

Module 11: Exploring Tableau Online

Demo Document IV

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Demo IV

Assign Explorer and Viewers site roles to two different accounts and try to publish the report in Tableau Online and visualize the difference.

Refer the datasets: Coffee Chain.xlsx

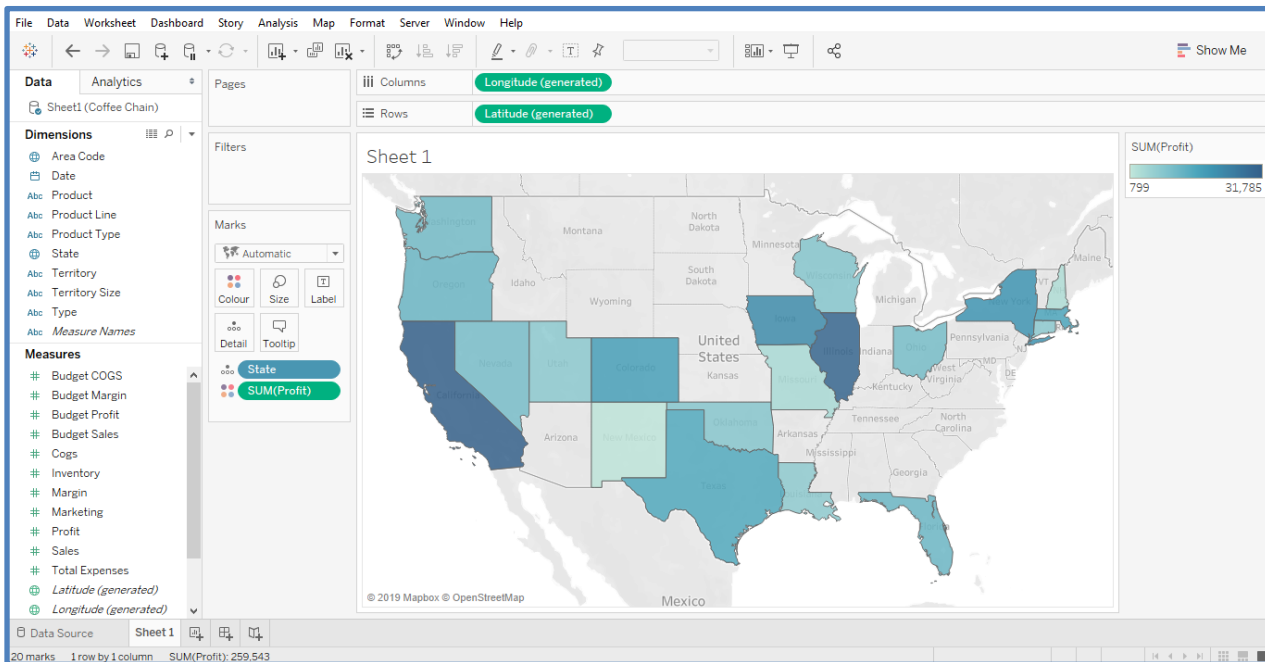
Demo IV Solution

Step 1: Create two different Tableau Online accounts and assign Explorer and Viewer to them respectively.

