



Tableau Server

Self-Evaluation Guide

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Introduction

Thank you for your interest in Tableau Server. This guide will help you make a quick, easy assessment of Tableau Server and its fit within your organization. Tableau is a new kind of company. And, Tableau Server is a new kind of software. During this evaluation, you are going to see an alternative to the slow pace and rigidity of traditional business intelligence software. You'll see a system that is 100 times faster and fun to use.

What is Tableau?

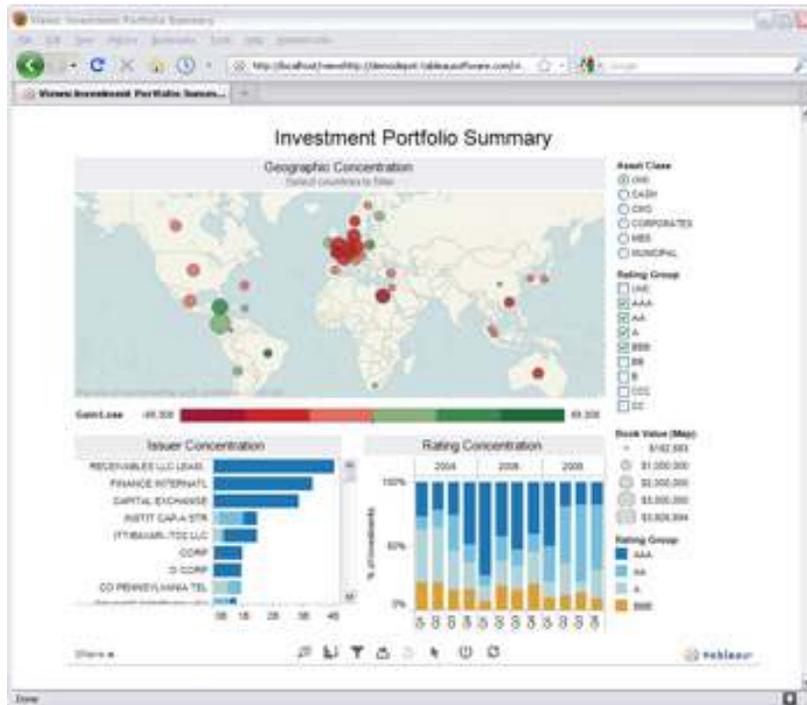
Tableau Desktop is based on breakthrough technology that enables you to drag and drop to analyze data. With Tableau Desktop, you connect to, analyze, and share your data with live, interactive dashboards in minutes. Our 'secret' is based on years of university research into how people naturally think and perceive data. It turns out that we're all visual thinkers. So, Tableau Desktop presents your data to you in highly interactive, visual views.



Tableau Desktop

Tableau Server provides interactive analytics to anyone. Business users working with Tableau Desktop can easily publish their visualizations and dashboards to Tableau Server. Other users can immediately interact with these visualizations from a browser or a mobile device. Visualizations can be embedded

within SharePoint or other portal environments so that they can be viewed within some broader enterprise context.



A Tableau Server dashboard as seen through a browser

Who Benefits from Tableau?

End Users. Self-service business intelligence is the most effective kind. Business users can create the reports they need to get answers themselves, today. They can change those reports as new priorities and considerations surface. Business users can get back to business and IT can get back to strategic IT.

IT Staff. As hard as they try, the IT team can't think of every report variation that business users might want. Business users change their minds, new needs come up, and information changes. When IT does develop a report and submits it to users, it is typical that the report goes through multiple revisions to get it "just right." This is a cumbersome process fraught with delays. Tableau gets business users out of the IT queue and gets them answers.

What's in this Guide?

Getting Started with Tableau Server – This section will walk you through the simple process of installing Tableau Server and our sample visualizations and dashboards.

Experiencing Interactive Visualizations – This section will provide you with a quick guided tour of Tableau Server from an end user's point of view.

Exploring Tableau Server – This section will help you understand how easy it is to maintain and secure your visualization content.

User Cases for Tableau Server – Read this section if you’d like more details on how to fully leverage Tableau Server in an environment that has lots of data, complex security rules, and lots of users.

Where to Go to Learn More – We have lots of great free learning resources available for you on our website. We’ll point out a few of them that are related to Tableau Server.

Getting Started with Tableau Server

Installation – Installing Tableau Server is easy. It’ll take you just a few minutes from start to finish.

1. First, check the prerequisites: <http://www.tableausoftware.com/products/server/specs>. We strongly recommend that you evaluate Tableau Server on a proper server machine rather than on your desktop computer. Visualizing enterprise data can be a big job. You probably have lots of data. And, you probably have lots of interested users. Your evaluation experience will be best if it is done in an environment that approximates your real-world implementation.

Note: Tableau Server is virtualization-friendly. We understand how important a virtualization strategy is in terms of IT cost containment. If you have a virtual machine that meets the specs noted above, then feel free to use it.

2. Next, download Tableau Server from <http://www.tableausoftware.com/products/server/try>. This is a fully functional version of Tableau Server.
3. Finally, double-click the installation file to install Tableau Server. Follow the on-screen instructions that are provided.

After you download the Tableau Server installation file, follow the instructions to install the server.

1. The Tableau Server install wizard:



Click Next to continue

2. Accept the license terms



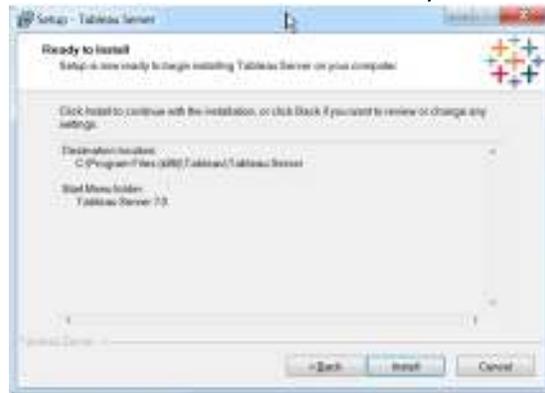
Click Next to continue

3. Determine where Tableau Server should be installed.



Click Next to continue

4. Tableau Server is now ready to install.



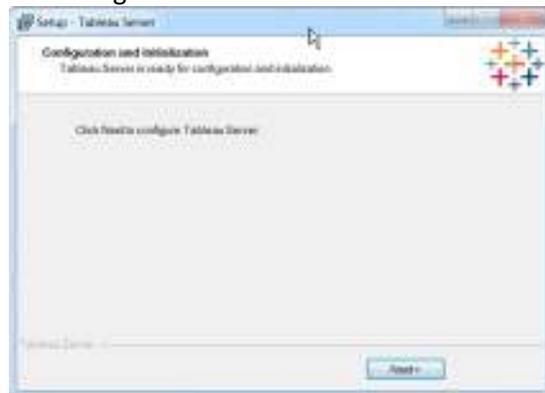
Click Next to continue.

