On-Demand Training:
Tableau Online
Administrative Overview

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

Tableau Online is a secure, cloud-based platform that is designed to share and distribute visualizations and dashboards. As an administrator, you have the ability to tailor Tableau Online to your needs. In this video, we will walk through the administrative options in the Tableau Online portal.

Logging In and Navigation

I'm going to log in to my Tableau Online Administrative account. Currently Tableau Online only supports Local Authentication.

Tableau Online supports Local Authentication or per-site SAML.

Once signed in Tableau Online, we can see the content published to Tableau Online. We can navigate to Projects, Workbooks, Views and Data Source on this Tableau Online.

As a Tableau Online Administrator, we can also make changes to the portal by navigating across this Tool Bar. Accessing different users, groups, schedules, tasks, and the status of Tableau Online Portal as well as different settings. As an administrator we have access to all of these tabs and can use these to make changes to our Tableau Online Portal.

Managing Users

Let's access the users tab first. An administrator has access to users and their respective roles. In this portal, we can easily add users and edit their permissions. You can add users by clicking here. You enter their emails manually or import them from a file.

Let's search for a user. I am interested in what Lari has published to our server. Now we can see the workbooks, different views she has created, the data sources she has published and you can see any workbooks she has subscribed to.

Managing Groups

Moving to the right, we can access information regarding the different Groups on the server. The purpose of Groups is to make it easier to manage multiple users. Let's begin exploring the different users within each group by clicking on the Group name. Let's go to the Product Team. Here we have access to the three members in this group. From here we can add different users as well as remove users from this group.

And let me just note here that we have this All Users group. This is a default group that every Tableau Online Portal will come with. It contains every users on your Tableau Online Portal.

Schedules and Tasks

The next Administrative tab is Schedules. Schedules can be used to set when Data Extracts are refreshed or when email subscriptions are sent out. The Schedules page shows a list of schedules, including their name, type, number of tasks, what they're for, processing method, and when they are scheduled to run.

Moving forward we'll explore the Tasks tab. Tasks pertain to Data Extracts Refreshes and email Subscriptions that have been assigned a Schedule.

Any Data Extracts set to refresh on a Schedule populates in this view. From here, an administrator can easily access information about the extract – extract type, assigned schedule, schedule priority, as well as next and last update.

To learn more about a specific task just click on the name. Here we can now see the workbooks connected to this extract as well as the schedules being assigned to it.

Administrative Views

Now let's explore the status tab. From the status tab an administrator can access informative dashboards about the Tableau Online Portal. These dashboards are created by Tableau and have been optimized to gain as much information needed about the activity on your tab online portal to make informed decisions about what is happening on your tab online portal and how you can optimize this portal for your users.

Conclusion

Now let's navigate to the last tab which is the Settings tab. Here a Tableau Online Administrator can activate whether or not they want live data sources to be allowed for data source that include MySQL, PostgreSQL, and SQL Server data hosted on the Internet.

Thank you for watching this Administrative Overview of Tableau Online training video. We invite you to continue with the Online-Demand Training videos to learn more about using Tableau.