



On-Demand Training: Getting Started with Tableau Server and Online

Welcome to the Getting Started video for Tableau Server and Tableau Online End User Experience.

If you have access to Tableau Server or Tableau Online, you can log in and follow along. Keep in mind that your screen might look different, since I have different workbooks published. While this video uses Tableau Server, the Tableau Online user interface will look very similar, and will have the same functionality.

Logging In

When we first navigate to the URL of the Tableau Server most often we're prompted for a username and password within the login screen. This may be a Windows login if your organization is authenticating with Active Directory. It might also be a username and password that has been set by a Tableau Server administrator. If you're logging in with Tableau Online, your username will be your email address.

If the organization is leveraging the multi-tenancy feature of Tableau Server or Tableau Online to break up an organization into sites, we may be prompted to choose a site that we want to use. Sites are a way for organizations to partition users and projects so that they are completely separate from one another. Sites are most often used internally, perhaps to separate departments.

Now that we have entered the Tableau Server or Tableau Online portal, we can navigate through the tabs. It is possible that some of these tabs will not be on your screen if your organization does not have multiple sites, or if you do not have certain privileges. Navigation of the tabs that are on your page should look about the same, though.

Projects

Projects, at a very high level, are basically folders within Tableau Server or Tableau Online. Workbooks can be published into a specific project as a way to keep them organized or to control access. Each project might have different permissions, with different people being able to access and interact with different projects and all of their workbooks.

Workbooks

Workbooks are the files published from Tableau Desktop. Workbooks include all of the dashboards, stories, and individual sheets that are contained in a single Tableau workbook.

Views

The views are all of the individual dashboards, stories, and sheets that have been published to the Tableau Server.

Searching Content

We can very easily filter content. So, if we wanted to find a published demo, we can type in the word demo and it's going to filter down the material with demo in title or tags. If there are no dashboards published with the word "demo", then nothing will be returned. We could also search based on the project or publisher as well as when a dashboard has been published.

Data Sources

Storing data sources on Tableau Server or Tableau Online is a fast way to quickly connect to data and start authoring. For more about how to create workbooks within Tableau Server or Tableau Online from published data sources, please refer to the "Web Authoring" video.

Sites

Next, let's navigate to the top of the screen, here. If we have multiple sites and we are a member of multiple sites (like I am), we can easily navigate between different sites very quickly and easily, without having to log out and log back in to Tableau Server or Tableau Online.

Account Settings Page

Now, let's look a little deeper into the user preferences by navigating to "My Account Settings". One thing we can do is change our email address. We want to have an up-to-date email address for subscriptions; we can select a dashboard that we want have emailed to us on a specific schedule. For more information, please refer to the video on "Interacting with Content".

We can also change our start page of the Tableau Server or Tableau Online at the project level or workbook level. We also can set the language or locale to match our physical location. We may also be able to change our password, but note that this is only possible in Tableau Server if we're set up with the local authentication option with username and password.

Conclusion

Thank you for watching this End User Experience training video. We invite you to continue with the next video on interacting with content.