2 Analytics pane 5](#_Toc435707893)

[b. TOOLBAR. 6](#_Toc435707894)

[c. Columns and Rows. 7](#_Toc435707895)

[d. Marks 8](#_Toc435707896)

[e. FILTERS 9](#_Toc435707897)

[4. Calculated Fields 9](#_Toc435707898)

# User Roles and Permissions

The Web Editor Tool is allowed to be used to all the users that have **edit permissions** in their user role.

Currently, FDSF tool has the roles below:

* Risk Administrator:
  + Can do everything into Tableau model.
* Risk Project Leader
  + He can modify the report but NOT saving it or create a new one.
  + He cannot move or delete the current reports stored at server
  + He cannot set permissions
* Risk Publisher
  + He can see the reports but do nothing more.

|  |  |  |  |
| --- | --- | --- | --- |
| **USER NAME** | **Can access to Web Edit Tool** | **Can modify the current report but no saving this** | **Can create new reports or modify the current ones** |
| RISK ADMINISTRATOR | YES | N/A | YES |
| RISK PROJECT LEADER | YES | YES | NO |
| RISK PUBLISHER | NO | NO | NO |

# Restrictions using Web Editor Tool

Web Editor Tool contains big part of the current functionalities included at Tableau Desktop. This allows to the users to modify or create new reports online, without using Tableau Desktop. There are some rules that the users must bear in mind using the Web Editor Tool:

**What the Web Editor Tool users can do:**

* Create new views (sheets), duplicate, and rename views in a workbook
* Change aggregation of measures
* Use **Show me** to create views
* View underlying data
* Create and edit **calculated fields**, and use quick table calculations
* Drag field to different mark types in the **Marks** card
* Use the Analytics pane to drag reference lines, trend lines, and other objects into the view
* Add, modify, and remove filters (Shown as **Quick Filters**), and edit a filter layout.
* Show labels, totals and subtotals
* Swap X and Y axes
* Change the view size
* Exclude or remove fields in the view

**What the Web Editor Tool users cannot do:**

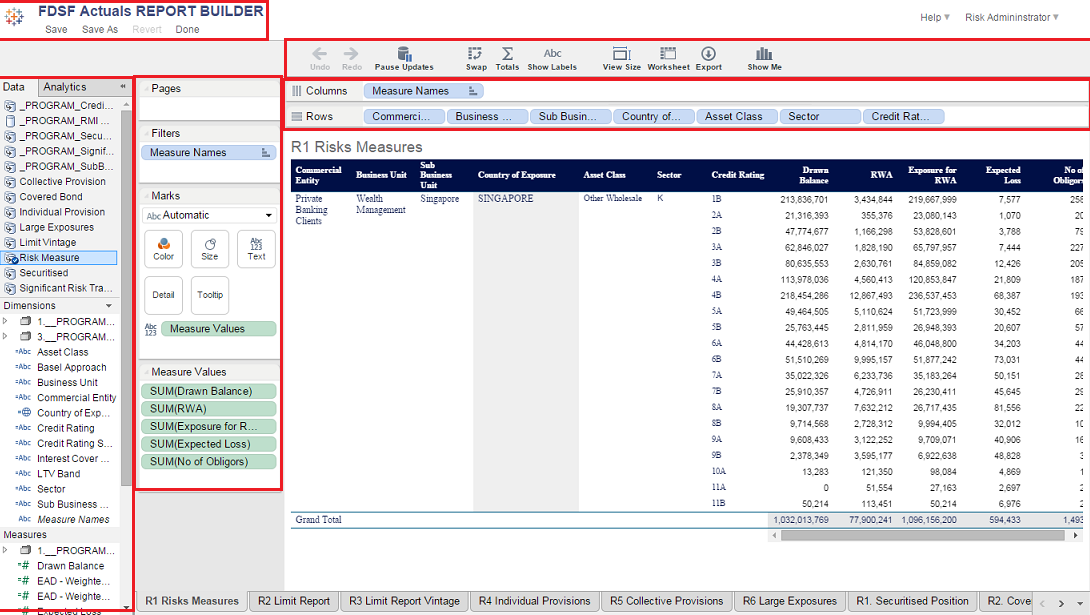
* Cannot add data sources to a published workbook
* Data model editing is not supported.
* Dashboards and stories cannot be created or modified at the server
* Formatting options are not available

# Navigation

The users can access to the Web Editing Tool by clicking on the “Edit” button that is placed at the bottom of the current Report.



