

Tableau Site Admin Reference

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Terms

Site – A collection of content (workbooks, data sources, users, etc) that's walled off from any other content on that instance of Tableau Server.

Site Administrator – The person in charge of creating and maintaining a site on Tableau. Their duties can include creating and managing users and groups, creating projects to organize content on the site, assigning permissions to allow users to access the content.

Workbook – The file created in tableau desktop. Contains data connections, worksheets, and dashboards.


Worksheet – An individual visualization. Most likely what you think of when thinking tableau.

Dashboard – An interactive view made up of worksheets in the same workbook. Can add filters and other prompts to interact with all the items on the dashboard.

Data connection – The Metadata and connection to a database or file.

Security Tips

Data Detail Access

Most built in roles default to being able to download the detail data. Make sure to disable it (look for this icon in permissions ) on any sensitive data you do not wish to be exposed.

Guest Access

You can use the Guest account for embedding worksheets in other websites without any log in prompting. **Guest is a member of the all users group**, so anytime all users is granted access so is guest. Guest cannot log into Tableau and can only see the embedded links, which can be found under the share button.

Active Directory Groups

AD groups can be imported if you use active directory groups in the ADS domain. There are a few things to keep in mind if you are considering using them.

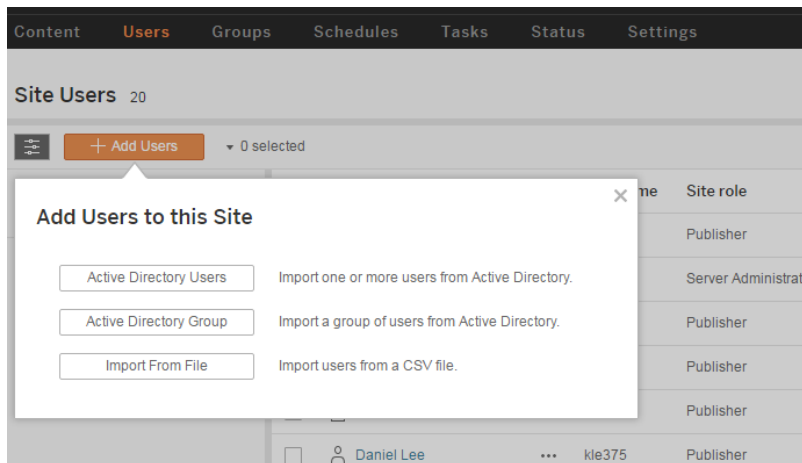
- They are not real time, they refresh on an hourly basis.
- You must assign a site level to the group when you import it. This site level automatically raises the users of the group to match it and adds any users to the site.
- If a user is removed from the group, their site level role is not changed. You would have to lower or remove the user manually.

User Management

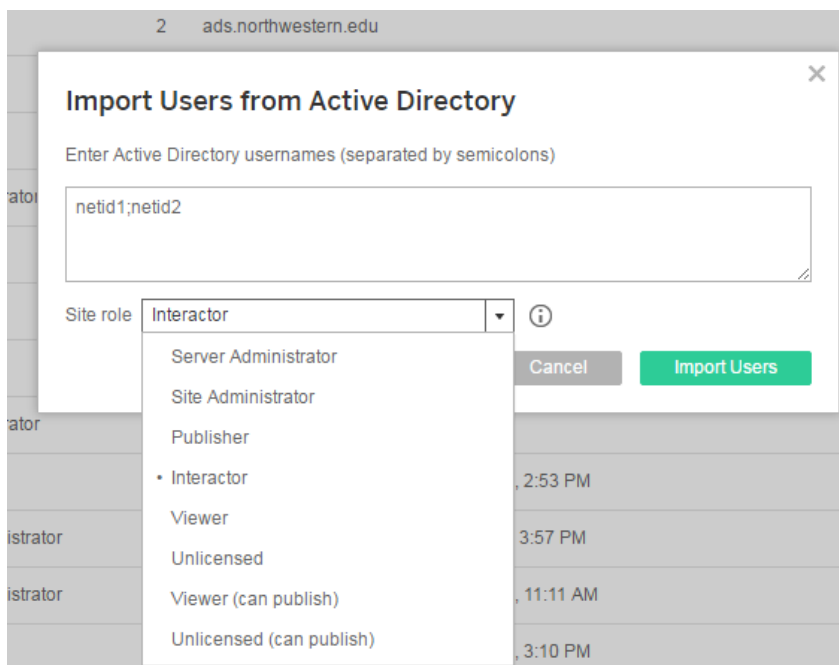
Adding Users

You may add users to your site. Click on the Users tab and then the Add Users Button.

Then click on Active Directory Users



You'll see the following screen.

