Module 11: Exploring Tableau Online

Demo Document IV

edureka!

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.
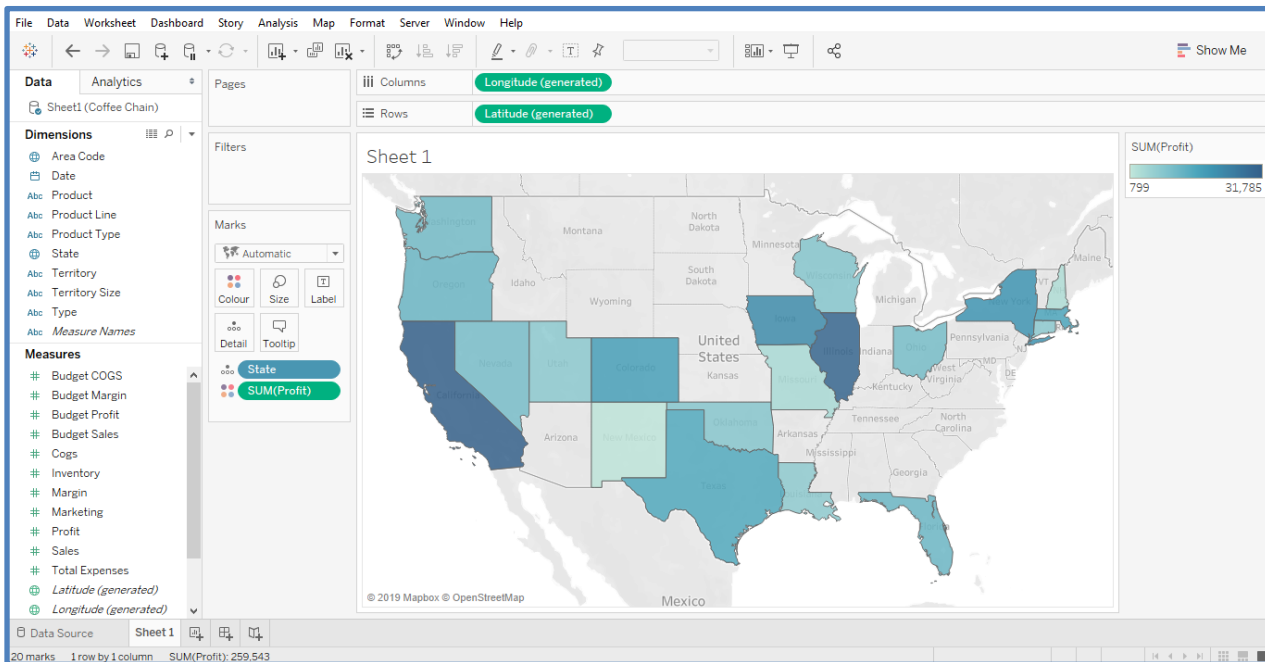
Refer the datasets: Coffee Chain.xslx

