

Looker Studio | Access Controls



Notes for CQI Conference 2022 session:

- [Looker Studio](#) was formerly known as *Google Data Studio*.
- bit.ly/datacqi22 to access sample data set during conference workshop.

Commented [SL1]: Link

Commented [SL2R1]:

1. Prep a Google Sheet showing a column with email addresses and a column with the type of data each should have access to. In this case data access is by site and the data set is the 2nd worksheet of the CQI Conference Demo Data Set.

The screenshot shows a Google Sheet with the following data:

	A	B
1	Email Address	Site
2	mstathis@ymcachicago.org	Beverly
3	mstathis@ymcachicago.org	Shelbyville
4	mstathis@ymcachicago.org	Roseland
5	kbarnick@ymcachicago.org	Beverly
6	jgilbreath@ymcachicago.org	Shelbyville
7	jecooper@ymcachicago.org	Roseland
8		

2. Add as a new data source. Choose Google Sheets as your data source.

Access Control Demo

Participant Goal Summary

Add data to report

Connect to data My data sources

Search

Google Connectors (24)
Connectors built and supported by Looker Studio [Learn more](#)

- Looker PREVIEW
By Google
Connect to your Looker semantic models.
- Google Analytics
By Google
Connect to Google Analytics.
- Google Ads
By Google
Connect to Google Ads performance report data.
- Google Sheets**
- BigQuery
- AppSheet

3. Find the CQI Conference Demo Data Set and Access Control worksheet.

Add data to report

Data credentials: Melanie Stathis

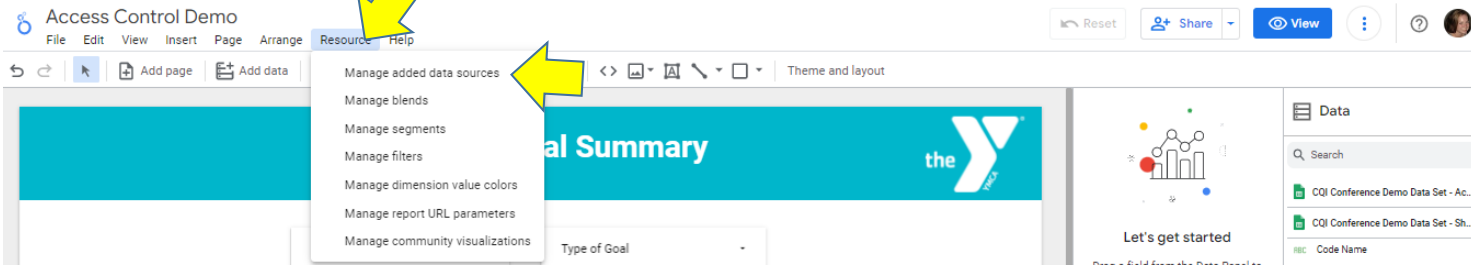
Google Sheets
By Google
The Google Sheets connector allows you to access data stored in a Google Sheets worksheet.

LEARN MORE REPORT AN ISSUE

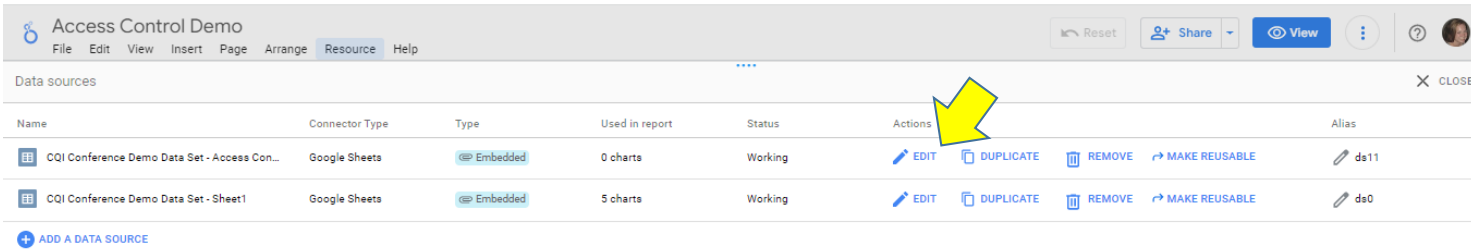
ALL ITEMS	Spreadsheet	Worksheet	Options
OWNED BY ME	CQI Conference Demo Data Set	Sheet1	<input checked="" type="checkbox"/> Use first row as headers
SHARED WITH ME	ACA YOY All_GDS	Access Control	<input checked="" type="checkbox"/> Include hidden and filtered cells
STARRED	YSVP 2023 Scorecard Mock Up		Column headers must be unique. Columns with empty headers will not be added to the data source.
	High Level Impact Measures Programs Ass...		
	YSVP Grant Tracking Requirements - FY22		

Cancel Add

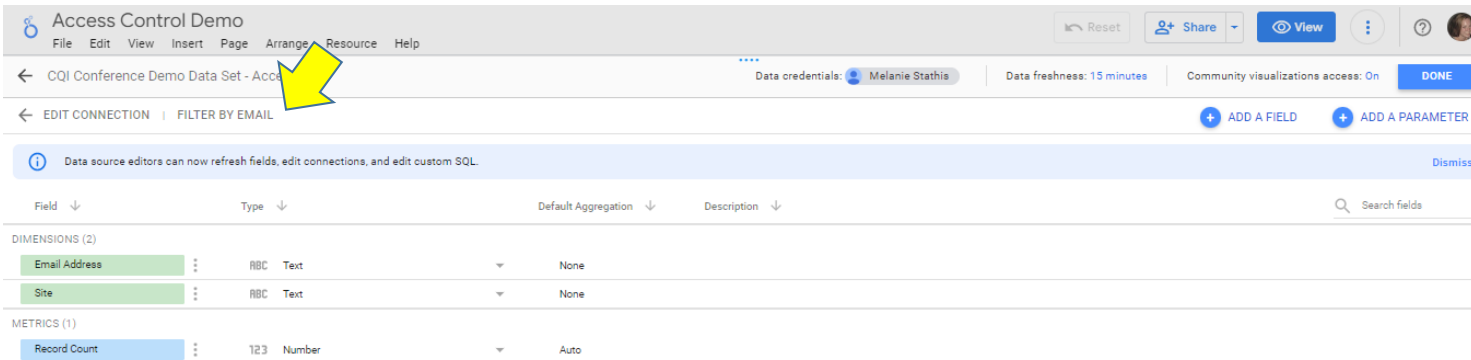
4. Under the Resources menu, go to Manage added data sources



5. Click the EDIT button next to the Access Control data source



6. Click FILTER BY EMAIL



7. Check the Filter data by viewer email check box. Click "Select email field".

Access Control Demo
File Edit View Insert Page Arrange Resource Help

← CQI Conference Demo Data Set - Access... Data credentials: Melanie Stathis Data freshness: 15 minutes Community visualizations access: On DONE

← ALL FIELDS

Filter by email
If your data contains email addresses, you can filter this data source to show only data matching the currently signed in user's email address. Report viewers must consent to letting this data source access their email address. [Learn more](#)

Filter data by viewer email

Select email field

This is the field that contains the addresses to filter by.

