

Tableau Server Basics

1. The home tab includes favorites, recently viewed, and reports others are viewing.

The screenshot shows the Tableau Server Home page. On the left is a navigation sidebar with icons for Home, Explore, Favorites, and Recents. The main area is titled "Home" and contains three sections: "Favorites" (displaying a bar chart for "Custodial Services" and a line chart for "Weekly Time Trend"), "Recents" (displaying a line chart for "Monthly Time Trend" and a heatmap for "Active Employees"), and "Others are viewing" (displaying a line chart for "Monthly Time Trend").

2. You can favorite project folders, views, and workbooks.

Favorites

Select All

The screenshot shows the "Favorites" page. It lists three items: "Custodial Services" (labeled "Folder"), "Weekly Time Trend" (labeled "View"), and "Active Employees" (labeled "Workbook"). Each item has a star icon for favoriting and a three-dot menu icon.

3. Favorite by clicking the star



4. The explore tab contains all the project folders

A screenshot of the "Explore" tab. On the left is a sidebar with icons for Home, Explore (which is selected and highlighted with a grey background), Favorites, and Recents. The main area has a header "Explore" with a dropdown menu "Top-level Projects ▾". Below the header are two cards:

- All FM**: General audience content of broad interest across Facilities Management teams. This card includes a star icon and three dots at the bottom right, with the star icon highlighted with a magenta square.
- All User Sandbox**: Ad hoc analysis or creating quick prototype dashboards. Not intended to be permanent. This card also includes a star icon and three dots at the bottom right.

5. Click on a project folder

The screenshot shows the Power BI 'Explore' interface on the 'FM Test Server'. On the left, a navigation bar includes links for Home, Explore (which is selected), Favorites, and Recents. The main area displays 'Top-level Projects' with two items visible:

- All FM**: A folder icon with a sub-folder icon inside. A pink box highlights this item. Below it is a description: "General audience content of broad interest across Facilities Management teams.".
- All User Sandbox**: A folder icon surrounded by small grey circles. Below it is a description: "Ad hoc analysis or creating quick prototype dashboards. Not intended to be permanent".

6. This takes you to the workbooks inside the folder

The screenshot shows the 'All FM' project folder within the 'Explore' interface on the 'FM Test Server'. The folder icon from the previous screen is highlighted with a pink box. The folder details are shown:

- All FM**: The folder name.
- Owner**: Tombs, Joseph N. (jnt6h)
- Description**: General audience content of broad interest across Facilities Management teams.

Below the folder details, there are two workbooks listed:

- Active Employees**: Contains two charts: "Employees per District" (a treemap) and "Employees per Org and Dept" (a treemap).
- AIM Project Comparison**: Contains a chart titled "Project Overview" showing various project metrics.

At the bottom of the screen, other workbooks are partially visible:

- Customer Request Description Search**
- FM Budget Table**

7. Click on a workbook

The screenshot shows the Power BI service interface. On the left, there's a navigation bar with icons for Home, Explore, Favorites, and Recents. The main area displays the 'All FM' workbook, which has a folder icon and is owned by 'Tombs, Joseph N. (jnt6h)'. The description is 'General audience content of broad interest across Facilities Management teams.' Below the title, there are two cards: 'Active Employees' (highlighted with a pink border) and 'AiM Project Comparison'. Other cards visible include 'FBI Audit Table' and 'Customer Request Description Search'. At the bottom, there are tabs for 'Views 4', 'Data Sources 1', and 'Subscriptions 0'.

8. This takes you to the views inside the workbook

This screenshot shows the 'Active Employees' view from the 'All FM' workbook. The view has a bar chart icon and is owned by 'Goodrich, Kathryn Elise (keg4ky)'. It was modified on Mar 1, 2019, at 8:38 AM. Below the title, there are buttons for 'Edit Workbook', 'Views 4', 'Data Sources 1', and 'Subscriptions 0'. A 'Select All' link is also present. The view itself contains three cards: 'Employee Counts' (with a bar chart and a grid), 'Contact Info Dash' (with a grid), and 'Position Details' (with a grid).

9. Click on a view

Explore / All FM / Active Employees

Active Employees ★ ⓘ ...

