

Request a Tableau Server Project

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What is a Project?

In [Tableau Server](#), a **project** is a collection of related workbooks shared with a defined audience.

A Tableau Desktop user (with the appropriate permissions) can publish visualizations to a project.

When you [request a project](#), you will be asked to provide the following.

1. Project name and description
2. Type of project (see below)
3. Name of the project administrator(s) (see below)
4. Users who can publish to the project
5. Users who can view the project (optional, you can set viewers later after the project is created)
6. If you want WIP Project (see below)

Project Types

There are two types of projects, depending on the intended audience.

Project Type	Audience	Project Naming Convention	Example Project
Organizational unit	Users who belong to the same department or team	The project name should match the name that describes the organizational unit.	Office of Institutional Research Project for Institutional Research department members only.
Cross functional	Users who come from various departments and teams and cannot be defined by an organizational unit. For example, a committee.	The project name should be descriptive of the content it will contain. (see also <i>WIP Projects</i> below)	Faculty Activity Project that contains visualizations created collaboratively by publishers in BioMed, Dean of the Faculty, and Institutional Research for consumption by users across departments with a vested interest in data about the activity of faculty.

WIP Projects

WIP stands for **work in progress**. Think of a **WIP project** as a draft folder for cross functional projects.

Cross functional project publishers can request an optional additional (**WIP**) project. The purpose is to give publishers a specific project location to:

- publish content that is under development
- collaborate with other publishers on a cross-functional team
- share content with specific users for testing and feedback before it is published and shared all project viewers.

WIP Project Naming Convention

WIP projects begin with " **WIP -** " followed by the cross functional project name. For example, a project named **XYZ Committee** might have a WIP project named **WIP - XYZ Committee**.

Project Administrator

Each Tableau Server project will have a designated [project administrator\(s\)](#)—also called a project contact.

Usually the project administrator is the primary publisher for the project. However, it can be all or some project publishers and, in cases where the BI Team publishes content, a business user may be the project administrator.

Project Administrator Responsibilities

- manage project security via Brown Groups
- be a member of the project Publisher group (usually, but may not be the only publisher)
- field questions from users you give access to your content as well as users interested in viewing your content
- appear on the [Tableau Server Projects](#) knowledge base article

Locked Project Permissions

We use groups to manage project permissions because it is a best practice.

[Project content permissions are locked](#) by default. This means when you publish to Tableau Server, you cannot override the project's group permissions and assign permissions to individual users.

Exceptions to Locked Projects

There are two exceptions where projects are unlocked and we allow the publisher to set permissions when publishing content.

- WIP projects are unlocked by default. The intention of a WIP project is to share works in progress with a subset of a viewer group for feedback, so publishers have more flexibility to choose who sees what in this type of project. Publishers can leverage the

Viewer group in this project *or* share content with individual users.

- You need to share content with varying individuals and the overhead of creating and maintaining individual projects and a Viewer group doesn't make sense.

Example:

Institutional Research creates one-time visualizations for various users—sometimes one viz for one or two people. It doesn't make sense to create the overhead of a project and security groups for a single visualization. Their team has an unlocked project for this purpose.

Need a project with unlocked permissions?

[Contact the Business Intelligence Team](#) to discuss unlocking your project permissions.

If you have a project with unlocked permissions, we recommend you grant the same set of permissions to individuals that we grant to Viewer groups.