5. Determine where Tableau Server's menu shortcuts should be placed.



Click Next to continue

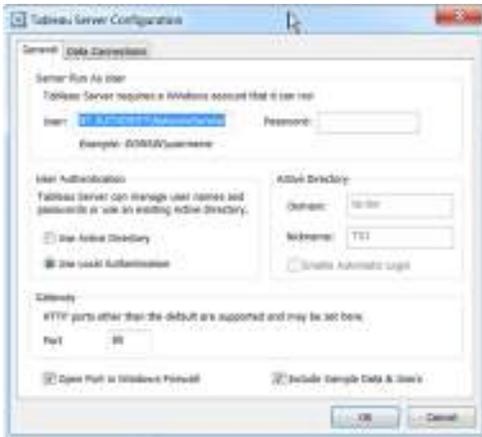
6. Tableau Server has been installed and needs a few, brief configuration items.



Click Next to continue.

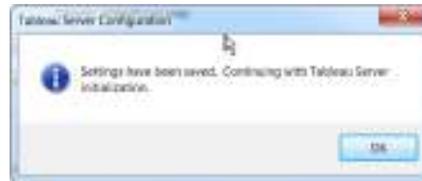
7. For a simple installation, you can accept the defaults shown here. Alternatively, if querying SQLServer, you can provide service account details for a user that has query permissions to your database(s).

Be sure to keep the “Include Sample Data & Users” option checked. We’ll use these samples later.



Click OK to continue

8. Tableau confirms that your settings have been saved.



9. Tableau will launch your browser and will ask you to create your first administrative user. Be sure to create a user account and password that you will remember.



Click 'Add User' to continue.

10. Congratulations! Tableau Server has been installed and configured. You are now ready to share your visualizations through an interactive web browser.



Configuration – There are a couple of things that you’ll want to do to take advantage of Tableau’s optional Data Extract scheduling capability. When performing a scheduled refresh, Tableau will need to connect to your data for you. In some cases, this may require a password. Selecting this option will allow you to save your data connection passwords within Tableau Server. Follow the instructions below to accomplish these two tasks.

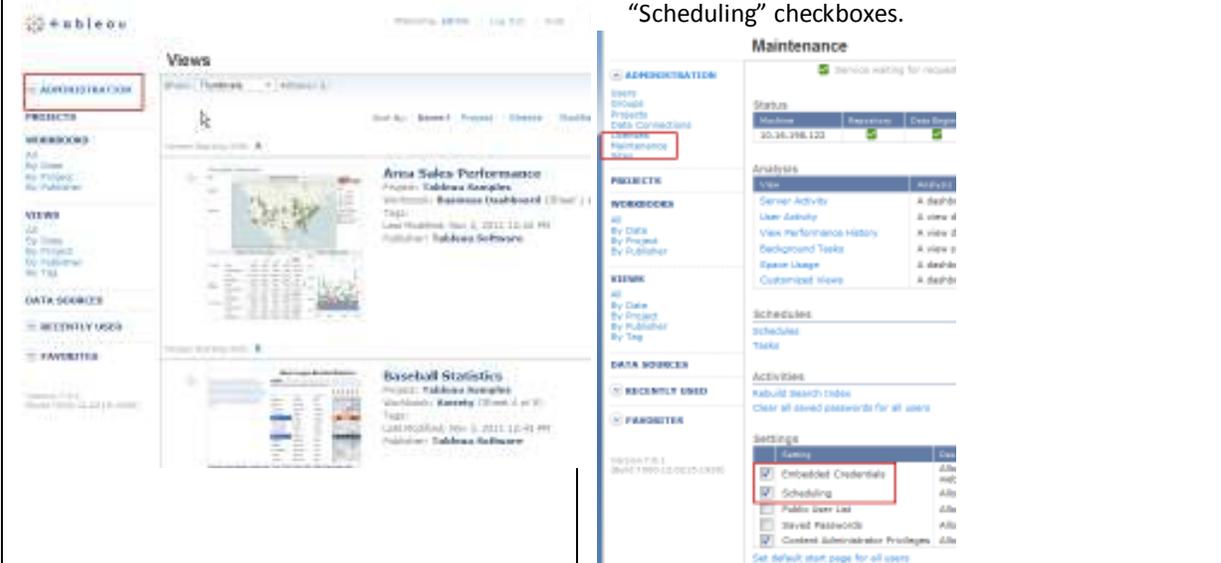
1. Launch your browser and visit <http://<server name>> where <server name> represents the name of the machine on which you just installed Tableau Server.

2. Login with the Administrator username and password that you created earlier.

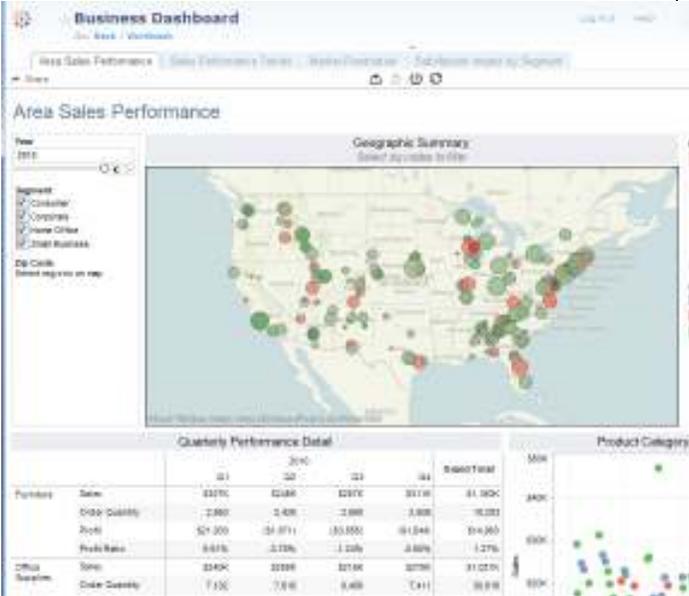


3. Click on the Administration link

4. Click on the Maintenance link
5. Finally, select the “Embedded Credentials” and the “Scheduling” checkboxes.



Interact with a visualization – You’re ready to go! Tableau Server is installed, configured, and ready to use. Let’s take a quick look at one of the samples that is included:

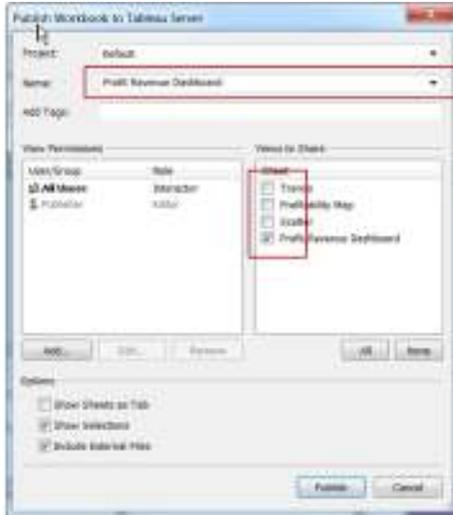
<p>1. Click on the  icon that you see in the upper left of your browser. This will always take you back to the Tableau Server home page.</p>	<p>2. Click on the ‘Area Sales Performance’ link. This will bring you to a dashboard like the one shown here:</p> 
<p>3. Navigate around this dashboard by trying some of the following:</p> <ul style="list-style-type: none"> • Move the date slider around to select different years. • Check/Un-check some of the Segments. • Click and drag to select some points on the map. • Notice how these changes cascade through the entire dashboard. • Click on the Product Category color legend. Notice how selecting a category causes it to be highlighted throughout the dashboard. • Hover over some points on the map. Notice the tool tips that reveal even more detail about your data. 	<p>4. Click the  icon to return to the Tableau Server home page.</p>

Publishing your first visualization –You’ve installed Tableau Server and you’ve seen how easily someone can interact with a visual workbook. Now it’s time to publish one of your own workbooks to your Tableau Server. You will see how easy it to do. In a matter of seconds, your favorite workbook can be used by everyone on your team.

Note: This section assumes that you have already installed Tableau Desktop – the tool used to quickly connect with and visualize your data.

<p>1. Launch Tableau Desktop and open the workbook that you want to publish.</p> 	<p>2. Select Server...Publish Workbook... From the menu.</p>  <p>3. Log into Tableau Server using the Administrator username and password that you created earlier.</p>
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- 4. Provide a meaningful name for your published workbook.
- 5. Determine which tabs you want to publish.
- 6. Click Publish.



- 7. Tableau will publish your workbook and then give you a preview of it.



- 8. Your users can now browse through the Tableau Server website to open and interact with your workbook.

Exploring Tableau Server

You saw how easy it is to install Tableau Server. It is just as to configure and maintain it. Tableau Server has everything you need in order to organize, secure, and share your business data visualizations. The key concepts to keep in mind are these:

- **Users and Groups** – You can decide who gets access to Tableau Server, and who does not. You can also decide what kind of product functionality these users should have. Should they be able to drill into details? Should they be allowed to download snapshots of your data? Should they be allowed to provide comments about your visualizations? You can provide very specific instructions for what users can do or not do. You can either create groups locally on the server or import from Active Directory.

Most customers prefer to manage permissions like this for groups of users rather than for individual users. For example, you may have a group of Financial Analysts who all share a common set of security permissions. Or, you may have a group of field sales personnel who all need to interact in the same way with Tableau Server. So, you can manage all of this easily by bringing people together in groups.

- **Projects** - A project is a collection of related workbooks. People browsing the server can find projects by clicking the **Projects** link in the navigation area on the left side of the page. Projects are useful for collectively setting permissions for a group of workbooks.
- **Server Maintenance** – Tableau Server has a very simple interface that you can use, when needed, to view important information about its own over-all health and performance. As a Tableau Server administrator, you can check the status of the server, analyze and monitor activity on the server, and manage scheduled tasks. In addition, there are several settings that you may want to specify to customize the user experience. There’s no need to learn any complicated systems administration toolset. You can do all of these tasks from the Maintenance page.

Create Some Tableau Users & Groups

1. In Tableau Server, click Administration...Users...Add User.



2. Add a user named Pat. Give her an Interactor license, and give her Publish rights.
3. Click “Add User” when done.



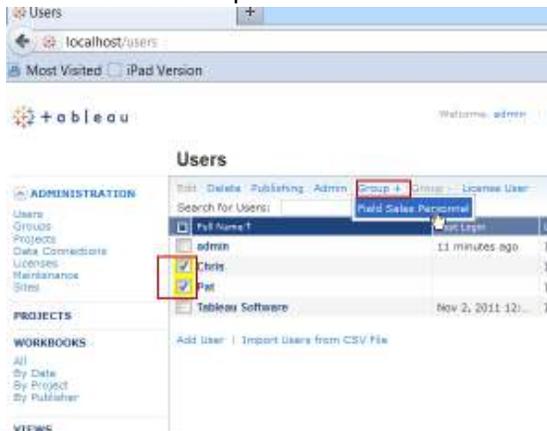
4. Repeat this for user "Chris"
5. Click "Return to Users" when done.



