Tableau Server Permissions

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Tableau terminology

Folder navigation

- **Project**: contains Tableau content produced by a department; similar to a folder
    - projects consist of workbooks (.twb or .twbx files), views, and data sources
    - projects are flat (no subprojects or folders within a folder)
- **Workbook**: Tableau workbook (.twb or .twbx file), resides inside a project
- **View**: tab within a Tableau workbook
- **Data Source**: files or database tables, or combination of the two, used to create a workbook

User roles

- **Server Administrator**: IS&T staff who administer the entire Tableau Server installation.
- **Site Administrator**: administers permissions and content in a site
- **Project Leader**: administers permissions in a project, can create or delete content within a project
- **Publisher**: produces content; can publish, and update or delete workbooks they own; needs permission to delete workbooks owned by other users
- **Interactor**: consumes contents, can filter, sort or download
- **Viewer**: views content, but cannot filter, sort, or otherwise interact with the view

Permission scope

(adapted from Tableau Server online help)

- **Site role**: A user's site role determines whether a user can publish, interact with, or only view content and the different levels of permissions allowed for a user. By default all users are assigned the **Publisher** site role, so if they have **Publisher** permission within a project, they will be able to create content in that project.

- **Content permissions**: Every project, workbook, view, or data source can have a unique set of permission rules. Permissions at the content level are more granular.
    - Recommendations:
        - Permissions should be set using Groups (Moira lists) instead of at the User level
        - “Deny” permissions take precedence over “Allow” permissions if a User is part of multiple Groups
        - Permissions on lower-level objects (such as Workbooks) override permissions on higher-level objects (such as Projects)
    - See the following pages for more information:
        - Permissions Reference
        - Set Permissions for Workbooks and Views
        - Set Permissions for a Data Source

See Also

- Tableau Landing Page