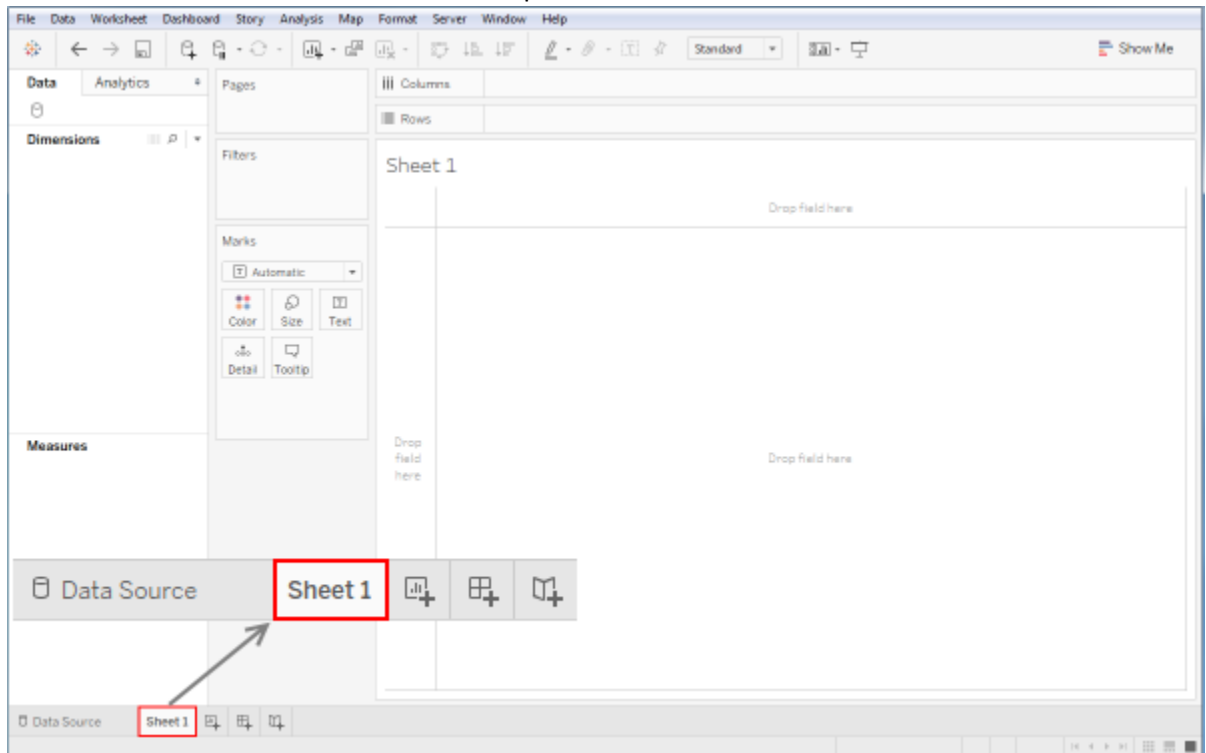


Publishing Data Sources and Workbooks to Tableau Server

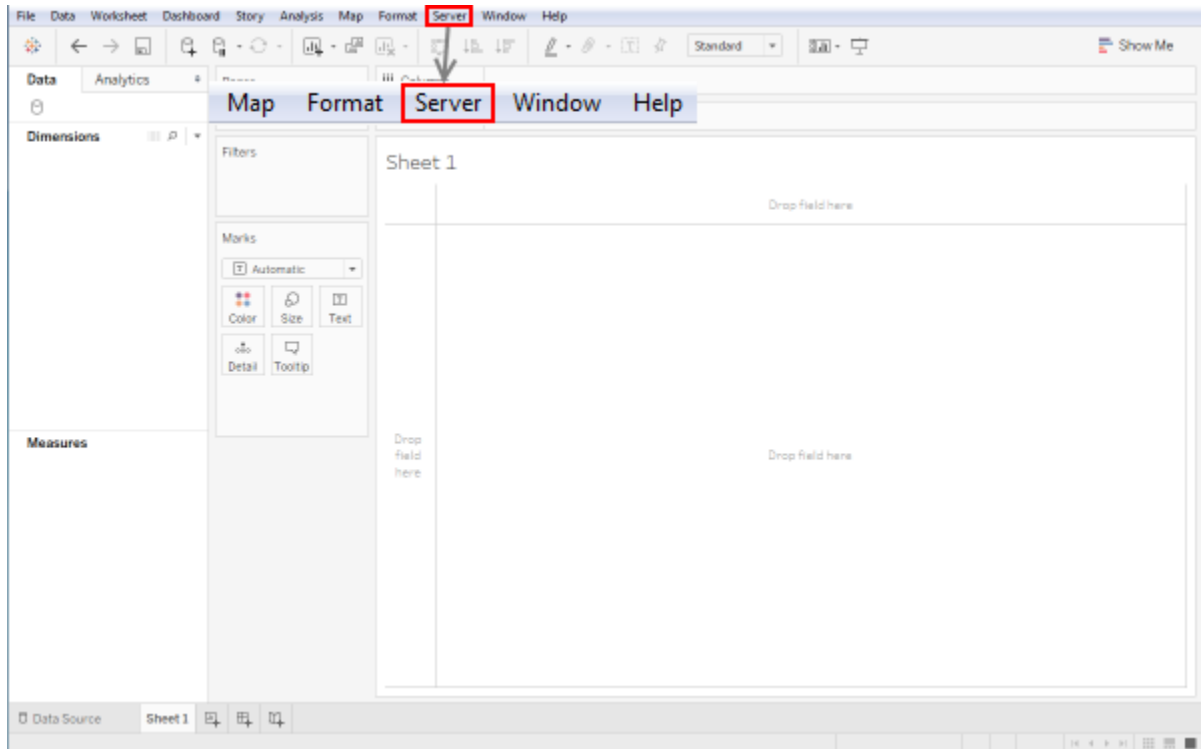
Data Sources

Once a connection is established (see [Connecting to Tableau Data Sources](#) documentation), to publish a data source, follow these steps.

1. Select the worksheet tab in Tableau Desktop.

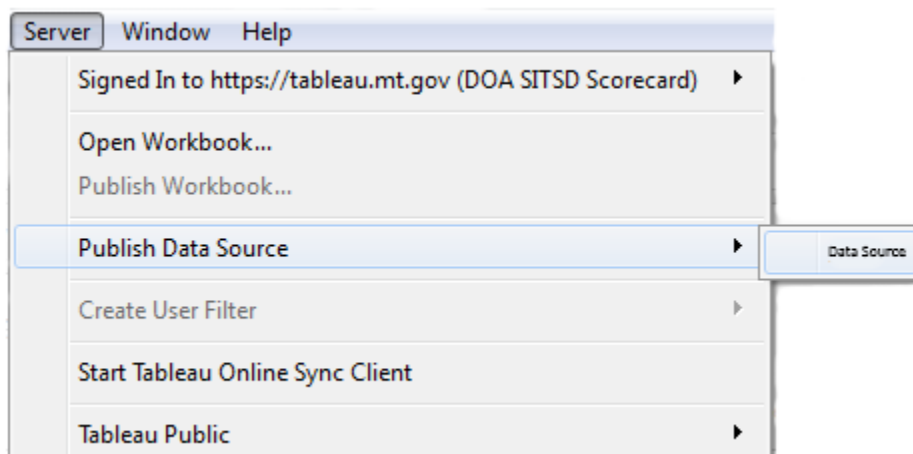


2. Click on “Server” in the menu bar.



Note: User will need to be signed in to Tableau Server with credentials given permissions to Tableau Server. This login may or may not be the same as the credentials used to sign-in to a data source. If the user is not already signed in, the user will be prompted for Server URL (<https://tableau.mt.gov>), Credentials, and Site name when the data source connection is selected. Users for Tableau Server are Windows authenticated accounts only.

