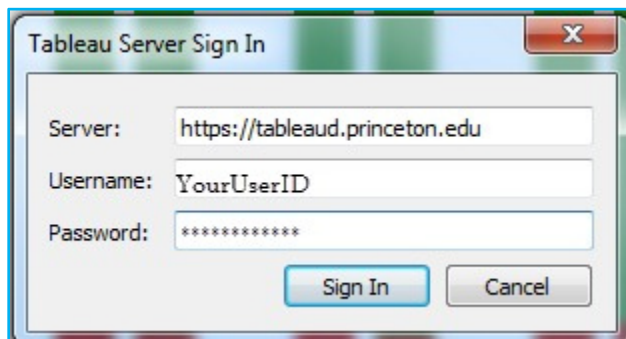


Publishing to Tableau Server

Once you've created your visualization and are ready to share it with others, you'll want to publish to the Tableau Server. This will make the Worksheet, Dashboard, or Story available to those with appropriately defined access on your Tableau site.

1. On the **Server** menu, select **Publish Workbook**.
 2. The first thing you'll be asked to do is to sign into the server. The server we'll be using for training is <https://tableaud.princeton.edu>. You will enter your username (netid) and password.

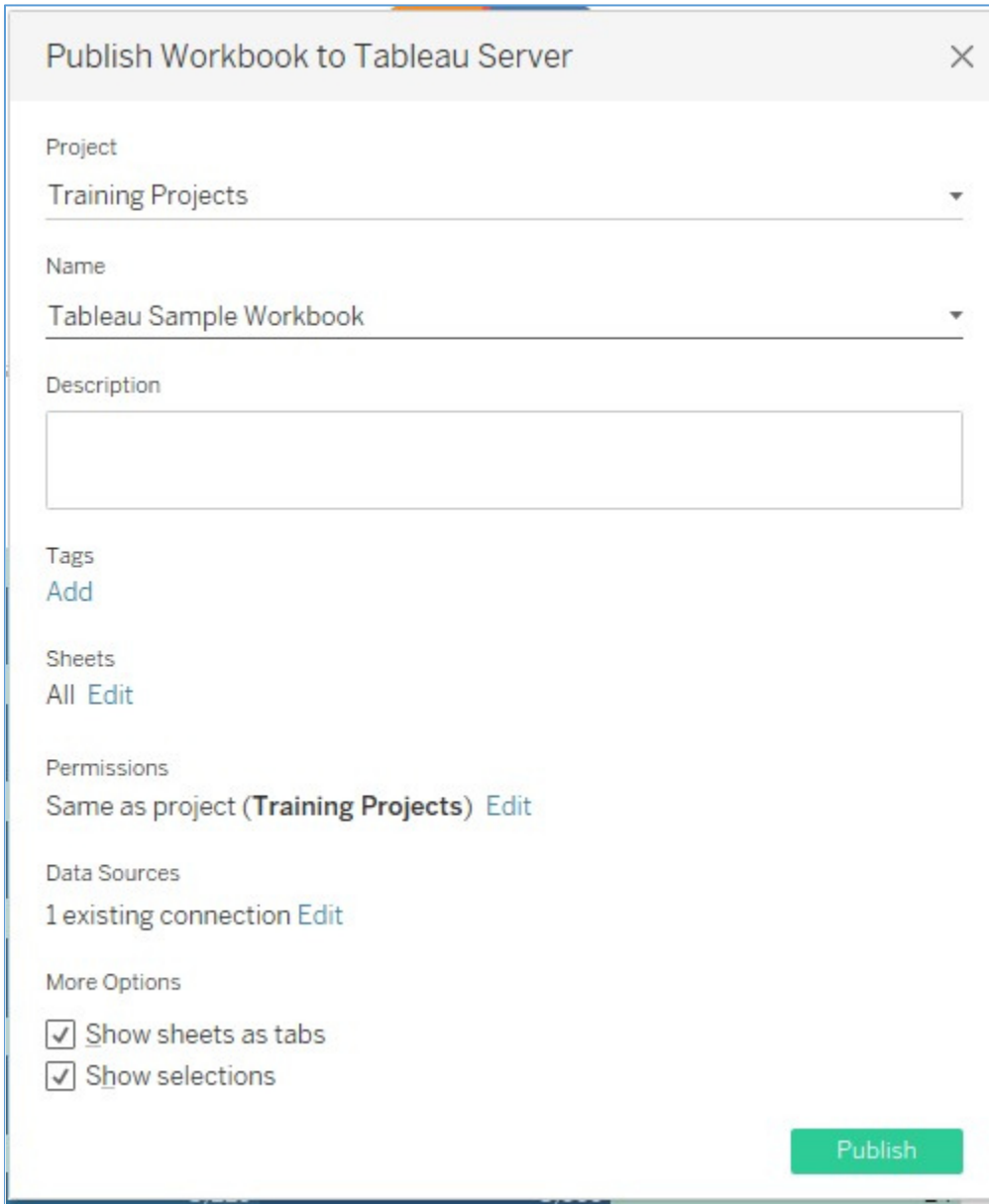


If you have access to more than one site on the server, after providing your username and password you'll be asked to select a site. We'll be using **Tableau Training** for this course.

