



Manufacturing Indicators

PROJECT

Workbooks 14

Views 18

Data



Product Defects

4,381 views ★ 1



Cluster Analysis

3,669 views ★ 1



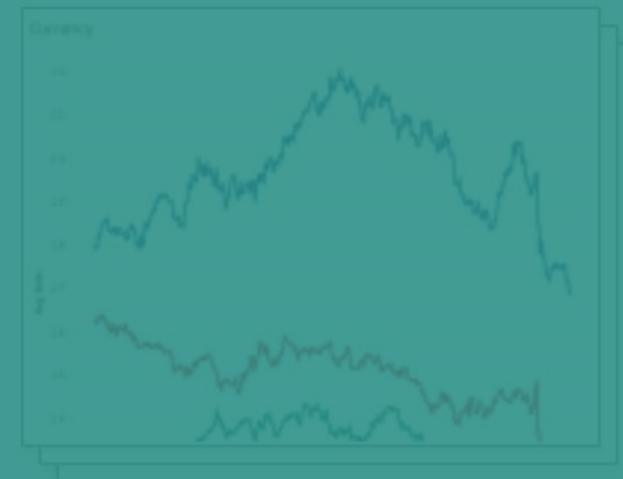
Base Sales Opportunities

3,110 views ★ 0



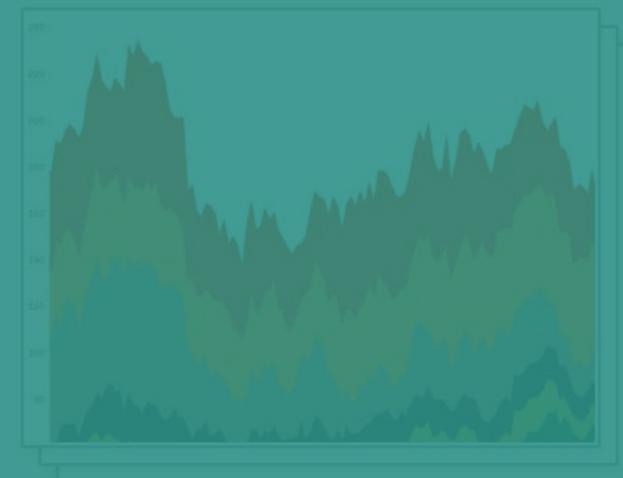
Active Trends

2,440 views ★ 0



Shipping Rates

4,039 views ★ 0



Backend Site Performance

1,331 views ★ 0



Best Practices

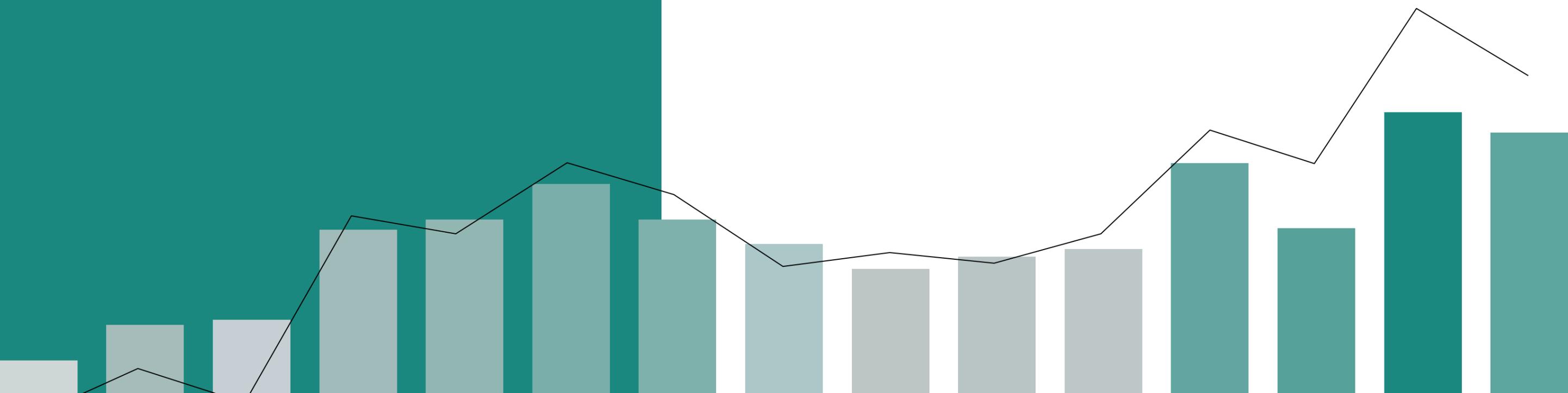
FOR TABLEAU ONLINE

You've successfully published a workbook to Tableau Online. You've added users to your site. Perhaps your teammates are starting to share their own dashboards and collaborate with shared data sources. It's time to take your skills to the next level.

