Tableau Server Permission and Roles

Each site is completely independent of every other site's security, the only overlap is for System Admins.

Site role. A user's site role determines whether a user can publish, interact with, or only view resources and the different levels of permission capabilities allowed for a user. The site role acts as the "ceiling" for what permissions are allowed.

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

Effective user permissions are determined by:

- Maximum permissions allowed for a user's site role. For more information, see Site Roles for Users.
- Whether the user owns the content item
- The evaluation of each user or group permission rule that applies to that user for that content item.
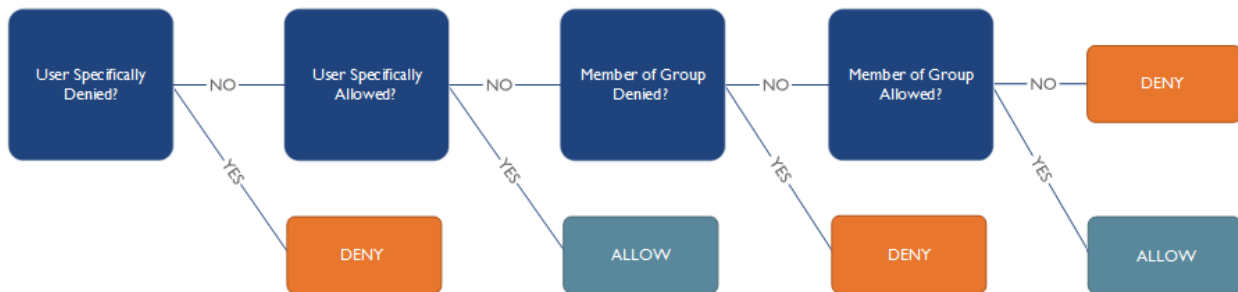
Tableau Server evaluates permissions in the following order of precedence:

1. Server and Site Administrator: Administrators can access all site content with full permissions.
2. User - Unlicensed, Viewer license, or Guest: If a user is Unlicensed, has a Viewer license (different than Viewer site role), or is a Guest, there are certain capabilities they are never allowed to perform. If the capability is explicitly denied for the user because of licensing, they are denied.
3. Project Owner: If the user owns the project that contains the content, the capability is allowed. Otherwise,
4. Project Leader: If the user has the Project Leader capability, or is in a group that has the Project Leader capability, they are allowed. If the user is explicitly denied the Project Leader capability, they are denied. Otherwise,
5. User - Authorizable Owner: If the user is the owner of the content, they are allowed. Otherwise,
6. User - Capability Denied: If the user has been explicitly denied the capability for the content, they are denied. Otherwise,
7. User - Capability Allowed: If the user has been explicitly allowed the capability for the content, they are allowed. Otherwise,
8. Group - Capability Denied: If the user belongs to a group that has been explicitly denied the capability for the content, they are denied. Otherwise,
9. Group - Capability Allowed: If the user belongs to a group that has been explicitly allowed the capability for the content, they are allowed. Otherwise,
10. The user is denied access to the content.

Site roles and Active Directory import and synchronization

When you import Active Directory users to a site, either as a single user or as member of a group, you can specify a site role for the user. If a user is not yet a member of any site on the server, the user is added to the site with the assigned role. When you synchronize Active Directory groups, the site role is applied through the Minimum Site Role setting on the Groups - Details page.

If a user already exists in a Tableau Server site, the site role assigned during the import or sync process will be applied if it gives the user more access in a site. Importing or synchronizing users and groups will promote a user's site role, but not demote a user's site role.

If a user already has the ability to publish, that ability will always be maintained. For example, if a user with the current site role of Unlicensed (can publish) is imported with the new site role of Interactor, that user's site role will be promoted to Publisher on import.

To guarantee a user maintains a site role with equal or greater capabilities in server after an import, the following matrix shows the rules applied for site roles on import. Bold indicates that a site role was promoted to preserve the user's ability to publish.

Import Site Role	Current Site Role						
	Site Administrator	Publisher	Interactor	Viewer	Viewer (can publish)	Unlicensed	Unlicensed (can publish)
Site Administrator	Site Administrator	Site Administrator	Site Administrator	Site Administrator	Site Administrator	Site Administrator	Site Administrator
Publisher	Site Administrator	Publisher	Publisher	Publisher	Publisher	Publisher	Publisher
Interactor	Site Administrator	Publisher	Interactor	Interactor	**Publisher**	Interactor	**Publisher**
Viewer (can publish)	Site Administrator	Publisher	**Publisher**	Viewer (can publish)	Viewer (can publish)	Viewer (can publish)	Viewer (can publish)
Viewer	Site Administrator	Publisher	Interactor	Viewer	Viewer (can publish)	Viewer	**Viewer (can publish)**
Unlicensed (can publish)	Site Administrator	Publisher	**Publisher**	**Viewer (can publish)**	Viewer (can publish)	Unlicensed (can publish)	Unlicensed (can publish
Unlicensed	Site Administrator	Publisher	Interactor	Viewer	Viewer (can publish)	Unlicensed	Unlicensed (can publish

Examples

Case 1

User Bob has a site role of interactor. Bob is put into a local group called viewers.

Viewers group is given viewer permission on the default project.

Bob has viewer permissions on the default project and its contents.

Case 2

User Bob has a site role of viewer. Bob is put into a local group called interactor.

Interactor group is given interactor permission on the default project.

Bob has viewer permissions on the default project and its contents. (Limited by his site role of viewer)

Case 3

User Bob has a site role of interactor. Bob is put into an AD group called viewers with a site role of viewer.

Viewers group is given viewer permission on the default project.

Bob has viewer permissions on the default project and its contents. (User site role is higher than the AD group site role, so no change.)

Case 4

User Bob has a site role of viewer. Bob is put into an AD group called interactor with site role of interactor.

Interactor group is given interactor permission on the default project.

Bob has interactor permissions on the default project and its contents. (User site role was promoted to match the AD site role)

Case 5

User Bob has a site role of interactor. Bob is removed from an AD group called interactor with site role of interactor.

All projects only have groups assigned to them and no permissions to the all users group.

Bob still sees the site but has no access to anything. He would see a blank site until he is removed from the user's list of the site. (AD groups do not remove users when they are removed from the group.)

Case 6

User Bob has a site role of interactor. Bob is removed from a local group called interactor.

All projects only have groups assigned to them and no permissions to the all users group.

Bob still sees the site but has no access to anything. He would see a blank site until he is removed from the user's list of the site. (Users stay in the user list until they are removed from the site.)

Case 7

User Bob has a site role of interactor. Bob is removed from an AD group called interactor with site role of interactor.

All projects only have groups assigned to them and the all users group has viewer permission on project XXX.

Bob still sees the site and has viewer access to project XXX. (AD groups do not remove users when they are removed from the group. Ever user in the site is a member of the all users group.)

Case 8

User Bob has a site role of interactor in the HR site. Bob is in an AD group called HR viewer with site role of interactor. Bob has a site role of publisher in the SES site. Bob is in an AD group called SES publisher.

In the HR site all projects have viewer permissions granted to the HR viewer group.

In the SES site all projects are secured by local groups and SES publisher has not been granted any permission.

Bob see a choice of two sites when he logs in: SES and HR. He sees nothing in the SES site. He has viewer permissions on all projects in the HR site. (Sites are completely independent permissions.)