Tableau Server - User Guide

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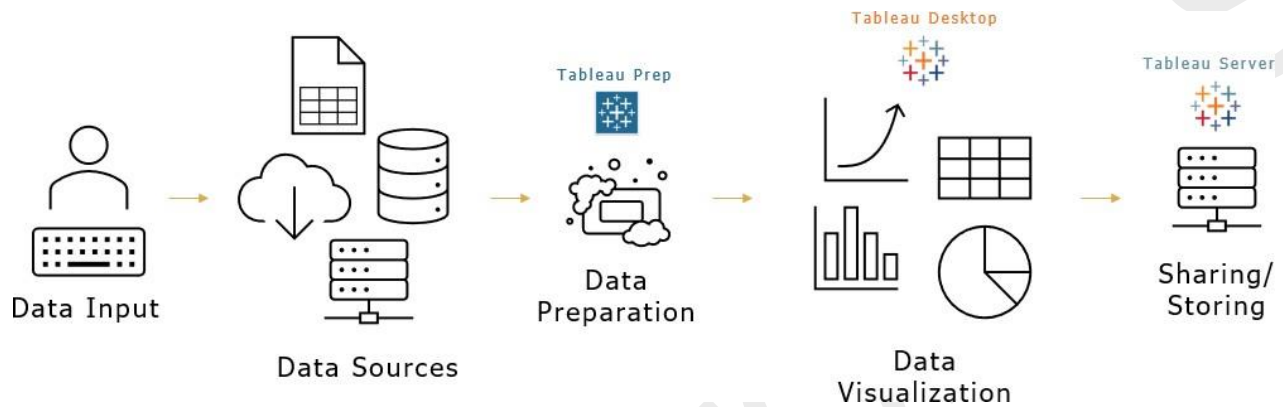## Contents

What is Tableau Server?

Tableau Server is a platform for sharing data that has been created using Tableau Desktop.

This is a schematic of data's journey:

The benefits of Tableau Server are that dashboards remain interactive, and permissions can be customized.

Gaining access to Tableau Server

To gain access to Tableau Server you need to have completed 'Tableau Server - Vanderbilt Introductory Training'.

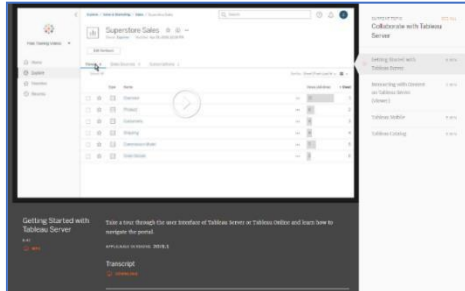This is available for self-registration and completion in Oracle Learn.

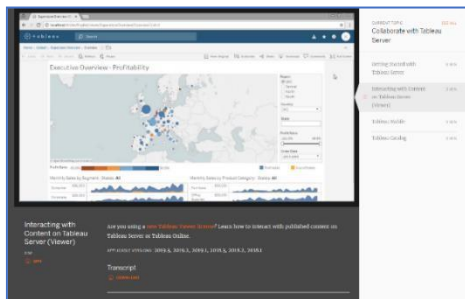Tableau Server Home - http://tableau.app.vanderbilt.edu/

Links to Video Tutorials

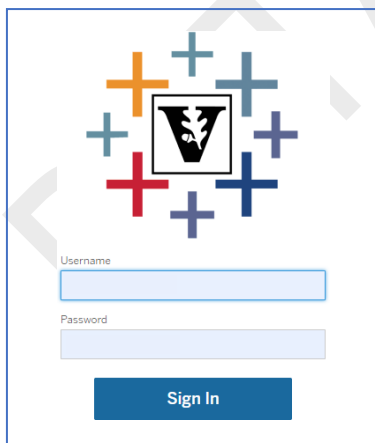[Video on getting started with Tableau Server](#) – 6 mins

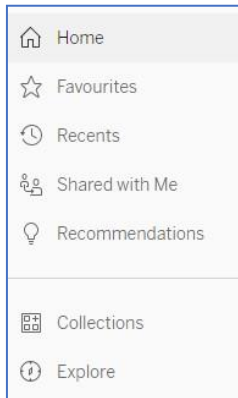[Video on interacting with content on Tableau Server](#) – 3 mins