As an administrator, you can manage and govern both the content on your site as well as the users who share and collaborate with it. This guide gives you best practices to create a trusted self-service environment for everyone in your organization.

5 Best Practices for Managing Your Tableau Online Site

1. Be secure
2. Organize content
3. Set permissions
4. Keep data fresh
5. Create subscriptions



 **tableau**

Sign in to Tableau Online

[Forgot password](#) Remember me

[Sign In](#)

[Sign Up](#)

1 Be secure

Log in to your computer and you're prompted for a username and password. These security credentials are managed by your IT team. Your data and dashboards should also be secured behind similar credentials.

Secure your site in one of two ways:

- **TableauID.** Let Tableau handle authentication. This method requires a password every time a user logs in and is turned on by default.
- **SAML.** Use a third-party provider (IdP) like OneLogin or Okta to authenticate people accessing your site. This method allows you to create a single sign-on (SSO) experience.

Learn how:

[Set up and manage authentication](#)

2 Organize content

Your Tableau Online site contains workbooks as well as the data sources that power them. Projects help you organize all that content.

Organize your site for success by:

- **Creating projects for your teams.** Give teams a place to share and collaborate with department-specific projects.
- **Using production and sandbox projects.** Sandbox projects give people a place to publish experimental visualizations while production projects are reserved for trusted and certified reports.
- **Setting project leaders.** Project leaders can manage the content and permissions of their project, but not those of other projects or overall site administration.

Learn how:

[Use projects to organize content](#)

The screenshot displays the Tableau Online Projects page. At the top, there are navigation tabs for Projects (9), Workbooks (19), Views (129), and Data Sources (2). Below the tabs, there are four project cards arranged in a 2x2 grid:

- Finance:** Primary location for content specific to the Finance organization. View the latest company metrics, reports, and dashboards here. Project Leaders: Piper McShane, Stephanie Perez. Workbooks: 2, Views: 4, Data Sources: 0.
- HR:** Primary location for content specific to the HR organization. Contains company dashboards on hiring, productivity, resourcing, employee benefits, and more. Please contact project leaders for content access, publishing rights, etc. Project Leaders: Emily Richardson, Lari Daly. Workbooks: 3, Views: 4, Data Sources: 0.
- Marketing:** Primary location for content specific to the Marketing organization. All users have viewer permissions on the project, with various teams granted greater editing permissions. Project Leaders: Stephanie Perez. Workbooks: 1, Views: 1, Data Sources: 0.
- Sales:** Primary location for content specific to the Sales organization. Members of the Sales AD group have Interactor permissions to the project. Project Leaders: Ross Chen, Emily Richardson (backup). Workbooks: 1, Views: 5, Data Sources: 0.

3 Set permissions

Permissions allow you to define what content a person will see on your site. They also control if and how people can interact with your content.

Manage your permissions in two ways:

- **By a user's site role.** Tableau Online allows you to select a site role for each user, giving you the ability to quickly choose from eight preset permission configurations.
- **With groups.** Creating groups allows you to easily apply and manage permissions for multiple users with one click. Create groups for each team using your site—marketing, HR, and sales, for example. Then add users to their appropriate group as people join your site or change teams.

