Creating Users

The reason you have Tableau Server is to allow users to share their Tableau workbooks and data sources! So one of your tasks is to set up your server so that your coworkers can sign in, publish their work, and view the work of others. How you do this depends on whether you configured your server to use Active Directory identity store or local identity store.

Unless you are running with a Guest user (someone who can see views but can't interact with them, anyone who accesses your Tableau Server has to sign in --- that is, be authenticated. Tableau Server stores information about users, and when someone signs in, they have to be identified as one of the users who's defined on the server.

About users, groups, and sign-in

There are two ways to create users in Tableau Server. If the server is configured to use Active Directory, you import the users from your organization's Active Directory store. This copies user names and email addresses of users from Active Directory to Tableau Server. (It doesn't copy the password.)

If you configured the server to use local identity store, you create a user name, password, and optional email address for each user. If you have to create a lot of users, you can make this process more convenient by first creating a text file with the information for all the users, and then importing the text file.

We'll walk you through the steps for creating users in both configurations---Active Directory and local identity store---later in this chapter.

User limits and your license

Your server license determines how many users you can create. If you have a user-based license, the license tells you the maximum number of registered users you can have, across a range of user-based license types. If you have a core-based license, you can create as many users as you want.

Sites

Before we talk about users and roles, we must quickly talk about *sites*. You might be used to using the term *site* to mean "a collection of connected computers," or perhaps as the short form of "website." But in Tableau-speak, we use *site* to mean a collection of content (workbooks, data sources, users, etc) that's walled off from any other content on the server.

Imagine an entirely separate server with users, projects, workbooks, and data connection configurations. That's what another site is like on your instance of Tableau Server. There's no way for users of one site to access any information on another site, even though the sites (and users) are hosted on the same physical computer. The only users who can access other sites are server administrators.

Why might you create separate sites? One reason is to test functionality before you make changes to your main site. Another reason that organizations create separate sites is to host different types of content that must not be intermingled or even be visible to different users. For example, some financial companies might be required by law to maintain ethical boundaries between divisions. Such a company could set up a Tableau Server with two sites: one for investors, one for bankers. Each site has its own URL and its own set of users, and each site has completely segregated content, projects, and data sources.

When you install Tableau Server, it comes preconfigured with a site whose name is, unsurprisingly, [Default]. For the purposes of this guide, where you're running a single server and you want to get up and running with the least amount of fuss, we recommend using the default site.

Users and site roles

When you create a user, that user is in a specific site. For the tasks in this guide, you'll be creating users in the [Default] site.

You also have to assign the user a site role, which defines the maximum access the user has. In this guide we assume that you, as the person who created the administrator user at the end of the Tableau Server installation process, have the [Server Administrator] site role. This site role allows access to everything on your server and across all sites.

Levels of access that other site roles allow include:

- [Site Administrator Explorer], as you can probably guess, can perform administrative functions, such as managing users and content, on a given site. The site administrator doesn't have permissions to administer the server itself.

- [Explorer (Can Publish)] can publish data sources or workbooks to the server and edit published content.

- [Explorer] can view *and* interact with workbooks.

- [Viewer] can view workbooks but not change anything in them.

Site roles are the first step in assigning permissions to users. As mentioned above, a good way to think about a site role is that it determines the maximum capabilities that a user will ever have on a given site. For example, if a user's site role is [Viewer], the user can view content on the site but can't publish to that site, regardless of what other permissions the user is granted later. (You assign a site role when you create a user, but you can change it later.)

For now, we recommend that you assign the site role of [Explorer (Can Publish)] for new users who aren't administrators. (In Structure Content Projects, Groups, and Permissions, we'll describe how to implement a content permissions model that fits your organization.)

Finally, you can assign the [Unlicensed] site role to users when you want to create a user name and password for the user, but you don't want that user to count against your user-based license limit. You can create as many users as you want that have the [Unlicensed] role.

Groups

Tableau Server lets you organize users into groups, which makes it more convenient for certain tasks, such as assigning permissions. For now, your goal is just to add users to your Tableau Server site, so we'll go into detail when we talk about permissions. However, we mention groups here because if you're working with Active Directory, you can import users from Active Directory groups to Tableau Server groups.

