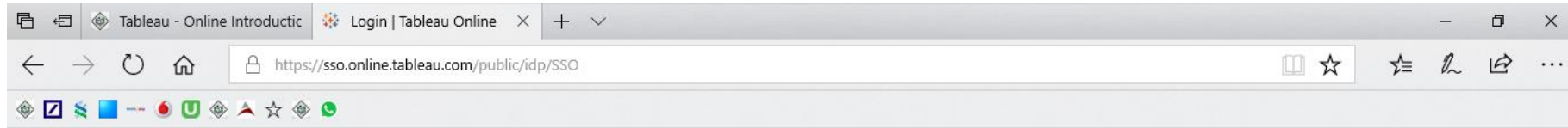


# Tableau Online

Tableau online is a platform to share our report / analysis with different people.



Sign in to Tableau Online

☐ Remember me

[Forgot password](#)

Sign In →

[Sign Up](#)



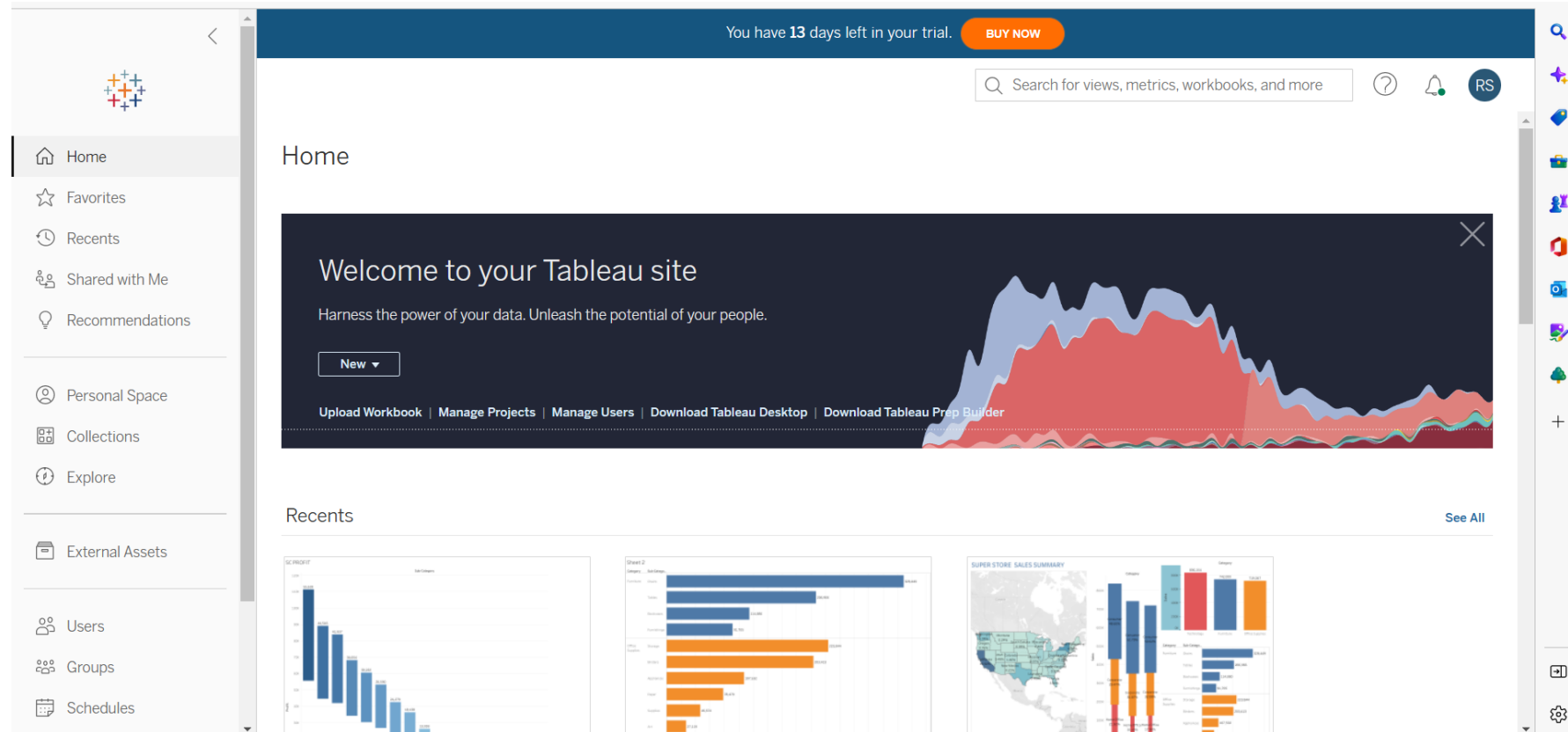
Projects , Workbooks, Views, Data Sources