Learn how:

[Set user, group, and content permissions](#)

Search for a user to view their permissions

User / Group	Permissions	View					Interact				Edit	
		Eye	Print	Download	Share	Refresh	Filter	Download	Export	Share	Delete	Refresh
Sales Managers (15...)	Interactor	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Dustin McIntyre	Interactor	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Eric Lee	Viewer	✓	✓	✓	✓	✓						
Eric Peterson	Editor	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Jason Wilson	Custom	✓	✓	✓	✓	✓	✓	✗	✓	✓	✗	✗
Jen Bachand	Editor	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Josh Parenteau	Custom	✓	✗	✗	✓	✓	✓	✗	✓	✗		
Marshall Daly	Editor	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Martha Jaworski	Viewer	✓	✓	✓	✓	✓						

+ Add a user or group rule

Leaders

- Customer Operations **Leaders**
- Dev Area **Leadership**

Group ▾

4 Keep data fresh

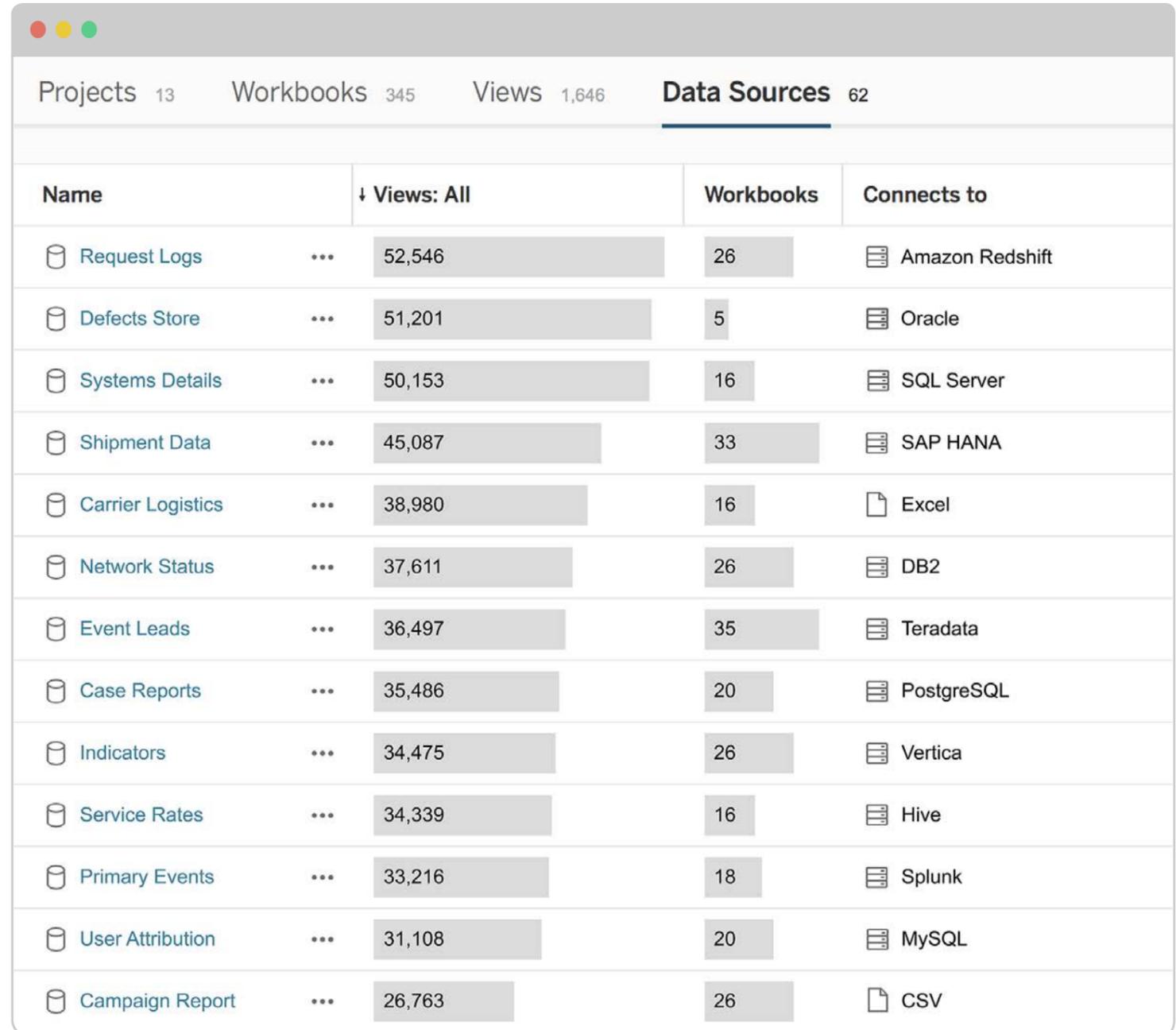
Tableau data sources are either extracts of or live connections to your raw data ([learn more](#)). Publishing standalone data sources to Tableau Online allows other users to easily connect to your data while ensuring connections remain fresh and secure.

