Tableau at UNH: Workbook Permissions on Tableau Server

Permissions allow or deny capabilities to Tableau Server users. In practice, permissions are used by Tableau Desktop publishers to determine who can and cannot see content saved on Tableau Server, such as workbooks. Granting selective access to sensitive content is the most common use for permissions.

Tableau Desktop users who publish workbooks on Tableau Server assign permissions at the point of publishing. They have two options for setting permissions on workbooks:

1. Accept the default permissions of the project where the workbook is being published.
2. Select individual permissions for the workbook.

During a department’s initial Tableau Server setup, projects and their assigned permissions are developed by UNH’s EIM team along with a Tableau publisher within the department. Most departments will have a similar group of projects:

- Project containing data visuals to be shared outside the department but within UNH (“external”)
- Project containing visuals that will only be shared within the department (“internal”)
- Project which stores published data sources
- Project serving as a “Sandbox” area where developers can store unfinished work and share it with selected people

In most cases, the above set of projects provides publishers with enough options to easily secure their content and keep content permissions manageable as their content library grows (option #1). Project permissions are assigned to content when publishing, therefore, a publisher can secure their content by simply choosing the appropriate project for it.
Following is an example. “My Viz”, shown below, is a workbook that can only be shared internally. By publishing it to the MA–Internal Visualizations project, My Viz is assigned that project’s permissions. Thus, only users given access to the MA–Internal Visualizations project can access the My Viz workbook.

![Publish Workbook to Tableau Server](image)

Occasionally a publisher’s security needs can’t be met using one of the existing projects. In these cases, a publisher must select individual workbook permissions (option #2).

However, Tableau permissions are complicated. Frequently customizing permissions could accidentally expose sensitive content, and make content security harder to manage as a publisher’s library grows. Therefore, it’s best to have a thorough understanding of Tableau permissions before manually assigning them on a workbook-by-workbook basis.

Following are additional resources for understanding Tableau Server content permissions:

- [http://www.theinformationlab.co.uk/2014/06/11/understanding-tableau-server-permissions/](http://www.theinformationlab.co.uk/2014/06/11/understanding-tableau-server-permissions/)
- [https://www.interworks.com/blog/bfair/2015/09/29/tableau-server-permissions-demystified](https://www.interworks.com/blog/bfair/2015/09/29/tableau-server-permissions-demystified)