

## **Access** <sup>[1]</sup>

# **Accessing Tableau**

## **How to log in**

Visit Tableau [Training Resources](#) <sup>[2]</sup> for a video on [How to log into the CU Tableau Private Server](#) <sup>[3]</sup>.

Users can log in directly to the CU employee portal or through the Tableau Enterprise Server URL. Here's how:

## **Log in via the employee portal**

## Step 1: Connect to a campus network.

Users must connect to a campus network in order to access the Tableau Enterprise Server. That means physically being at a CU campus and plugged into the network with a cable, or connected to the password-protected wireless network (NOT the Guest network).

If off-campus, users must connect to the university VPN. The process to connect to the VPN is slightly different for each campus.

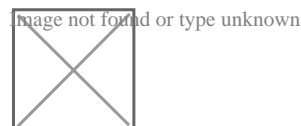
VPNs provide a secure connection to your campus network from any location, as long as your device has an internet connection. CU Denver and CU Anschutz also offer a virtual desktop option.

- [CU System Administration VPN instructions](#) [4] (use the System-FullTunnel-MFA VPN)
- [UCCS VPN instructions](#) [5]
- [CU Boulder VPN instructions](#) [6]
- [CU Denver / Anschutz VPN instructions](#) [7]

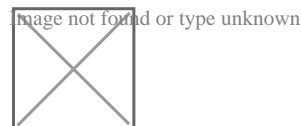
**CU affiliates** should log in to the [CU Denver VPN](#) [8] and connect as normal to access CU content.

**Step 2:** Log in through the Portal by typing [my.cu.edu](#) [9] into a browser, selecting your campus, and logging in using your VPN and AD credentials.

**Step 3:** In the left drop-down menu, select Reporting and Compliance.



**Step 4:** Click on the CU Visualizations portal tile.



**Log in via Tableau Enterprise Server URL**

To log in from your browser directly, go to [viz.cu.edu](https://viz.cu.edu) <sup>[10]</sup> in your browser, select your campus and log in using your VPN and AD credentials. If a user only has access to one site, the user may need to use a site-specific URL. See a full list in the section below.

## Site-specific Tableau URLs

Visit the Tableau SharePoint Access folder for the most recently updated version of [How to Log In](#) <sup>[11]</sup>

## CU Tableau Public Add or Remove User Request

CU Tableau Public Site admins may use the [Request Add or Remove User form](#) <sup>[12]</sup> when they need a new user or remove an existing user from the CU Tableau public site. The form requires information about the requestor and the new or existing user. Questions should be directed to [irmhelp@cu.edu](mailto:irmhelp@cu.edu) <sup>[13]</sup>

## Troubleshooting access issues

Screenshot of access issue

Image not found or type unknown

If a user sees this error message when attempting to log in,

1. Make sure that the user is connected to the VPN (details for Denver, affiliates, Boulder, and System can be found in the previous **How to log in** section)
2. Make sure the user is logging in with his/her correct credentials. Confirm that their caps lock isn't engaged.
3. Make sure the user already exists within the Tableau Private Server and has access to the site in question.

A good way to confirm #2, that the user has the correct credentials, is to have the user log in to the portal and access CU-Viz from the portal tile. If that fails, see if the user can access another application from the portal that requires VPN (any tile with a red VPN indicator).

If the user is logged in to the VPN and can access other VPN-required applications, work with your Site Administrator to confirm #3, that they already exist as a user.

## Tableau Licenses and Roles

## Tableau Customer Service

For contact information for Tableau sales representatives, technical help or Tableau's customer success manager for CU, visit [Tableau Sales Representatives](#) <sup>[14]</sup> on SharePoint. You will need to be on a CU VPN for access.

## How to purchase or renew Tableau desktop licenses

Tableau desktop software allows dashboard developers to publish their work in the CU Tableau Server. To develop a Tableau dashboard, each developer will require a Tableau Desktop License. CU developers can purchase a Tableau desktop license directly from the Tableau Sales Representative (You will need to be on a CU VPN for access).

### CU System: UIS Employees Only

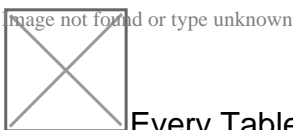
If you are a CU System **UIS employee**, follow the instructions in this document: [UIS\\_TableauDesktopPurchase-Renewal diagram.vsd](#) <sup>[15]</sup>

If you are a university employee on any campus or at CU System, follow the instructions below.