6. Click 'Groups' from the menu on the far left.
7. Click 'Add new group' from the middle of your screen.
8. Create a name for your group (e.g. 'Field Sales Personnel')
9. Click 'Add Group'

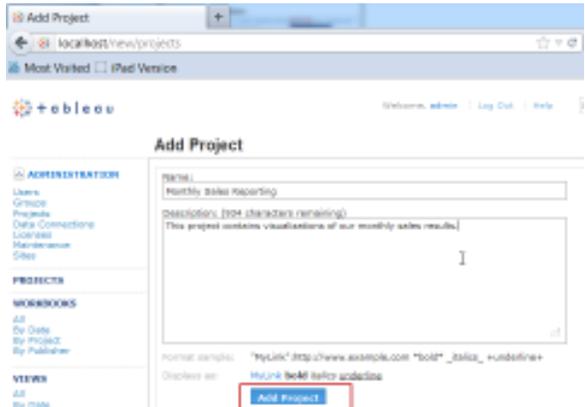


10. Return to the list of users.
11. Put a checkmark next to Pat and Chris.
12. Click the 'Group+' option on the menu.
13. Add Pat and Chris to the 'Field Sales Personnel Group'

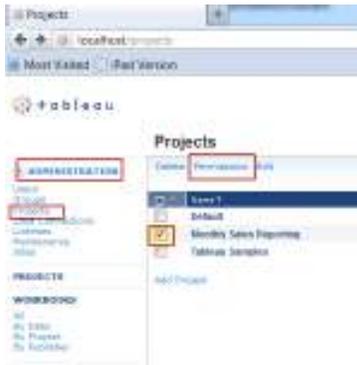
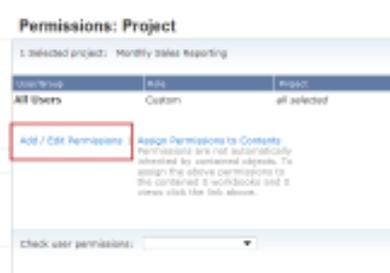


14. Click the  icon to return to the Tableau Server home page.

Create a Project

<p>1. Click on Administration....Project....Add Project as shown.</p> 	<p>2. Give your project a name (e.g. 'Monthly Sales Reporting').</p> <p>3. Provide a meaningful description for your project.</p> <p>4. Click 'Add Project'</p> 
<p>5. Click the  icon to return to the Tableau Server home page.</p>	

Assign permissions to a project

<p>1. Click on Administration....Projects</p> <p>2. Select the project that you want to modify</p> <p>3. Click on the 'Permissions' menu option</p> 	<p>4. Click 'Add/Edit Permissions'</p> 
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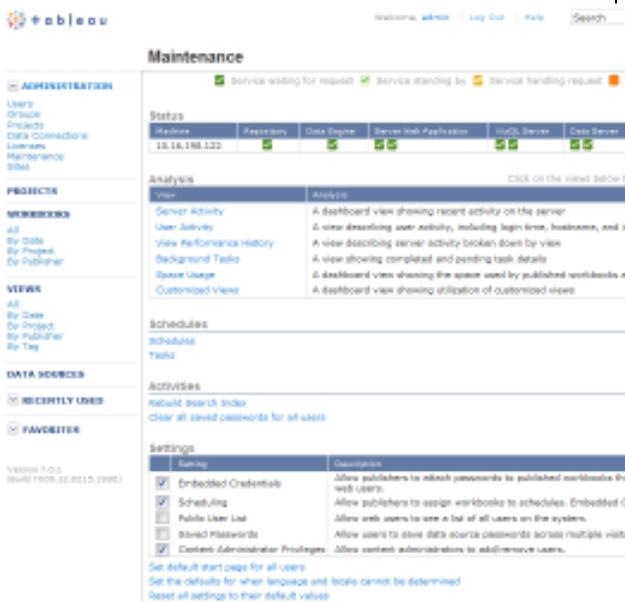
5. Select 'Groups' and find the Field Sales Personnel group.
6. Assign permissions to this group as desired.
7. Click 'Submit'



8. Click the  icon to return to the Tableau Server home page.

Explore the Tableau Server maintenance page

1. Click 'Maintenance'.
2. Explore the options here which will help you monitor and optimize the performance of your Tableau Server implementation.



3. Click the  icon to return to the Tableau Server home page.

Use Cases for Tableau Server

Now you've gotten Tableau Server installed and configured. You've viewed a workbook through your browser. And, you've learned a bit about how to add users, projects, and security to Tableau Server. Now it's time to start learning more about why organizations like Tableau Server. What are they doing with it, and why?

Tableau Server is a great environment for:

- **Sharing visualizations with others.** – If you've got lots of people who all want to see similar visualizations on similar data, then just create it once and share it with everyone!
- **Providing a Common Semantic Layer** – Suppose you have many people in your organization that are making data visualizations. How can you make sure that they all have a common definition of things like revenue, expense, customer, or project? Tableau Server can handle this for you and can ensure that everyone is looking at the business through the same lens.
- **Providing a lightning fast query experience** - Sometimes your data isn't as fast as you'd want it to be. In those cases, you may choose to take advantage of Tableau's fast data extract engine to speed things up.
- **Data Visualizations on the Move** – Do you have a mobile workforce? With Tableau Server you can provide your data visualizations to your mobile workforce without taking any additional development steps. Once you publish something to Tableau Server, it is immediately available to users via the iPad or via their laptop web browsers.

The following sections will walk you through each of the scenarios noted above so that you can see for yourself how Tableau Server will fit within your organization.

1. Sharing Visualizations with Others

Overview

Once you've found something insightful in your data, the next logical step is to tell someone else about it. Tableau makes it easy for you to share an interactive view of your findings with others.

Why Tableau

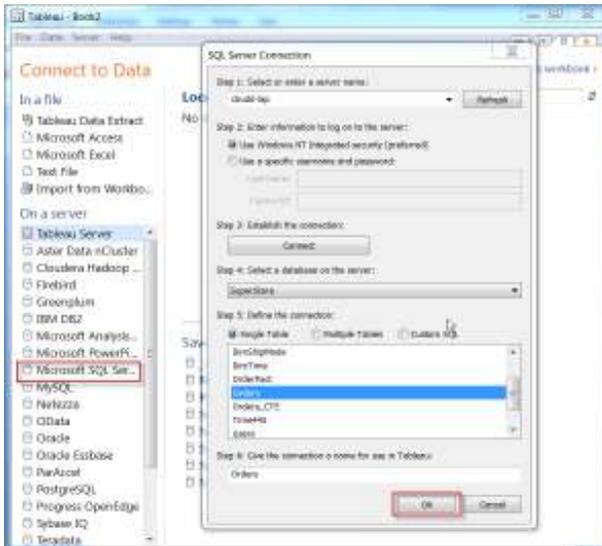
Tableau Server makes it easier than ever before to share your visualizations with a wide audience. In one simple move a Desktop user can publish their workbook to Tableau Server and instantly entire groups of people to access and analyze their data.

Do you have a lot of data? Unlike some visualizations tools today, Tableau Server is not exclusively an “in-memory” solution. Although that is an architectural option in Tableau, you can just as easily tap directly to the powerful servers that you already have for your big data. There’s no need to replicate any data. And, there’s no complex programming required to plug your data right into Tableau dashboards.