3. From the Server menu, select “Publish Data Source” and select the correct data source from the list.



4. Fill out the fields in the “Publish Data Source to Tableau Server” window. When finished, select Publish.


Publish Data Source to Tableau Server ✕

Project
ATSB Scorecard

Name
<Data Source Name>

Description
<Description>

Tags
[Add](#)

Permissions 
Permissions are locked by the site admini... [View](#)

Authentication
Embedded password [Edit](#)

More Options

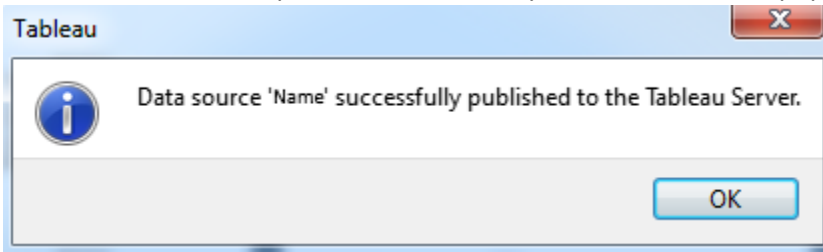
Update workbook to use the published data source

[Publish](#)

Note: Authentication should be changed to “Embedded Password” like shown in the picture above. To change this setting, select “Edit” and in the drop down, shown below, change from “Prompt User” to “Embedded Password”. To set authentication to embedded password from Tableau Server see Tableau Server Authentication document.