Demo IV Solution

Step 1: Create two different Tableau Online accounts and assign Explorer and Viewer to them respectively.
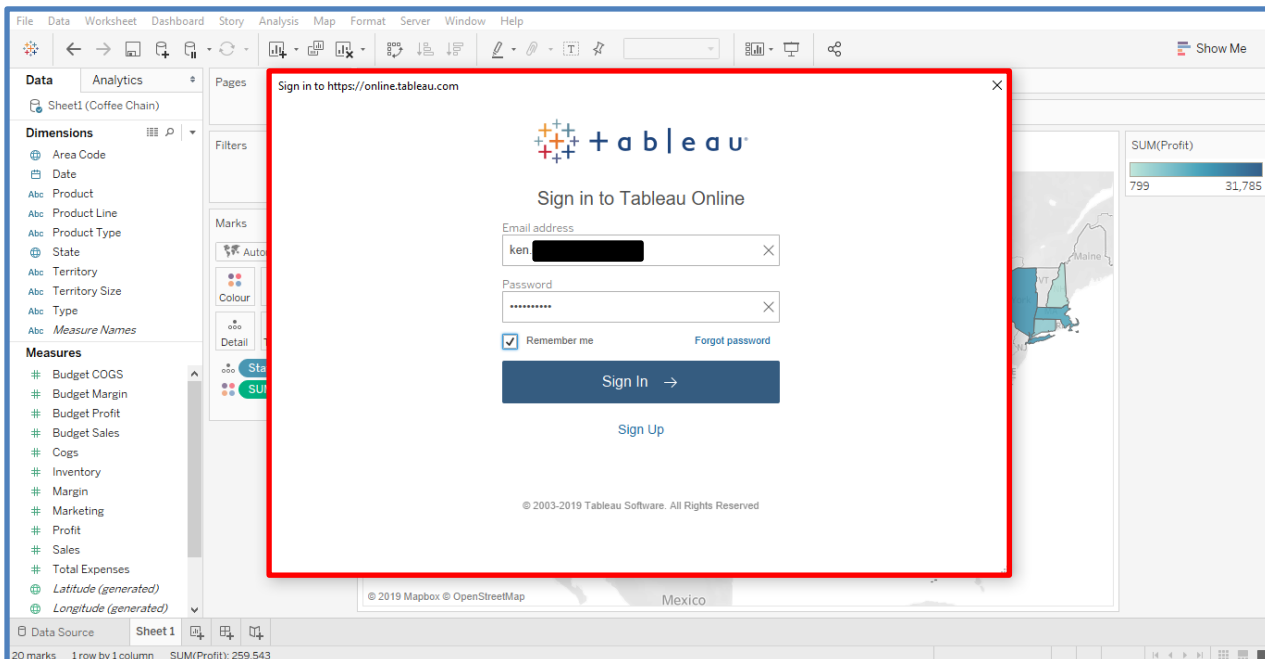
- ➢ Go to Home → Manage Users → Click on User
- ➢ Action → Site Role → Drop Down → Select Explorer → Change Site Role
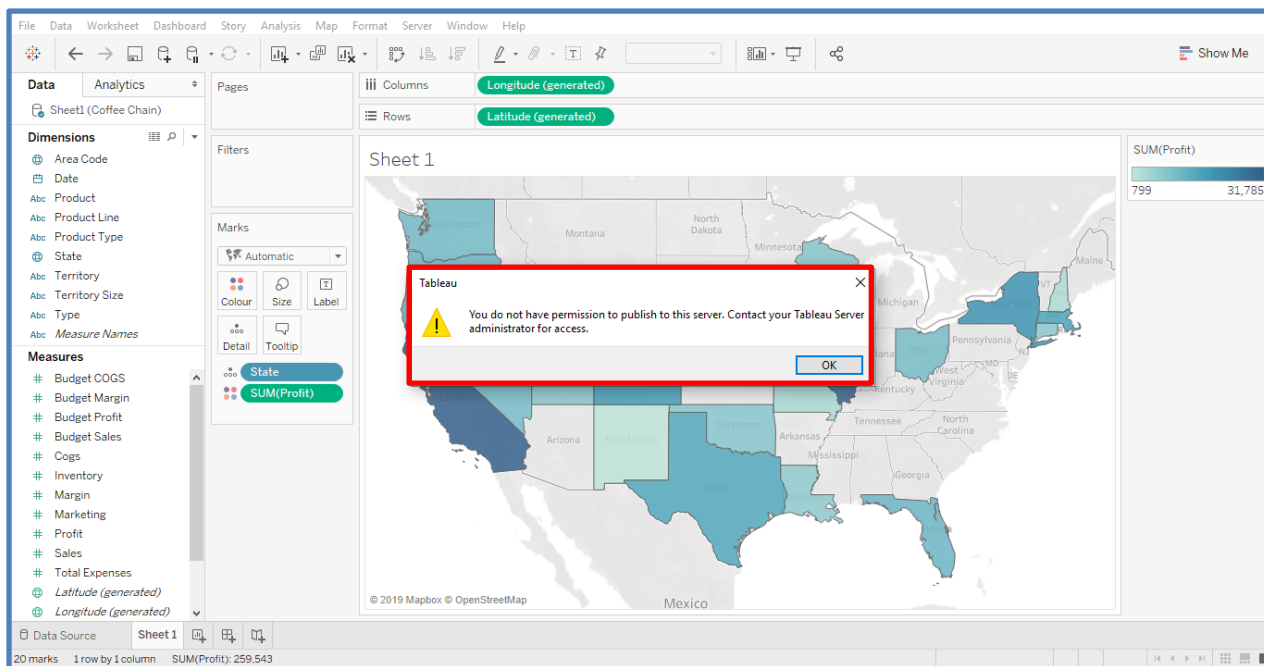- ➢ Ken and Shabnam → Explorer and Viewer respectively

