



On-Demand Training: Publishing to Tableau Server or Tableau Online

Welcome to this video on publishing workbooks. You can download the Exercises workbook to follow along in your own copy of Tableau, but to securely publish a workbook you must have access to either Tableau Server or Tableau Online.

Publishing a workbook means taking the file created in Tableau Desktop and sharing it with others via Tableau Server, Tableau Online, or Tableau Public.

How to Publish a Workbook

- Publishing a workbook is done from inside Tableau Desktop by going to Server > Publish Workbook and entering the information necessary.
 - For Online, this will be the URL `online.tableau.com`
 - For Server, this can be the server name
 - Then enter your credentials depending on the method of user authentication
 - If you are already signed into Tableau Server, you will not have to sign in again
- Various options are available when publishing
 - For content management, a project can be selected and a description and tags can be added to help users search for the workbook once it's been published
 - Permissions can be established at the time of publishing
 - These override group or user permissions established by the administrator. If a person is granted permission to edit a workbook when it is published, this overrides if they are otherwise just an interactor
 - Specific views can be selected for publication
 - And this can be useful if there are a lot of views in the workbook but only the final dashboard or story needs to be shared
 - If the workbook includes an extract, a refresh schedule can be set based on the schedules set by the administrator.
- Let's publish this workbook
- Now, we can open it in the browser, and let's click into the dashboard

Sharing Published Workbooks

Once a workbook has been published, there are several ways it can be shared

- The Share button offers a link for direct access as well as embed code for inserting a live visualization into a web page at a specific size.
- A view can be exported as an image or PDF.
- The workbook can be downloaded and opened with Tableau Desktop.

And if the feature has been enabled, the view can be subscribed to, so that an email is sent out on a pre-set schedule with a snapshot of the current view and a link to open it in a browser.

Conclusion

Thank you for watching this training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.