

# Tableau Implementation Client Packet

## Introduction

Welcome to **Tableau Server!** Tableau Server is an online solution for sharing, distributing, and collaborating with content created in *Tableau Desktop*.

**Shareable.** Tableau Server users can edit our library workbooks, create their own from the provided data sources, and share and organize those via projects, email, embedding and more. We'll train you on how.

**Secure.** Tableau Server administrators (that's us), control who has access to server content. Administrators can set user permissions on projects, workbooks, views, and data sources. We can work with you to scale out your permissions.

**Mobile.** Users can see and interact with the most up-to-date server content from anywhere, whether they use a browser or mobile device.

Our Tableau Server program is designed to get you off the ground in creating and adopting a culture of visual analytics by providing a library of pre-made Tableau workbooks (reports), providing basic navigation and editing training, and your own live Tableau Server site where your library content is refreshed daily with updated data from your Raiser's Edge.

While Tableau Desktop is Tableau's flagship product and is the workhorse behind building awesome visualizations, Tableau Server contains an editor – essentially a “lite” version of Tableau Desktop baked into Tableau Server – that allows for a good level of editing control. Once you've completed your training, you will have ongoing access to the Concourse Library workbooks and data sources. From this *default* location, you can make a copies of templates, place them into a *sandbox*, make modifications, and then republish with your modifications and changes to a *production* project when you're ready. Your champion Tableau Server users will also be able to create new workbooks from scratch, using the data sources we've built from RE. At Concourse, we are developing and adding new workbooks on a quarterly basis, and we'll add those to the Library that you have access to. We've also been developing some regular interactive web sessions to gather client feedback on potential new workbooks.

For organizations who take the next step and really develop their own culture of visual analytics using Tableau Desktop, and/or use an outside consultant to help them build custom workbooks, there is the potential for you to purchase your own copies of Tableau Desktop (from Tableau), and incorporate it with your Concourse Tableau Server solution. We can even be commissioned to create custom data sources! All this can be discussed when and if you're ready.

## Concourse Workbook Library and Your *RE* data

To get you started with visual analytics with Tableau, we've developed a starter library of workbooks (reports), and connected them to a copy of your Raiser's Edge data. This RE data copy is updated once every 24 hours, so that any Tableau workbook that uses the data will be updated as well. We're constantly working on the current items in the default library to make them better, and working to add new reports regularly.

## Your Tableau server site

Your organization will have its own "Site," accessible by anyone who has and needs a Tableau Server user account (you'll figure this out more as training moves along). Users can access Tableau Server via the web on any web browser at [tableau.concoursehost.com](http://tableau.concoursehost.com) (after their first training). In addition, you'll see there are many other ways you can share your Tableau content: mobile, email sign ups, embedding in a web page, for example. Over the course of your training we'll show you how.

In your site, you'll have the ability to create **Projects**. Your site will have one project to begin called *default*. It is in this default site where we have supplied you with the library of pre-built workbooks to get you started with visual analytics. You will approach them as works in progress and we'll show you how to copy them over to a *sandbox* project where you can start to pull them apart and customize them so they are more useful to you. Once you've started to do that you can think about how you will want to distribute and use them.

## Training and Schedule

Training will consist of four sessions, and you will have a primary contact access our available training dates via the training calendar (see link above). *We need you to choose and let us know your primary contact for Tableau Server.* We'll deliver a link with a selection of calendar dates for training to your primary contact He/she should discuss the dates with the rest of your selected team, book the dates from the calendar and share the appointment details with your team.

### Training Process

Week 1 Outline: Introduction to navigation within Tableau Server and your library workbooks

Week 2 Outline: Sharing, Subscriptions, Organizing and Tagging. Workbook Q&A, Introduction to Editing Workspace

Week 3 Outline: Sandboxing, Editing

Week 4 Outline: Building your own views, Working with Data. We build week 4 agenda based on your interests and needs.

### Goal of Training

Our mission is to help you jump start your organization's culture of visual analytics with Raiser's Edge. To do so, we've created a way to pull apart the RE data tables and put them back together again in "data sources" that Tableau can connect to and understand. This data refreshes once every 24 hours. We've created starter workbooks using Tableau Desktop, then published them to Tableau Server in your own *site*. We've

created a training outline that takes apart the online guides available from Tableau and put them together in a logical order and we're taking you through those in person during the training sessions.

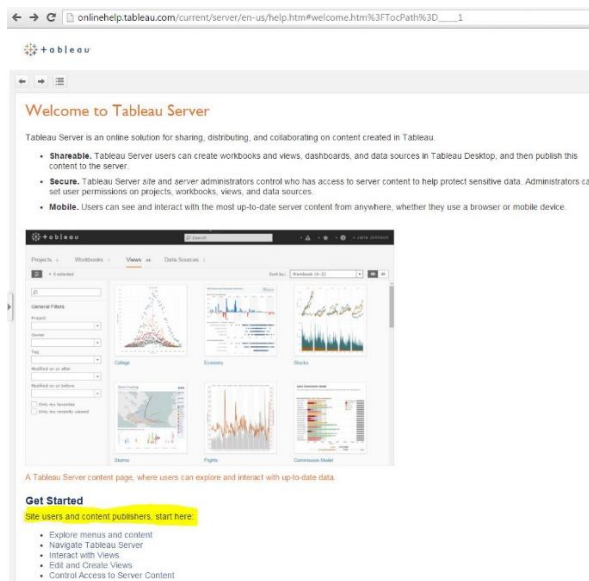
After you're finished with the training, you should be able to navigate your Tableau Server site, interact with the library workbooks using the built in tools and filters, and perform basic editing functions to customize the library workbooks that you find useful.

This process should help you begin to see what you can do with Tableau visualizations, how you can organize and share your visualizations, and think about how you might scale them out among your organization. You may decide to dive deeper by purchasing Tableau Desktop to have full-range creation control and you may decide to seek outside consulting help you further engage with Tableau. Tableau Server is the hub for scaling and sharing your data visualizations and Concourse Hosting is here to help you get it all off the ground! We're learning too, and you may see the library items change, training materials get updated, and find us hitting the books for answers from time to time too!

## Resources

### Training Outline

Our training outline picks apart the Tableau Server guide, and we've reorganized and made them available here: [support.concoursehost.com](http://support.concoursehost.com)



We focus on the “getting started items for site users and content publishers.” The outlines we provide you will have direct links to the items contained and discussed in greater detail within the Tableau Server guide. Since Tableau Server contains a “lite”

editor based off of Tableau Desktop, we also can draw from the Desktop guide available [here](#). The Tableau Server official help guide is available [here](#).

## Support

General support will be through our normal channels. Send an email to [support@concoursehost.com](mailto:support@concoursehost.com) Please put the word *TABLEAU* in the subject line of any support ticket related to Tableau Server support.

## Updates & Sessions

Concourse Hosting will update our Tableau Server clients when we update our workbook library and/or make changes to workbooks or data sources. We usually send out a blog post, a pdf to the main point of contact, and schedule a live webinar to go over new items.

From time to time, we will also schedule open webinar sessions to gather client feedback on current Tableau Server items or get input on new development.