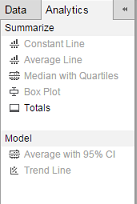
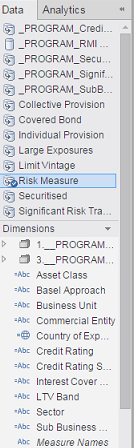
When the user clicks on this button, the Web Editing Tool is activated and the user can see the screen below (We fully recommend to use **Chrome Browser** for the editing tool):



These are the different areas included at the Web Editor, there is below a full summary for all the areas included at the Wed Editing Tool.

## **Data and Analytics pane.**

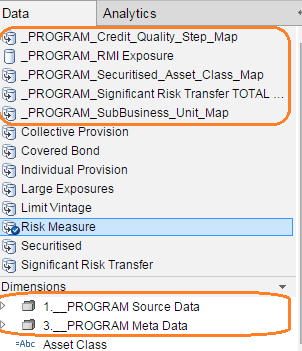
This area appears on the left side of the workspace and is divided in 2 tabs: Data and Analytics



The data pane include the names of the data sources included on the workbook, and the fields (as dimension or measure), parameters, and sets included in the active data source.

The active data source will be always the source that appears with a blue arrow. If the user clicks in other data source, the Data pane will change and will show the fields, parameters, and sets included at the clicked data source.

For FDSF there are some fields and data sources that have been used for internal purposes and have not business containing, they have the \_\_PROGRAM prefix. If the user access to them, maybe will find not understanding fields but they are used for create rest of fields and measures used at reports.



The pane is split in 2 parts: Data Pane and Analytics Pane

### Data Pane

At the top of the Data pane is a list of available data sources for the workbook. Current used data sources are coloured in Blue (if this is the main data source) or Red (if this is a secondary data source). You can see 3 big groups of fields above the data pane:

* **Dimensions**contains the fields that have discrete and qualitative data
* **Measures** contains numerical data that can be aggregated
* **Parameter**contains dynamic values that can replace constant values in calculations, filters, and reference lines. Parameters may be present in workbooks that you edit, but you **cannot create parameters**.

To build visualizations, these 3 groups of fields can be dragged and dropped from the data pane to the **Rows** and **Columns** shelves, the Marks card, or one of the other available shelves.

### Analytics pane

The Analytics pane provides quick and easy access to common analytic features in Tableau.

This pane includes reference lines, box plots, trend lines forecasts, and other items that can be dragged and dropped into the view from the **Analytics** pane.

Toggle between the **Data** pane and the **Analytics** pane by clicking one of the tabs at the top of the Side Bar

## **TOOLBAR.**

A **toolbar** with options for editing the view is displayed at the top of the workspace.



There is a summary of the current actions for do below:

**Undo/Redo:** Lets to undo or redo almost any type of change in the view.

**Pause Updates:** When there is placed a field on a shelf, Tableau generates the view by querying the data source. If updates seem slow when editing the view, “Pause updates” button can be activated while making a series of edits, then turn on again.

**Swap:** This moves the fields on the Rows shelf to the Columns shelf and vice-versa.

**Totals:** Lets to the user to compute grand totals and subtotals for the data in a view.

* **Show Column Grand Totals** Adds a row showing totals for all columns in the view.
* **Show Row Grand Totals** Adds a column showing totals for all rows in the view.
* **Add All Subtotals** Inserts subtotal rows and columns in the view, if you have multiple dimensions in a column or row.
* **Remove All Subtotals** Removes subtotal rows or columns.

**Show/Hide Labels:** Select to show or hide marks labels in the view.

**View Size:** Lets to change the proportions of the view within the browser window

**Worksheet:** Contains options for making changes at the worksheet level. Create worksheets, modify sheet names, clear sheet formatting, or clear the entire sheet.

**Export:** The user can export to capture parts of the view for use in other applications.

**Show Me:** Opens a control that shows a range of visualization types that can be used in Tableau. Tableau uses the data in the current view to determine which visualization types to make available.