Leverage data sources by:

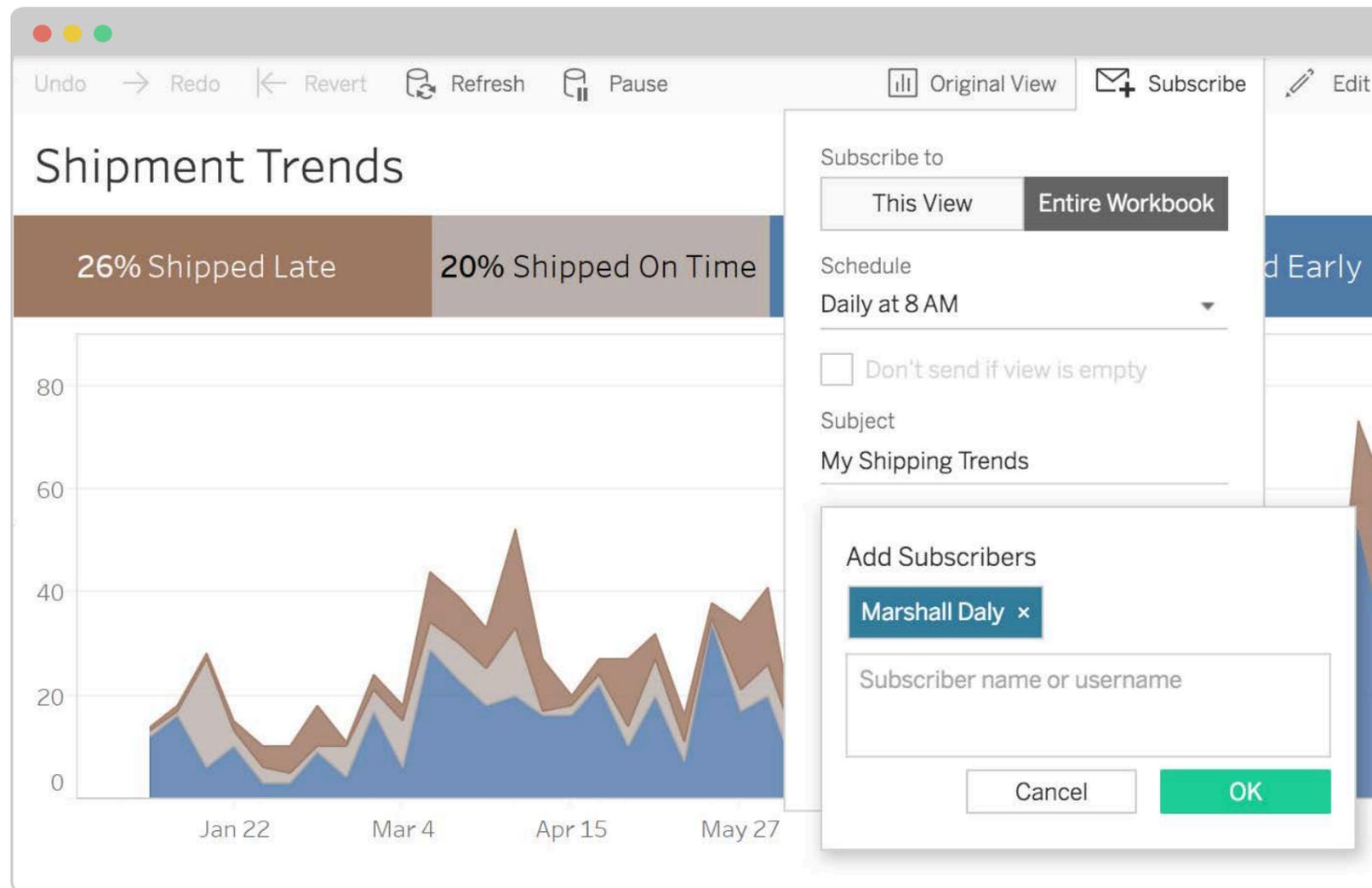
- **Publishing live connections.** If you need always up-to-date information, publish data sources using live connections.
- **Setting refresh schedules.** Data sources using extracts can be automatically refreshed by Tableau Online on a preset schedule.
- **Connecting the sync client.** When refreshing data sources that connect to on-premises data, use Tableau's sync client to run automatic refreshes.