Logging In

1. Log in to the VPN using Pulse Secure
2. If you are allocated a Tableau Server license you need to navigate to http://tableau.app.vanderbilt.edu/ to access the Server
3. It will ask you for your username and password

4. Type your normal VUNetID and password and you will be straight through to Tableau Server

Navigating Tableau Server

On the home page there are multiple tabs. This 'Navigating Tableau Server' section will guide you through them:
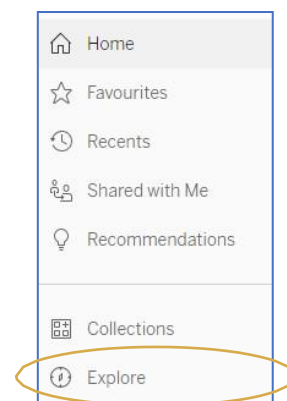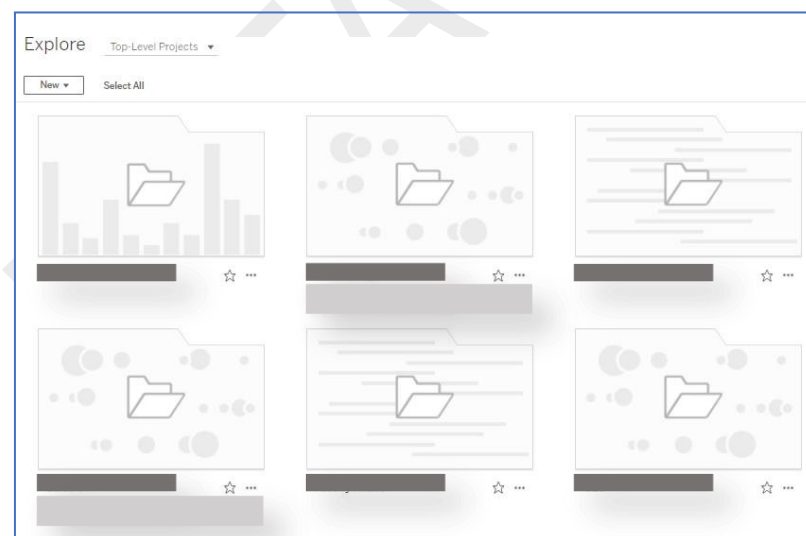

There are different license types for Tableau.

From least to most features: Viewer, Explorer, Creator and Site Administrator Creator.

This guide will cover features available to Viewers; other license types will have all the features mentioned along with extra.
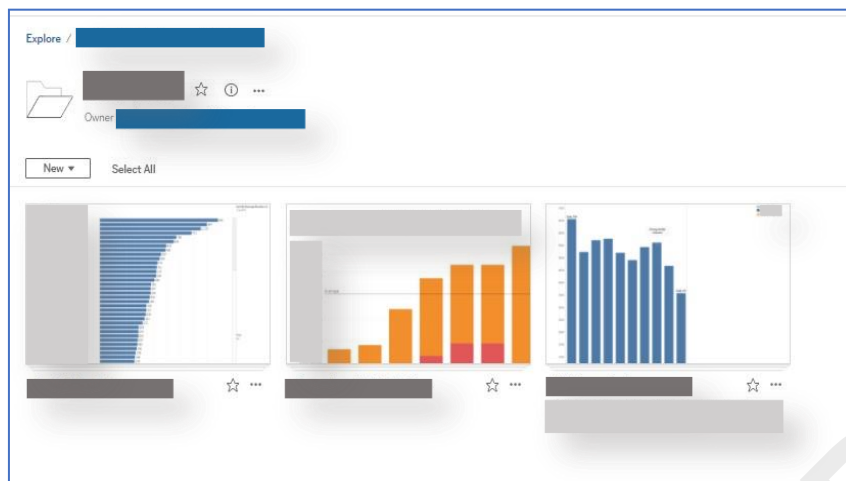
Explore

