

Tableau Server

Week 2 Training

Resources

The following is an organized outline of Tableau Server topics presented in our customized order to facilitate your learning the Tableau Server system. It is based on, and all *more* sections link to, [Tableau's online help available here](#). As a more in-depth resource, we recommend you explore the *Get Started* section for site users and content publishers.

Share, Subscribe, Download.

Share Server Views

Easily share your Tableau Server views with others. Clicking Share in a workbook or view creates links that you can embed in a blog or webpage or email to a friend or co-worker. [Quick Start: Share Server Views](#)

Email a View. Every published view and workbook can be shared via email or embedded into another webpage, wiki, or web application. Anyone viewing a shared view must have an account on Tableau Server and permission to access the view. [more](#)

Embed a View. You can share a view by embedding it into another webpage. Click Share in the upper left corner of the view. Copy the HTML and paste it into the page in which you want to embed the view. [more](#)

Export Views

You can export a view as an **Image** or **PDF**. Alternatively, you can export the data as a **Crosstab** or CSV file (**data**). Select an option on the Export menu on the toolbar at the top of the view. [more](#)

Subscribe to Views

When you open a view on Tableau Server, if it has a subscription icon (✉) in the upper right corner, your administrator has configured subscriptions for your site. You can click this envelope to select options for subscribing to the view. This means that, at regular intervals, you can have a snapshot of the view automatically delivered to your email account—without having to sign in to Tableau Server.

You can also choose to receive each view in a workbook in a single email, or unsubscribe to views you no longer want to receive. [more](#)

Download Workbooks

Workbooks can be downloaded using the **Download** link in the upper right corner of the view. The downloaded workbook can be opened with

[more...](#)

a version of Tableau Desktop. Downloading the workbook from the server is the same as selecting **Server > Open Workbook** in the desktop application. The workbook can only be opened if it is still published to the server. [more](#)

Tag Content

Tags are keywords you can create for workbooks, views, and data sources to help you find, filter, and categorize content in Tableau Server. Authors can add tags to content when they publish the content. After content is published to a Tableau server, you can add tags to any ...workbook, view, or data source that you are allowed to access, and you can delete any tags you have added. [more](#)

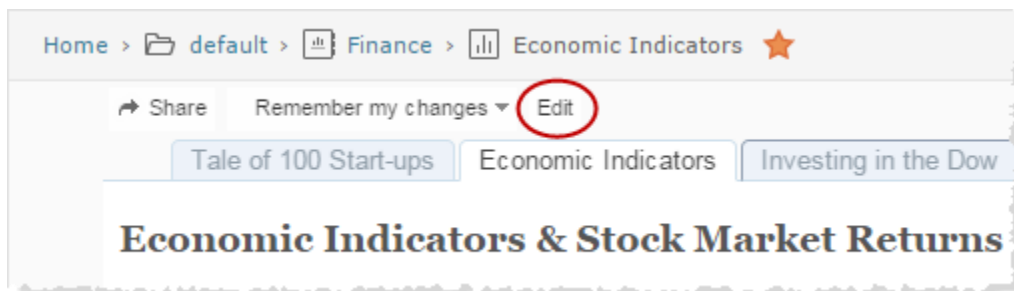
- View Tags – within *Tool Tips*
- Find Tagged Content – via *Quick Search*
- Add Tags – to a single view or multiple views

Edit a View [more](#)

To make changes to a view, click Edit. This action is available to users who have web editing permissions. Editing views will be covered in Training #3 in more detail for those that have web editing permissions.

In the Views section, you can open a view for editing either of the following ways:

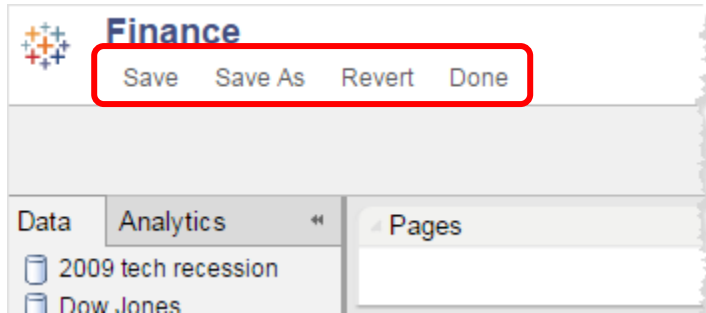
- Click **Edit** in the tooltip that appears when you hover the pointer over a thumbnail view.
- Select a view to display it, and then click **Edit** at the top of the view.



If the workbook publisher did not embed database credentials, you are prompted to provide them.

Save or Discard Changes

While you are editing a view, you can save or discard changes by clicking the menus above the view area.



When you save your work, even though you entered the authoring environment from a single view, the complete workbook is saved, including other views you may or may not have edited.

Save overwrites the original workbook. **Do NOT USE SAVE**, as you will overwrite the workbook in the *default* project!

Save As creates a new workbook

When you are creating a “new” workbook from a workbook sourced from the *default* project, always use **Save As** to create a new workbook. Save to your *Sandbox* or any other project other than *default*.

If you select **Show sheets as tabs**, the workbook permissions override the permissions on individual views within the workbook, until the workbook is saved again without tabs.

Revert discards edits and returns to the last saved version of the workbook.

Done exits the authoring environment.

If you have unsaved changes, you are prompted to save them. If you do not save changes, the unsaved changes are still present when you return to the authoring mode for that view, for as long as you remain signed in to the current server session.

Compare Tableau Desktop Web Authoring Workspace (WAW) with Tableau Server WAW (editing view) [More](#)

- Data Pane
- Analytics Pane
- Sheet Tabs

Tableau Server WAW

High level of layout

- Toolbar [More](#)
- Marks, Pages, Filters
 - [More on Marks](#)
 - [More on Pages](#)
 - [More on Filters](#)
- Columns, Rows [More](#)

Detailed Walkthrough of Toolbar [More](#)

Undo/Redo

Pause

Swap

Totals

Show/Hide Labels

View Size

Worksheet

Export

Show Me

Side Bar [\(expand/close\)](#).

- Dimensions and Measures (explain)
- Marks (intersection of rows and columns of your data)
- Filters Shelf [More](#)
- Tooltips [More](#)
- Embed, Share, Subscribe
 - [More on Embed](#)
 - [More on Share](#)
 - [More on Subscribe](#)