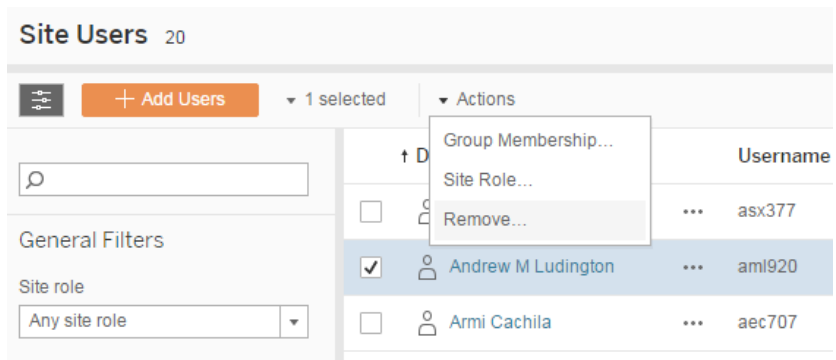


Enter the users netids that you wish to add. And choose a site role. And Click Import Users.

See the permission section for details. This will apply the minimum permissions this user has to your site. Group membership can increase this level. Viewer can be a safe default if you plan on adding users to groups. **Note unlicensed role cannot log into your site.**

Removing Users

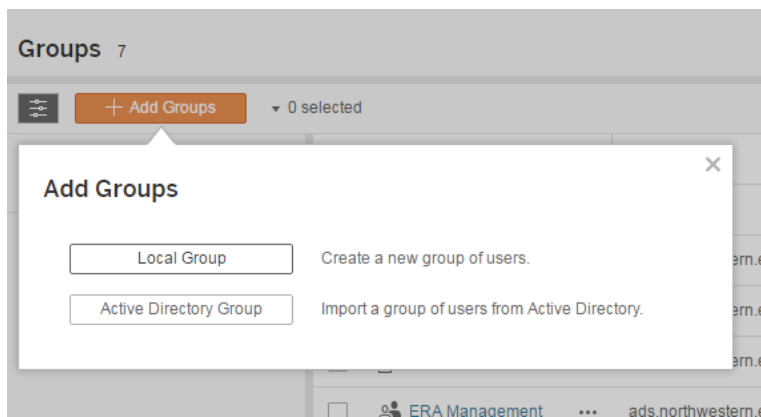
On the Users tab, select the user(s) by checking the box. Then click on the action button and choose remove.



Group Management

Creating Groups

You may create custom groups for your site. Click on the Groups tab and then the Add Groups Button.

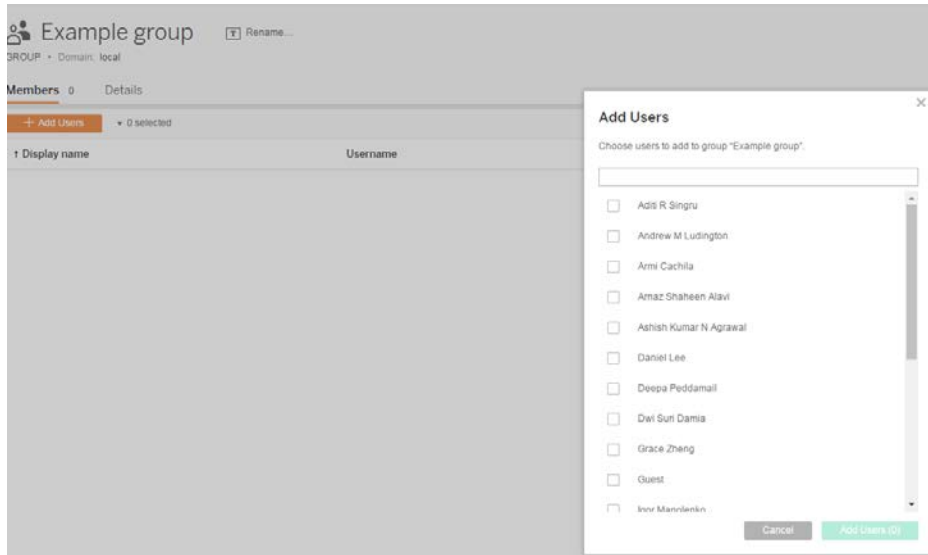


Click on Local Group. And enter the name of the group and click Create.

Adding Users to Group

To add users to the new group, click on the group name in the group list.