Shows all the Project folders you can access. Within each Project folder there may be multiple Workbooks. Within each Workbook there may be multiple Views.
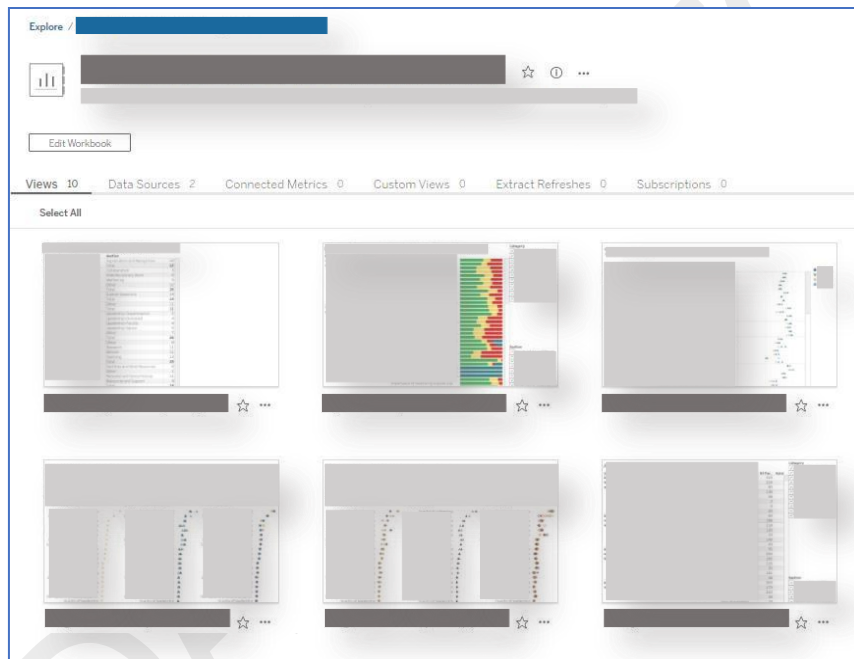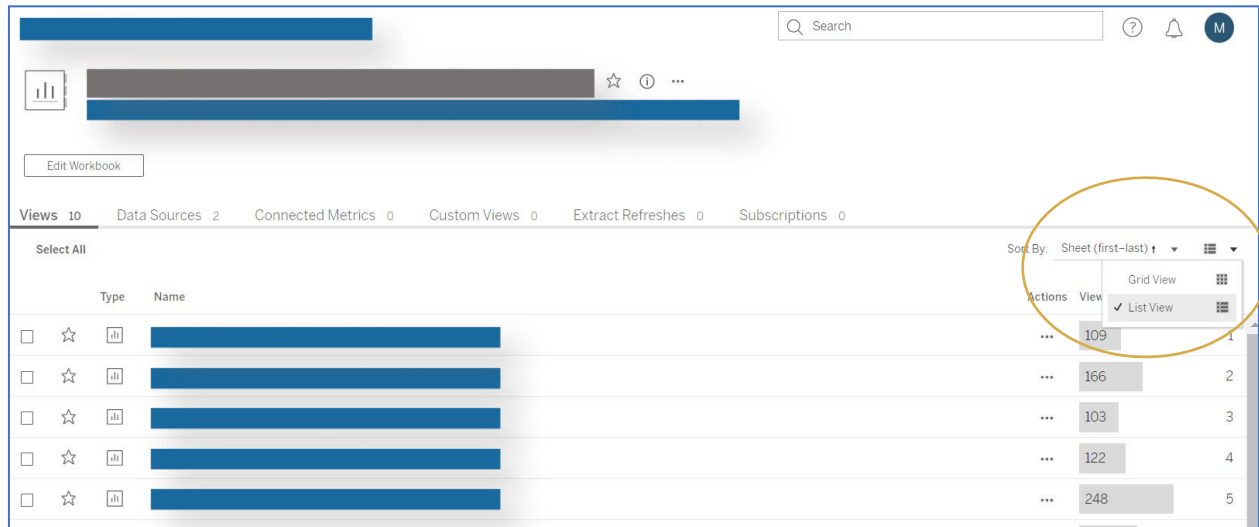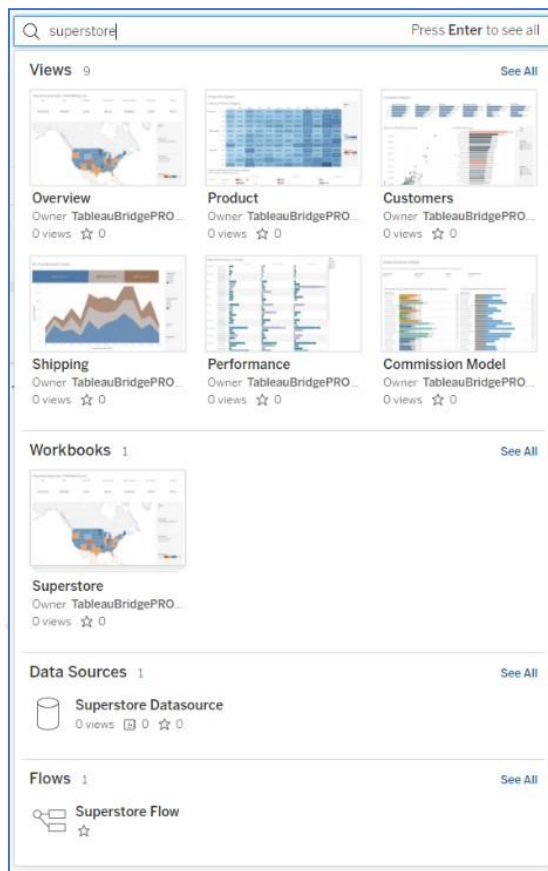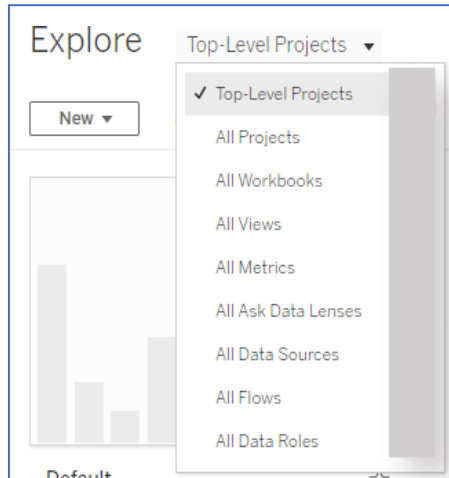
Projects:

Workbooks:

Views:

You can choose to view Projects, Workbooks and Views as a grid or a list (mid-right of screen):

You can search all content across the Server by using the Search bar (top-right of the screen):
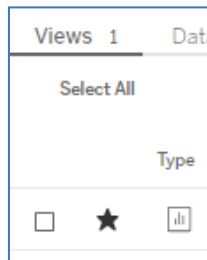
You can choose to view 'Top-Level Projects' or 'All Projects', 'All Workbooks' etc... from the dropdown menu available in the Top-Left of the Explore tab:
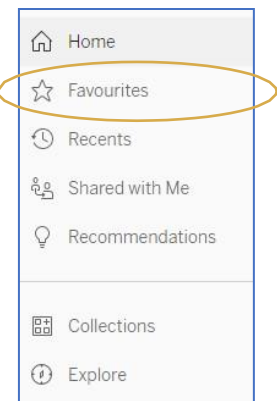

Favorites

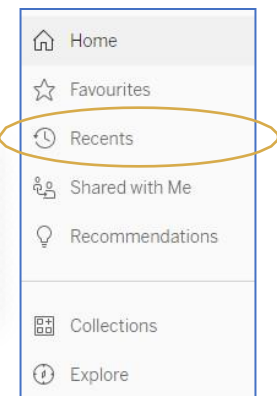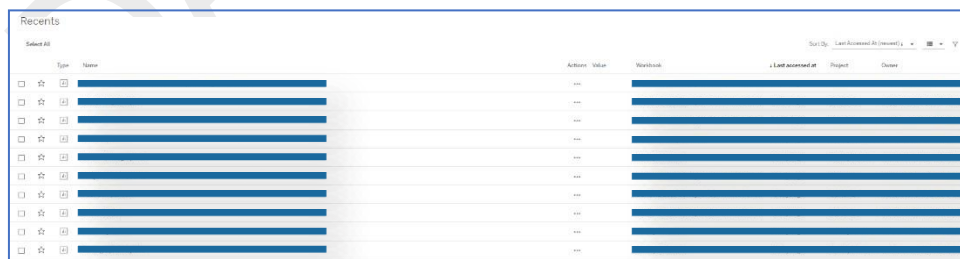You can select the star on any Project, Workbook or View to favorite it.