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

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

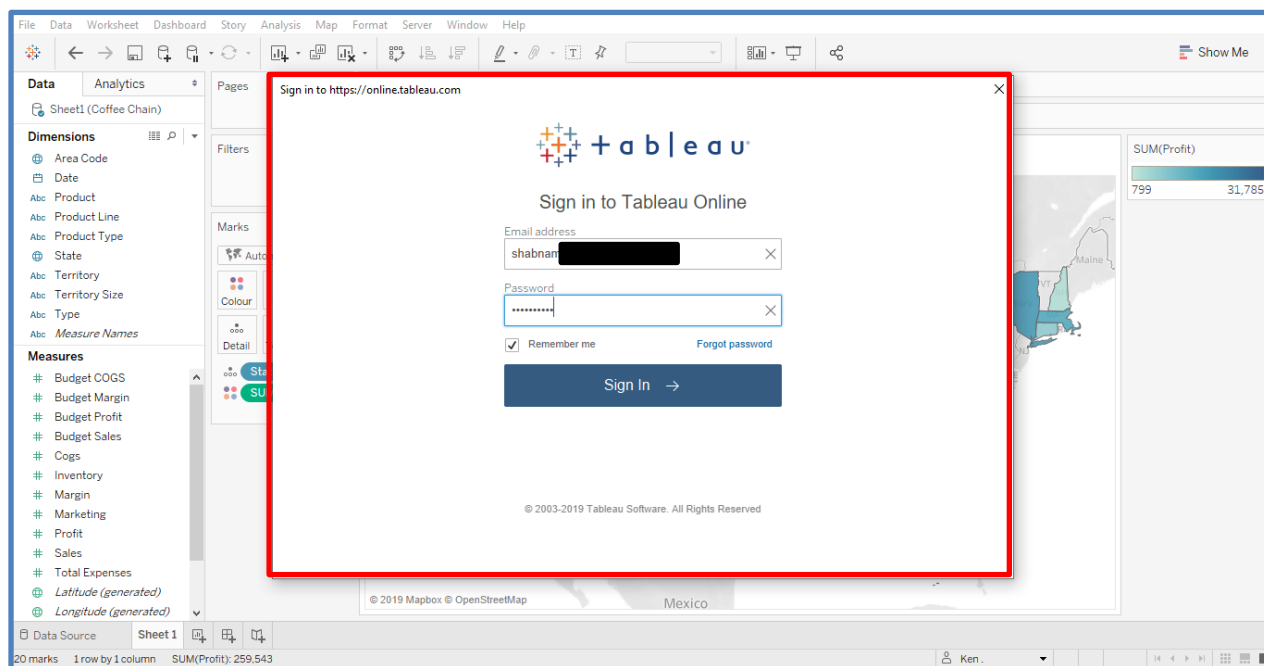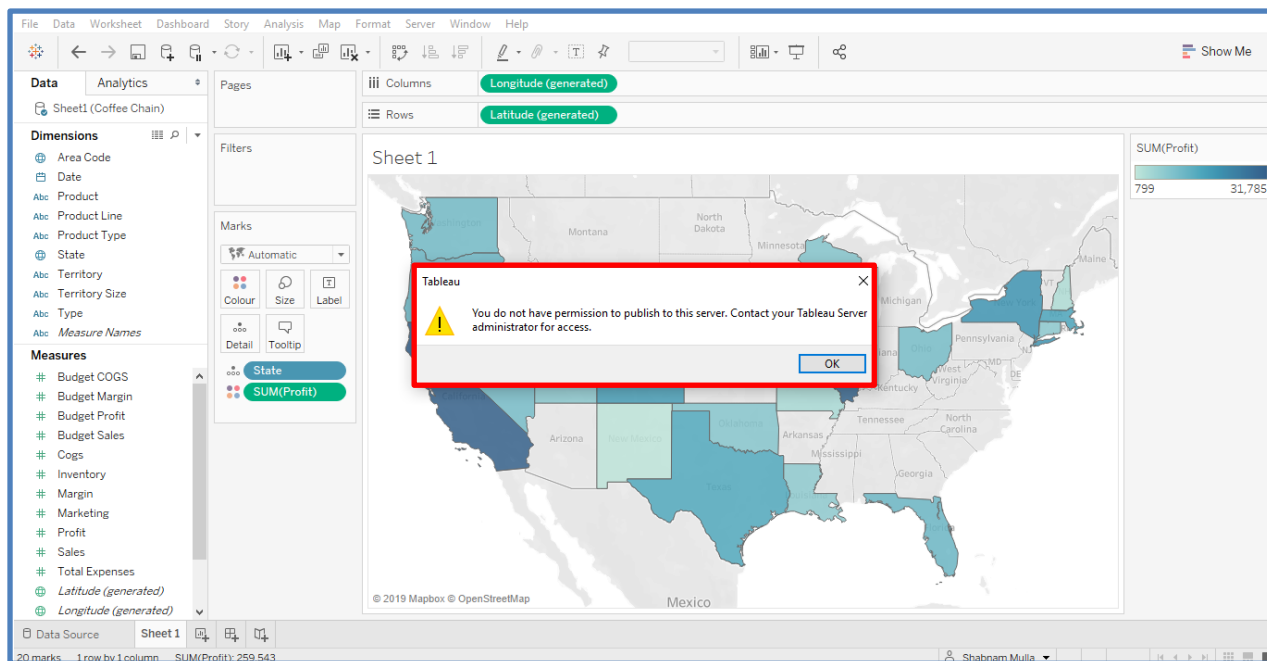Since only Explorer Site Role has been assigned to Ken, he cannot publish the account.