Owner: Goodrich, Kathryn Elise (keg4ky) Modified: Mar 1, 2019, 8:38 AM

Edit Workbook

Views 4 Data Sources 1 Subscriptions 0

Select All

Employee Counts Contact Info Dash Position Details

The screenshot shows the 'Active Employees' workbook interface. At the top, there are three cards: 'Employee Counts' (with a bar chart showing employee counts by division), 'Contact Info Dash' (with a large heatmap titled 'Employees per Org and Shop'), and 'Position Details' (with a table of position details). Below these cards is a section titled 'Select All' with checkboxes for 'Employee Counts', 'Contact Info Dash', and 'Position Details'. At the bottom of the page, there are links for 'Views 4', 'Data Sources 1', and 'Subscriptions 0'.

10. This is a view. Views can have graphs, tables, and filters.

Employee Counts Contact Info Dash Position Details FTE and Wage Counts

Total Active Employees: 1,278

Employees per Division

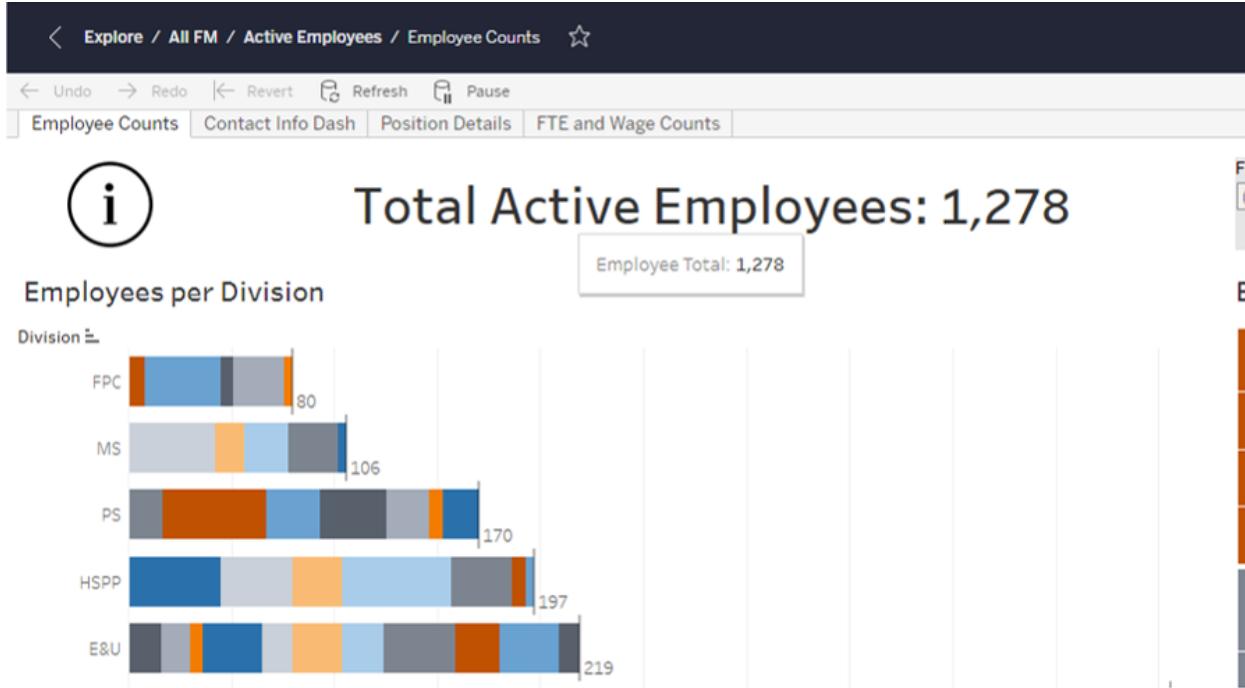
Employees per Org and Shop

Employees by Full Name

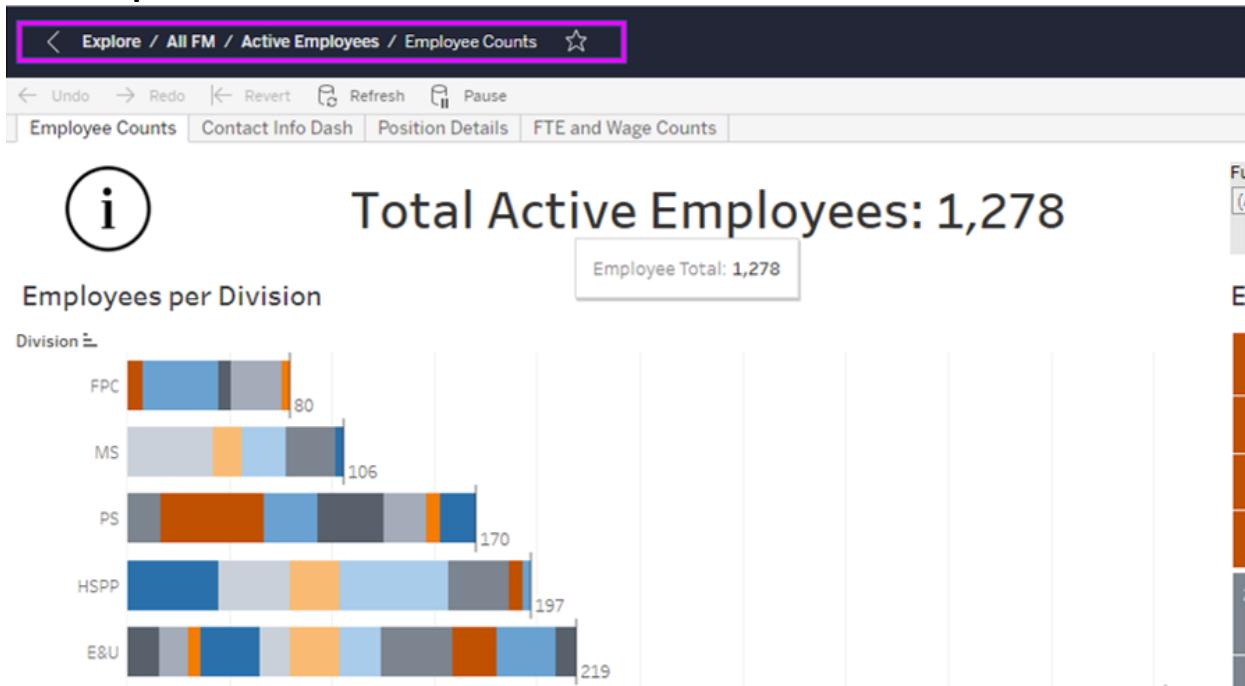
Full Name	Job Title	Shop	Org	Supervisor Name	Labor Class	Hourly Billable Rate	Staff Type	Day of Original Hire Date	