8. Choose the Email Address field and click Done

Access Control Demo
File Edit View Insert Page Arrange Resource Help

← CQI Conference Demo Data Set - Access... Data credentials: Melanie Stathis Data freshness: 15 minutes Community visualizations access: On DONE

← ALL FIELDS

Filter by email
If your data contains email addresses, you can filter this data source to show only data matching the currently signed in user's email address. Report viewers must consent to letting this data source access their email address. [Learn more](#)

Filter data by viewer email

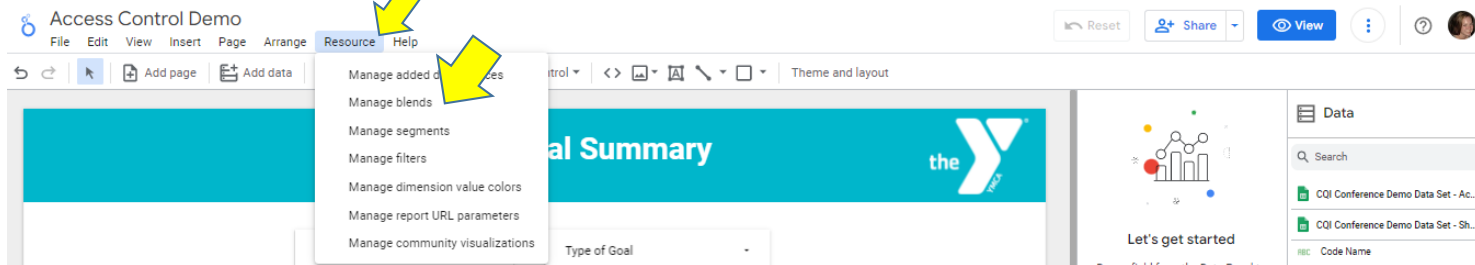
Type to search

Default group

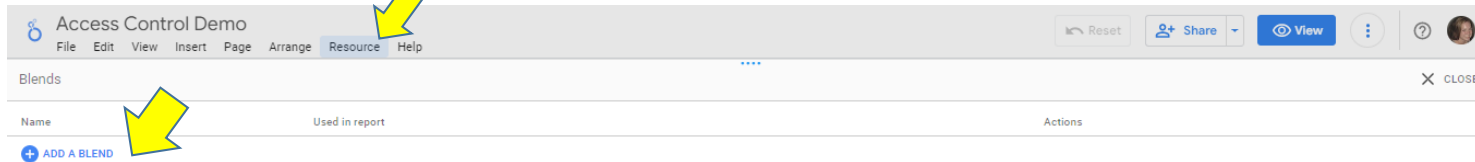
- Email Address
- Site

This is the field that contains the addresses to filter by.

9. Go to the Resources menu. Click Manage blends to add a blend.



10. Click ADD A BLEND



11. Click Add Another Table

Access Control Demo

File Edit View Insert Page Arrange Resource Help

Reset Share View

Blend Data

Table 1 (Table Name)

CQI Conference Demo Data Set - Sheet1

Join another table

Dimensions

Site

Add dimension

Metrics

Add metric

Date range

Add dimension

Available Fields

Type to search

- REC Code Name
- REC Goal Description
- REC Graduation Year
- REC Met Goal
- Site
- REC Type of Goal
- 123 Record Count

Data source name

Included dimensions and metrics

Site

12. Find the Access Control sheet of the CQI Conference Demo Data Set

Access Control Demo

File Edit View Insert Page Arrange Resource Help

Reset Share View

Blend Data

Table 1 (Table Name)

CQI Conference Demo Data Set - Sheet1

Search

Added data sources

- CQI Conference Demo Data Set - Access Control
- CQI Conference Demo Data Set - Sheet1