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

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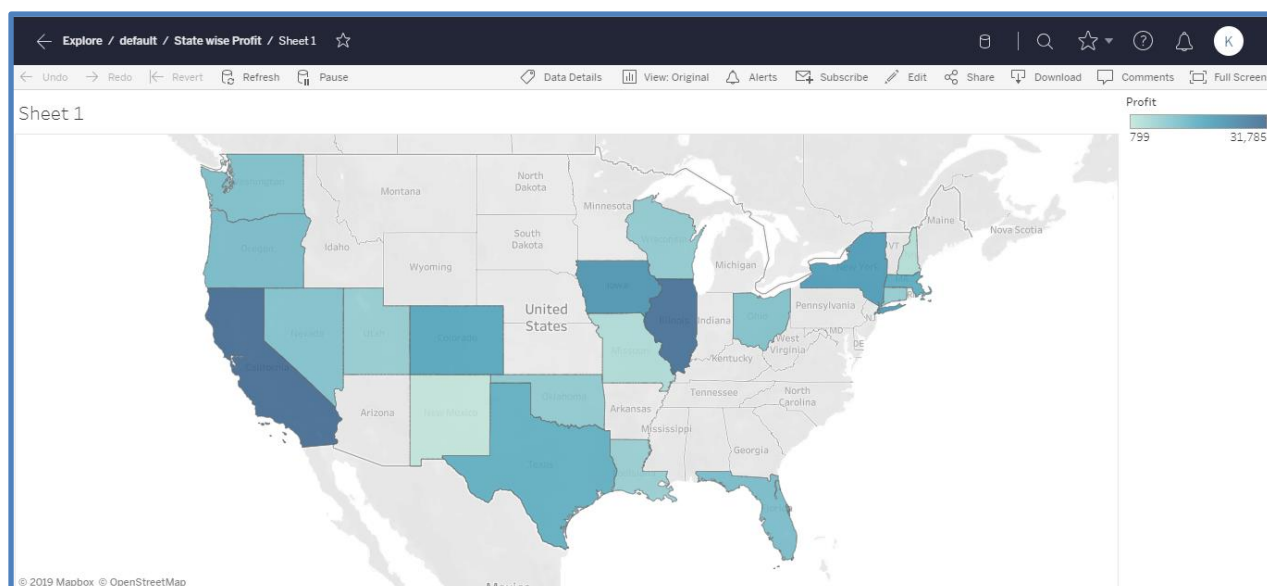
On selecting Publish Workbook option, we get Publish Workbook to Tableau Online dialog box. Click on Publish.

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.