Users, Groups, Status, Settings



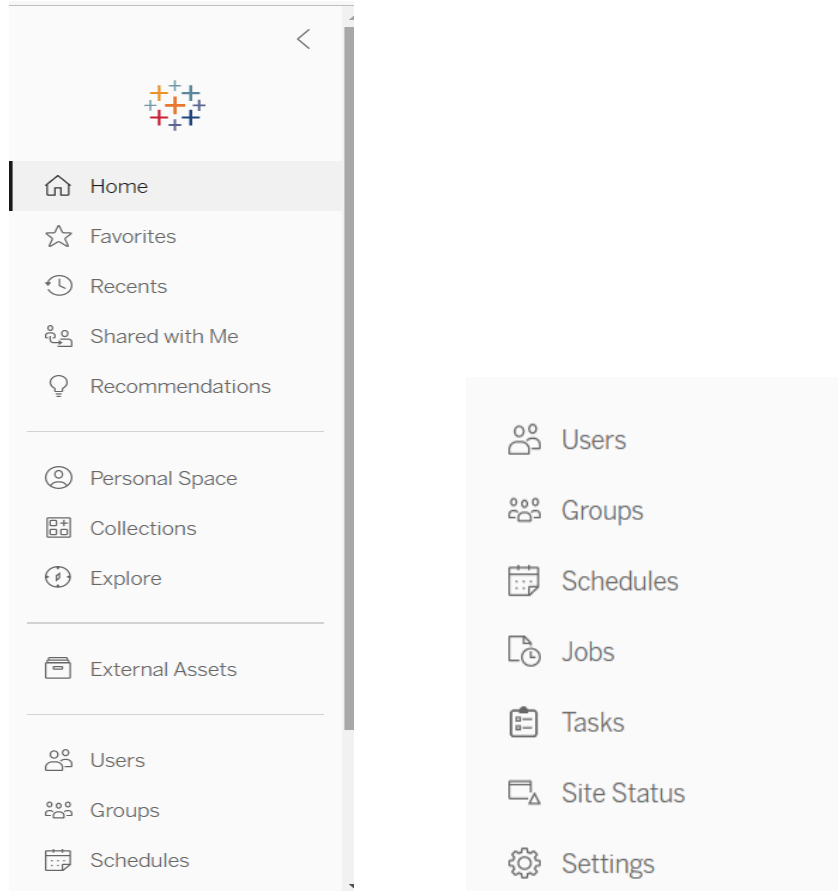
# Tableau Online

Tableau online- the home page.