Available data sources

- Data studio update log - Sheet1

Dimensions

Site

Add dimension

Available Fields

Type to search

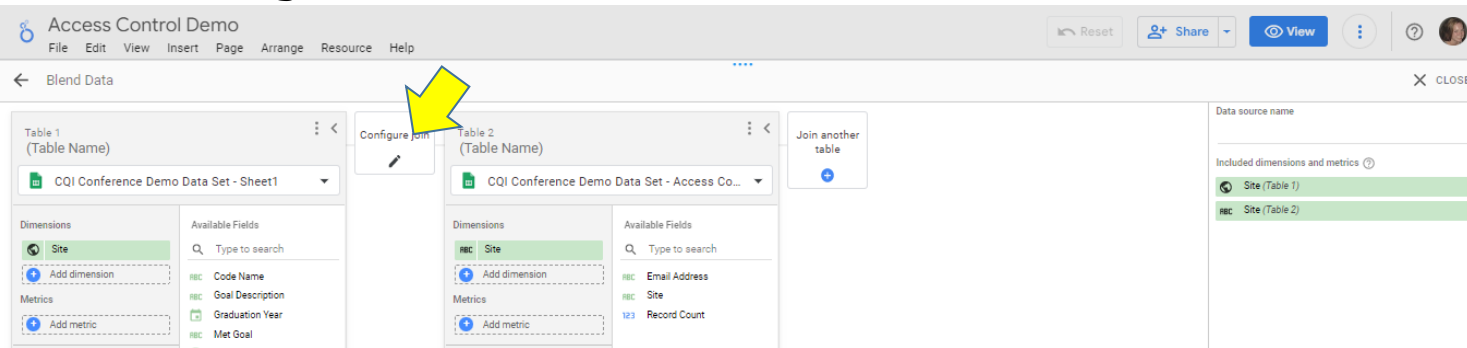
- REC Code Name
- REC Goal Description

Data source name

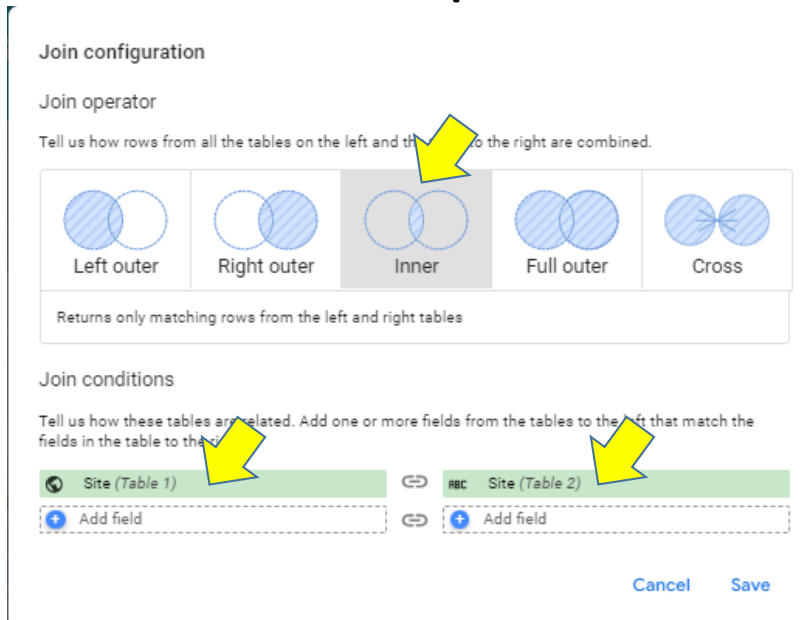
Included dimensions and metrics

Site

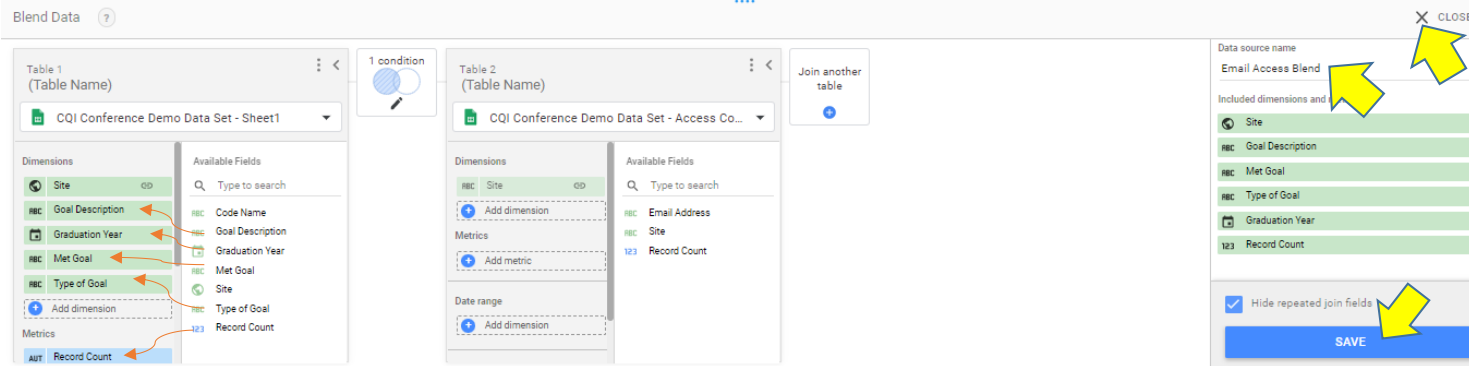
13. Click Configure Join



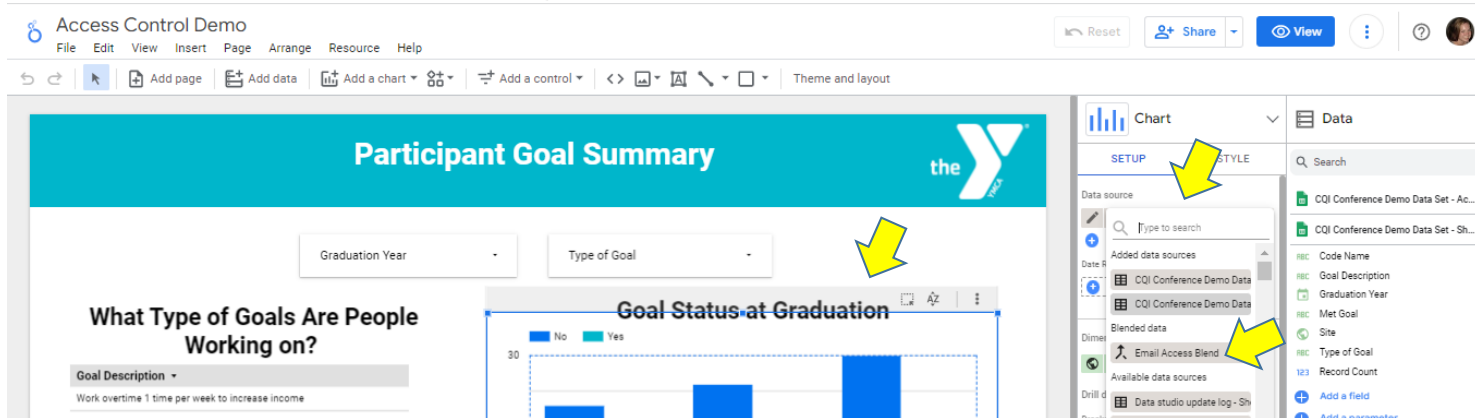
14. Choose the Inner option and the Site fields from each table/data source.



15. Add all dimensions possible for maximum flexibility. Add Record Count as metric. Add a name for the blend. Press save and close.



16. Click on a chart or table that you want to apply email access to. Click on the data source to change it. Choose the blend you created.



17. Once anyone views a report with email access the pop up below will appear. Direct all users to click “Allow”. They will then see data only for the sites listed next to their email address on the Access Control sheet.

