

# Make the Tableau Server interface more customizable

---

Tableau Server seems to be setup with a particular use-case in mind: that of people collaborating within an organisation to share visualizations with other reasonably advanced users. It is great for that.

However, if you want to use Tableau Server to serve external clients or the public at large, it is not very good. It is far too abstract and cluttered to be easily used by the layperson. It puts all sorts of concepts like 'views' and 'workbooks' right up front, as well as information about who published workbooks and when, whether they have tabs turned on, what project they are in and so on.

In our case, and I imagine in many other company's cases, we are serving up data and visualisations to clients who have no idea what Tableau IS, let alone what the distinction between a workbook and a view is and so on.

What they want is a solution to a particular business problem of some kind. They don't care about the fact the data is presented via Tableau or about any of the details of how it was constructed or by whom.

What we sorely need is the ability to ~easily~ create customised navigation and change the look and feel on a per-site basis.

Now I know there are some options for doing this, such as creating an HTML wrapper site that simply serves up the vizs: this is a development overhead and also makes things more difficult than they should be to add new workbooks and so on. Ideally if you add a workbook, you shouldn't have to get a HTML developer to update the navigation and forms to allow it to be seen.

And I am aware that the server can be 'white labelled' to some extent by directly modifying the underlying CSS, images, and templates. However this is difficult and has to be redone each time the server is updated.

The basic things that would go a long way towards helping with this issue would be:

- Create a directory on the server where custom CSS, templates and images could be put to override the defaults, and which is kept intact during updates
- Provide configuration options for turning on and off various elements of the interface, especially:
  - the main 'workbook' and 'view' navigation
  - favorites
  - whether to display JUST workbooks or JUST views (the distinction is meaningless for the end user in many cases)
    - the 'list' view
    - the display of workbook details such as publisher, time modified etc
    - the checkboxes and associated controls shown when listing workbooks
    - the header and footer elements: search, comments and so on
    - the tagging features

Make the Tableau Server interface more customizable

- 'share' this workbook
- Provide a system to create a folder heirarchy for workbooks or views, which could then be used as the main navigation in place of the workbook/view stuff
- The ability to create custom links in the main navigation, which could then be used to link to certain workbooks, or search results, or folders and so on.
- The ability to add html descriptive text to workbooks/views and folders (such that it is displayed when listing workbooks, I realise you can add text and html stuff WITHIN the workbook itself)

All of this would ideally be implemented on a per-site basis.

Cheers

Tom