- Coordinate the purchasing funds with your supervisor and CU campus purchasing/procurement services.
- Contact the Tableau Sales Representative to inquire about Tableau Desktop License pricing. The representative's email address can be found in this file on SharePoint > [Tableau Sales Representative](#) <sup>[16]</sup> (CU VPN access is required)
- Once funds are secured, share the payment information with the Tableau Sales Representative and collect a new license key.
- Requester receives Tableau License key and activates in Tableau Desktop. Need help with activation? [Email the Data & BI team](#) <sup>[17]</sup>.
- To renew your current license key, first confirm the funding with your supervisor or department. Then contact the [Tableau Sales Representative](#) <sup>[16]</sup> (CU VPN access is required) and provide the payment information (credit card) along with your existing license key. Once the representative processes the payment, they will renew the license, allowing you to reactivate the same license key on Tableau Desktop.

For more information and guidance, please contact [irmhelp@cu.edu](mailto:irmhelp@cu.edu) <sup>[18]</sup>

## Tableau Server Roles



Every Tableau Server user is assigned a site role. Each site role offers a distinct set of capabilities, as outlined below.

A user's site role determines the maximum capabilities they can exercise on a site. For example, even if a user is granted specific permissions—such as the ability to publish to a project—they will be unable to exercise those permissions without the appropriate site role.

The following is a list of site roles ranked from highest to lowest capability: Server Administrator, Site Administrator, Explorer (Can Publish), Explorer, Viewer, and Unlicensed.

## **Server Administrator**

The Data and BI Team within University Information Services has Tableau Server Administrator capabilities.

The Server Administrator site role allows a user to manage Tableau Server. Examples of things a server administrator can manage include:

- Server-wide settings
- Start page for all users
- Schedules
- Maintenance
- Search indexes
- Users
- Groups
- Projects
- Workbooks
- Views
- Data sources
- Data connections
- Scheduled tasks (extracts and subscriptions)
- Ownership of workbooks, projects, and data sources
- Web authoring ability for a site

## **Site Administrator (Site Owner)**

The Data and BI Team or an existing Site Administrator Explorer can assign the Site Administrator Explorer role to designated individuals for each site within Tableau Server Enterprise. These users can add other server users to their site.

Within the site, they can create groups to make the management of permissions easier at a project level. Site Administrator Explorers have full editing and saving rights to any dashboards on their sites and can publish content to the server.

A site administrator manages everything within a given site on Tableau Server. Examples of things site administrators can manage on their sites include:

- Groups
- Projects
- Workbooks
- Views
- Data sources
- Data connections
- Scheduled tasks (extracts and subscriptions)
- Users (if allowed by server admin)
- Ownership of workbooks, projects, and data sources

Site administrators can't manage system-wide settings or site settings that are applied from the server administrator level. A user with this site role does not need permission to do these things. If permission is explicitly denied for something, this site role will override that denial. Exact capabilities depend on which license type (Creator or Explorer) the site role uses.

### **Site Administrator Creator – not the default, as it requires special licensing**

- Highest level of access for Tableau Online
- Unrestricted access at the site level
- Connect to Tableau or external data via browser, Tableau Desktop or Tableau Prep Builder
- Can create new data sources, build and publish content

### **Site Administrator Explorer – the default for a Site Administrator**

- Same access to site and user configuration as Site Admin Creator but cannot connect to external data from web editing environment
- ?Can Connect to Tableau published data sources to create new workbooks, and edit and save existing workbooks

### **Explorer (can publish)**

Site Administrator Explorers (Site Owners) can assign users the Explorer (can publish) capability within sites in Tableau Enterprise Server. Users with an Explorer (can publish) license can publish new content to Tableau Server and can save and publish changes made to existing content.

An Explorer (can publish) site role provides users with publishing permissions within Tableau Server. The Explorer (can publish) site roles require an Explorer license. The Explorer license provides access to the server from the browser or Tableau Mobile.