Sign in to Tableau Server

When you add users to Tableau Server, you create or import them using the Tableau Server administrator page, which you access with a web browser. Before you sign in, you'll need this information:

- The URL that you use to sign in to your instance of Tableau Server. The URL depends on whether you're working directly on the server computer or accessing the server from a different computer. If you don't know the server name or IP address, check with your IT person.

  If no IT person is available, sign in to the computer where Tableau is running. Then, on the Windows [Start menu], right-click [Computer] and then choose [Properties]. The [Properties] window lists the computer name for the server computer.

- You also need to know what port Tableau Server is using. If another process had already claimed port 80 when you installed Tableau Server, Tableau Server will listen on a different port. (By default, the alternate port that Tableau Server will set is 8000.)

  To review ports and related information, see Running Setup

If your IT department set up your server, they might have set a custom virtual directory or another type of namespace mapping to accommodate multiple web destinations on a single computer. If that's the case for your installation, check with your IT department for the URL for your server.

Here's how to sign in to Tableau Server:

1. Open your browser and enter the server URL. Here are some examples of what the URL might look like:

   `http://localhost/` (if you're opening a browser directly on the server computer)

   `http://MarketingServer/` (if you know the server name)

   `http://10.0.0.2/` (if you know the server's IP address)

   If the server is *not* using port 80, you need to include the port number in the URL, as in these examples:

   `http://localhost:8000/`

   `http://MarketingServer:8080/`

   `http://10.0.0.2:8888/`

   ... where `8000` or `8080` or `8888` is the port that you configured.

   Tableau Server displays a page where you can enter a user name and password:

2. Enter the credentials for the server administrator that you created when you finished the installation.

   You're then taken to the main page of the [Default] site, and you're ready to create users.

Create users: Active Directory

If you configured Tableau Server to use Active Directory, you import users into Tableau Server from your organization's Active Directory. You can import users individually, but if you have a lot of users, you can also import

them in a batch. Either way, you'll need to specify a site role for the users you're importing.

Note: In the context of user and group synchronization, Tableau Server configured with LDAP identity store is equivalent to Active Directory. Active Directory synchronization features in Tableau Server function seamlessly with properly configured LDAP directory solutions.

Import users individually

1. Sign in to Tableau Server.

2. At the top of the page, click [Site].

3. Click the [Users] tab, click [Add Users], and then click [Active Directory Users].

4. In the [Import Users from Active Directory] dialog box, enter the user names for the Active Directory accounts that you want to import. The user name is often the same as the left-hand side of an email address. For example, John Smith might have a user name of `jsmith` or `johns`. To import multiple users, enter their names separated with a semicolon.

   The first time you import users, or if you're importing users from another trusted domain, you might have to enter the domain nickname with the user name. For example, if your domain nickname is `exampleco`, enter user names in this format: `exampleco\jsmith`.

   After you enter the user names, set the [Site role] to [Explorer (Can Publish)] and then click [Import].