Steps to Follow

This section will review and expand upon the instructions provided above when you published your first visualization to Tableau Server.

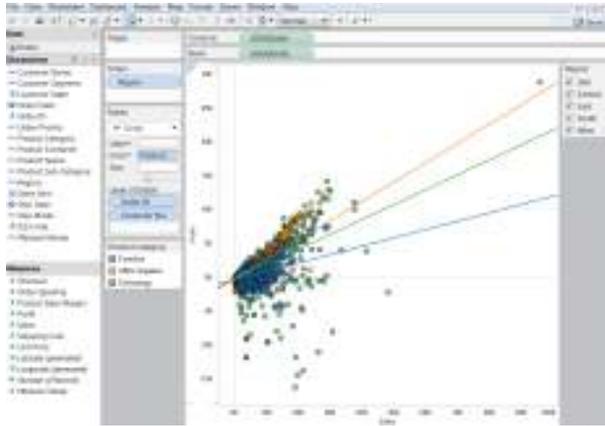
1. Launch Desktop and connect to one of your datasources. In this case, we’re connecting to a SQLServer database.



2. Select the option to ‘Connect Live’. This is your way of connecting directly to the source database. There’s no need for any complicated scripts to transform your data and take a snapshot of it into Tableau Desktop.

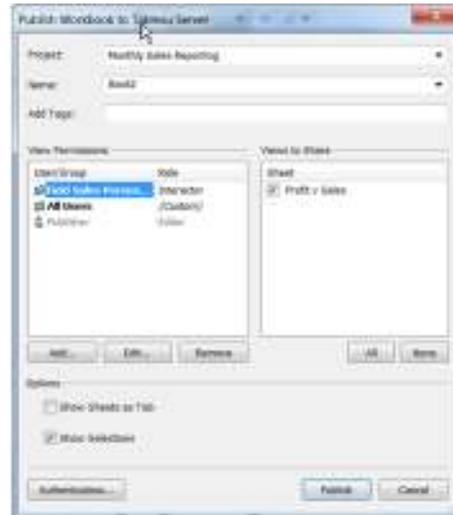


3. Produce your visualization. In this case, each dot represents an order. We can see the correlation between sales amount and profit.



4. Publish the workbook. Go to server....publish. Login to Tableau Server with your username and password if you haven't already done so.

We're publishing this workbook to the 'Monthly Sales Reporting' folder.



5. Publish to Tableau Server

6. View and interact with your visualization on Tableau Server

Highlight

Hover over a datapoint and explore the options that appear on the tooltip. You can:

- View the details beneath that data point
- Exclude or Keep Only that data point

Look at the toolbar above your visualization.

Experiment with the options.

- Export your visualization
- Export the data behind the visualization

Use "Remember my changes" to store the current state of all of your filters on this view.

Tableau Server makes this entire dynamic experience possible without the business user-author knowing about any complex programming, coding, or scripting capabilities. All you have to do is publish your workbook to Tableau Server!

Note this is connected directly to your database. You didn't need to export this data to any data extract environment in order to make these dashboards possible.

Where to Learn More

View our free online training here: <http://www.tableausoftware.com/learn/tutorials/on-demand/end-user-training> for more information about how users navigate through Tableau Server to find and consume your data visualization content.

2. Providing a Common Semantic Layer

Overview

You've seen how Tableau Server can provide an easy way to share business visualizations amongst a number of users. But, what if all of your business users have slightly different questions that you can't answer with any one visualization? How can you empower your users to answer their own questions but still ensure that they all have a common understanding of the *meaning* of your data? For example, how can you be sure that your users are all calculating a key ratio like Margin correctly? How can you make sure that your users are all accessing the right data to begin with?

Tableau Server can answer these important questions.

Why Tableau

You've already seen with Tableau Desktop that your users can easily connect to their critical business data. In some cases, those connections can be fairly sophisticated. They may involve lots of tables or sophisticated joins. You may have also seen how you can enhance those connections with other key elements that add value to your data. For example, you may have added hierarchies or groups to your connections. Or, you may have created sophisticated calculations that enhance the value of your raw data. Not every business user has the skills or the desire to build these data connections.

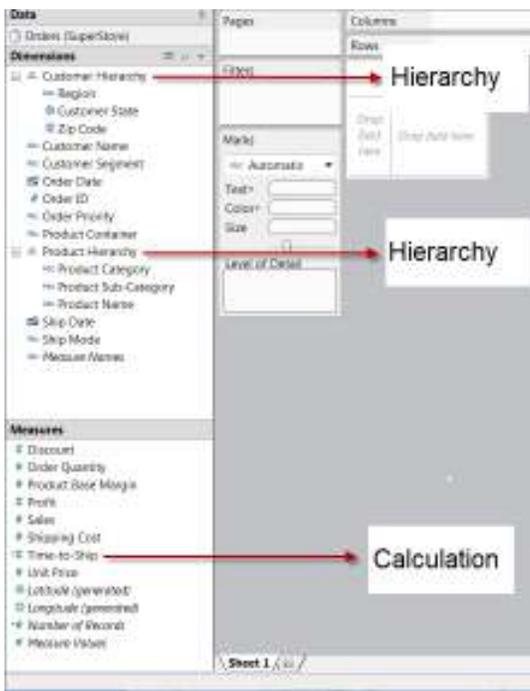
Fortunately, with Tableau Server, your business users don't have to build these connections. Tableau Server makes these data sources reusable and centrally managed. Now, your users can simply utilize a predefined data source that they can find on the Tableau Server. There's no need for the user understand how to connect to their data, join tables, or build formulas. They can just point to a shared data source on Tableau Server and start visualizing their data.

This will save your end user time. And, it will ensure that everyone is using the same data in the same way.

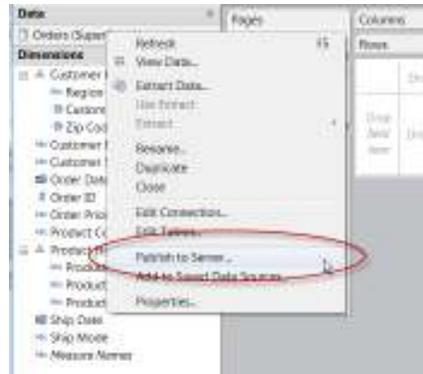
Follow the steps below to create and then use a Tableau Data Source. In this scenario, we've got some data stored on a SQLServer database, and we want to make sure that all of our business users can access and visualize this data quickly and easily.