Abdalhusain, Zouzek	ZHA2M	Plumber Apprentice	166 FM-CENTRAL GROUNDS ZONE ELECTRICAL/PLUMBING	20217 FM-Central Grounds Zone	Roberts, David	0500	\$44.00	University Staff Operational and Administrative	July 23, 2018
Ackerman, Steven	SBA4F	Senior Electronic Technician-ELEC51	973 FM-AUTOMATION SERVICES CONSTRUCTION 973	20322 FM-Automation Services	Persinger, Lewis	0274	\$66.34	University Staff Operational and Administrative	August 4, 2003
Acree, Dennis	DMA4M	Trades Utility Senior Worker	351 FM-HSPP ZONE 1 NORTH	20355 FM-Health Sys PP Zone 1	Branch, Kelly	0383	\$56.00	Classified	March 25, 1994
Acree, Edward	EMA4N	Fire and Life Safety Systems Manager	180 FM-FIRE PROTECTION AND LIFE SAFETY 180	20270 FM-Fire Protection	Payne, Michael	0220	\$60.00	University Staff Managerial and Professional	September 3, 1998
	ESA4C	HVAC Installation and Repair	347 FM-HSPP ZONE 1 SOUTH HVAC 347	20355 FM-Health Sys PP Zone 1	Branch, Kelly	0383	\$56.00	Classified	July 1, 1993
Adams, Garnett	GWA7G	Cabinet Builder Assistant	584 FM-PS CABINET SHOP 584	20170 FM-Project Services-Carpentry/Masonry	Harris, Walter	0222	\$55.00	University Staff Operational and Administrative	March 7, 2016

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11. Focus on the upper left corner of the view