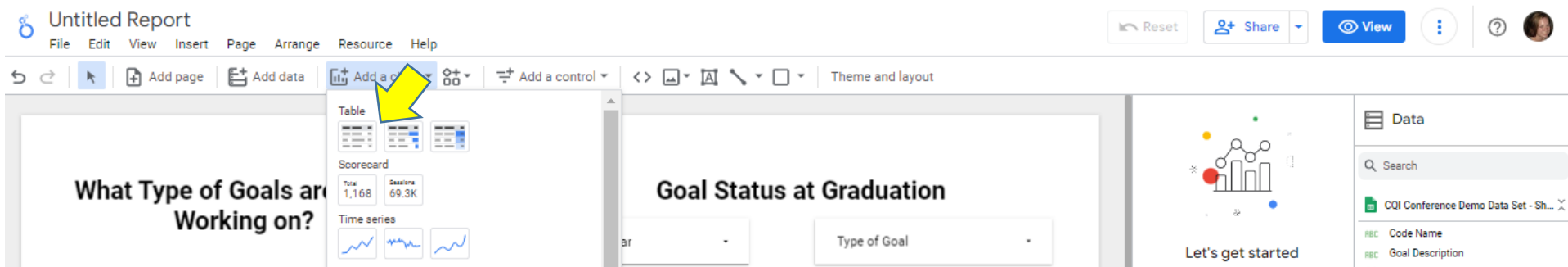
The screenshot shows a Power BI report titled "Participant Goal Summary" with the YMCA logo. A "Grant consent" dialog box is centered on the screen, asking for permission to use personal information for personalization. The dialog text includes: "This report wants to use your information to personalize what you see.", "Information requested:", and a list containing "Your email address (mstathis@ymcachicago.org)". Below the list, it states: "Selecting Allow will grant access for all data sources on this report." The dialog has "Cancel" and "Allow" buttons. The background report shows a "Goal Description" section with items like "Work overtime 1 time per week to increase income" and "Volunteer to put something on my resume". The right-hand pane shows a "Data" view with fields like "Email Address", "Site", and "Record Count".

Looker Studio | Interactive Qualitative Data and Formatting

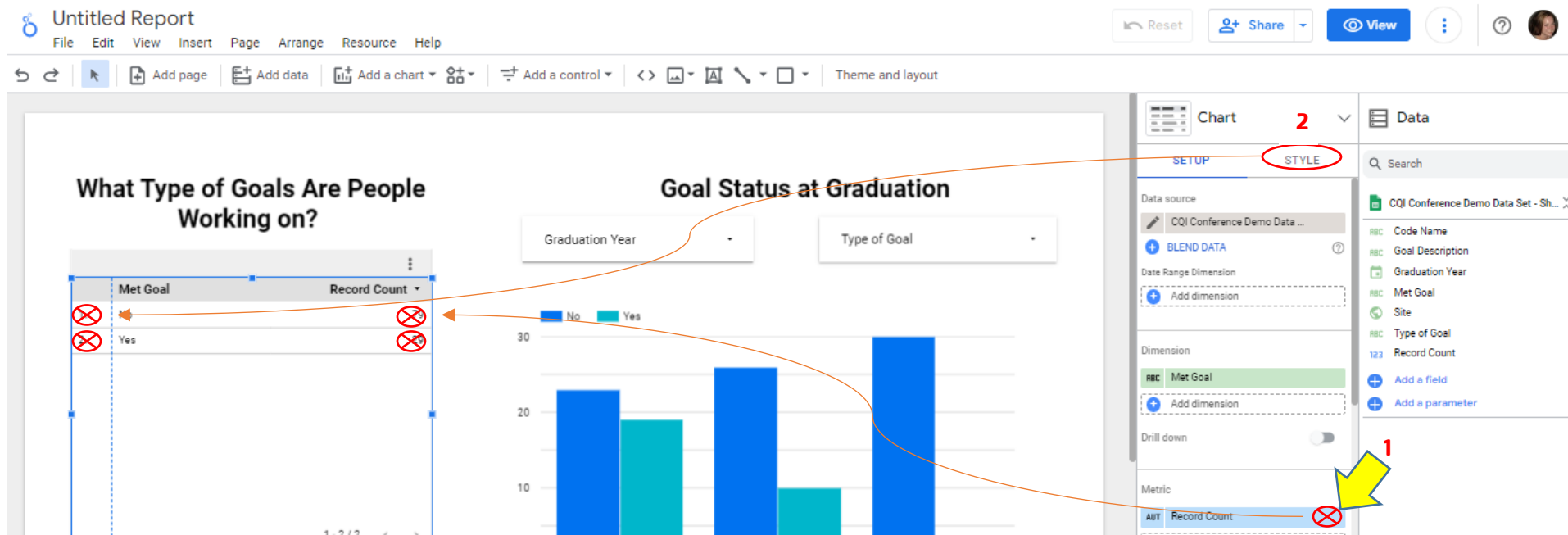
Notes for CQI Conference 2022 session:

- [Looker Studio](#) was formerly known as *Google Data Studio*.
- bit.ly/datacqi22 to access sample data set during conference workshop.

1. Add a table



2. Remove the Record Count metric. Go to the Style menu to remove row #s.



3. Scroll down on the style menu and uncheck "Row numbers"

The screenshot shows a report builder interface. On the left, a table titled "What Type of Goals Are People Working on?" is displayed with a "Met Goal" column containing "Yes" and "No". In the center, a bar chart titled "Goal Status at Graduation" shows data for three sites: Roseland, Shelbyville, and Beverly. The chart compares "No" (blue) and "Yes" (teal) goal status. Below the chart is a table with columns "Site" and "Number Served", showing Roseland with 42. On the right, a "Chart" style menu is open, showing "Row numbers" unchecked. A yellow arrow points to the "Row numbers" checkbox.

4. Add Goal Description as a dimension and remove the other dimension

The screenshot shows a report builder interface. On the left, a table titled "What Type of Goals Are People Working on?" is displayed with columns "Goal Description" and "Met Goal". The bar chart titled "Goal Status at Graduation" shows data for three sites: Roseland, Shelbyville, and Beverly. On the right, a "Chart" style menu is open, showing "Dimension" with "Goal Description" selected and "Met Goal" deselected. A yellow arrow points to the "Goal Description" dimension.

5. Controls already added will also allow for filtering with the new table.

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

What Type of Goals Are People Working on?

Goal Description ▾

Work overtime 1 time per week to increase income

Goal Status at Graduation

■ No ■ Yes

Site	No	Yes
Roseland	23	19
Shelbyville	26	10
Beverly	30	0

Data

Search

COI Conference Demo Data Set - Sh...

- Code Name
- Goal Description
- Graduation Year
- Met Goal
- Site
- Type of Goal
- Record Count
- Add a field
- Add a parameter

Let's get started

Drag a field from the Data Panel to the canvas to add a new chart or select a component on the report canvas to edit it.

6. Change the number of rows that show up at one time.

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

What Type of Goals Are People Working on?