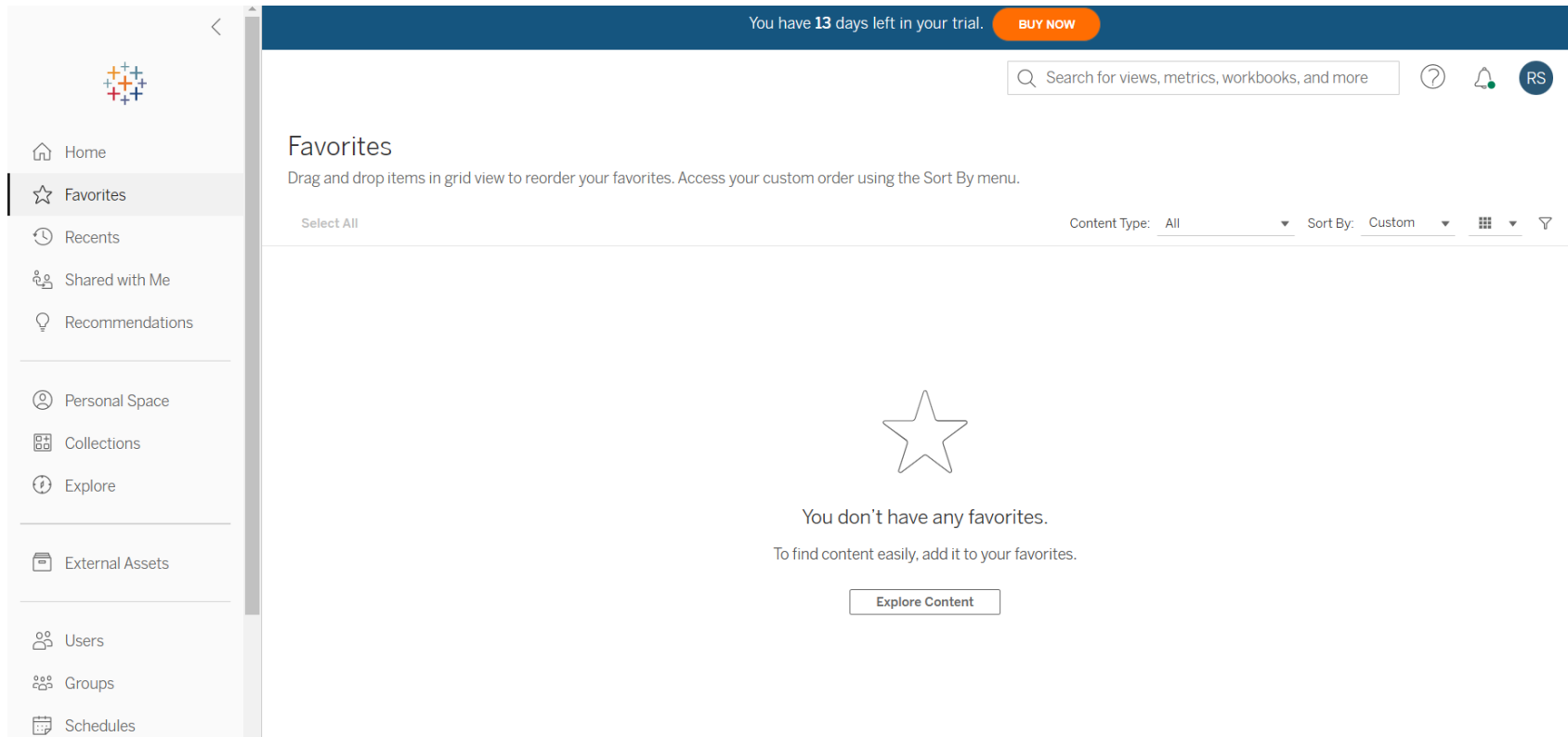
# Tableau Online

Tableau online- the home page.



# Tableau Online

The visuals which we use frequently can be added as the Favorites. Just like we add some website as favorites in our browser.



The screenshot shows the Tableau Online interface. On the left is a navigation sidebar with icons and labels for Home, Favorites (selected), Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore, External Assets, Users, Groups, and Schedules. The main content area has a dark blue header with a trial notice: "You have 13 days left in your trial." and a "BUY NOW" button. Below the header is a search bar with the placeholder text "Search for views, metrics, workbooks, and more" and icons for help, notifications, and a user profile labeled "RS". The main heading is "Favorites", followed by a subtext: "Drag and drop items in grid view to reorder your favorites. Access your custom order using the Sort By menu." Below this is a "Select All" link and a filter section with "Content Type: All" and "Sort By: Custom". The main area is empty, displaying a large star icon and the text "You don't have any favorites. To find content easily, add it to your favorites." with an "Explore Content" button.