## **Columns and Rows.**

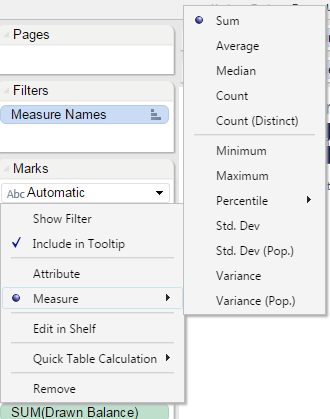
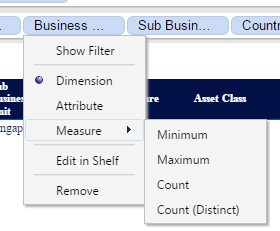


All views included in tableau have their structure arranged by Columns and Rows. The user can modify this structure by other different one.

By dragging fields to the Columns or Rows shelf, new columns or rows are included to the table. There can be dragged multiple fields to either shelf.

Discrete values (typically, dimensions) are displayed in blue on the Columns and Row shelves; continuous values (typically, measures) are displayed in green.

There is also a drop down menu in each field included at Columns or Rows pane. This menu changes his options depending on the type of field where is activated.



DIMENSION

MEASURE

The complete list of options includes:

* **Include in Tooltip (Measure)**

By default, all fields on the Columns and Rows shelf are included in the tooltips that appear when the mouse is moved over one or more marks in the view. Un-checking this option wil remove a field from tooltips.

* **Show Filter (Dimension and Measure)**

This option is used for add a filter for this field to the view. Users will then be able to specify which data to include and exclude for this dimension or measure.

* **Dimension/Attribute/Measure**

This option is used for convert a dimension to a measure or a measure to a dimension.

There can be also defined the option as an Attribute, which returns the value of the given expression if it only has a single value for all rows in the group, and otherwise displays an asterisk (\*) character. Null values are ignored.

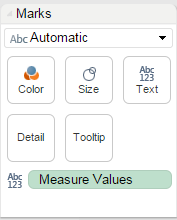
* **Quick Table Calculation (Measure)**

Provides a set of options for redefining the meaning of the marks for the value.

* **Remove (Dimension and Measure)**

Removes the value from the Columns or Rows shelf.

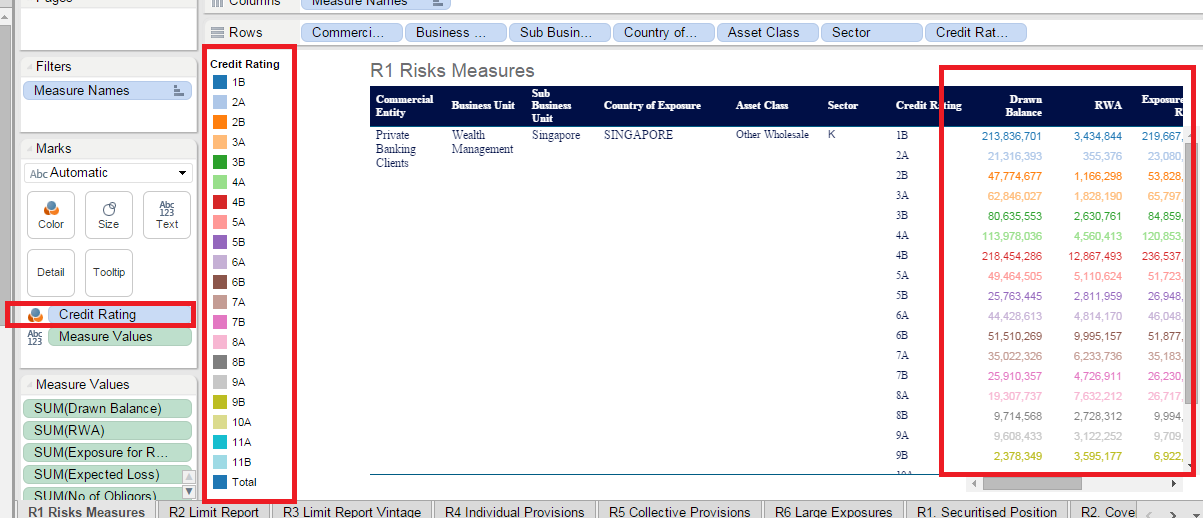
## **Marks**



Marks can be displayed in many different ways including lines, shapes, bars, maps, and so on.

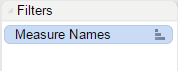
There are multiple options for work with them, the most are used to show additional information about the data using mark properties such as color, size, shape, labels, etc. The type of mark used and the mark properties are controlled by the Marks card.

**Example: Group a dimension value by colour into the table**



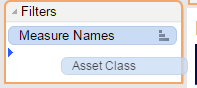
In this little sample there have been used the Mark Pane Colour option to separate the different values from “Credit Rating” in colours. The user has only to drag and drop the Credit Rating field from dimensions to Mark/Colour to have this effect.