Data Source	Connection	Authentication	Extract	Username
<Data Source>	<Connection>	<div style="border: 1px solid #ccc; padding: 2px;"><div style="display: flex; justify-content: space-between; align-items: center;">Prompt user▼</div><ul style="list-style-type: none">Prompt user<li style="background-color: #e6f2ff;">Embedded passwordImpersonate via embedded password</div>	No	<Username>

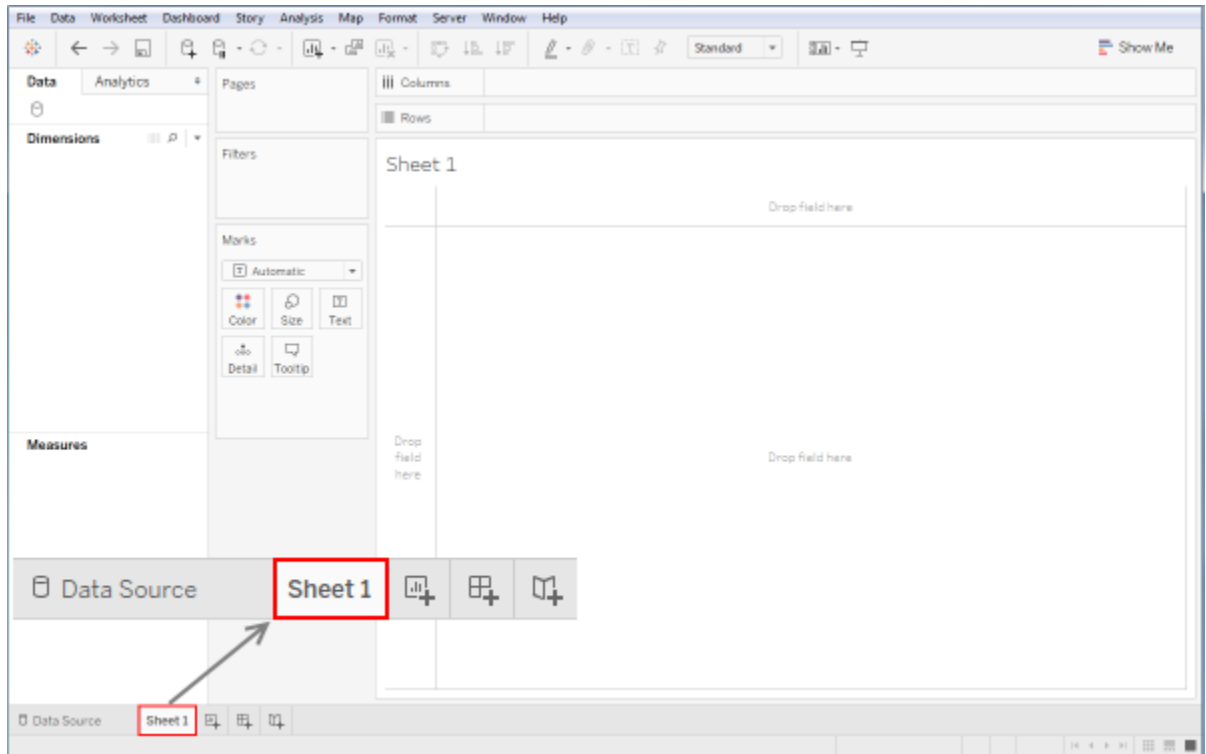
5. If the Data Source was published successfully then a window will pop up confirming success.