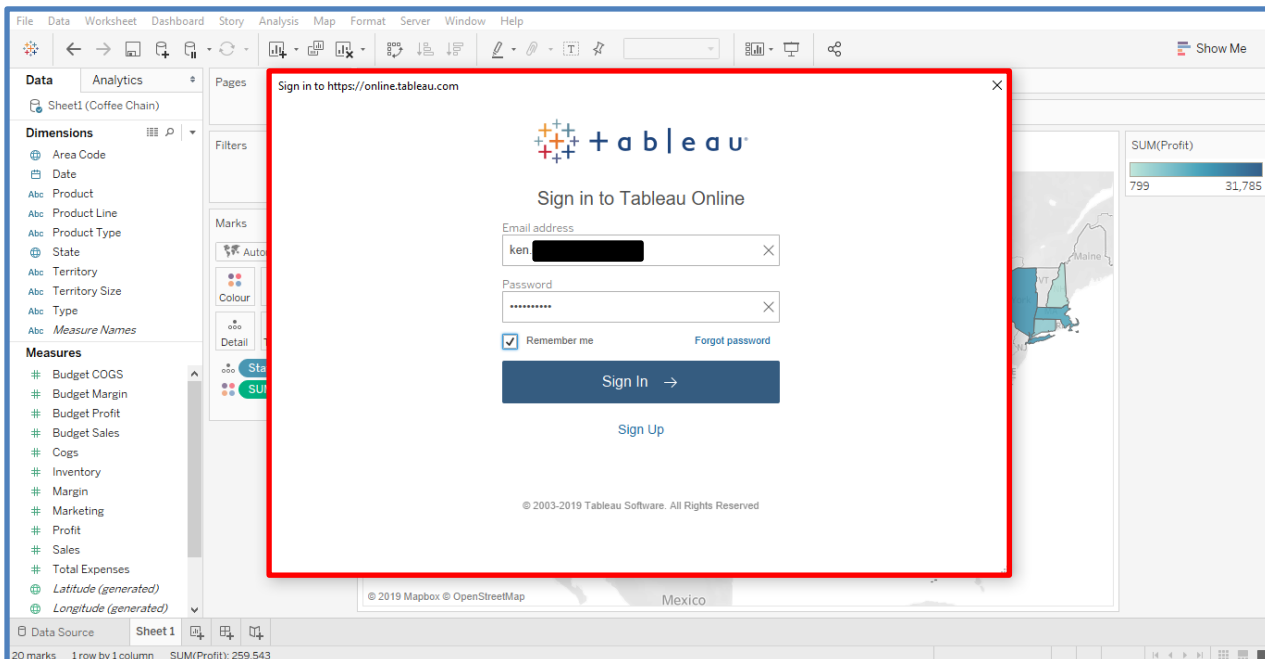
- Go to Home → Manage Users → Click on User
- Action → Site Role → Drop Down → Select Explorer → Change Site Role
- Ken and Shabnam → Explorer and Viewer respectively

Display name	Username	Site role	Groups	Authentication	Last signed in
...	...	Viewer	1	Tableau	
...	...	Viewer	1	Tableau	
...	...	Explorer (can publish)	2	Tableau	
...	...	Explorer (can publish)	1	Tableau	
...	...	Viewer	2	Tableau	
...	...	Creator	2	Tableau	
...	...	Explorer (can publish)	2	Tableau	
...	...	Site Administrator Creator	2	Tableau	Nov 4, 2019, 2:57 PM
Ken	ken.edureka@gmail.com	Explorer	1	Tableau	
Shabnam Mulla	shabnam.edureka@gmail.com	Viewer	1	Tableau	Oct 31, 2019, 2:03 PM

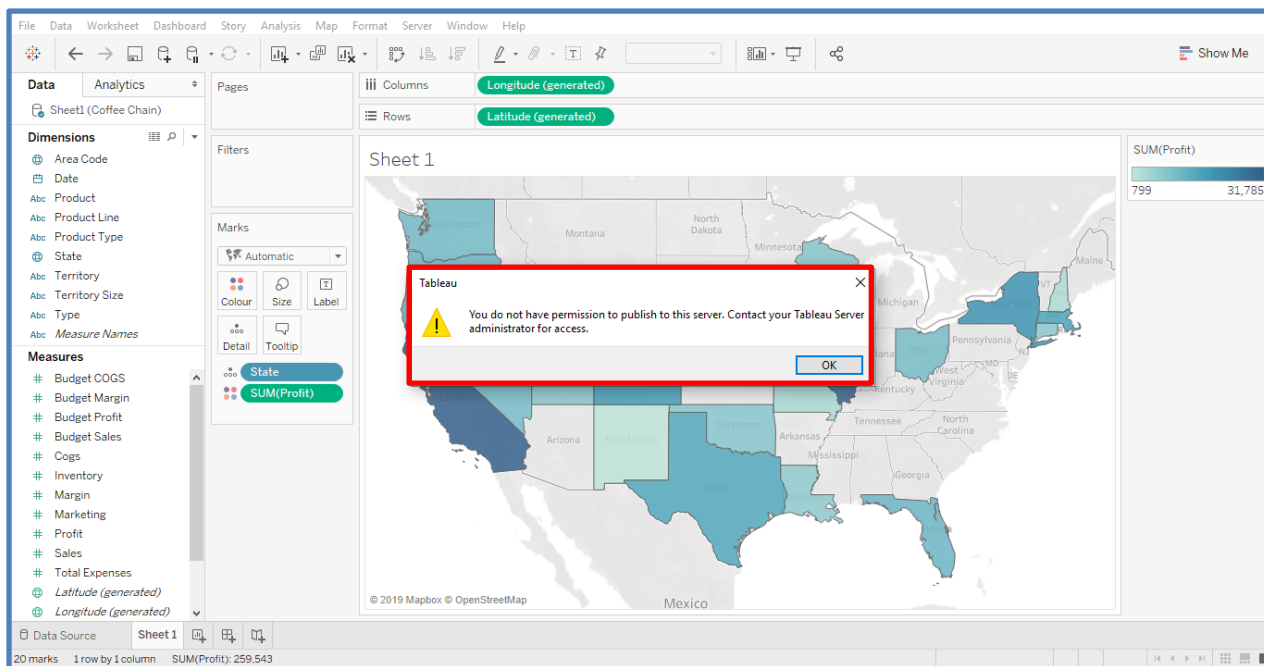
Step 2: Now, create a workbook on Tableau Desktop.



