



On-Demand Training: Distributing and Publishing Transcript

Welcome to this video on how to distribute Tableau visualizations. You can download the Exercises workbook to follow along in your own copy of Tableau.

Ways to Distribute

There are several ways to distribute the work done in Tableau Desktop that vary in security, interactivity, and data freshness.

- Images and PDFs do not contain the underlying data and are static, both for any interactivity and for data updates because they're simply snapshots taken at a particular time
- Workbooks, either packaged to contain the data or not, can be shared with others who have Tableau Reader or Tableau Desktop
 - Tableau Reader can view and interact with workbooks
 - Tableau Desktop can view and edit workbooks
 - Packaged workbooks do contain the underlying data and are not encrypted
 - Non-packaged workbooks require the recipient to have access to the same data source as they do not contain the data themselves
- Workbooks can also be published to Tableau Online or Tableau Server
 - These workbooks are secure, fully interactive, and can be scheduled to have data refreshes or maintain a live connection to the data source
 - Published workbooks can be accessed via any major web browser as well as on mobile devices with the native Tableau App or a mobile web browser.

Exporting Images and PDFs

- Views can be exported by going to Worksheet > Export and selecting Image, Data, or Crosstab to Excel
 - Selecting Image brings up options for what should be included, such as legends and titles, as well as the layout
- And the file can be saved as a Jpeg, Bitmap, Enhanced Metafile, or PNG.
- Dashboards and Stories can be exported by going the Dashboard or Story menu and selecting Export Image
 - The Dashboard image will be the current state of the Dashboard
 - The Story image will contain the current story point in its current state
- The entire workbook or a specific sheet can be printed to PDF by going to File > Print to PDF and choosing the appropriate settings
 - Printing the entire workbook includes each story point

Workbook File Types

Workbooks in Tableau Desktop can be saved as .twb files or .twbx files. Twb workbooks are not packaged with the

data itself – they contain just the information needed for the data connection and construction of the view. Opening a twb file requires access to the same data source used to create it.

.twbx workbooks are packaged – they contain the information in a twb as well as any data and local files such as background images and custom geocoding. As noted previously, twbx files are not encrypted and have no data security – opening a twbx shows all underlying data

Opening Workbook Files – Desktop and Reader

Packaged workbooks can be opened with Tableau Desktop or Tableau Reader. Opening a file in Tableau Desktop is the same experience as authoring a workbook – there is full functionality including the ability to edit or create new worksheets from the data.

Tableau Reader can open packaged workbook files to be viewed, and preserves full interactivity of the workbook contents including dashboards, stories, and any filtering or other actions, but the workbook cannot be edited.

Publishing Securely – Tableau Online and Tableau Server

Finally workbooks can be published to Tableau Online or Tableau Server. These workbooks are secure, fully interactive via browser, and can be set up for automatic data refreshes or be connected live some data sources. For more information, please see the video on Publishing Workbooks to Tableau Server or Tableau Online.

Conclusion

Thank you for watching this video on distributing Tableau content. We invite you to continue with Publishing Workbooks to Tableau Server or Tableau Online to learn more.