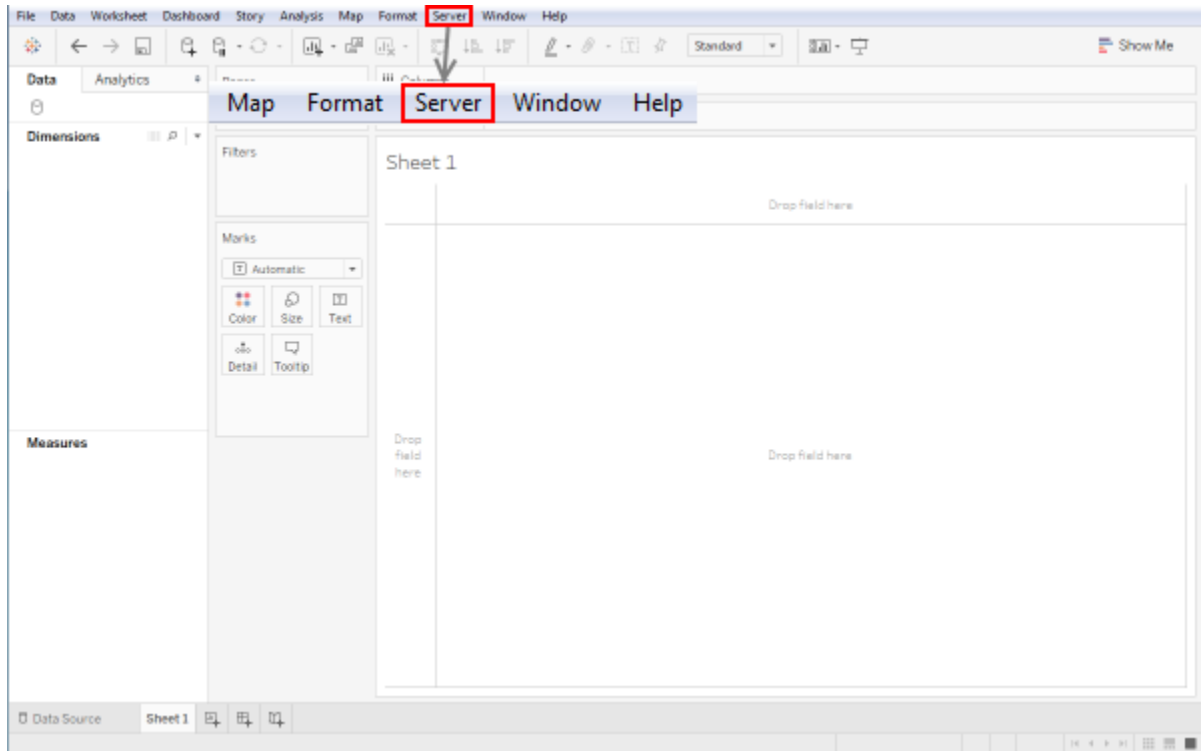
Workbooks

After a worksheet has been created, to publish a workbook follow these steps.

1. Select the worksheet tab in Tableau Desktop.

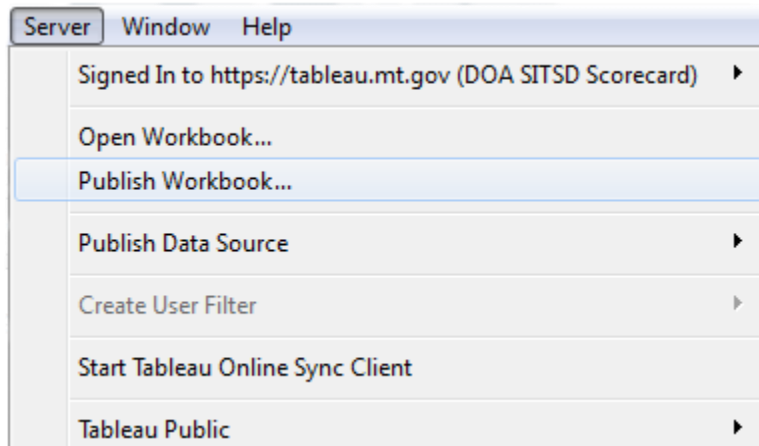


2. Click on “Server” in the menu bar.



Note: User needs to be signed in to Tableau Server (tableau.mt.gov) with credentials given permissions in Tableau Server. This login may or may not be the same as the credentials used to sign-in to a data source. If the user is not already signed in, the user will be prompted for Server URL (<https://tableau.mt.gov>), Credentials, and Site name when publish workbook is selected

3. From the Server menu, select “Publish Workbook”.



4. Fill out the information needed for publishing a workbook. When finished, select Publish.

Publish Workbook to Tableau Server ✕


Project
ATSB Scorecard

Name
<Name>

Description
<Description>

Tags
[Add](#)

Sheets
[All](#) [Edit](#)

Permissions 
Permissions are locked by the site administrator or project leader [View](#)

Data Sources
1 existing connection [Edit](#)

More Options

Show sheets as tabs

Show selections

[Publish](#)

Note: Select “Show sheets as tabs” if multiple sheets have been published, they can be viewed as tabs instead of one at a time. Select “Show selections” for a specified section of the worksheet to be highlighted when the workbook is viewed. These selections need to be made before the workbook is published. If more than one worksheet has been created but only one needs to be published, under Sheets select edit then select only the worksheet(s) that need to be published.

WARNING: if you have previously published a worksheet with a workbook and choose not to publish it again it will be deleted.

5. After Publish is selected, if successful, a pop up should appear with a success message. Also, a new browser should open to Tableau Server with the Site and Workbook where the Worksheet was published.