Creating a shared data source - Steps to Follow

1. Launch Tableau Desktop and connect to some of your data. We'll connect to an example SQLServer database in this case.
2. Edit your Data Source with calculated items, hierarchies, or other elements as needed.



3. Right-click on the datasource in the upper left of Tableau Desktop. Choose Publish To Server... from the menu.



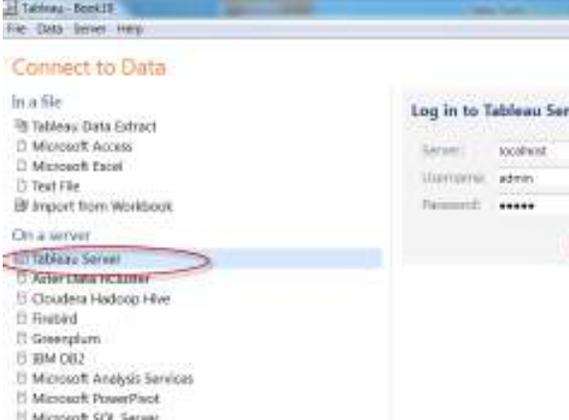
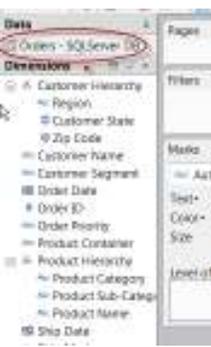
4. Give the datasource a meaningful name and then click 'Publish'.



5. You have now created and published a re-usable Tableau Data Source.
6. Close Tableau Desktop.

Using a shared data source - Steps to Follow

Let's assume that you're an inexperienced user and that you merely want to produce some quick visualizations without going through the process of connecting to a database, joining tables, building hierarchies, etc. You just want to leverage an existing connection and get on with visualizing your data. Here's how you do it:

<ol style="list-style-type: none"> 1. Start Tableau desktop. 2. Click 'Connect to Data' 3. In the 'On a Server' section, click 'Tableau Server' 	<ol style="list-style-type: none"> 6. Click on the datasource that you want to use. 7. Tableau Desktop will connect to that datasource. Note that the datasource icon looks like other Tableau icons. This is our way of representing that this datasource is managed by Tableau Server. 
<ol style="list-style-type: none"> 4. Enter the appropriate values for your Tableau Server, username, and password. 5. Click Login. 	

Why is this important?

Shared datasources in Tableau Server are good for business users, and they're good for IT.

- **Business users** get the benefit of a quick connection to their data without the need to worry about what tables they need, how they should be joined, etc. Meanwhile, they still have all of the great user-friendly capabilities that they need to personalize those data connections when needed.
- **IT benefits for a couple of reasons.** First, the data connections can get created once and used many times. Everyone will be looking at the same shared copy of this key semantic metadata. Everyone will have the same 'understanding' of key business concepts that are held within the data. Second, when you use Tableau Server-managed data sources, your database queries will get routed through the Tableau Server. That means that IT won't have to worry about all of the complications that frequently arise when you have to install and maintain database middleware from vendors like Oracle, Teradata, or DB2 on lots of

desktop computers. That middleware can be installed centrally on your Tableau Server rather than having it distributed across all of your desktops.

Where to Learn More about shared data sources in Tableau

You can learn more about the Tableau Data Server by having a look at our Server Administration Guide here: http://downloads.tableausoftware.com/quickstart/server-guides/en-us/server_admin7.0.pdf. Have a look at the section titled “About Tableau Data Server”

There is also some information about published data sources available in one of our On Demand training videos that you can find here:

<http://www.tableausoftware.com/learn/tutorials/on-demand/connect-databases>

3. Using Our Fast Data Engine (optional)

Overview

Tableau is extraordinarily efficient when it comes to querying your databases. It is able to produce highly optimized queries that will give you the answers that you need very quickly. However, some customers find that their databases are slow or that they are not optimized for a visualization / exploration experience. Those customers sometimes find that they can provide a better end user experience by placing a snapshot of their data within Tableau’s optional Data Extract engine.

Note: Other visualization tools will REQUIRE you to do this. And, they will require you to invest in expensive high-capacity computers in order to be of any use. Tableau’s approach is to make its data extract engine completely optional. And, when used, our extract engine doesn’t require high-end servers with large volumes of RAM memory.

Why Tableau

Tableau Desktop and Tableau Server make it fast and easy to get high performance columnar snapshots of your data. Your end users can be successful making their own data extracts. There is no need for any complex scripting or coding in order to produce a Tableau Data Extract. Compare this with other data visualization tools that require you to use their data engine, and that require IT specialists in order to make that possible.

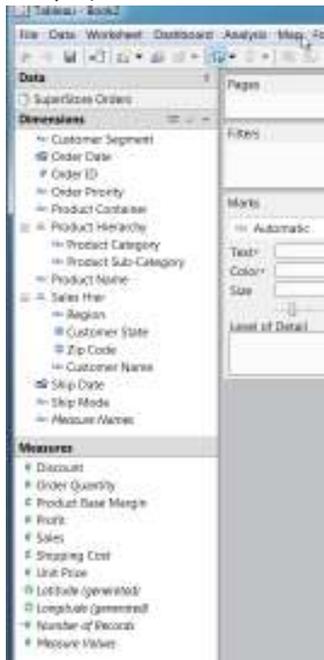
Additionally, your end users can publish their extracts so that others can use them for their analysis. They can get to their answers even more quickly, and no one has to worry about keeping those extracts up-to-date, because Tableau Server will do it for you.

Steps to Follow

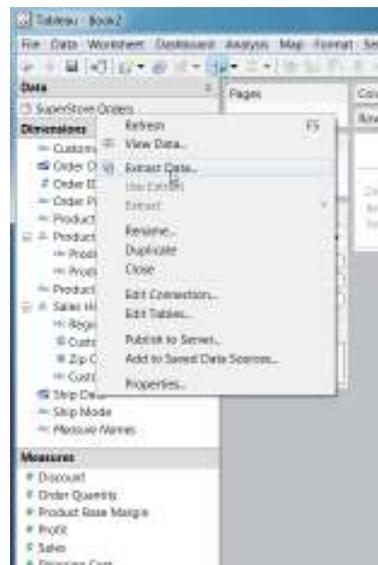
Here are some simple steps that you can do to

- Make a data extract and use it in Tableau.
- Publish that extract for others to use.
- Rely on Tableau Server to keep the data in that extract fresh and current.