Goal Description ▾

- Work overtime 1 time per week to increase income
- Volunteer to put something on my resume
- Transfer to a different school
- Take medicine every day
- Take accounting course
- Take SAT practice test and prep course
- Take GED prep course
- Submit medical receipts for reimburseent
- Study for the fire department test
- Stop wasting money on coffee, make my own

1 - 10 / 108

Goal Status at Graduation

■ No ■ Yes

Site	No	Yes
Roseland	23	19
Shelbyville	26	10
Beverly	30	0

Chart

SETUP STYLE

Data source

COI Conference Demo Data ...

BLEND DATA

Date Range Dimension

Add dimension

Dimension

Goal Description

Add dimension

Drill down

Metric

Add metric

Optional metrics

Metric sliders

Rows per Page

10

Data

Search

COI Conference Demo Data Set - Sh...

- Code Name
- Goal Description
- Graduation Year
- Met Goal
- Site
- Type of Goal
- Record Count
- Add a field
- Add a parameter

1. Roseland 42

7. On the Insert menu insert an image and a text box

The screenshot displays a reporting tool interface. The top menu bar includes 'File', 'Edit', 'View', and 'Insert'. The 'Insert' menu is open, showing options such as 'Scorecard', 'Scatter chart', 'Bullet chart', 'Stacked area chart', 'Pivot table', 'Treemap', 'Gauge', 'Drop-down list', 'Fixed-size list', 'Input box', 'Advanced filter', 'Slider', 'Checkbox', 'Date range control', 'Data control', 'URL Embed', 'Text', 'Image', 'Line', 'Rectangle', and 'Circle'. Yellow arrows point to the 'Text' and 'Image' options in the menu.

The main content area features a bar chart titled 'Goal Status at Graduation'. The chart compares 'No' (blue) and 'Yes' (teal) goal status across three sites: Roseland, Shelbyville, and Beverly. The y-axis represents the number of people, ranging from 0 to 30.

Site	No	Yes
Roseland	23	19
Shelbyville	26	10
Beverly	30	0

Below the chart is a data table with the following content:

Site	Number Served
1. Roseland	42

The right sidebar contains a 'Chart' panel with 'SETUP' and 'STYLE' tabs, and a 'Data' panel with a search bar and a list of data fields including 'Code Name', 'Goal Description', 'Graduation Year', 'Met Goal', 'Site', 'Type of Goal', and 'Record Count'.

8. Adjust the text size, color, spacing, background and border color.

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

← Add page Add data Add a chart Add a control Theme and layout

Participant Goal Summary

Graduation Year Type of Goal

What Type of Goals Are People Working on?

Goal Description

- Work overtime 1 time per week to increase income
- Volunteer to put something on my resume
- Transfer to a different school
- Take medicine every day
- Take accounting course
- Take SAT practice test and prep course
- Take GED prep course
- Submit medical receipts for reimburseent
- Study for the fire department test
- Stop wasting money on coffee, make my own

1 - 10 / 108

Goal Status at Graduation

Site	No	Yes
Roseland	23	19
Shelbyville	26	10
Beverly	30	0

Site	Number Served
1. Roseland	42
2. Shelbyville	36

Text Properties

Font and Paragraph 10px

Roboto

B *I*

U ☒

Overflow settings: visible

Background and Border

0 100%

None Solid

Data

Search

Code Name

Goal Description

Graduation Year

Met Goal

Site

Type of Goal

Record Count

Add a field

Add a parameter

Add Data

9. Select an image file from your computer.

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Participant Goal Summary

Graduation Year: [Dropdown] Type of Goal: [Dropdown]

What Type of Goals Are People Working on?

Goal Status at Graduation

Legend: No (Blue), Yes (Teal)

30

Image Properties

SETUP STYLE

Image File

Select a file

Preserve Aspect Ratio

Image Link URL

Data

Search

CQI Conference Demo Data Set - Sh...

- Code Name
- Goal Description
- Graduation Year
- Met Goal
- Site
- Type of Goal
- Record Count

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Participant Goal Summary

the Y YWCA

Graduation Year: [Dropdown] Type of Goal: [Dropdown]

What Type of Goals Are People Working on?

Goal Description

- Work overtime 1 time per week to increase income
- Volunteer to put something on my resume
- Transfer to a different school
- Take medicine every day
- Take accounting course
- Take SAT practice test and prep course
- Take GED prep course
- Submit medical receipts for reimburseent
- Study for the fire department test
- Stop wasting money on coffee, make my own

Goal Status at Graduation

Legend: No (Blue), Yes (Teal)

30

Roseland Shelbyville Beverly

Site Number Served

1. Roseland 42

Let's get started

Drag a field from the Data Panel to the canvas to add a new chart or select a component on the report canvas to edit it.

Data

Search

CQI Conference Demo Data Set - Sh...

- Code Name
- Goal Description
- Graduation Year
- Met Goal
- Site
- Type of Goal
- Record Count

