



On-Demand Training: Web Authoring Transcript

Welcome to the Web Authoring video. If you have access to Tableau Server or Tableau Online, you can log in and follow along. Keep in mind that your screen might look different, since I have different workbooks published. While this video uses Tableau Server, the Tableau Online user interface will look very similar, and will have the same functionality.

Web Editing

Both Tableau Server and Tableau Online have a web authoring component if it has been turned on. This is a powerful feature that allows someone consuming content in a browser or via the mobile app to modify a published workbook's sheets.

If the author of the workbook turns this feature on and the end user has the right permissions, the published viz will have the word "Edit" on the top left of the screen.

- Once we click Edit, we are brought to the web editing screen.
- If we want to modify the view of the map, for example, by adding Sales to the size of the mark on the map, we can simply drag and drop Sales to Size on the view
- We can make these marks larger as well.
- We can also create a new sheet and look at the same data differently.
- We'll duplicate this sheet by right clicking and use "Show Me" to view it as a bar chart instead. So, maybe we want to look at Sales.
- We see that this view in web authoring mode looks very similar to the user interface we have in Tableau Desktop.
- However, web authoring is not meant to replace Tableau Desktop, which is a more robust tool for creating content.

Saving

- If we have publishing rights, we can use the Save As feature to save our work as a new workbook.
- We may also be able to save OVER the original workbook using the "Save" option, but only if we have permission to do so.

Creating New Workbooks with Published Data Sources

Creating new workbooks on Tableau Server can be done from the published data sources section. Note that data sources on Tableau Server or Tableau Online must be published via Tableau Desktop.

- Here, we see the data sources that have been published up to the data server functionality of Tableau Server or Tableau Online.
- If we check this box, for to "More" and then select "New Workbook", we can actually make a new workbook from our browser.

Web Authoring versus Tableau Desktop

- Tableau web authoring is intended for quick, ad hoc analysis or answering additional questions based on existing content.
- Web authoring offers a subset of features from Tableau Desktop to allow for rapid edits directly from Tableau Server or Tableau Online, without having to go back to Desktop.
- Because web authoring is not meant to be a cloud-based replacement for Tableau Desktop, there are some restrictions in functionality for web authoring versus creating in Tableau Desktop.
- In web authoring, we don't have the ability to create new hierarchies, new calculated fields, or new parameters.
 - Creating new dashboards and stories and editing pre-existing dashboards and stories are also features specific to Tableau Desktop.

Conclusion

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