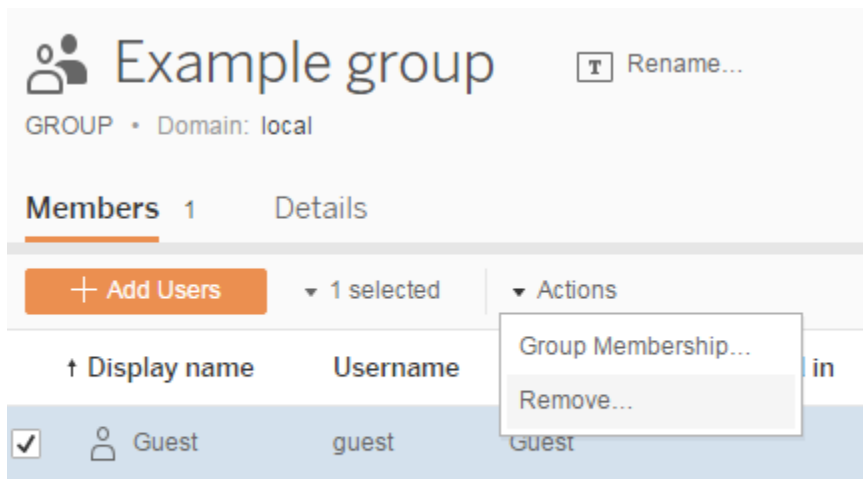
You will see an add users button.



Check the box next to the user's name(s) you wish to add and click add users.

Removing Users From Group

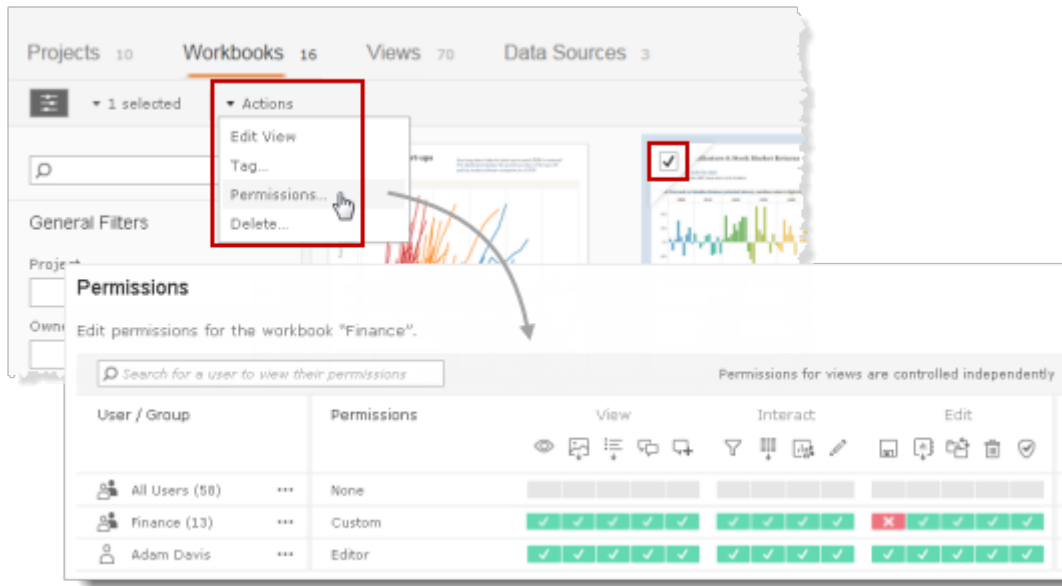
To remove users from the group. Check the box next to the users name(s) and click on the Actions Menu and choose remove.



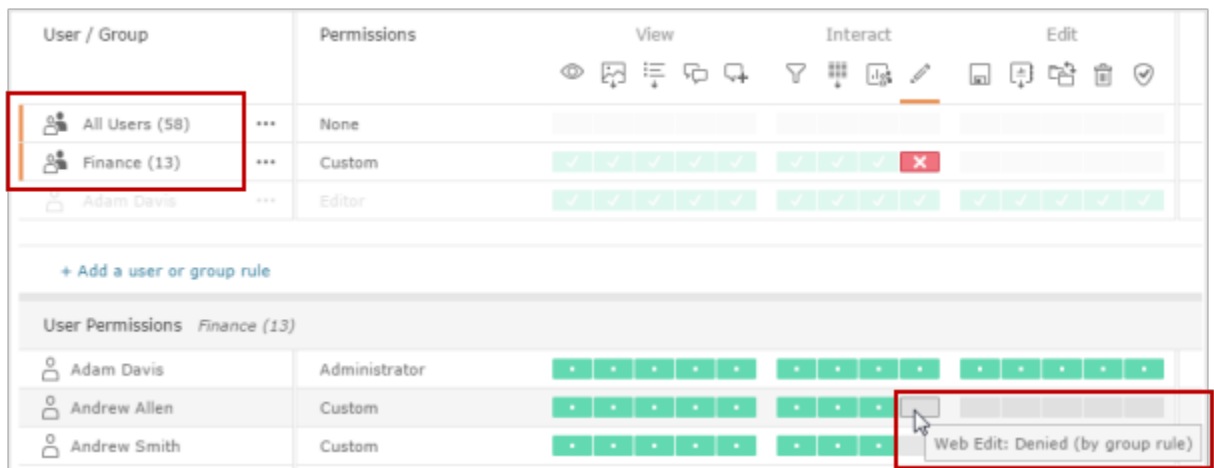
You will get a confirmation box to finish the removal, just click remove.