Add a field

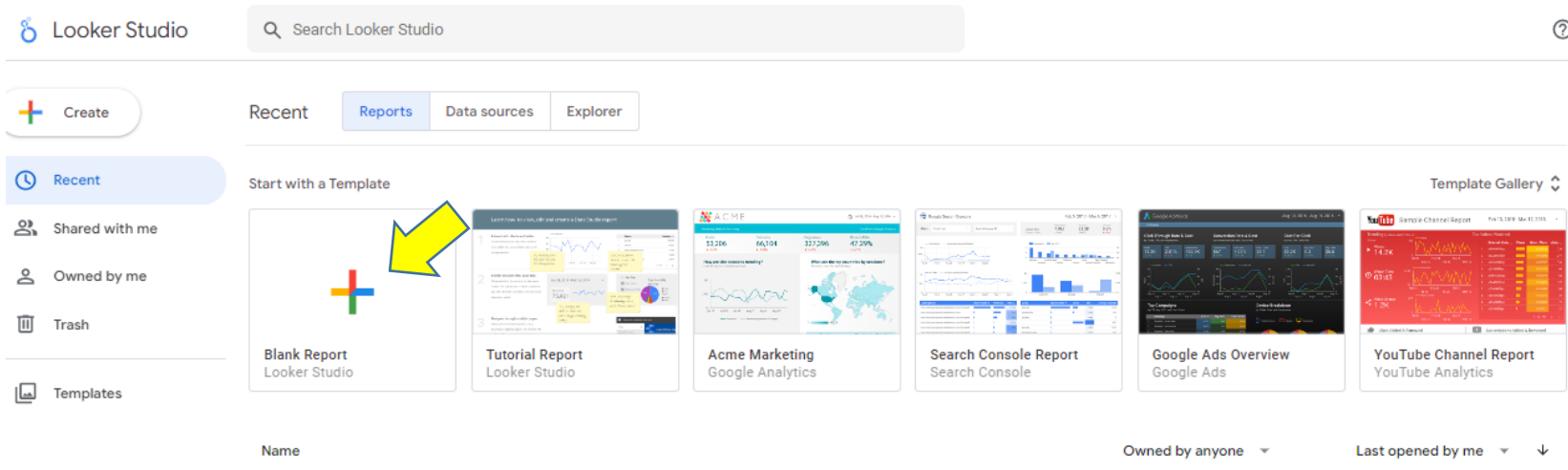
Add a parameter

Looker Studio | Basic Visuals

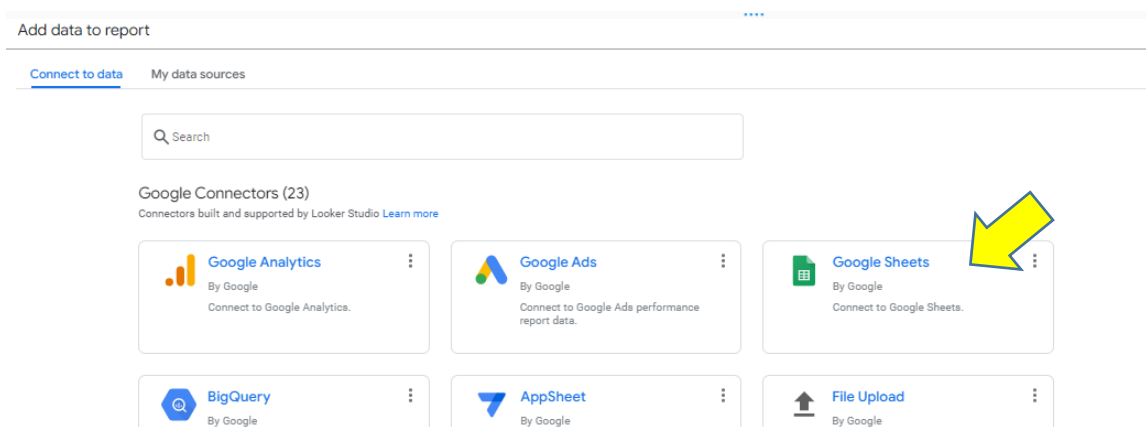
Notes for CQI Conference 2022 session:

- [Looker Studio](#) was formerly known as *Google Data Studio*.
- bit.ly/datacqj22 to access sample data set during conference workshop.

1. Create a new report



2. Choose your first data source (Google Sheets recommended)



3. Search for an existing Google Sheets spreadsheet

Untitled Report
File View Page Help
Reset Share View

Add page Add data Add a chart Add a control Theme and layout

← Add data to report Data credentials: Melanie Stathis

Google Sheets
By Google
The Google Sheets connector allows you to access data stored in a Google Sheets worksheet.
[LEARN MORE](#) [REPORT AN ISSUE](#)

ALL ITEMS Spreadsheet

OWNED BY ME CQI Conference Demo Data Set

4. Choose a worksheet (if multiples on your spreadsheet), and press add

[LEARN MORE](#) [REPORT AN ISSUE](#)

ALL ITEMS Spreadsheet Worksheet Options

OWNED BY ME CQI Conference Demo Data Set Sheet1

SHARED WITH ME OST 2223 PQA Data and Report Template
CSI Scorecard_Sept 2022

STARRED CSI consents info by school - 9.30.22
Needs and Characteristics CSI Schools an...

URL YMCA Valuation

OPEN FROM GOOGLE DRIVE ConsolidatedAttRpt_July2021
SHP FY23 Service Reporting Quarterly Rep...
ETH FY23 Service Reporting Quarterly Rep...
EHS and HS Grant Statistics (Internal Refer...
COPA 201s March-Aug 2022
COPA 201s March-July 2022

Options
 Use first row as headers
 Include hidden and filtered cells
Column headers must be unique.
Columns with empty headers will not be added to the data source.
Optional Range, e.g. A1:B52

Cancel Add

5. A table will appear with a column from your data set as a dimension.

In this example, *Site* is the only dimension and *Record Count* is the only as a metric. To change the name of the Record Count column, click on the AUT near the pink star (to the left of Record Count)

The screenshot shows a reporting tool interface with a table and a configuration sidebar. The table has two columns: 'Site' and 'Record Count'. The 'Record Count' column has a pink star and 'AUT' next to it. The sidebar shows the 'Chart' setup with 'Site' as the dimension and 'Record Count' as the metric.

Site	Record Count
1. Roseland	42
2. Shelbyville	36
3. Beverlv	30

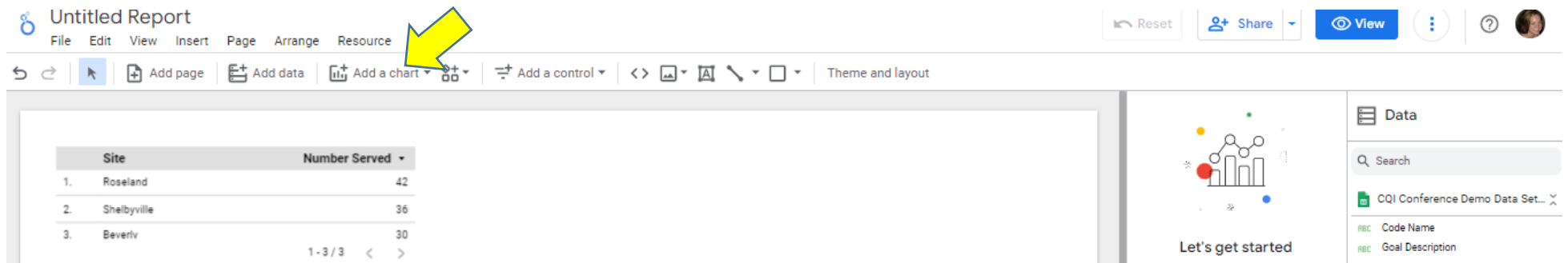
6. Rename *Record Count* to *Number Served*

In our sample dataset, each row represents one person served so a count of the records is a count of the people served.

The screenshot shows the reporting tool interface with the table updated to have 'Number Served' as the second column. A red arrow points from the 'Number Served' column header to the 'Number Served' field in the configuration sidebar.