1. Start Tableau Desktop, connect to your data, and build out anything that you need within your datasource. (The screen shot below contains two hierarchies, for example).



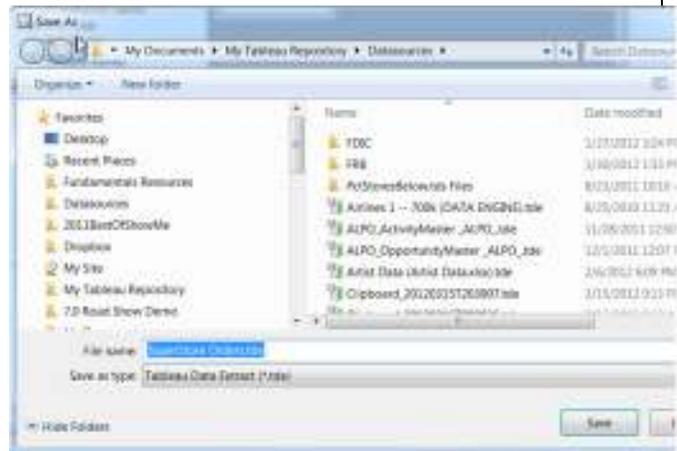
2. Right-click on the datasource and select Extract Data...from the menu.



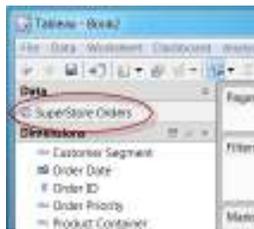
3. Provide any filtering criteria or other pieces of optional information requested on this screen, and then click 'Extract'.



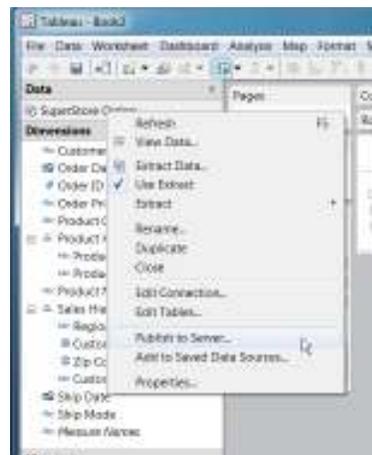
4. Give your extract a filename and location, then click OK.



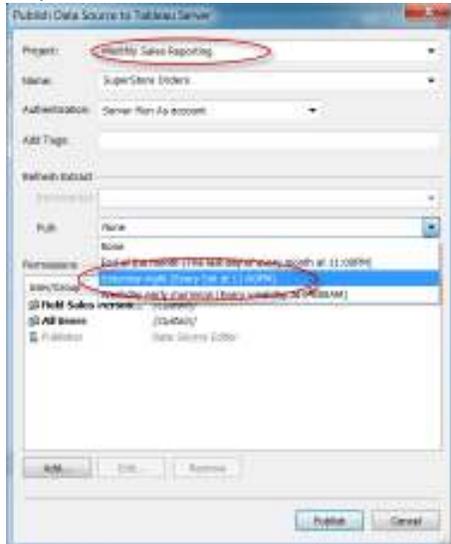
5. Notice the change in the datasource icon. It now appears like a pair of databases. This is your indicator that you are working with an Extract rather than directly on the source data itself.



6. Right-click on the data source and select 'Publish to Server'.

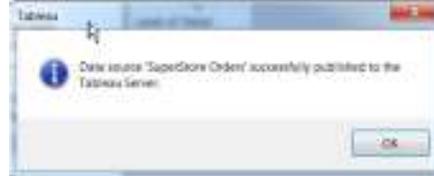


7. Select the Server project that you want to publish your extract into.
8. Optionally, you can specify the calendar which will drive *when* Server will refresh your extract.



Note: If you are going to have Tableau Server refresh your extracts for you, then you will need to make sure that Tableau Server's "run as" account is able to connect to your database.

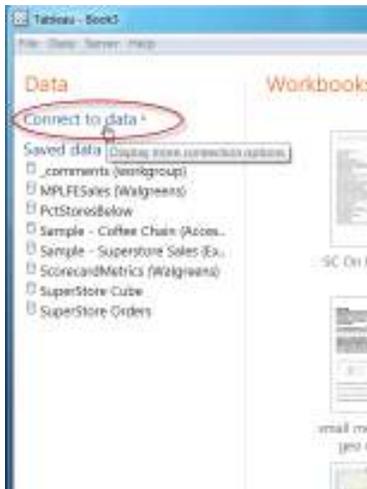
9. Tableau will tell you that your extract was published successfully.



Now you've published a data extract to Tableau Server. Tableau will now take over the periodic refresh of that data extract so that you are always looking at the most currently available information.

More importantly, *other people* can also take advantage of that same data extract. They don't need to build their own extracts. This will save them time. This will make sure that everyone is looking at the same data. And, this will make sure that you aren't retaining multiple duplicate copies of your business data. Here's how your business users can take advantage of the extract that you've already created for them:

1. Start Tableau Desktop and click 'Connect to Data...'



2. Click 'Tableau Server' and then provide your login information to your Tableau Server installation.

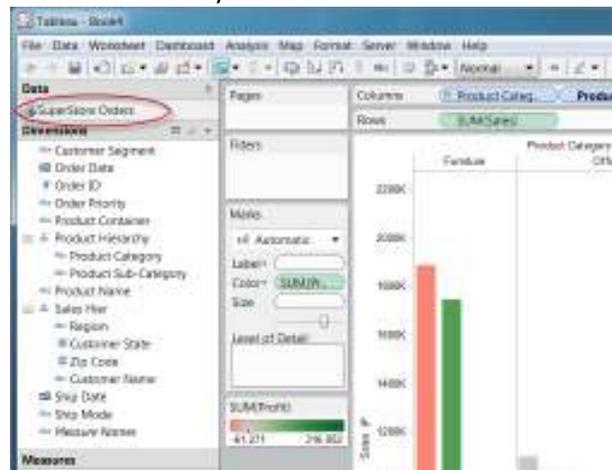


3. Select the one of the Tableau Server-managed datasources that is presented to you. This may be a connection back to an existing database, or it may be a connection to a Tableau data extract.



