Set Web Edit, Save, and Download Access on Content

If you're enabling web authoring functionality on your site, you can configure more precisely which users on the site have access to this functionality. Using site roles and permissions rules at the content level, you can grant or deny [Web edit], [Save], or [Download] capabilities on projects, workbooks, and data sources.

Note: This document strives to use the phrase *Web edit* only to specify the name of the capability in permissions rules, and *web authoring* to refer to the general functionality of creating and modifying workbooks on the server. However, you might otherwise see these two phrases used interchangably.

Why allow users to work on the site directly

As an administrator, your initial thought about allowing people to populate a site with content, seemingly indiscriminately, might be one of skepticism. However, with a few controls, you can limit where this is done, while providing important benefits that centralized content management offers both you and your users.

Web authoring pros and cons

For publishers and business users, some benefits of web authoring include the following:

- It provides analyst teams who work collaboratively with a central location in which to provide input.
- It enables people who do not have Tableau Desktop to connect to data sources and create workbooks.
- It enables people to access content when they are away from their Tableau Desktop computer or VPN, whether on a computer or a hand-held device.
- It can provide a framework for enabling consistency across Tableau reports.(By making template workbooks available on the site, analysts can download or create new workbooks with data connections, branding, and formatting already in place.

For administrators, benefits can include the following:

- Fewer Tableau Desktop deployments to manage and support.
- Fewer computers that need to have database drivers installed.
- Capacity to govern content.
- More accurate monitoring of what people are doing with Tableau.

Some disadvantages to web editing include the following:

- For analysts, web editing functionality is not as extensive as in Tableau Desktop (although it continues to evolve toward that parity).
- For administrators, more people working on the server might mean upgrading systems.
- Without publishing guidelines, content proliferation on the site is expected.
  This can confuse the people who rely on published Tableau dashboards and data sources, degrade server performance and data quality, and potentially affect data security.

Managing permissions to help users avoid content proliferation

To help users to avoid content proliferation on the site, many Tableau administrators use projects to allow varying levels of access to content. For example, one project can be configured to allow all users to edit and save workbooks; another can allow only approved publishers to save new content.

To get a better idea how this works, see the following resources:

- [Configure Projects, Groups, and Permissions for Managed Self-Service](){.MCXref .xref}
- [Projects and Content Permissions[(Link opens in a new window)]]() in *Everybody's Install Guide*
- [Governed Self-Service at Scale[(Link opens in a new window)]](), a Tableau whitepaper by Rupali Jain.
  To view the PDF, you might need to provide your Tableau website credentials. These are the same ones you use for the community forums or to submit support cases.

Coordinate edit and save capabilities with site roles for the appropriate level of access

To edit, save, and download workbooks, users must have a site role that allows those actions, along with the capabilities---defined in permissions rules---that grant or deny editing-related access.

Site role access

- When the appropriate permissions are set at the content level, the [[Creator]{.Variablessiterole-author}] or [Explorer (can publish)] site role allows both [Save] (overwrite) and [Save As/Download].

  Note that **File > Save** is only available to the workbook owner. When the **Save** permission capability has been granted at the project and workbook level, a non-owner user can overwrite the existing workbook in web authoring by selecting **File > Save As** and using the same workbook name. This overwrites the existing content and they become the owner and gain full access to the content.

- The [Explorer] site role can be granted the **Web Edit** and **Save As/Download** capabilities, but they will not be able to save (neither overwriting existing nor saving changes to a new workbook).

For more information, see Web Editing and Web Authoring.