

## **Tableau How to Guides** <sup>[1]</sup>

Tableau How-to-Guides are organized by user. The first section of guides may be useful to all Tableau users, then Developers, Site Administrators and finally Tableau Command users.

These guides are specific to the Tableau Enterprise Server at the University of Colorado. To access these how-to guides, you need to be logged in to your campus-specific VPN and will need CU System SharePoint access. If you encounter an issue accessing these documents, contact the [UIS Service Desk](#). <sup>[2]</sup>

### **Tableau General User Guides**

The General User Guides provide basic instructions to begin using Tableau. You will find out how to locate your unique identification code, subscribe to a specific dashboard, and refresh data points automatically on a dashboard.

[How to find your own CID](#) <sup>[3]</sup>

[How to subscribe to a specific dashboard](#) <sup>[4]</sup>

[How to set up extract refresh](#) <sup>[5]</sup>

### **Tableau Developers Guides**

The Developers Guide has insights on how to connect Tableau Desktop to the UIS in-house data warehouse (CIW), restrict data access in a Tableau Server dashboard, edit datasource connection in a published dashboard, resolve data sourcing errors, and set up row-level security for a dashboard.

[How to connect Tableau Desktop to the CIW](#) <sup>[6]</sup>

[How to restrict data access](#) <sup>[7]</sup>

[How to Edit the Datasource Connection to view a Dashboard when prompting for Username and Password](#) <sup>[8]</sup>

[How to resolve intermittent data source errors](#) <sup>[9]</sup>

[How to update row-level security calculations](#) <sup>[10]</sup>

### **Tableau Site Administrators Guides**

Site Administrator Guides show site admins how to add existing users (all staff, faculty, and students) to Tableau Server groups, and assign site roles to users.

[How to add users to groups](#) [11]

[How to add users within the Tableau Enterprise Server](#) [12]

[How to assign site roles to users](#) [13]

## TABCMD Specific Guides

TABCMD\* Specific Guides show you how to use command line for the following actions: download and install, bulk-add users to a group, and update password to use with TABCMD.

\*TABCMD is a command-line utility provided by Tableau. It allows you to automate administrative tasks on a Tableau Server or Tableau Cloud. Using TABCMD, you can publish workbooks, create users, generate PDF exports of dashboards, and more without needing to use the graphical interface. (ideally this is made smaller and added like a footnote)

[How to download and install the TABCMD tool](#) [14]

[How to add users in bulk to a group in TABCMD](#) [15]

[How to update TABCMD](#) [16]

### Groups audience:

University Information Services

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

### Links

[1] <https://www.cu.edu/uis/service-catalog/tableau/tableau-how-guides> [2] <mailto:help@cu.edu>

[3]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/All%20-%20How%20to%20find%20CID%20value.docx?d=w1587fcaad9bb423a8d5de597e8794c0e&csf=1&web=1>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/All%20-%20How%20to%20Subscribe.docx?d=w5435c958f31b4db3b0589016186914bb&csf=1&web=1&e=S>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/All%20-%20How%20to%20set%20up%20extract%20refresh.docx?d=w1600f1e1e6944016bd3570deddea1a4e&csf=1&web=1>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Developers%20-%20How%20to%20Connect%20Tableau%20Desktop%20to%20the%20CIW.docx?d=w42d489a16bc1462380fb56c>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Developers%20-%20How%20to%20apply%20User%20filter%20to%20apply%20Row%20Level%20Security.docx?d=w9ae7e4caab5>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Developers%20-%20How%20to%20Edit%20Datasource%20Connections.docx?d=wa356d9634e39414abae87e3a3c57c8b4&csf=1&web=1>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Developers%20-%20How%20to%20Resolve%20Intermittent%20Data%20Source%20Error.docx?d=w9715dfb2e8774fb89ac01fbf97b>

[10]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Developers%20-%20How%20to%20Update%20Row->

Level%20Security%20Calculations.docx?d=w9185a65a63c3453daf12ebf8f4825990&csf=1&web=1&e=d

[11]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Site%20Administration%20How%20to%20Add%20Users%20to%20Groups.docx?d=w2fcfd5e16cd4431487be3690354ecd24&csf=1&web=1&e=d>

[12]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Server%20Administration%20How%20to%20Add%20Users%20to%20Tableau%20Server.docx?d=w54a3c272d2db4009ad8e5743b179ac73&csf=1&web=1&e=d>

[13]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/Site%20Administration%20How%20to%20Reactivate%20Users%20and%20change%20Tableau%20Site%20Role.docx?d=we894eacdacc&csf=1&web=1&e=d>

[14]

<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/TABCMD%20Tools%20download%20and%20install.docx?d=w4715455c1bbf4fe6b7126d8829e094ab&csf=1&web=1&e=d>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/TABCMD%20Tools%20bulk%20add%20users%20to%20group.docx?d=wc8631357ae814f59aa4990659ca01974&csf=1&web=1&e=d>

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<https://cu0.sharepoint.com/:w:/r/sites/UIS/teams/databi/PublicDocs/Support/Tableau/Support%20Tips/TABCMD%20Tools%20update%20batch%20files.docx?d=wda96244159294d63b8a5b81be65af357&csf=1&web=1&e=d>