Step 3: Try to publish this workbook with different accounts and see the result.

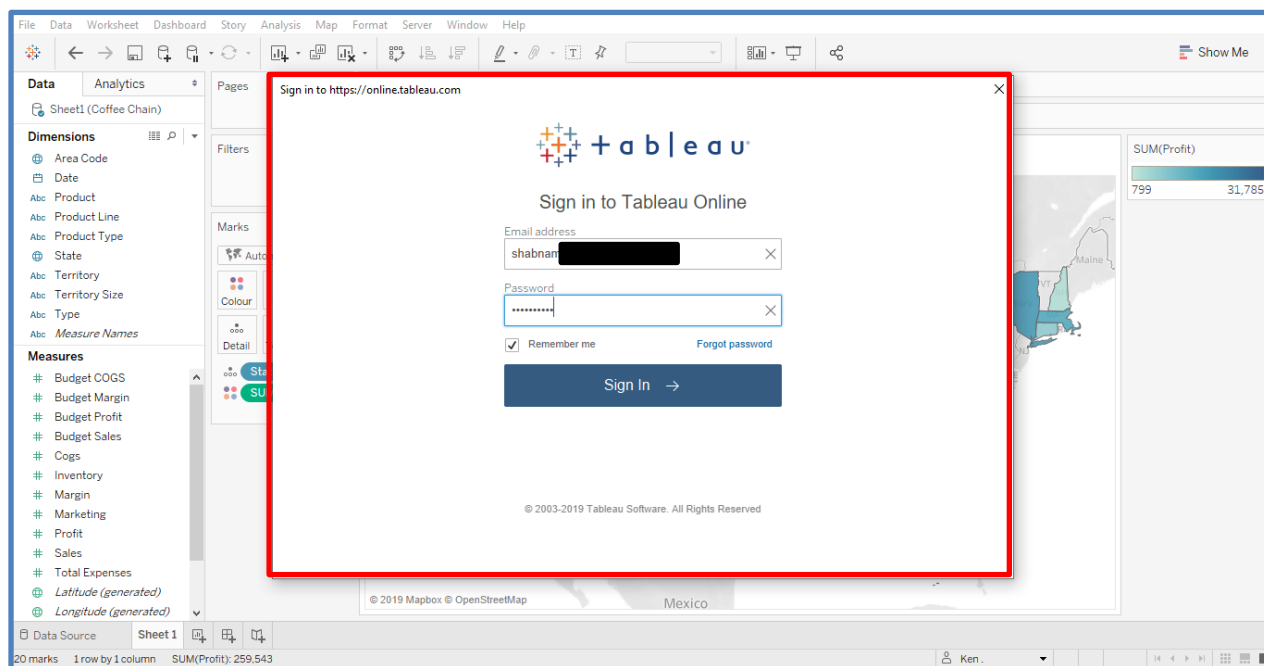


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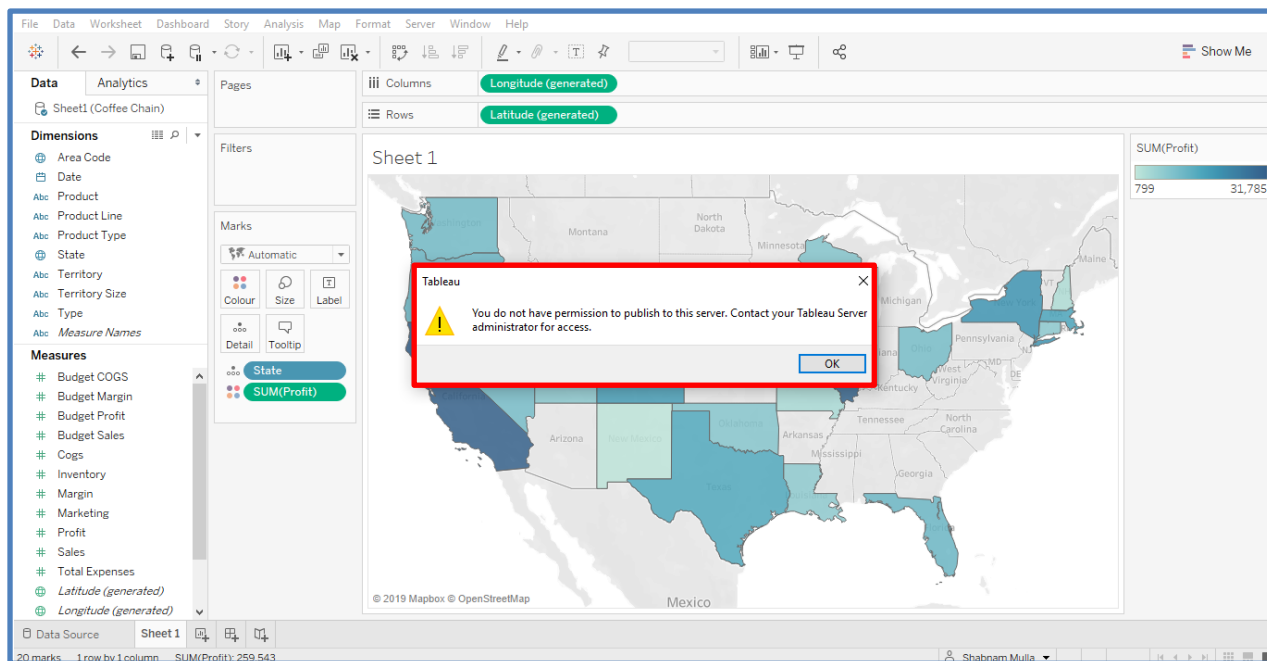


Since only Explorer Site Role has been assigned to Ken, he cannot publish the account.

Step 4: Now, try to publish using Viewer Site role.



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Since only Viewer Site Role has been assigned to Shabnam, he cannot publish the workbook.

Step 5: Again, go to Manager Users and can change the Site role of Ken from Explorer to Explorer (can publish) and see the difference.

The screenshot shows the Tableau Online Manager Users interface. The left sidebar contains navigation links: Home, Explore, Favorites, Recents, External Assets, Users, Groups, Schedules, Jobs, and Tasks. The main area displays a table of users. The table has columns: Display name, Username, Site role, Groups, Authentication, and Last signed in. The user "Ken" is highlighted with a red border. The user "Shabnam Mulla" is also visible.

Display name	Username	Site role	Groups	Authentication	Last signed in
Ken	ken.edureka@gmail.com	Explorer (can publish)	1	Tableau	Nov 4, 2019, 3:42 PM
Shabnam Mulla	shabnam.edureka@gmail.com	Viewer	1	Tableau	Nov 4, 2019, 3:44 PM