Import an Active Directory group of users

1. Sign in to Tableau Server.

2. At the top of the page, click [Site].
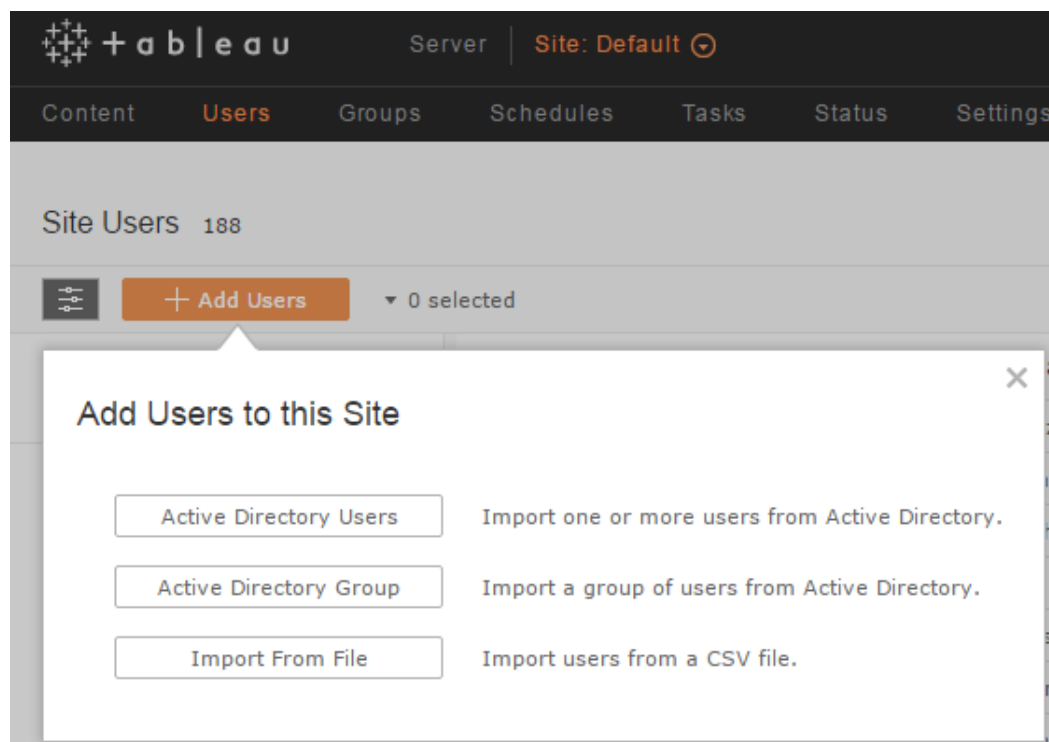
3. Click the [Users] tab, click [Add Users], and then click [Active Directory Group].

4. In [Import a Group from Active Directory], enter the friendly name of the group that you want to import.

5. Select the group that you want to import.

6. In [Site role], select [Explorer (Can Publish)], and then click [Import].

   Tableau Server imports the users. Because the import process is designed to handle hundreds or even thousands of users (probably not in your case, of course), Tableau Server runs the import process as a background task. Therefore, it might take a short while before all the users have been imported and are available for you to view.

If you don't want to license every single user in a given Active Directory group, you can either delete those users after importing the group, or you can set the site role for those users to be [Unlicensed].

Should you delete group containers after importing users from Active Directory?

When you import users from Active Directory groups, corresponding groups are created in Tableau Server. This is helpful if you want to map your groups from Active Directory directly to content permissions in Tableau Server. If that's useful to you, you might want to schedule periodic [synchronization of Active Directory groups[(Link opens in a new window)]](#) with Tableau Server. Read the next chapter, [Structure Content Projects, Groups, and Permissions](#), to understand how groups interact with projects.

We've found that in most cases, Active Directory groups don't map to the groups that you need in Tableau Server. Instead, Tableau Server admins usually create groups directly in Tableau Server for managing user access to content and data sources. In that case, you can delete the groups that are imported from Active Directory. (Deleting a group does not delete the users in it.) Again, the [Structure Content Projects, Groups, and Permissions](#) chapter might help you decide how you want to use groups in Tableau Server. If you decide later that you do want to sync Active Directory and Tableau Server groups, you can always re-create the groups.

To delete a group, do this:

1. Sign in to Tableau Server.

2. At the top of the page, click [Server].

3. Click the [Groups] tab and then select the group that you want to delete.

4. Click the [Actions] drop-down menu, and then click [Delete].

Create users: local identity store

If you configured Tableau Server to use local identity store when you installed it, you create users by entering user information directly into Tableau Server for each person who can sign in.

1. Sign in to Tableau Server.

2. At the top of the page, click [Users].

3. Click [Add Users] and then click [Local User].

4. In the [New Local User] dialog box, enter the user name, password, and site role. If you don't have a specific site role in mind for the user, pick [Interactor]. Make a note of the user names and passwords, because you'll need to distribute these credentials to your users when you [Open for Business!](#)

   You can also enter an email address for the user. This can be useful if you want to enable notifications for users, as we'll describe later in this guide.

5. Click [Create].

Import users with CSV file

For bigger batches of users, you can save time by creating a text file that lists the user name, password, and site role, and then importing the file.

If that seems useful to you, you can read more about it in [CSV Import](Link opens in a new window)] in the Tableau Server Help.