

Tableau Server

Week 1 Training

Expand or close each section by clicking on arrow

Resources

The following is an organized outline of Tableau Server topics presented in a customized order to facilitate your learning the Tableau Server system. It is based on – and all [more](#) links go to the specific topic pages in [Tableau’s online help, available here](#). As a more in-depth resource, you can explore the *Get Started* section for site users and content publishers.

Introduction

Tableau Server is an online solution for sharing, distributing, and collaborating on content created in Tableau.

Shareable. Tableau Server users can create workbooks and views, dashboards, and data sources in Tableau Desktop, and then publish this content to the server.

Secure. Tableau Server administrators (us), and site admins (one of you), control who has access to server content to help protect sensitive data. Administrators can set user permissions on projects, workbooks, views, and data sources.

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

Accounts

Adding Users

Your organization will initially add users to an access group on your Active Directory called **ORGNOME Tableau Users**. The Account Operator for your organization can do this using the Admin Tools “Active Directory Users and Computers” – the same tool they use to add a new Windows user who needs access to your terminal server.

- Add up to 5 users
- Remove users here

more...

We have created a synchronization between this Active Directory Group, and your Tableau Server site.

Accessing your Site

tableau.concoursehost.com

Login Format:

USERNAME@B9-ORGNAME (or) B9-ORGNAME\USERNAME

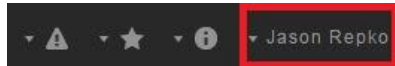
Your password is your Active Directory password

User Roles

Each user in Tableau Server is assigned a Role. Your training begins with users assigned the *Interactor* Role. As training segments progress, roles and permissions can be changed and added by Concourse, and will be explained in more detail. [More](#)

Manage Content and Account Settings [more](#)

We cover only the salient items. Explore more with the link above. The image below shows you how to access the following options.



- **Make this my start page** – Tableau Server installs with Views at the default start page. Make the current page your start page by navigating to what you want and clicking here.
- **My Content** – access content you have published to Server
- **My Account Settings** – Password Changes *do not happen within Tableau Server*. Your Account Operator can change passwords in your Active Directory on your terminal server. Or, you can log onto your Windows Account.



This is where you access the following options.

- Server Help – take you [here](#).
- Support – takes you to your Tableau support account if you've signed up for one
- About – Tableau Server version information



Your list of favorite content items

more...

Terminology

Workbook: A file with a .twb extension that contains one or more worksheets (and possibly also dashboards and stories)

Worksheet: A sheet where you build views of your data by dragging fields onto shelves.

Dashboard: A combination of several views arranged on a single page. Use dashboards to compare and monitor a variety of data simultaneously.

Story: A sheet that contains a sequence of views or dashboards that work together to convey information.

More Terminology than you could ever absorb:

<http://onlinehelp.tableau.com/current/pro/desktop/en-us/glossary.html>

Navigate Tableau Server

The pages you can see in Tableau Server and the options available to you are based on your site role and content permissions. All content is published, accessed, managed, and controlled independently for each Tableau Server site. Content owners publish Tableau workbooks, views, and data sources to specific sites. Users signing in to Tableau Server can then see their allowed content in the sites they belong to.

Quick Start: [Access and Manage Your Content](#)

Content Pages [more](#)

Content pages include the **Projects, Workbooks, Views, or Data Sources** menus, Quick Search, filtered search, and sorting and viewing options to help explore your content. In these types of views you can mark favorite content, and select content to tag it or set permissions.

- **Projects:** a project is a collection of related workbooks. Administrators create and maintain projects [default, sandbox (define)]
- **Workbooks**
- **Views**

more...

- Data Sources

Navigate to Views [more](#)

There are several different ways to navigate to a view:

- Click Projects > workbook > view thumbnail
- Click Workbooks > view thumbnail
- Click Views > view thumbnail or view name in list

View, Sort, Select content [more](#)

On a site's Content page, select the **Projects, Workbooks, Views, or Data Sources** menu to see the content available to you. Within these pages, you can search, filter, sort, view, and select content. For details on searching and filtering content, see [Search Content](#).

View Content in Lists or Thumbnails, Click the thumbnail or list icon to toggle the view.

- Sort Content
- Select Content



Quick Search [more](#)

Use the quick search box at the top of the page to find resources anywhere on the site.

Content Interaction

With a view open, different actions will be available in the view depending on the settings for the server and site, and your permissions. Possible actions include: share, export, or download the view, subscribe to the view, create custom views, and edit the view.

Tag Content [more](#)

Help find, filter, and categorize content

Sort [more](#)

- Sort buttons located in a view on an axis, field label or header
- Revert All (undo)

more...

Filter Data: Interactors can filter data in a view to narrow the visualization to the data. [more](#)

- Quick Filters
- Keep Only/Exclude
- Revert All

Work with Maps [more](#)

- Search field
- View Toolbar
- Pan and Zoom

Explore Data via Tooltips: hover for additional details [more](#)

- Keep Only – display only what you’ve selected in the view
- Exclude – remove what you’ve selected from a view
- View Data – Opens window displaying data.
 - Summarized – displays the aggregated data in the view or selection within the view
 - Underlying – displays the values for each row in the data sources (as restricted by the marks you’ve selected)

Highlight Marks, Legends & Actions [more](#)

- Click on an individual mark to highlight or drag and select multiple
- Click within legends to highlight
- Highlight actions – primarily used in Dashboards where multiple views are shown at once

Comment on Views [more](#)

You can add comments to any view

Mark and Search Favorites [more](#)

- To make it easy to find your most-used views or workbooks, you can mark (start) them as favorites.
- You can search favorites from the upper right hand corner of page

Custom Views [more](#)

Create custom views that “remember” your changes so each time you open the views they display information you want to see. You can share custom views with other Tableau Server users.

Remember my changes

Displays above the views area when looking at a published view. Original view will display at the very top. Click the dropdown to display saved custom views.

Save a custom view [more](#)

A custom view will always be associated with the original view and changes to the original, or to the data in the original, will affect the custom view.

- Open a view you want to customize
- Filter data, change sort order, highlight, zoom, etc.
- Click Remember my changes, name view
- You can change the view to your default