Publish Workbook to Tableau Online

Project

Default

Name

State wise Profit

Description

Tags

Add

Sheets

All Edit

Permissions

Same as project (Default) Edit

Data Sources

1 embedded in workbook Edit

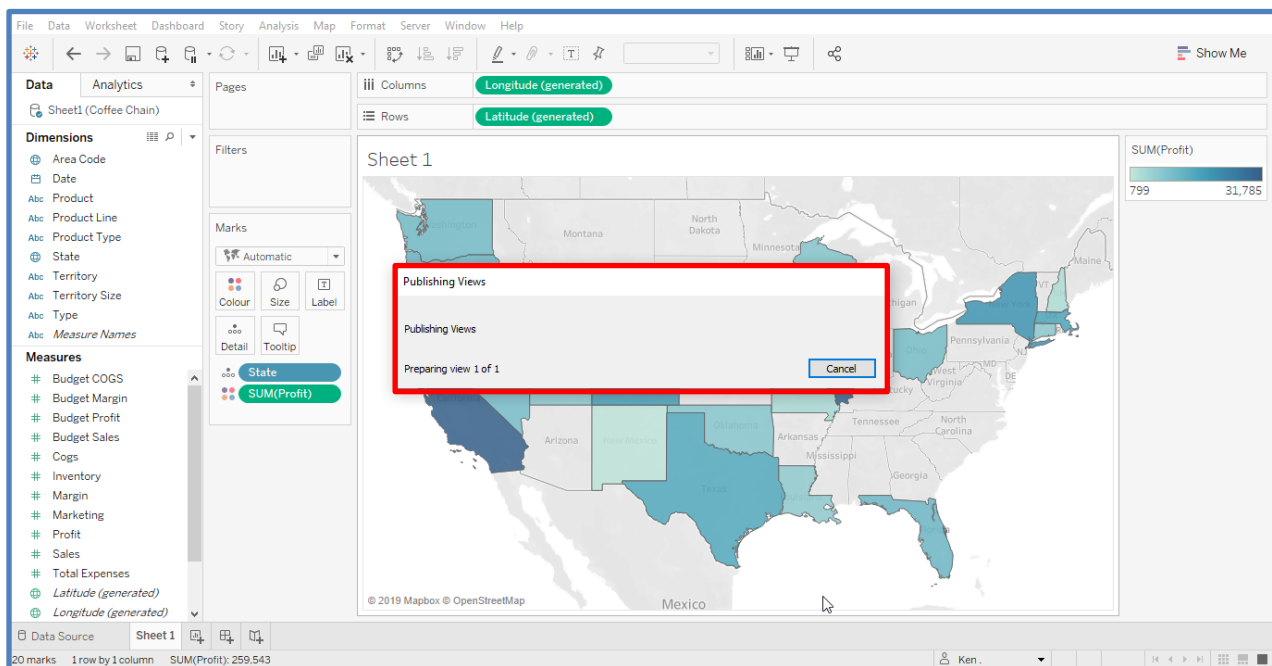
More Options

☐ Show sheets as tabs

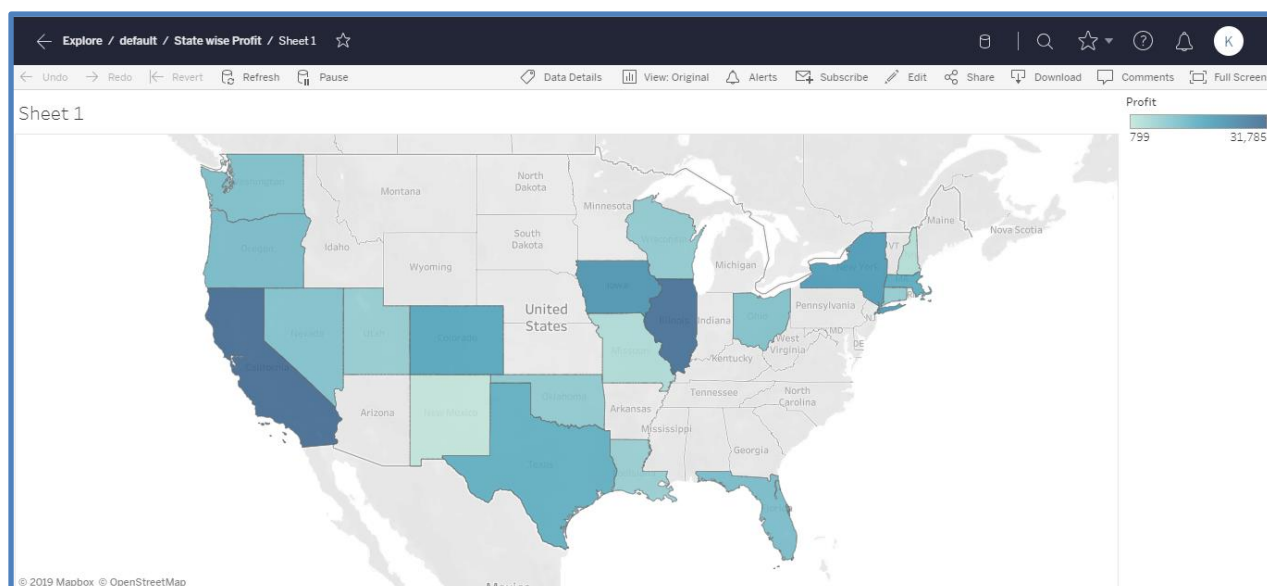
☒ Show selections

Publish

On selecting Publish Workbook option, we get Publish Workbook to Tableau Online dialog box. Click on Publish.



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You can see that the workbook has got published in **default** project folder, and you can even see and access all permissions that have been set for you.