12. This is the directory of the view. Use this to go back to the workbook, folder, or explore



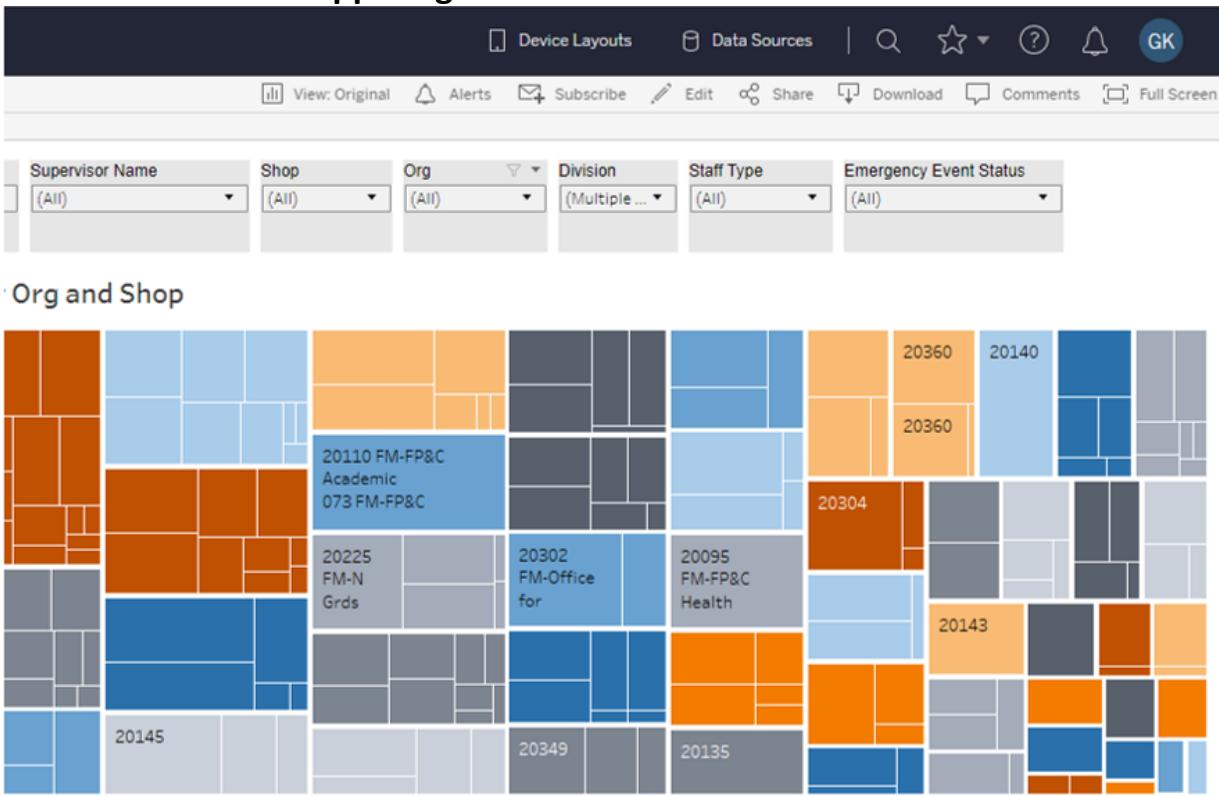
13. These tabs are the other views in the workbook

The screenshot shows a dashboard interface with a top navigation bar and a toolbar below it. The toolbar includes buttons for Undo, Redo, Revert, Refresh, and Pause. Below the toolbar, there are four tabs: Employee Counts (highlighted with a pink border), Contact Info Dash, Position Details, and FTE and Wage Counts. The main content area features a large information icon (a circle with an 'i') and the text "Total Active Employees: 1,278". A box labeled "Employee Total: 1,278" is also present. Below this, a chart titled "Employees per Division" displays data for five divisions: FPC, MS, PS, HSPP, and E&U. Each division has a horizontal bar composed of several colored segments (orange, blue, grey, white). The total count for each division is labeled at the end of the bar: FPC (80), MS (106), PS (170), HSPP (197), and E&U (219). To the right of the chart is a vertical color legend.