# Tableau Online

Recents - Recently used visuals will be displayed under this section.

Home

Favorites

Recents

Shared with Me

Recommendations

Personal Space

Collections

Explore

External Assets

Users

Groups

Schedules

You have 13 days left in your trial. [BUY NOW](#)

Recents

Select All

Sort By: Last Accessed At (newest) ↓

SC PROFIT  
44 minutes ago

Sheet 2  
1 hour ago

Dashboard 1  
1 hour ago



# Tableau Online

Shared with Me – Visuals shared by any user will be appearing in this section.

The screenshot displays the Tableau Online user interface. On the left is a navigation sidebar with icons and labels for Home, Favorites, Recents, Shared with Me (which is highlighted), Recommendations, Personal Space, Collections, Explore, External Assets, Users, Groups, and Schedules. The main content area at the top features a dark blue header with a trial notice: "You have 13 days left in your trial." followed by a "BUY NOW" button. Below this is a search bar with the placeholder text "Search for views, metrics, workbooks, and more" and user profile icons. The "Shared with Me" section is active, showing a "Select All" button and a grid view of a visualization titled "SUPER STORE SALES SUMMARY". This visualization includes a map of the United States, a bar chart showing sales by region, and a horizontal bar chart showing sales by product category.



# Tableau Online

Explore— This section is used to see what is there on the website.  
Projects are the folders which contains the visuals

The screenshot displays the Tableau Online 'Explore' page. On the left is a sidebar with navigation options: Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore (selected), External Assets, Users, Groups, Schedules, Jobs, Tasks, Site Status, and Settings. The main content area features a top navigation bar with a trial notice: 'You have 13 days left in your trial. BUY NOW'. Below this is a search bar with the text 'Search for views, metrics, workbooks, and more'. The 'Explore' section shows a 'Top-Level Projects' dropdown. Below this are three project cards: 'default' (The default project that was automatically created by Tableau), 'DEMO' (THIS IS MY FIRST PROJECT ON SUPER STORE), and 'Samples' (This project includes automatically uploaded samples). Each card has a star icon and a menu icon. The 'default' card has a folder icon, while the 'DEMO' and 'Samples' cards have bar chart icons.



# Tableau Online

Users – This tab displays the list of the users of the website. Any no of users can be added to the respective website.

The screenshot displays the Tableau Online 'Users' management page. The left sidebar contains navigation options: Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, Explore, External Assets, Users (selected), Groups, Schedules, Jobs, Tasks, Site Status, and Settings. The main content area shows a list of users with the following columns: Actions, Username, Site role, Authentication, and Last signed in. A modal window titled 'Add Users' is open, showing options for adding users (Tableau with MFA or Tableau) and a text input field for email addresses.

**Users** 3  
Creator: 1/25 Explorer: 2/0 Viewer: 0/0

**Add Users** Select All

**Add Users by Email**  
Import users from file

	Actions	Username	Site role	Authentication	Last signed in
<input type="checkbox"/> <b>PB</b> Pallavi Bhat	...	PALLVISBHAT@GMAIL.COM	Explorer (can publish)	Tableau	Mar 13, 2023, 10:09 AM
<input type="checkbox"/> <b>PG</b> Prajwal Goswami	...	goswamiprajwal78@gmail.com	Site Administrator Creator	Tableau	Mar 13, 2023, 10:07 AM
<input type="checkbox"/> <b>RG</b> rajeev garg	...	RAJEEV@RCORPGINIE.COM	Explorer (can publish)	Tableau	

**Add Users**

☐ Tableau with MFA  
Users will receive an invite email that contains a link to the site and instructions to set up their Tableau ID.