Learn how:

[Publish and refresh data source connections](#)



Name	↓ Views: All	Workbooks	Connects to
Request Logs	52,546	26	Amazon Redshift
Defects Store	51,201	5	Oracle
Systems Details	50,153	16	SQL Server
Shipment Data	45,087	33	SAP HANA
Carrier Logistics	38,980	16	Excel
Network Status	37,611	26	DB2
Event Leads	36,497	35	Teradata
Case Reports	35,486	20	PostgreSQL
Indicators	34,475	26	Vertica
Service Rates	34,339	16	Hive
Primary Events	33,216	18	Splunk
User Attribution	31,108	20	MySQL
Campaign Report	26,763	26	CSV



5 Set subscriptions

Subscribe to a custom view or an entire workbook to receive a snapshot of any updates, delivered to your inbox whenever you choose—all without having to sign in to Tableau Online.

Keep tabs on your data by:

- **Creating a custom view.** If you regularly look at certain views of a dashboard, create a custom view to remember your changes ([learn more](#)), then subscribe to updates. You can also subscribe to the entire workbook.
- **Subscribing team members.** Site administrators and workbook owners can subscribe other users to keep entire teams and workgroups updated on business-critical KPIs and metrics.

Learn how:

[Set subscriptions for views and workbooks](#)

With these five best practices you'll be well on your way to creating a trusted self-service environment for everyone in your organization to share and collaborate with data. Ready for more? Get in-depth advice from Tableau Online experts in our Tips and Tricks blog series.

[GET THE TIPS AND TRICKS →](#)

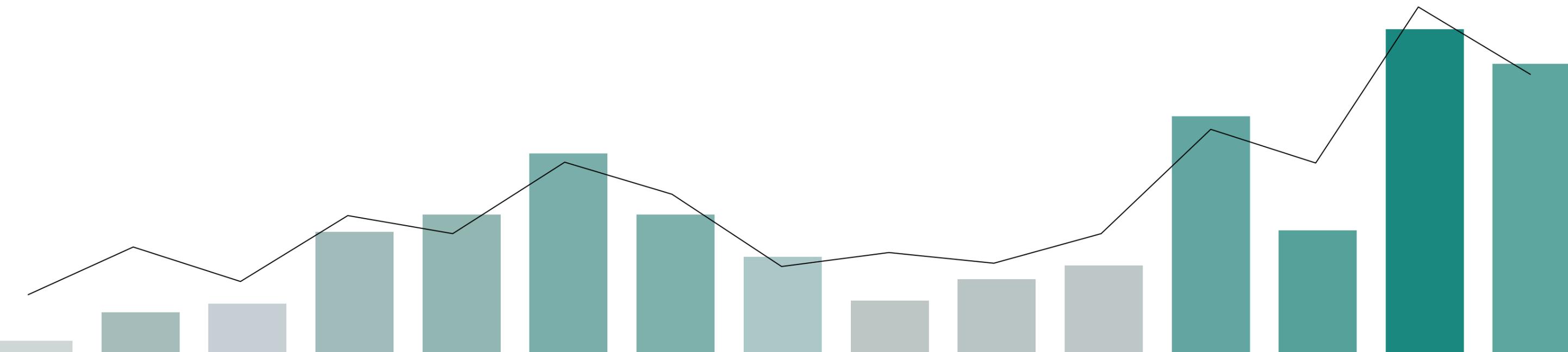




Tableau helps people transform data into actionable insights. Explore with limitless visual analytics. Build dashboards and perform ad hoc analyses in just a few clicks. Share your work with anyone and make an impact on your business. From global enterprises to early-stage startups and small businesses, people everywhere use Tableau to see and understand their data.

[LEARN MORE AT TABLEAU.COM](https://www.tableau.com)