



On-Demand Training: Authorization and Permissions Transcript

Welcome to this video on the authorization and Permissions aspects of Tableau Server and Tableau Online.

There are four main components of Tableau Server and Tableau Online security: authentication, authorization and permissions, data security, and network security. This video will focus on the second piece, authorization and permissions.

Sites

Authorization, also referred to as permissions, deals with content published to Tableau Server – who can see the content and how they can interact with it. Before we dive into assigning permissions, let's discuss where content lives in Tableau Server.

The highest level of content organization is at the site level. Sites are meant for distinct user communities and allow for multi-tenancy on Tableau Server. Each site's workbooks, data and user lists are completely isolated from content on other sites.

To create a new site within our Tableau Server instance:

- Sign in as an administrator
- Navigate to the "Settings" page
- Click "Add a Site"
- There are various site-related settings. More information about setting up a site can be found in the online help. I'll name this site "ABC Corp" and move on.

Once there are multiple sites, an administrator can see a list of sites in the "Sites" page in the Tableau Server interface.

Projects

Let's talk about the next level down in content organization: projects. Projects act as folders within sites, which allows us to manage the permissions of content at scale rather on an individual workbook or view level.

To create a new project:

- Navigate to the "Content" page
- Click "Projects". This takes us to a list of projects on this site
- Click the "New Project" button the top left hand corner of the page
- I will name it "Sales" but you can use whatever an applicable name is for you
- Once the project is created lets navigate to the actual project page. Here we can see which workbooks and views are in the project. We can also decide who has access to the project and how they interact with it by going to the "Permissions" section. We will discuss assigning permissions shortly.

Groups

So far we've covered organizing content in sites and projects. Before we discuss assigning permissions, let's briefly talk about the users we will assign permissions for.

Like projects, groups are a great way to manage security as you scale. Let's make a quick group:

- Go to the "Groups" page
- Click "New Group"
- I'll name the new group "Sales Managers" but feel free to use whatever makes sense in your environment
- Once the group is created, click the group and then click "Add Users"
- I'll add Chris and William to the Sales Managers group

Permissions

We have a system for organizing workbooks with projects and a system for organizing users with groups. Let's assign permissions to control which groups have access to which projects, along with how they can interact with each project's content.

To assign permissions:

- Go to the "Content" page
- Click on the "Projects" tab
- Click the checkbox for the project you want to change permissions for. I'm going to use the Sales project we created earlier.
- Once the box is checked, an "Actions" menu appears. Within it, we can choose Permissions.

Let's assign some permissions. This can be done at the individual level, or the group level, if we want to assign the same set of permissions for multiple users.

- Click the "Add a user or group rule"
- I'm going to use the Sales Managers groups we created earlier
- When assigning permissions, there is a dropdown that gives us the options of various roles. These are not different license levels, rather they are permission templates or starting points.
- Let's choose the Viewer role. Notice that the "view" permission is now allowed.
- We can also choose individual abilities. Let's also allow the Sales Managers to filter.

The bottom section of this permissions page displays the resulting permissions based on the rules we've chosen. This helps clarify what the experience will be like for a user in potentially confusing permission scenarios, like if permissions are defined for a user in multiple groups.

In this example we have defined permissions for a group of users and a project. Workbooks that are subsequently published to, in this case, the Sales project, will inherit the permissions we've defined here. The same goes for users that are added to the Sales Managers groups.

When assigning permissions, keep in mind that:

- Permissions can also be defined at the individual user or workbook level.
- If permissions are not explicitly defined, as indicated by the grey box, the default result is to deny the users.
- Also, individual permissions trump group level permissions. This means that if an individual is specifically denied a right, but is also a member of a group that is allowed the same right, the individual deny will win out.

For more information on how permissions are determined, what each ability is, and more, please refer to the online help.

Conclusion

Thank you for watching this security and authorization training video. For more information on security with Tableau Server and Tableau Online, refer to the “Installation and Configuration” video addresses Authentication specific to Tableau Server. The “Data Security with User Filters” training video is relevant to both Tableau Server and Tableau Online.