4. Note the datasource icon. This is your indicator that you are using a Tableau Server—managed data source. Note that you will see all of the hierarchies, calculations, and other items that were built by the author of this datasource. You don't need to re-create any of these valuable items.

5. Produce your data visualization as needed.



Where to Learn More about our Fast Data Engine

If you'd like to learn more about when and when not to use data extracts, please have a look at the following whitepaper. This will give you some great use-cases for either direct-connect or extracted databases.

<http://www.tableausoftware.com/learn/whitepapers/memory-or-live-data>

You can learn more about data connections and data extracts by watching this online video:
<http://www.tableausoftware.com/learn/tutorials/on-demand/working-data>

You can also check out our On-Line help at
<http://onlinehelp.tableausoftware.com/v7.0/pro/online/en-us/help.htm> Search for the topic “Publishing Data Sources”

4. Mobile Data Visualization

Overview

Business users today are constantly on the move. They need visual information at their fingertips quickly and easily so that they can make observations and act upon them quickly. Fortunately, Tableau Server makes this possible without any special work beyond what you’ve already done in this evaluation guide. As soon as you publish something to Tableau Server, it is immediately available for consumption on your iPad.

Why Tableau

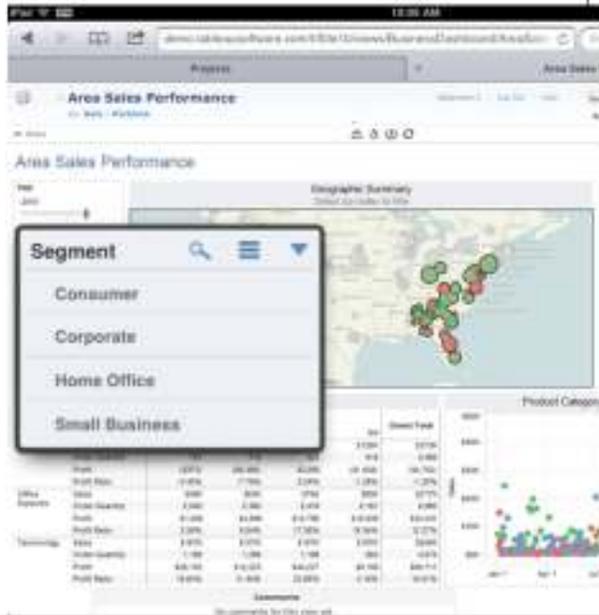
Tableau Server content is immediately available for consumption in a browser or on an iPad. The server will automatically figure out if you’re using a standard browser or an iPad. You as a business user author do not need to do anything special in order to take advantage of the special ‘touch-enabled’ capabilities offered by an iPad.

This means that you can get your visualization out to lots of people across your business without having any specialized, proprietary skills.

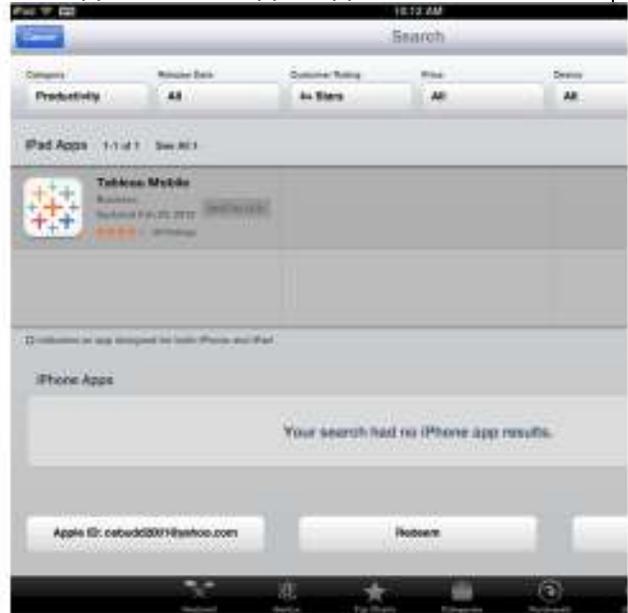
Steps to Follow

Let’s prove this point quickly by taking one of the standard Tableau samples that come with the product, and viewing it on an iPad.

1. Here we are using the Safari browser on your iPad to view the Area Sales Performance dashboard. Note how the screen is immediately touch-enabled. You can “pinch and zoom” on the map. Selections on the Segment filter will cause that filter to expand so that it’s easier for you to utilize with your fingertip rather than a mouse.



2. You can also download a FREE copy of Tableau’s iPad “App” from the Apple App Store.



3. After installing and launching the Tableau app, you will see a gallery screen like the one below.



4. Tap on 'Workbooks' at the bottom of the screen, and you'll be asked for your Tableau Server login screen.



5. After logging in, you will see a list of workbooks that you are able to access.



6. Tap on one of your workbooks, and you'll be able to interact with it on your browser.



Where to Learn More about Tableau visualizations on a mobile device:

You can learn more about mobile BI best practices here:

<http://www.tableausoftware.com/learn/whitepapers/5-best-practices-mobile-business-intelligence>

Where to learn more about Tableau Server

At Tableau we believe in transparency and openness. We provide free and open access to all of our product documentation and online training at <http://www.tableausoftware.com/learn>. Here you will find

- On-Demand training for Tableau Desktop and Tableau Server
- Links for live bi-weekly training webinars
- Schedules for our classroom training

Be sure to check our support page too! (<http://www.tableausoftware.com/support>) You'll find

- Links for our Desktop and Server documentation (<http://www.tableausoftware.com/support/manuals>).
- Access to our Knowledge Base where you can find step-by-step 'how-to' answers to many of your questions.
- The Tableau Community where you can either find or share solutions through forums and user groups.

Conclusion

Thank you for your interest in Tableau Server. And, thank you for taking the time to review a few of the key things that distinguish Tableau Server. You've seen it working in your environment. You've seen it connect to some of your data. And, you've seen how it can provide interactive visualizations securely to a wide audience within your company with minimal work on your part. Please contact us to learn more about licensing Tableau Desktop and Tableau Server. <http://www.tableausoftware.com/about/contact>