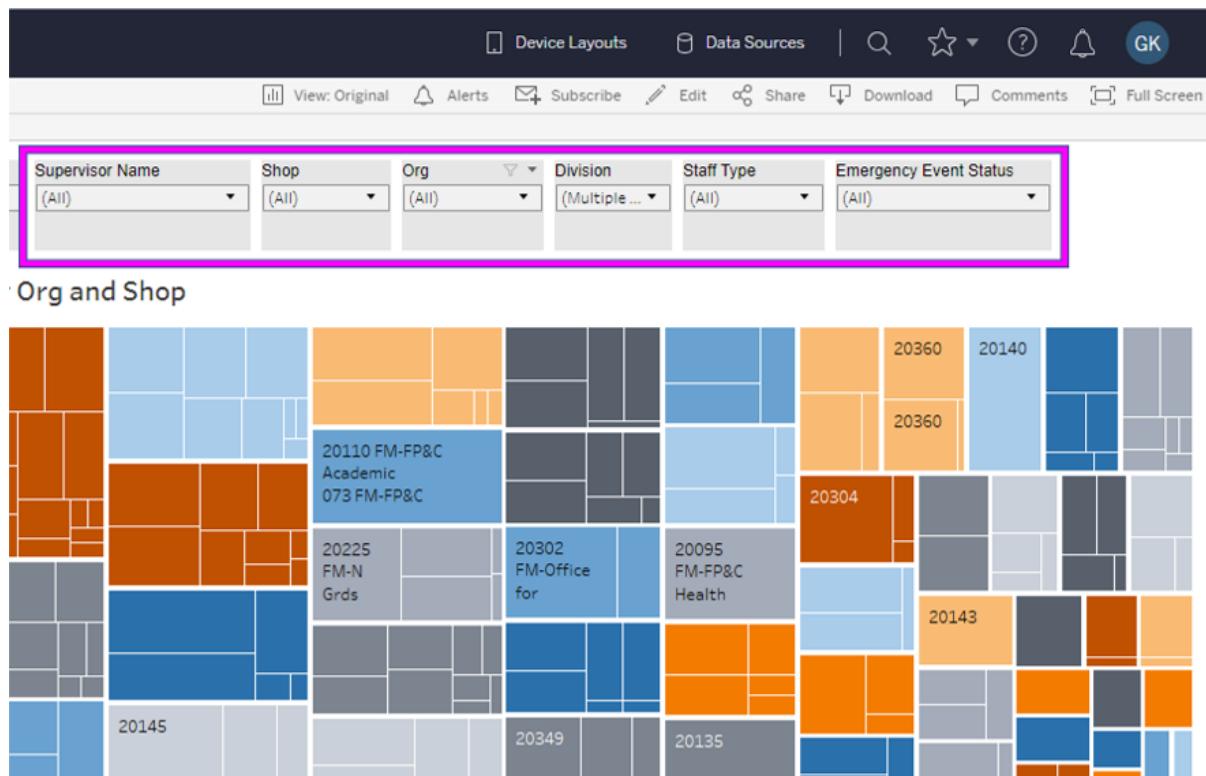
14. Hover over this information symbol to read about the workbook.

This screenshot is identical to the one above, showing the same dashboard layout and data. However, the information icon (the circle with an 'i') is now highlighted with a thick pink border, indicating it is being interacted with or selected.

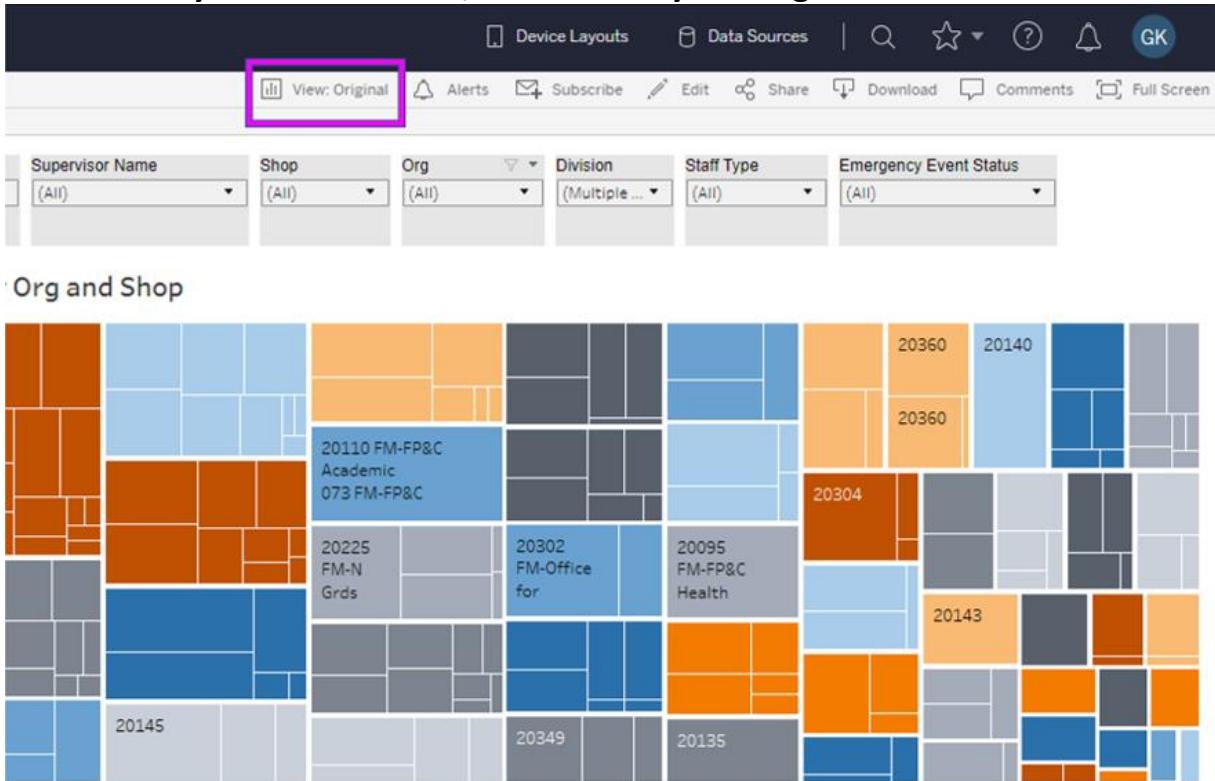
15. Focus on the upper right corner of the view