☒ Tableau  
Users will receive an invite email that contains a link to the site and instructions to set up their Tableau ID.

Enter email addresses

Click here and type email addresses separated by semicolons

Site role: Explorer (can publish)

**Cancel** **Add Users**





# Tableau Online

Tableau online is a platform to share our report / analysis with different people.

User Site Roles :

- Site Administrator Creator – Full Control
- Creator - Full Control Can not change permissions
- Site Administrator Explorer – Cant connect to external data
- Explorer (can publish) Can publish however, can not connect to external data and create new data sources
- Explorer – cant save the work
- Viewer – read only access can download
- Unlicensed – not allowed to publish any thing



# Publishing

Publishing the projects on to Tableau online. What we have created on Tableau desktop we need to publish it on Tableau Online.

Tableau - > Server -> SignIn

After login to tableau Online click on publish Workbook.



# Publishing

In the popup box provide the below information:

- Project : Name of the Project in Tableau Online in which the workbook needs to be published.
- Name : Name of the Work Book to be displayed in Online
- Description : Short description about the project.
- Sheets: Specify the sheets to be published.
- Tags: Specify the key words that can be used to search the respective workbook
- Permissions : Set the permissions for the workbook.
- Data Source s: Specify how to publish the dashboard as a part of workbook / separately.
- Show Sheets as tabs – Display sheets tabs on Tableau Online
- Show Selections – Only selected sheet will be displayed



Publish Workbook to Tableau Online

Project

Demo

Name

SuperStore|

Description

This is my first project for Super Store Sales summary

Tags

profit

region

sales

5 Tags

Sheets

All Edit

Permissions

Set to existing workbook default Edit

Data Sources

1 embedded in workbook Edit

More Options

☐ Show sheets as tabs

☒ Show selections

Publish

# Publishing

Once the workbook is published all the visuals will be on tableau online and will be machine independent.

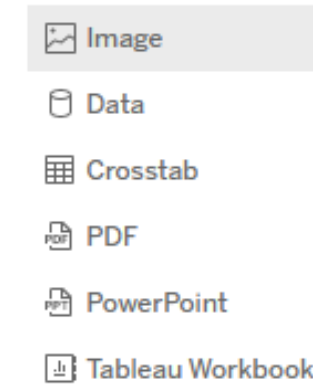
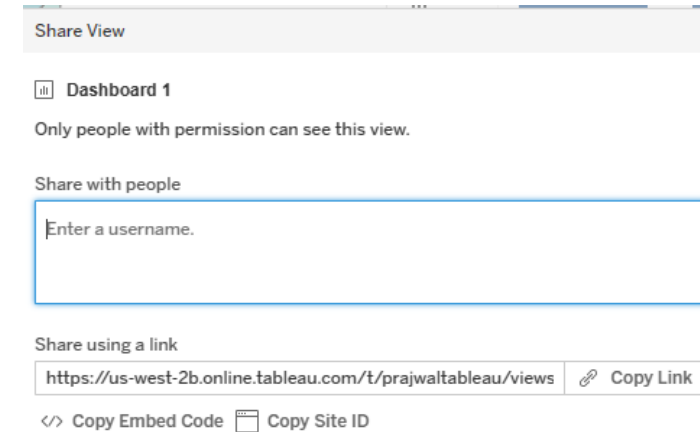
The visuals will be as dynamic as in the tableau desktop.



