

What is a site



You might be used to using the term *site* to mean "a collection of connected computers," or perhaps as the short form of "website." In Tableau-speak, we use site to mean a collection of users, groups, and content (workbooks, data sources) that's walled off from any other groups and content on the same instance of [Tableau Server]. Another way to say this is that [Tableau Server] supports multi-tenancy by allowing server administrators to create sites on the server for multiple sets of users and content.

All server content is published, accessed, and managed on a per-site basis. Each site has its own URL and its own set of users (although each server user can be added to multiple sites). Each site's content (projects, workbooks, and data sources) is completely segregated from content on other sites.

Site administrator tasks

Where the Server Administrator site role gives a user unrestricted access to the entire [Tableau Server] deployment, the Site Administrator site roles give a user unrestricted or minimally restricted access at the site level. The differences between Site Administrator Creator and Site Administrator Explorer are in the level of data connection and publishing access. Both site roles allow administering the site itself and managing site users. For more information, see [Set Users' Site Roles](#).

Although a server administrator can work at both the server and site levels, we make a distinction between the two levels of task. The site administrator is typically in charge of creating and maintaining the framework that enables Tableau users in the organization to publish, share, manage, and connect to data sources and workbooks. In this vein, site administrator tasks include any of the following (and both site roles allow this level of access):

- Creating project hierarchies to organize the site's data sources and workbooks. This can include delegating project-level management to project leaders.
- Creating groups and assigning permissions that allow users to access only the content they need.
- Adding and removing users, assigning their site roles. This is allowed by default on a site; however, a server administrator can restrict this access to the server level only.
- Managing the site's extract and subscription schedules.
- Monitoring site activity.

Steps for setting up your site

The table below shows a loose sequence of steps for setting up a site, along with links to topics where you can get more information. You can complete the steps in any order that makes sense for you.

However, before you perform the steps to configure the site, we recommend spending some time with the articles in this section, learning about site authentication, site roles, projects, and permissions. Ideally you would document a plan for your projects, groups, and overall permissions strategy. Then set up a few projects and add a preliminary set of users, to test the plan and resolve issues before you add the remaining users. You can change many site settings after your users are working with the site, but try to go in with the intention of minimizing post-production changes.

Plan	To supplement the recommendations above this table, get an overview of how the site components work together in Planning a Site .
Configure access	<p>Work with the server administrator to determine how users sign in to the site, and configure the site appropriately.</p> <p>For example, if the server is configured for single sign-on using SAML, you might configure SAML authentication at the site level as well.</p>
Create projects and the permissions structure	Projects help you organize content, delegate project-level content management, and manage permissions effectively. To get started, see Use Projects to Manage Content Access .
Add users	Determine the users who can sign in to the site. See Add Users to a Site .
Get your data to Tableau Server	<p>After you create your projects and permissions structure, designate approved users for publishing and managing vetted data sources to the appropriate projects on the site.</p> <p>In some organizations, people serve in multiple Tableau roles. Site administrators commonly also are data stewards. By that, we mean they create, publish, and manage the Tableau data connections. If this is you, make sure you are assigned the Site Administrator Creator site role.</p> <p>After content is published to the site, you can maintain connection information (credentials, access tokens) and refresh schedules. For more information, see Refresh Data on a Schedule.</p>
Analyze site usage and performance	Monitor usage, performance, and other metrics. See Administrative Views .