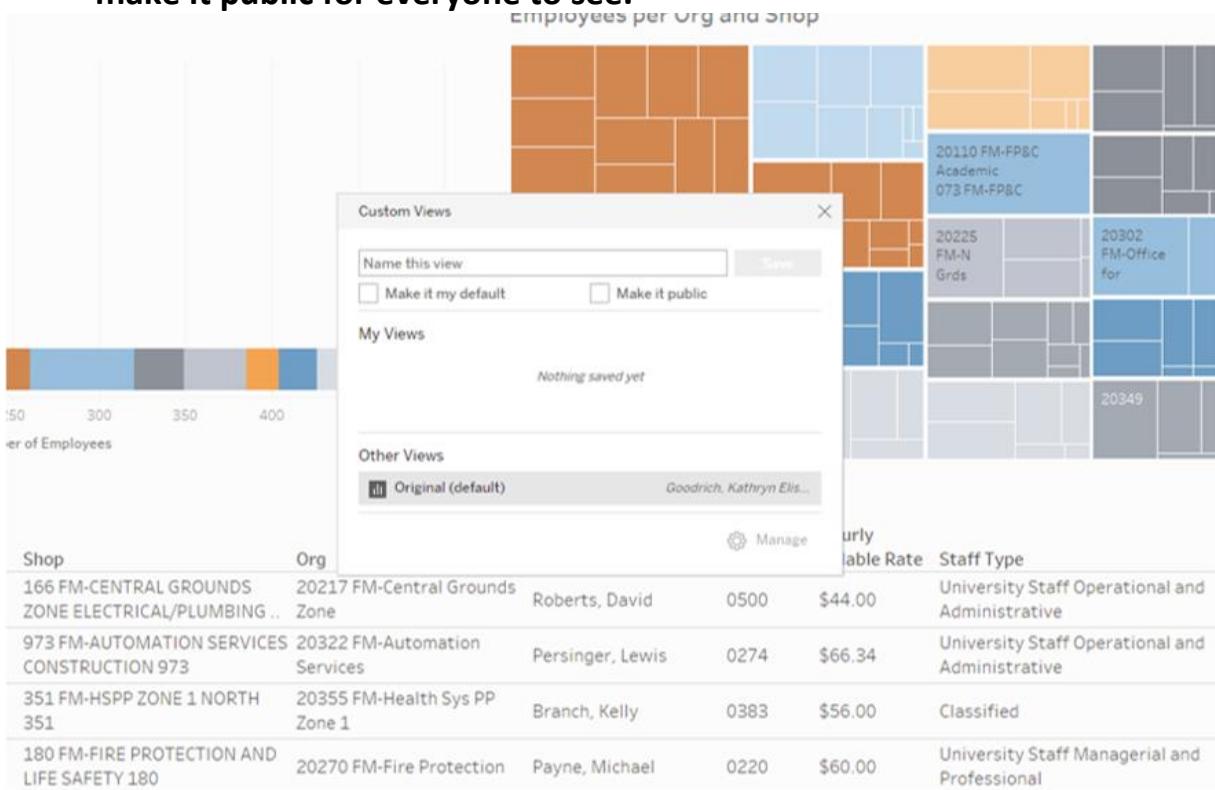
16. Filters are used to choose what data reaches the view



17. After you set the filters, save them by clicking on the view button



18. Choose what to name the view. If you want, you can make it your default and/or make it public for everyone to see.



19. Don't forget to save!

