How to Create a Demo Dashboard
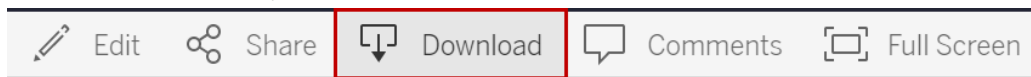
The following procedure describes how to create a demo dashboard from an existing Tableau customer workbook.

Prerequisites

- You must have Tableau Desktop installed on your local machine.
- In Tableau Desktop, you must be signed into the following server: https://tableau-stage.company.com/
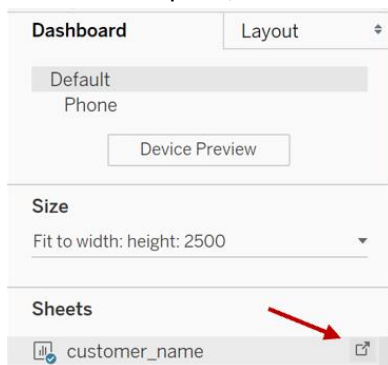
Procedure

1. In Tableau, access the customer dashboard from which you want to create a demo dashboard.

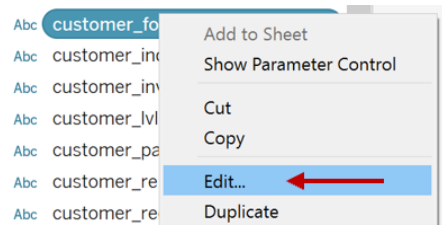2. In the Tableau toolbar, click the **Download** button.

   NOTE: If you do not see the Tableau toolbar, remove the query string from the URL; that is, remove all text after and including the question mark (?).

3. In the Download dialog window, click **Tableau workbook**, and then click **Download**.

4. Once the download completes, double-click the .twbx file to open it in Tableau Desktop.

5. In the Sheets pane, click the icon to open the customer_name worksheet.

6. In the Parameters section of the customer_name worksheet, right-click the parameter you want to change, and select **Edit**.

Note: For a list of suggested modifications, see Suggested Parameter Modifications.

7. In the Edit Parameter window, enter a generic value in the Current value field, and click **OK**.

8. Once you have modified the parameters, click **Save** to save your changes.

9. Publish your changes:
   a. From the Server menu, click **Publish workbook**.
   b. In the Publish Workbook to Tableau Server window, select the **Demo Dashboards** folder from the Project drop-down list.

c. Enter a new name for the dashboard in the Name field.

Publish Workbook to Tableau Server ✕

Project
Demo ▾

Name
workbook_name ▾

Description

Tags
Add

Sheets
All Edit

Permissions
Same as project (**Demo**) Edit

Data Sources
1 embedded in workbook Edit

More Options
☐ Show sheets as tabs
☐ Show selections
☑ Include external files

⌁ **Workbook Optimizer**

Publish

d. Click **Publish**.

10. Once the workbook is published, verify the changes on the Tableau server, and ensure no proprietary or confidential information appears on the dashboard.

Suggested Parameter Modifications

Here is a list of suggested parameters to change:

Parameter	Suggested Value
customer_ name	Customer Name
customer_partner_name	Partner Name
customer_contracts	123456, 234567
customer_inventory_name	INVENTORY_NAME