Free Training Transcript: Tableau Server Administrative Overview

Welcome to the Administrative Overview of Tableau Server video. We encourage you to follow along in your own Tableau Server environment.

For an administrator, there are two toolbars—the grey content toolbar, which all end users can see, and the blue admin toolbar. The admin toolbar provides access to aspects of the server such as, Users, Schedules, and Settings.

Sites

Tableau Server can have multiple sites, or collections of contents that are walled off from other content on the server. If there is more than one site, we can toggle between them – here, I'm in a site named English. If I click on Users in the admin toolbar, I see the users on this site. Changing the site by clicking the dropdown, I'll select Default, when I click Users again—I now see the users on the Default site.

To manage a site's content, we need to be in that site, like we are now. To manage sites overall, such as adding a new site, click "Manage All Sites" in the same dropdown. Now the admin toolbar changes.

If we click on Sites in this toolbar, we can see the various sites on this server, how many users they have, and options relevant to each one. If we click on Users, we see all the users on the server, rather than just in one site.

Users and Groups

Adding and managing users is easy. Users can be added locally or imported from a CSV. Whether users and groups are managed by Active Directory is a choice made when the server is installed and cannot be changed here.

Groups are managed at a per-site level. For more information on groups and how to use them for managing permissions, check out the video on permissions.

Schedules

Back on the toolbar for the server as a whole (we know because the dropdown says "All Sites"), we can see Schedules for the server. If we wanted to add a new schedule, for extract refreshes for data or subscriptions, we could do so here by clicking New Schedule, and filling out the required information. Schedules can also be set up just for specific sites by navigating to that site, then adding the schedule from its admin toolbar.

Tasks

Tasks show the specific extract refreshes or email subscriptions themselves. We can manage aspects of each task and see the last time it ran. If we click on the ellipses here, we get additional options.

Status

The next tab, Status, shows us the status of processes and any workers in the Server, as well as administrative views. These views help provide insight into how the server is running, what users are viewing what content, how space is being used, and more.

Settings

The settings tab contains options relevant to the site or server, such as enabling embedding credentials at the server level, or, for a specific site, setting storage limits, turning on revision histories, and turning on web authoring.

Alerts

Finally, the alerts menu gives easy access to any alerts pertaining to an extract refresh failure. These are separate from email alerts you may have set up in the Server Configuration Utility.

Conclusion

Thank you for watching this Administrative Overview of Tableau Server video. We invite you to continue with the Free Training videos and the Online Help to learn more about administering Tableau Server.