Site	Number Served
1. Roseland	42
2. Shelbyville	36
3. Beverlv	30

7. Add a visual / chart



Untitled Report

File Edit View Insert Page Arrange Resource

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Site	Number Served
1. Roseland	42
2. Shelbyville	36
3. Beverly	30

1 - 3 / 3

Let's get started

Data

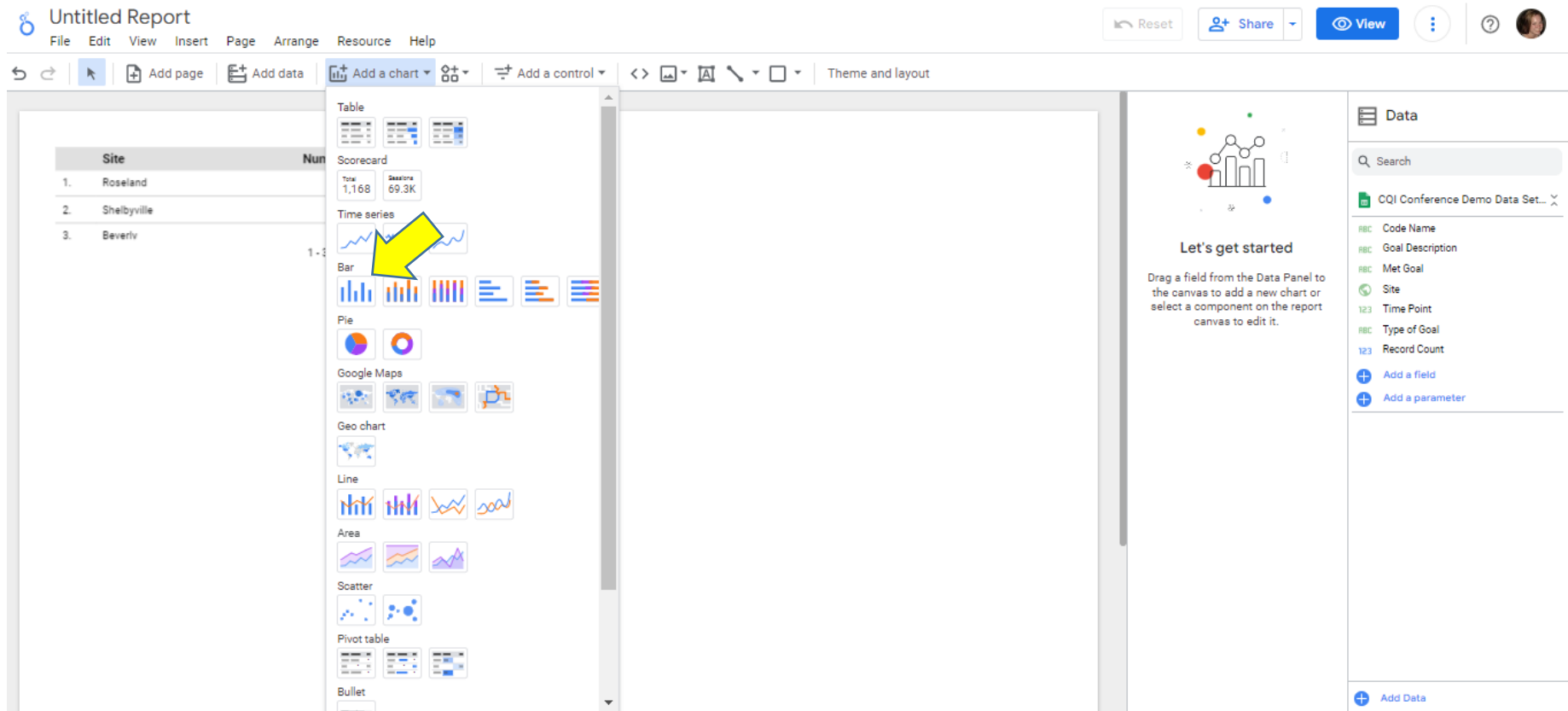
Search

CQI Conference Demo Data Set...

Code Name

Goal Description

8. Choose a chart type. In this example, we will make a bar graph.



Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Site	Number Served
1. Roseland	42
2. Shelbyville	36
3. Beverly	30

1 - 3 / 3

Let's get started

Drag a field from the Data Panel to the canvas to add a new chart or select a component on the report canvas to edit it.

Data

Search

CQI Conference Demo Data Set...

Code Name

Goal Description

Met Goal

Site

Time Point

Type of Goal

Record Count

Add a field

Add a parameter

Add Data

9. By default, dimension is *Site* and metric is *Record Count* (# served)

Click/drag a field from the right menu. In this case, choose *Met Goal* to see how many people from each site met their goals.

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Site	Number Served
1. Roseland	42
2. Shelbyville	36
3. Beverly	30

1 - 3 / 3 < >

Record Count

Roseland Shelbyville Beverly

Chart

SETUP STYLE

Data source

QCI Conference Demo Data ...

BLEND DATA

Date Range Dimension

Add dimension

Dimension

Site

Drill down

Breakdown Dimension

Add dimension

Data

Search

QCI Conference Demo Data Set...

Code Name

Goal Description

Met Goal

Site

Time Point

Type of Goal

Record Count

Add a field

Add a parameter

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Site	Number Served
1. Roseland	42
2. Shelbyville	36
3. Beverly	30

1 - 3 / 3 < >

No Yes

Roseland Shelbyville Beverly

Chart

SETUP STYLE

Data source

QCI Conference Demo Data ...

BLEND DATA

Date Range Dimension

Add dimension

Dimension

Site

Drill down

Breakdown Dimension

Met Goal

Metric

Record Count

Data

Search

QCI Conference Demo Data Set...