Setting Permissions

1. On the Content page for a site, click **Workbooks, Views, Projects, or Data Sources**. To select an item in the page, select the checkbox for the item.
2. Select **Actions > Permissions** to view the current permission rules.



3. Click a group or user name in the permission rules area to see the resulting permissions. Hover over a capability box in User Permissions to see a tooltip with details on whether a capability is allowed or denied.






Custom indicates a user's capabilities have been changed from the initial settings for their site role or content role.










Permissions Reference






Tableau Server License Level Capabilities

License Level Capabilities		License Level	
Capability	Viewer	Interactor	
Add/View Comments	✓	✓	?
Add/View Tags		✓	?
Create PDF	✓	✓	?
Customize and Save View Preferences		✓	?
Export Crosstab (Summarized)	✓	✓	?
Export Data (Summarized)	✓	✓	?
Export Image	✓	✓	?
Follow Filter Actions to other Views		✓	?
Keep/Exclude Data		✓	?
Navigate Date Hierarchies		✓	?
Open Hyperlink to External System		✓	?
Pause/Resume Automatic Updates		✓	?
Refresh Data from Data Source	✓	✓	?
Select Marks		✓	?
Use Color Legend Highlighting		✓	?
Use Pan/Grab Tool		✓	?
Use Quick Filters		✓	?
Use Sort Tool		✓	?
Use Zoom Tool		✓	?
View Data (Not Summarized)		✓	?
View Tooltips	✓	✓	?

Site role	Web access	Interact	Publish	Manage
Server Administrator	✓	✓	✓	✓
Site Administrator	✓	✓	✓	✓
Publisher	✓	✓	✓	
Interactor	✓	✓		
Viewer	✓			
Unlicensed				
Viewer (can publish)	✓		✓	
Unlicensed (can publish)			✓	

Permission	Applies to...	When allowed, users can...
View 	workbooks data sources views projects	View the item on Tableau Server. Note: When a workbook is configured to show sheets as tabs, all views use the workbook permissions, even if different permissions are specified on an individual view.
Web Edit 	workbooks views	Edit views in workbooks.
Save 	workbooks data sources views projects	Overwrite the resource on the server. When allowed, the user can re-publish a workbook or data source from Tableau Desktop, thereby becoming the owner and gaining access to all permissions. Subsequently, the original owner's access to the workbook is determined by that user's group permissions and by any further permissions the new owner might set. This permission also determines the user's or group's ability to overwrite a workbook after editing it on the server.

Permission	Applies to...	When allowed, users can...
Download Workbook/ Save As 	workbooks	Download a workbook from the server, and also save an edited workbook as a new workbook on the server.
Download Data Source 	data sources	Download the data source from the server.
Delete 	workbooks data sources views	Delete the resource.
Filter 	workbooks views	Modify filters in the view, keep only filters, and exclude data.
Add Comments 	workbooks views	Add comments to views in a workbook.
View Comments 	workbooks views	View the comments associated with the views in a workbook
Download Summary Data 	workbooks views	View the aggregated data in a view, or in the user's selection within the view, and download that data as a text file.
Download Full Data 	workbooks views	View the raw data behind each row in a view, as restricted by any marks the user has selected, and download the data as a text file.
Download Image/PDF 	workbooks views	Download each view as an image.

Permission	Applies to...	When allowed, users can...
Share Customized 	workbooks views	Make saved customizations to a view available for others to see. Users can create custom views using Custom Views in Tableau Server.
Move 	workbooks	Move workbooks between projects. Note: Only administrators can move data sources between projects.
Set Permissions 	workbooks data sources views	Specify permissions for the resource. For workbooks, this permission extends to the views in a workbook.
Connect 	data sources	Connect to the data source on the server. The Connect permission allows a user to connect to a published data source from an editor (in Tableau Desktop or Tableau Server web editing). If a workbook author embeds credentials in a workbook or view, users who also have the Web Edit permission will be able to access to the workbook's data source regardless of their Connect permissions. Note: If a workbook is configured to show sheets as tabs, all views use the workbook permissions, even if different permissions are specified on an individual view.
Project Leader 	projects	Set permissions for all resources in a project and for the project itself. Can lock project permissions and edit default permissions. Also can change the owner, move content, and run refresh schedules.