Published on *University of Colorado* (https://www.cu.edu)

Access [1]

Accessing Tableau

How to log in

Visit Tableau Training Resources [2] for a video on How to log into the CU Tableau Private Server [3].

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.

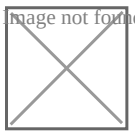
VPNs provide a secure connection to your campus network from any location, as long as your device has an internet connection. CU Denver and CU Anschutz also offer a virtual desktop option.

- 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]

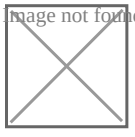
CU affiliates should log in to the CU Denver VPN [8] and connect as normal to access CU content.

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 [10] 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.

CU Tableau Public Add or Remove User Request

To request access to a Tableau Public site, please follow the steps below (NOTE: anyone can access the CU Tableau Public Site, anytime from anywhere. Special access is ONLY needed if you require the ability to publish and maintain a Tableau dashboard on this server).

How to Request Access

1. Identify your Tableau Public site:

University of Colorado Boulder ? CU Boulder

University of Colorado Colorado Springs (UCCS) ? UCCS

University of Colorado Denver ? CU Denver

University of Colorado Anschutz Medical Campus ? Anschutz

University of Colorado System ? CU System

2. Review the list of Primary Tableau Public Site administrators here: **Site Admin List** **[11]**

3. Submit email requests to the appropriate **Primary Site Administrator** for your site.

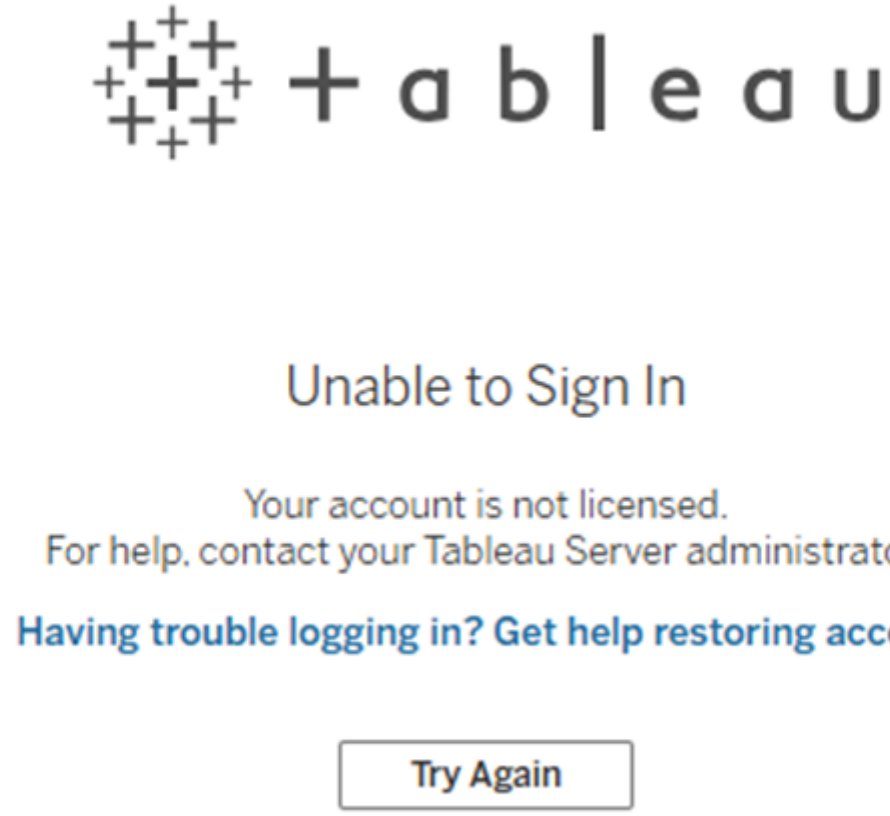
4. Include the following in your request:

- Full name
- CU email address
- Tableau site
- Requested role (if known)
- Business justification

Need help?

If you are unable to determine the correct site or administrator, contact the Data & BI Team for guidance at IRMhelp@cu.edu [12].

Access Issues and Solutions



If you encounter this error above, these are the common reasons:

What is "not licensed."

"Not licensed" means your user account does not have one of these roles:

- Server Administrator
- Site Administrator
- Explorer Can Publish
- Explorer
- Viewer
    - You must have on these user roles to log in to the Tableau Server, otherwise you will see the error.

    Terminology: User Role - This is the permission level given to each person (Server Administrator, Site Administrator, Explorer Can Publish, Explorer, Viewer). It determines

what actions they can perform on Tableau Server.

If your account shows a “Not Licensed” message when you try to sign in, refer to the role explanations further down on this page.

Why It Happens

- User created with a default unlicensed role.
- Because you have never requested access or never needed to access the CU Tableau Server.

Solution

1. Visit the Tableau private site administrators list [13] and contact your Campus Primary Site Admin. If you cannot access this list, email to help@cu.edu [14] (not irmhelp@cu.edu [15]).
2. If you are still unsure who is the campus site admin, email irmhelp@cu.edu [15].
3. Server Admin or Site Admin team will assign the appropriate role into the appropriate site and confirm your access.

Inactivity-related Access Demotion

Issue

Your Tableau Server access may be demoted after 365 days of inactivity. This can affect your ability to sign in.

Why It Happens

User Role is demoted due to inactivity.

> **Terminology: Inactive Tableau Account** – A user who has not accessed Tableau Server within the past 365 days is designated Inactive, and their account is automatically set to Unlicensed.

UIS sends 3 warning emails and 1 additional final email before an account is automatically set to Unlicensed/Not Licensed. Search your inbox for warning emails from no-reply-irm@cu.edu [16], to find the site name in the subject line of the email.

Solution

1. Visit Tableau private site administrators list [13]and contact your Campus Primary Site Admin. If you can not access this list, email to help@cu.edu [14] (not irmhelp@cu.edu [15]).
2. If you are still unsure who is the campus site admin, email irmhelp@cu.edu [15].
3. Server Admin or Site Admin team will assign the appropriate role into the appropriate site and confirm your access.

If a user sees an 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 [17] 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 [18] 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.vsdx [19]

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 [20](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 [15].
- To renew your current license key, first confirm the funding with your supervisor or department. Then contact the Tableau Sales Representative [20](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 [21]

Tableau Server Roles

Image not found or type unknown

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
Server Admin 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
Site Admin Creator or Site Admin Explorer This setting is only valid if you are importing users, while signed into a specific site.	Site	True	Creator or Explorer
Explorer (can publish)	None	True	Explorer
Explorer	None	False	Explorer
Viewer	None	False	Viewer
Unlicensed	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 [9] https://my.cu.edu [10] http://viz.cu.edu
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[21] mailto: irmhelp@cu.edu