# Publishing

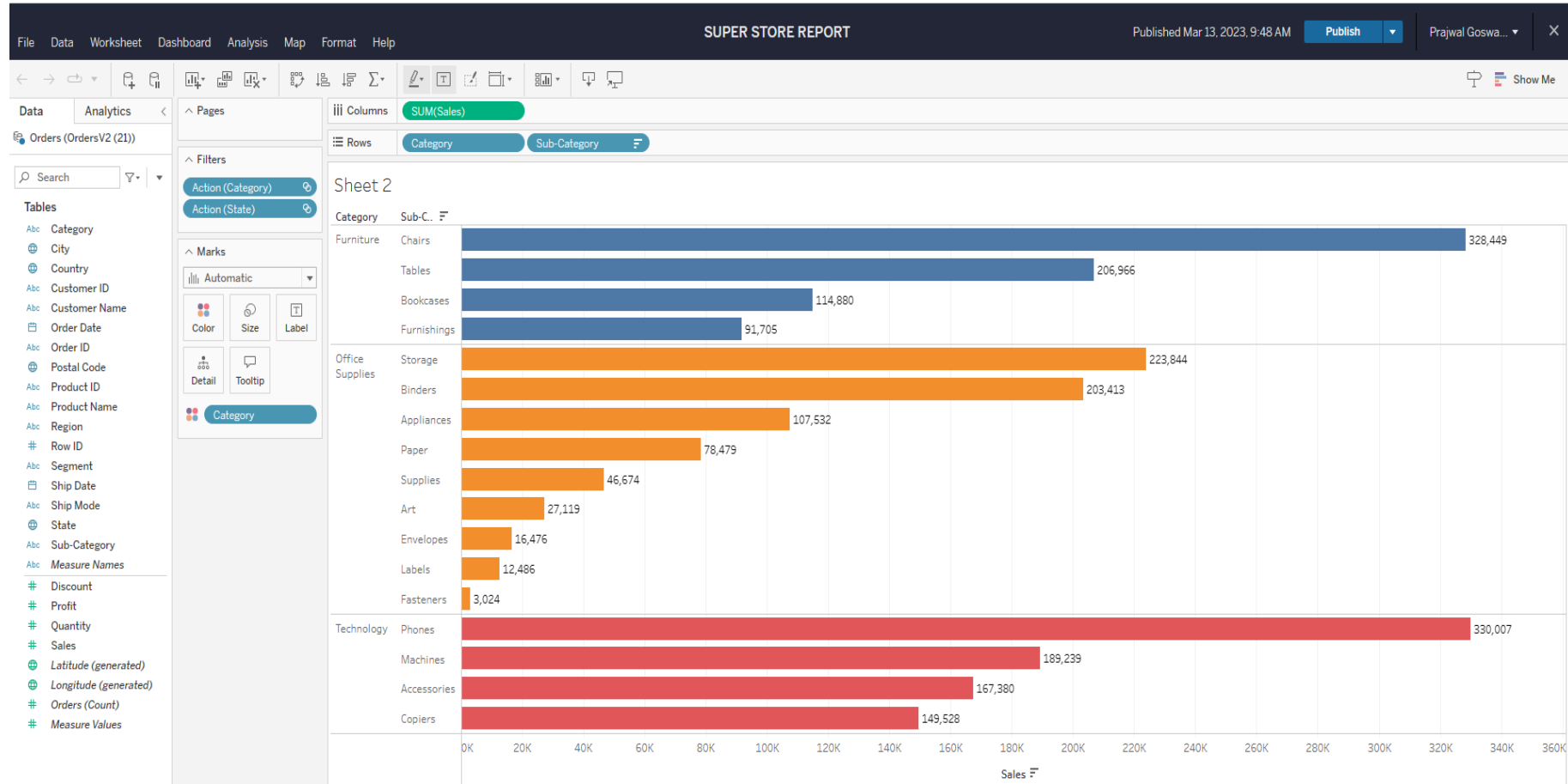
Once the visuals available on tableau Online, below actions can be performed:

- Share
- Download
- Comment
- Watch – Subscription
- Watch – Metrix
- Watch – Alerts
- Managing Views
- Editing



# Publishing

Existing visuals can be edited and new visuals can also be created in Tableau online through the Edit options.



*Thanks!*

**EVERY ENDING  
IS REALLY JUST A  
NEW BEGINNING**



**Rajeev Garg**  
**Data Analytics Trainer**