Examples of the capabilities for the Explorer (can publish) site role include:

- Publish new content from Tableau Desktop
- Browse and interact with published views
- Use all interaction features

Use the web editing environment to:

- Edit and save existing workbooks
- Can save new standalone data sources from data connections embedded in workbooks but cannot connect to external data and create new data sources

## **Explorer**

An Explorer site role can browse and interact with published views on Tableau Server. The Explorer site role requires an Explorer license. Examples of Explorer site role capabilities include:

- Subscribe to content
- Create data-driven alerts
- Can connect to Tableau published data sources and open workbooks in the web authoring environment for ad-hoc queries, but cannot save their work

## **Viewer**

A Viewer site role has access to Tableau Server. Role capabilities include:

- Can see published and custom views others have created
- Can use most interaction features, such as subscribing to views, downloading as images, and downloading summary data
- Cannot connect to data
- Cannot create, edit, or publish content
- Cannot set data alerts.

## **Unlicensed**

This type of user exists on the CU Tableau Enterprise server, but these users can't log in or see data unless they are granted a site role and the proper permissions. Users were given the Unlicensed designation in the enterprise server if they were unlicensed in campus servers or have never been granted access to Tableau Server.

The Unlicensed site role does not allow the user to sign in to Tableau Server or Tableau Online. The Unlicensed site role does not have a license assigned to it. Users are assigned the Unlicensed role in the following circumstances:

- You import users from a CSV file and their license level is set to unlicensed.
- You remove a user who owns the content on the site. The user will still own the content but not be able to do anything with it.

## **Tableau Site Roles at a glance**

SITE ROLE	Admin Level	Publishing Capable	LICENSE TYPE
<b>Server Admin</b> This setting is valid only if you are importing users while managing the server (i.e. not signed into a specific site, and requires a Creator license.	System	True	Any
<b>Site Admin Creator or Site Admin Explorer</b> This setting is only valid if you are importing users, while signed into a specific site.	Site	True	Creator or Explorer
<b>Creator</b>	None	True	Creator
<b>Explorer (can publish)</b>	None	True	Explorer
<b>Explorer</b>	None	False	Explorer
<b>Viewer</b>	None	False	Viewer
<b>Unlicensed</b>	None	False	Unlicensed

### Groups audience:

University Information Services

**Source URL:** <https://www.cu.edu/uis/service-catalog/tableau/access>

### Links

[1] <https://www.cu.edu/uis/service-catalog/tableau/access> [2] <https://www.cu.edu/uis/service-catalog/tableau/tableau-training-resources> [3] <https://vimeo.com/795772189> [4]

<https://www.cu.edu/docs/duo-vpn> [5] <http://oit.uccs.edu/services/network-and-internet/vpn>

[6] <http://oit.colorado.edu/vpn-virtual-private-network> [7] <http://www.ucdenver.edu/offices/office-of-information-technology/software/how-do-i-use/vpn-and-remote-access>

[8] [http://www.ucdenver.edu/docs/default-source/offices-oit-documents/how-to-documents/vpnaccess.pdf?sfvrsn=e96ca2ba\\_4](http://www.ucdenver.edu/docs/default-source/offices-oit-documents/how-to-documents/vpnaccess.pdf?sfvrsn=e96ca2ba_4) [9] <https://my.cu.edu> [10] <http://viz.cu.edu>

[11] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/How%20to%20Log%20in.docx?>

[12] <https://www.cu.edu/uis/forms/cu-tableau-public-new-user-request>

[13] <mailto:irmhelp@cu.edu?subject=Tableau%20new%20user%20request>

[14]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau%20Sales%20Representative%20contact%20details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=g1HiWz>

[15] [https://cu0.sharepoint.com/:u:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/UIS\\_TableauDesktopPurchase-Renewal%20diagram.vsdxd?d=w656b4d65199b4654957497688483340f&csf=1&web=1&e=g1HiWz](https://cu0.sharepoint.com/:u:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/UIS_TableauDesktopPurchase-Renewal%20diagram.vsdxd?d=w656b4d65199b4654957497688483340f&csf=1&web=1&e=g1HiWz)

[16] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[17] <mailto:irmhelp@cu.edu>

[18] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[19] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[20] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[21] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[22] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[23] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[24] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[25] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[26] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[27] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>

[28] <https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Access/Tableau/Tableau Sales Representative contact details.docx?d=w669f3ebf559f4599a518d27a1bafaab7&csf=1&web=1&e=654Fd1&xodata=MDV>



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