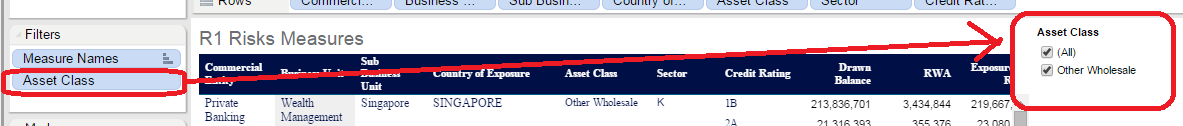
## **FILTERS**



Filters shelf is used for specify which data will be included or excluded at the view.

There can be included dimensions or measures into this pane. When a dimension or measure is dragged to the Filters shelf, Tableau automatically inserts a filter control into the view for selecting the values to display.





# Calculated Fields (Advanced)

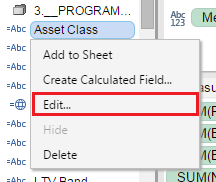
This section is for more advanced users that want to create or modify the fields included at Reports.

**Depending on the role permissions, the user will allow to create and modify fields. We recommend not to modify the current fields and create new fields if there is necessary. If not, there can fail other reports that are using these fields.**

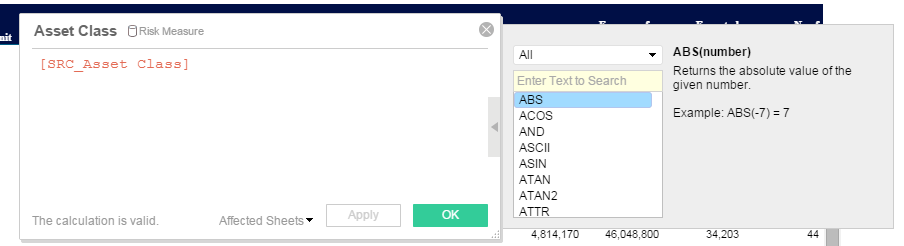
If your underlying data doesn't include all of the need fields, there is an option to create new fields in Tableau or modify the current ones, and then save them as part of the data source.

There can be created new calculated fields or modify the current ones using standard functions and operators.

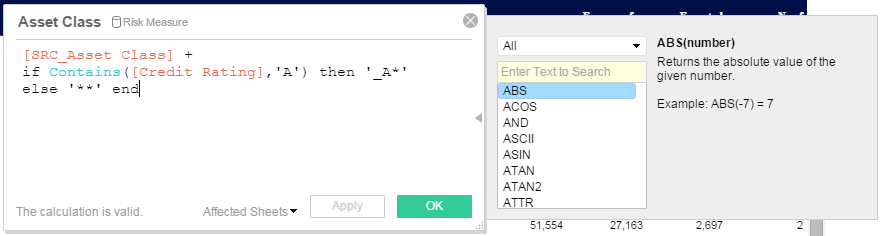
### EDIT CURRENT CALCULATED FIELDS



Original field: ASSET CLASS



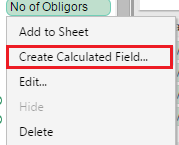
Modified field: ASSET CLAS + SUFIX



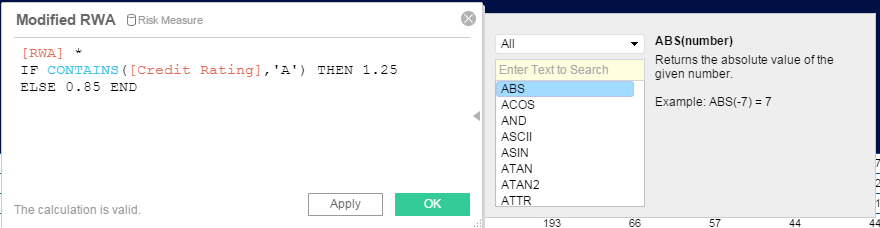
RESULTING FIELD



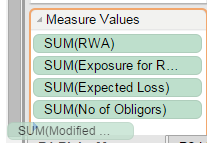
### CREATE NEW CALCLATED FIELD



Now we are going to create a new measure that will modify the RWA value depending on the Credit Rating. The new field will be named “Modified RWA”.



Drag and drop this new measure into Measure Values pane



And this is the result spreadsheet

