



Free Training Transcript:
Getting Started with
Tableau Server & Online

Welcome to Getting Started with Tableau Server and Tableau Online. If you have access to Tableau Server or Tableau Online, you can log in and follow along, although your content will not match mine.

Logging In

To access Tableau Online or Tableau Server from a browser, navigate to online.tableau.com or the URL specific to your server. You may be prompted to log in. How you do so will depend on how your organization configured this--it could be your email address, a username, or some sort of single sign on experience. Here, I'll enter my username and password.

You may be prompted to select a site when you log in. Sites are a way to partition content so it is completely separate from other sites, such as across departments. If you are not prompted to choose a site, you'll be brought directly to the content you have access to.

Content is organized across four tabs, here at the top.

Projects

Projects are basically folders. Workbooks and data sources are published to a specific project as a way to keep them organized and control permissions to content. Projects can also be nested, making it easier to organize and manage things. If we click into a project, the content is again arranged in tabs-- the nested projects, workbooks, views, and data sources we see now are those published to this project.

Workbooks

Workbooks are the files published from Tableau Desktop. Workbooks include all of the content in the file. Here, we're looking at workbooks within the default project. To see all the workbooks in this site, we can click on Home in the breadcrumbs, then on the Workbooks tab. I personally really like this page, so I'll set it to be my default start page by going to the menu in the upper right and selecting "Make This My Start Page", then confirming.

Views

The views are the individual dashboards, stories, and sheets contained in a workbook. We

can find views either by clicking into a given workbook, to see what it contains, or, like with workbooks, we can see all the views in the site by clicking on Home then the views tab. This shows us all views, regardless of workbook or project.

Searching Content

If we're looking for a specific view, we can look in a certain project or workbook, or we can search. The filters pane searches or filters the content type we're currently looking at—so here, it's views. We can search for “sales” and the relevant views that come up. Or we could filter for a specific owner, tags, modified date, etc. There's also the search at the top of the page. This searches across all content – including users, workbooks, views, and data sources.

Data Sources

Speaking of data sources, there's a tab for data sources, too. We can see at a glance all of the published, curated data sources on this site and information about them, including analytics about how they've been used. Data sources can also be certified, indicating that data source is being promoted as trusted by an admin or data steward.

Sites

If we have access to multiple sites, like I do, we can easily navigate between different sites here in the top toolbar.

Account Settings Page

Now, let's look a little deeper into our user preferences by navigating to “My Account Settings”. Here we can do things like change our password (if this isn't controlled by our administrator), see the content we've published (if relevant), and manage things like alerts and subscriptions.

Conclusion

Curious about those? Check out the video on Interacting with Content to learn more.