Code Name

Goal Description

Met Goal

Site

Time Point

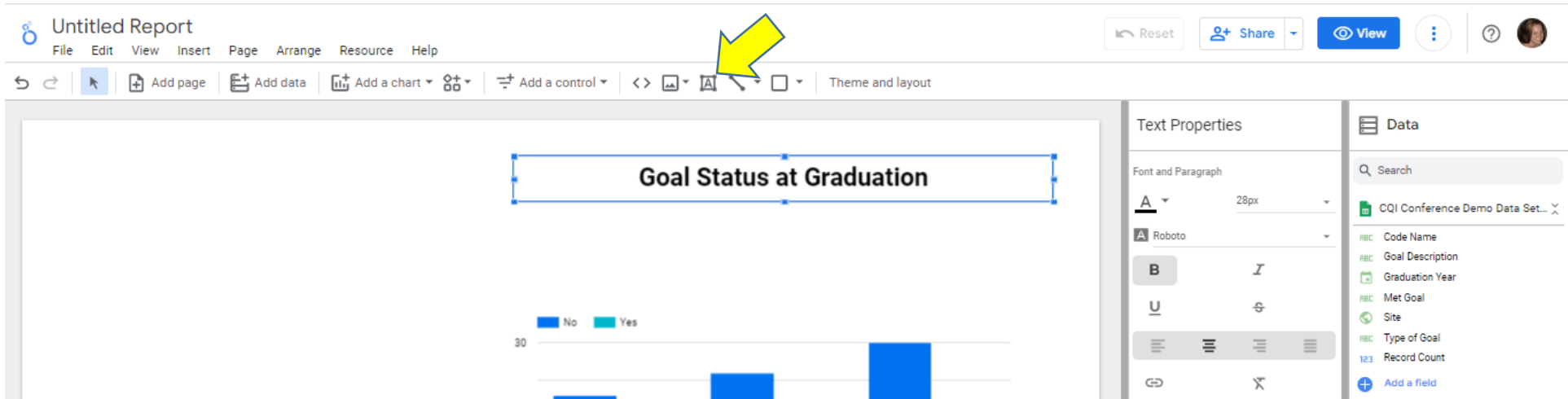
Type of Goal

Record Count

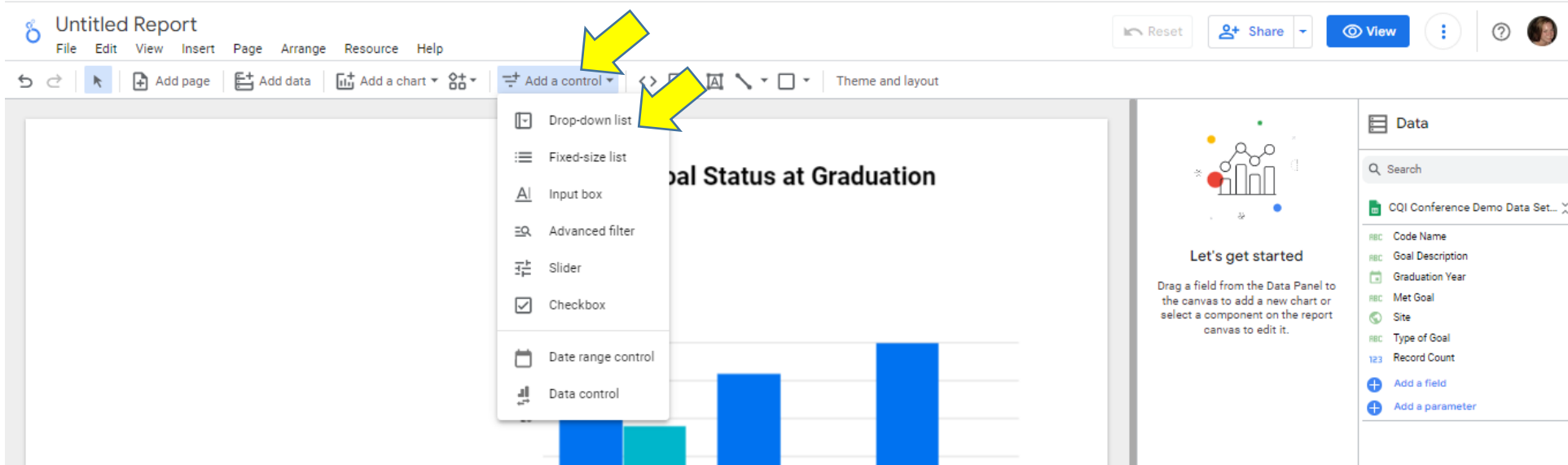
Add a field

Add a parameter

10. Add a title



11. Add an interactive drop down menu for users



12. Choose a field from the right menu and drag to add a control field.

Graduation Year is chosen as the control field for the first control.

The screenshot shows a report builder interface for an 'Untitled Report'. The main area displays a bar chart titled 'Goal Status at Graduation'. The chart has a legend with 'No' (blue) and 'Yes' (teal). The y-axis ranges from 20 to 30. There are three groups of bars. The first group has a blue bar at approximately 23 and a teal bar at approximately 19. The second group has a blue bar at approximately 26. The third group has a blue bar at approximately 30. A red arrow points from the 'Graduation Year' control field in the 'Control' panel to the chart. The 'Control' panel shows 'Graduation Year' selected as the control field. The 'Data' panel shows a list of fields: Code Name, Goal Description, Graduation Year, Met Goal, Site, Type of Goal, and Record Count. A yellow arrow points to 'Graduation Year' in the 'Data' panel.

Another down drop list control is added for *Type of Goal*.

The screenshot shows the same report builder interface. The main area displays the same bar chart. A red arrow points from the 'Type of Goal' control field in the 'Control' panel to the chart. The 'Control' panel shows 'Type of Goal' selected as the control field. The 'Data' panel shows the same list of fields as in the previous screenshot. A yellow arrow points to 'Type of Goal' in the 'Data' panel.

13. Adjust colors/formatting by going to the style menu and page settings

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page Add data Add a chart Add a control Theme and layout

Goal Status at Graduation

Graduation Year Type of Goal

Site	No	Yes
Roseland	23	19
Shelbyville	26	10
Beverly	30	0

Chart Style

Bar chart

Bars: 10

Series: 10

Stacked Bars

Show data labels

Color by

Single color

Bar order

Dimension values

Manage dimension value colors

Data

Search

CQI Conference Demo D

Code Name

Goal Description

Graduation Year

Met Goal

Site

Type of Goal

Record Count

Add a field

Add a parameter

Reset Share View

Untitled Report

File Edit View Insert Page Arrange Resource Help

Reset Share View

Add page

- New page Ctrl+M
- Duplicate page
- Delete page
- Current page settings
- Hide current page in view mode
- Manage pages
- Next page Pg-↓
- Previous page Pg-↑
- First page Home
- Last page End

Goal Status at Graduation

Graduation Year Type of Goal

Current Page Settings

Page

Canvas Size

Auto

Width (px): 1200 Height (px): 900

Reset to report theme

Data

Search

CQI Conference Demo Data Set - Sh...

Code Name

Goal Description

Graduation Year

Met Goal

Site

Type of Goal

Record Count

Add a field

Add a parameter

Reset Share View