Welcome to Tableau Server & Online Admin User Virtual Group

Understanding Tableau Nested Project Permissions

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Tableau Ambassador
Nested Project Permissions

1. Project leader/owner
2. Publisher permissions
3. Lock project permissions
1. Project leader/owner role in nested projects
Project Owner

Project owner: always one individual user

- Whoever creates a project is the owner by default
- Managing the content in it
- Making someone else the owner
- Assigning Project Leader permissions
**Project Leader**

**Project Leader** : multi-user administrative to
- a project
- and its child projects
- and all workbooks/data sources in those projects

**Site Admin**

**Site Admin** : manage all projects, workbooks, data sources, **groups**, (and maybe **site role**) for the site.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Project Leader</th>
<th>Project Owner</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/delete project leader</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Change owner</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Can delete the project</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Can delete its child projects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Publish to project</td>
<td>Yes if site role = publisher</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Publish to its child projects</td>
<td>Yes if site role = publisher</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Can be group</td>
<td>Yes</td>
<td>No</td>
<td>n/a</td>
</tr>
<tr>
<td>Can be interactor site role</td>
<td>Yes</td>
<td>No</td>
<td>n/a</td>
</tr>
<tr>
<td>Can be publisher site role</td>
<td>Yes</td>
<td>Yes (from 10.5)</td>
<td>n/a</td>
</tr>
<tr>
<td>Manage content of the project</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Manage content for all child projects</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Project leader/owner’s superpower for the project & its sub-projects

1. Change extract refresh schedule
2. Modify any workbooks
3. Change workbook owner
4. Change data source owner
5. Change data source user/password
6. Delete workbooks
7. Change workbook or data source permissions
8. Move workbook
9. Restore old revision
10. Lock or unlock project permission
11. Certify or uncertified data sources (10.4)
12. Create or delete sub project folder (10.5)
How Permissions are Evaluated in Project Hierarchies

Inaccurate Tableau Online doc

http://onlinehelp.tableau.com/v10.5/server/en-us/permissions_project_lock.htm

- PL = Project Leader
- O = Owner
- * = Owner was assigned explicitly
- Dotted line “inherited” at a parent level

Online documentation inaccurate here
How Permissions are Evaluated in Project Hierarchies

This is how 10.5.0 & 10.5.1 behaves!!

Both PL1 & O1 got implicit project leader permission

PL1, PL2, O1 & O2 got implicit project leader permission
Publish permissions in nested projects
2. Publisher Permission in Project Hierarchies

To publish to child:

- Publisher permission at **BOTH parent project AND child project**

Child project publishers have to have parent project publisher permission
Publisher Permission in Project Hierarchies (V10.5)

An user can publish to a child project only if:
- Site role = publisher
- Publisher permission at parent project level
- Publisher permission at child project level

Vote for IDEA: https://community.tableau.com/ideas/8490
3. **Lock project permissions in nested projects**

- Only top parent project can be locked
- If parent is unlocked, child can’t be locked
- For locked project:
  - All child projects are locked
  - All child projects have same permissions as parent project has.
  - All permission changes apply to all child projects automatically
  - Child projects can still have different owner
  - Child projects can’t have different project leaders

Vote for IDEA: https://community.tableau.com/ideas/8455
1. Leverage project leader for more self-service

2. Give parent project publisher permission even to those who only need to publish in sub-projects

3. Only top parent project can be locked.

Read more @ http://enterprisetableau.com/blogs/