3. Next you'll select the Project for your visualization. We'll use **Training Projects** for this class. You can also optionally customize the name of your workbook, set a description, and add tags. As the publisher you may also customize the permissions for your work. However, we do recommend leaving the default settings. The site administrator will have final control over how the individual permissions are set to content published to your server site.

If your workbook has more than one worksheet, dashboard, or story, you should select any or all that you would like to include on the server.

You can also customize the appearance of your visualization by indicating whether to show sheets as tabs, show selection or include external files such as images you may have included in your work.



Publish Workbook to Tableau Server [X]

Project
Training Projects [v]

Name
Tableau Sample Workbook [v]

Description
[Text Box]

Tags
Add

Sheets
All Edit

Permissions
Same as project (**Training Projects**) Edit

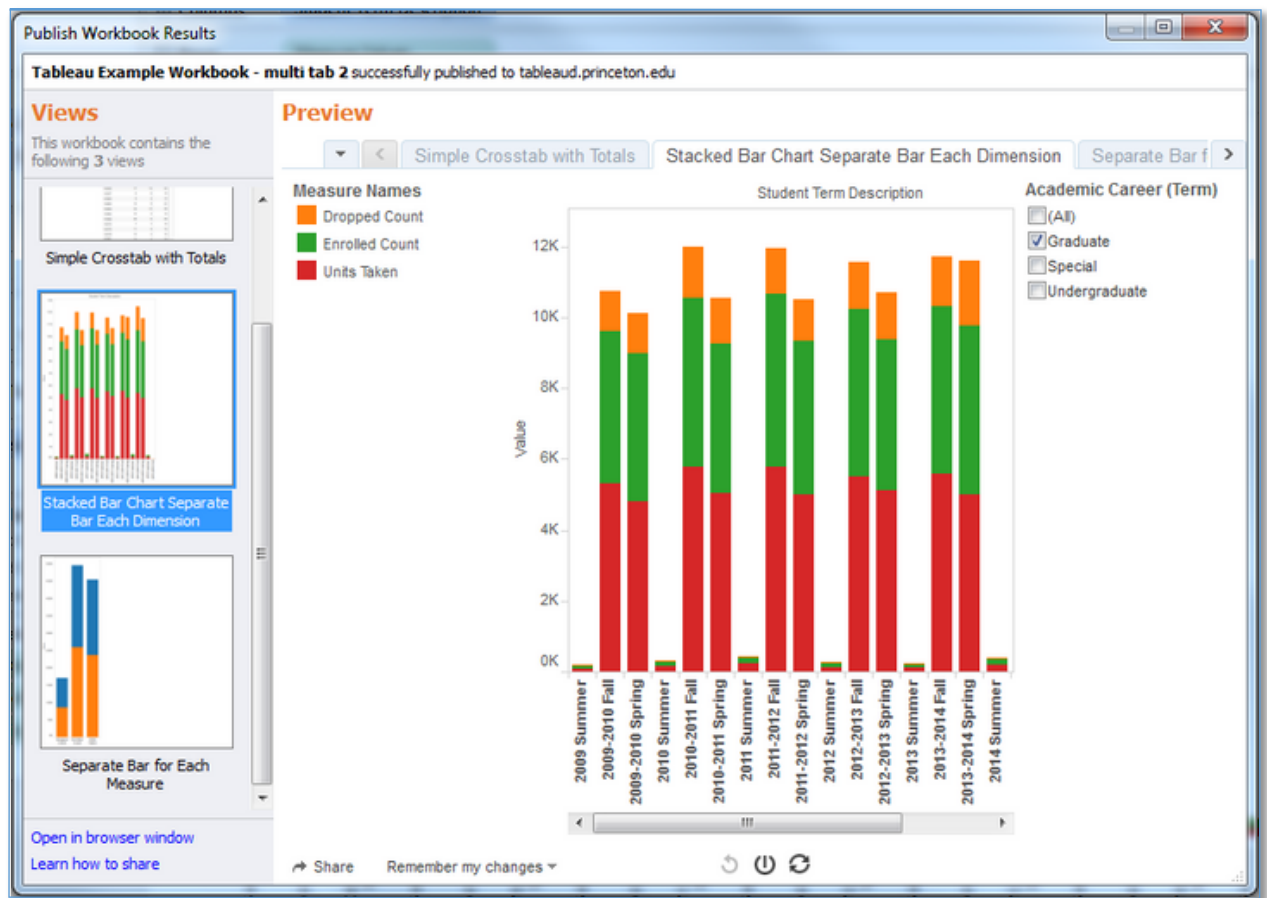
Data Sources
