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Free Training  
Transcript: Publishing  
to Server or Online

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

## How to Publish a Workbook

Publishing a workbook is done from inside Tableau Desktop by going to Server > Publish Workbook. Tableau remembers the most recent connection and keeps us logged in. If we're not already logged in, we'll be prompted to do so. For Online, we have this quick connect option. For Server, this can be the server name or URL. What credentials you will enter depends on the method of user authentication set up by your organization. If we have access to multiple sites, we'll be prompted to select which one to publish to.

Various options are available when publishing. For content management, a project can be selected. The default name is the name of the workbook, but this can be edited. We can add a description, and tags can be added to help users search for the workbook once it's been published. If the workbook includes an extract, a refresh schedule can be set based on the schedules established by the administrator. Specific sheets 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. Permissions may be established at the time of publishing. If permissions are not available, they may be locked to the Project. For more information, check out the Permissions video. We can also manage the data source, choosing to publish it as embedded in the workbook or separately, and we can embed credentials or require them to be provided, if relevant. And finally, we can control a few other options, such as if sheets show as tabs in the published workbook. We'll click publish, and we're brought to the browser. 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. If these behaviors have been allowed: a view can be exported as an image or PDF, the workbook can be downloaded and opened with Tableau Desktop, and the content can be subscribed to, so that an email is sent out on a pre-set schedule with a snapshot and a link to open it in a browser.

## Conclusion

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