Planning a Site

Before you add users and content to a site, we recommend that you plan the following aspects of the site.

- [Projects](#)

- [Users and groups](#)

- [Site roles and permissions](#)

- [Extract refresh schedules](#)

The subsequent sections go over these site components, assuming that you are familiar with

Note: This article and section apply only to self-managed Tableau Server deployments on-premises or in the cloud. If you use Tableau Online, see [Manage Content Access[(Link opens in a new window)]{.sr-only}.](#)

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You can create projects on a site, which act as containers in which you can organize related content assets (such as data sources and workbooks). For example, you might set up a project to contain all of the certified data sources and workbooks your organization uses for mission-critical decisions. Or you might set up projects by department.

Projects are also useful for managing permissions. Once you know how your users need to access content, it's usually easier to create projects based on those the type of content, and maintain permissions at the project level.

Every site has a default project named **Default**. When you create projects, the new projects get their initial set of permissions from the default project. In effect, the default project is a template for new projects. As we explain in related articles, for most environments, we recommend that you use the Default project only as a permissions template, and not as a container for published content.

For more information, see [Use Projects to Manage Content Access](#).

[]{.icon--med-lg .icon--arrow-up .heading-item__icon}{.heading-item__link .print-hidden} Users and groups

Any user who will publish content or access published content on a site must be able to sign in to the site. If the user already has an account on the server, you'll need to add that user to the appropriate site. You can add a user to more than one site as well. If the user doesn't already exist, you need to create a user account. Either way, make a list of the users who will need to be able to sign in to each site.

Note: The server license might restrict how many users you can have, or what level of access they can have. Check with the server administrator to make sure that you'll be able to have an account for all your users.

In general, we recommend that you create groups on the server and then add users to the groups. This helps to make permissions much easier to manage. You can assign permissions on groups, to give those permissions to all users in the group. (See the next section.)

A typical strategy is to create groups for users who use content in similar ways. For example, you might create a group named SalesWBPublishers for all the users in the Sales department who publish workbooks, and a separate group named SalesDSPublishers for people in Sales who publish data sources. Each of these sets of users needs its own set of capabilities, so it makes sense to have a group for each for these needs.

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Each user has a *site role* that determines the maximum permissions that they can have on the site. As part of your site planning, you need to decide each user's site role. A user with a site role that's too restrictive might not be able to do the work they need. By the same token, a security best practice is to limit users' capabilities to only those that they need to do their work. This is referred to as following the principle of *least privilege*.

You or a site administrator you delegate this task to must also determine the permissions a user needs to work with content. Each content asset (workbook, data source, project) supports a set of *capabilities. For example, you can **View** or **Add Comments** to a workbook. Before a user can perform tasks on a workbook, their permissions must allow those capabilities. A recommended practice is to sketch out a mapping of permissions to users outside of Tableau before you try to set this up on the server.

Permissions determine what a user can do *within the context of the site role. A user whose site role is **[Viewer]{.Variablessiterole-basic}** can never publish to the site, regardless of the permissions you grant them. A user whose site role is **[Creator]{.Variablessiterole-author}** can publish a workbook to the site, but only if that user has permission to save and view workbooks.*

[](){.icon--med-lg .icon--arrow-up .heading-item__icon}{.heading-item__link .print-hidden} Extract refresh schedules

If users publish data sources or workbooks that include extracts, you usually want to make sure that the extracts are refreshed, so that they contain the latest data. Users can manually refresh an extract, but this isn't always a good idea if the extract is large, and the refresh takes a long time. Instead, you can set up schedules for when an extract should be refreshed. Another planning task for a site administrator, therefore, is to think about when extracts should be refreshed and to work out schedules.