1 existing connection Edit

More Options
☒ Show sheets as tabs
☒ Show selections

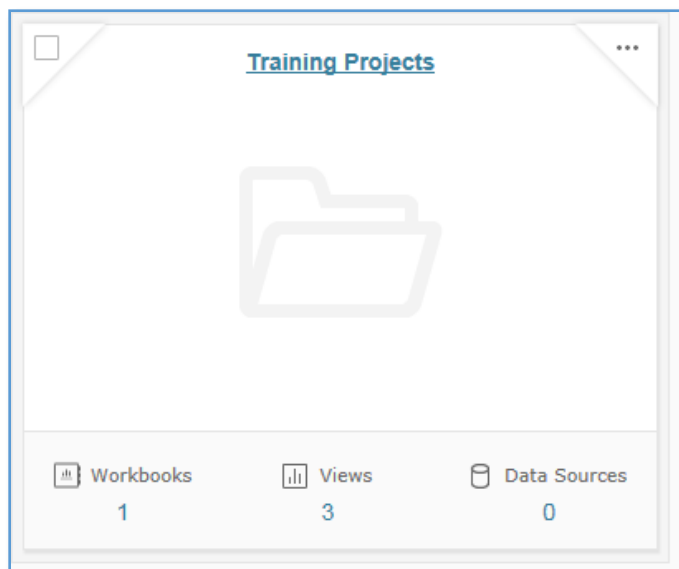
Publish

You can also set scheduling when publishing your work, though data extracts will be managed by your server administrator.

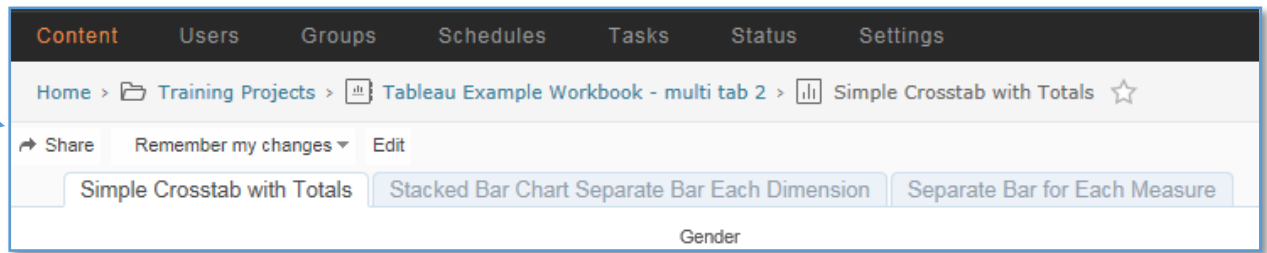
Once published, you may preview a sample of how your visualization will appear on the server.



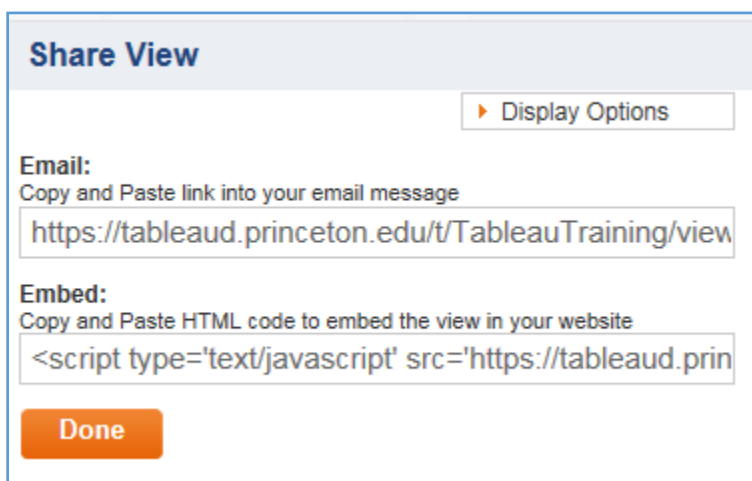
When you log into the server site, you will now see your work in the Project you selected.



- Once posted to the server, you have the option to share your work either by sending a URL that will direct people to the content on the server or by embedding code in webpages. To do this, when viewing your visualization on the server, click **Share**.



- Then select the appropriate link or embed code.



Using our Development or Production server will require users to be authenticated prior to accessing the views. If for any reason you need open, unauthenticated access you will need to work on the Princeton Tableau Public server.