Free Training Transcript: 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 data. 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 areas such as, Users, Schedules, and Settings.

Sites

Tableau Online is structured around sites. If we have access to more than one site, we can toggle between them –If we click on Users in the admin toolbar, we see the users on this site only.

Users and Groups

Adding and managing users is easy. Users can be added locally or imported from a CSV. Users will log in with their TableauID and password, or we can enable SAML authentication.

Groups can be a useful way to help manage users and permissions. For more information, check out the video on permissions.

Schedules

Schedules are used for refresh tasks for certain data connections and subscriptions. From this tab, we can start an extract refresh manually.

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 administrative views. These views help provide insight

into how the site is running, what users are viewing what content, how space is being used, and more.

Settings

The settings tab contains options such as changing the site logo and enabling live connections and data subscriptions. The Authentication tab is where SAML can be configured.

Alerts

Finally, the alerts menu gives easy access to any alerts pertaining to an extract refresh failure.

Conclusion

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