On-Demand Training:
Interacting with Content
on Tableau Server/Online

Welcome to the Interacting with Content 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.

Drill Down and Actions

Let's start on a Tableau dashboard that has already been published and saved. In this dashboard, we can interact with the information that's on this report. We can use filters that the author has set and drill down into a mark for more information very quickly and easily.

View Underlying Data

Now that we have chosen an interesting view, there are a few things we can do.

- If we want to find out more about California, we might have permissions to view the underlying data, indicated by this icon here.

- This underlying data shows the individual transactions on the row level that went into this mark.

Remember My Changes

We also can choose to "Remember My Changes".

- This way, we can come back to the specific set of actions we took, such as filter selections,

- or we can share our custom view with other people in the organization so they can see the insight that we have found as well.

- Because in this case we highlighted California, let's name this view "California info".

Now when we log in, we see that our view, "California info" is an option in the URL. It allows us to navigate specifically to this drill-down view of the data that we set.

Download Workbooks

We might also have permission to download the workbooks. If this "download" option appears, we can download a local copy to our machine and do some additional analysis in Tableau Desktop.

Export and Sharing

We may also have the ability to export data or a static image of the dashboard.

- The data can be exported as a crosstab or .txt file.

- We can export an image or PDF of the dashboard.

- Additionally, we can also email or embed a dashboard from Tableau Server or Tableau Online by copying and pasting the links shown in the "Share" option.

  - If we copy and paste this link into an email or embed it on a website, the person viewing or receiving it will be prompted for their credentials.

- They will only have permission to view the information if they are a Tableau Online or Tableau Server licensed user.

Favorites

We can see here, that there's a little star up at the top of the page which means that we have saved this as a favorite dashboard, which we can go back and view later here.

Subscriptions

We can subscribe to receive dashboards on a scheduled basis by going here.

- If an email address is set in the user preferences, we can choose to send this report on a certain schedule to our email inbox.

- We can choose from different schedules, such as having the messages sent on weekday mornings for example.

- The email will have a static image of the dashboard or report and we can click to navigate to the live version on Tableau Online or Tableau Server, where we can interact with that data.

- Note that subscriptions may not be turned on for all users.

Comments

We also may have the ability to add comments. We could say "Look at California again!"

Conclusion

Thank you for watching the Interacting with Content training video. We invite you to continue with the other On Demand training videos to learn about other features in Tableau Server and Tableau Online.