This will make it available to navigate to quickly on the Favorites tab.

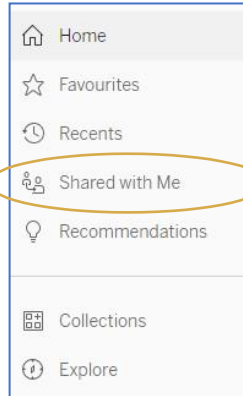## Recents

This shows Views you have been on recently.
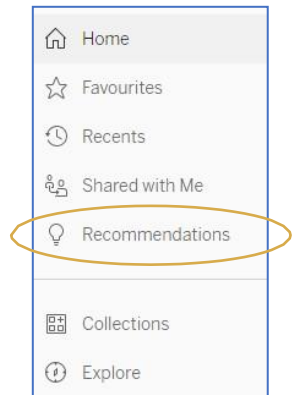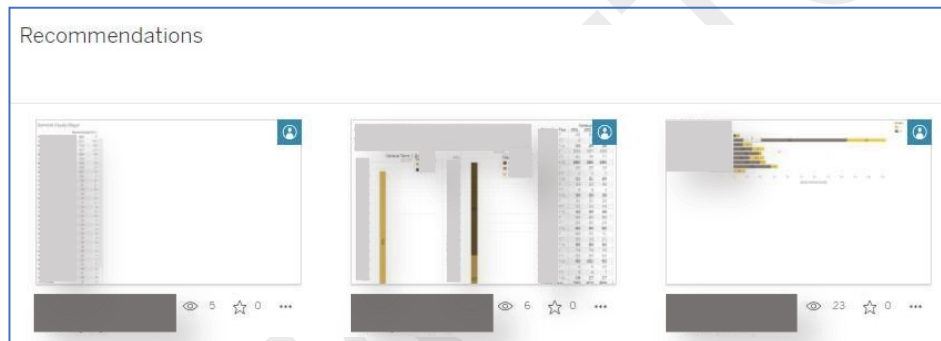
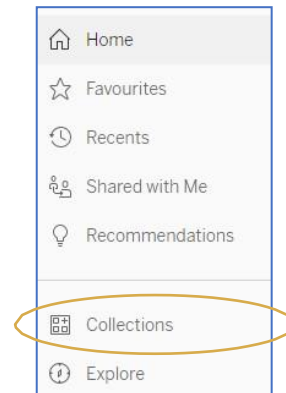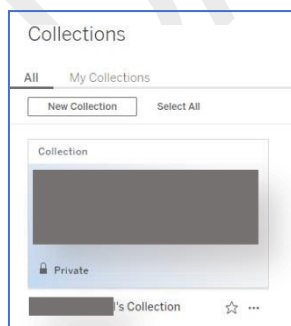## Shared with Me

Items shared with you.

Recommendations

Recommended Views based on Users with activity like your own e.g. Views other members of your team have been looking at.

Collections

You can create your own collection of workbooks to organize workbooks and views according to your own system.
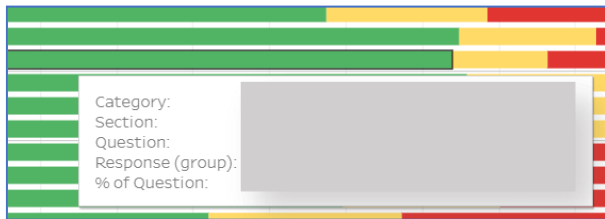
Interacting with Data in Tableau Server

With a Tableau Viewer license, you have 'read-only' access, which means you can only view the data; not edit it. This means you cannot break anything! (Explorers and Creators can edit data).

Hovering

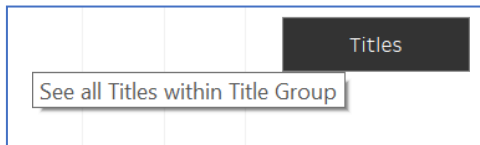Moving the cursor around the screen and hovering over data may encourage extra information to pop up.

An example of a pop-up (known as a tooltip) which appears when hovering over data:
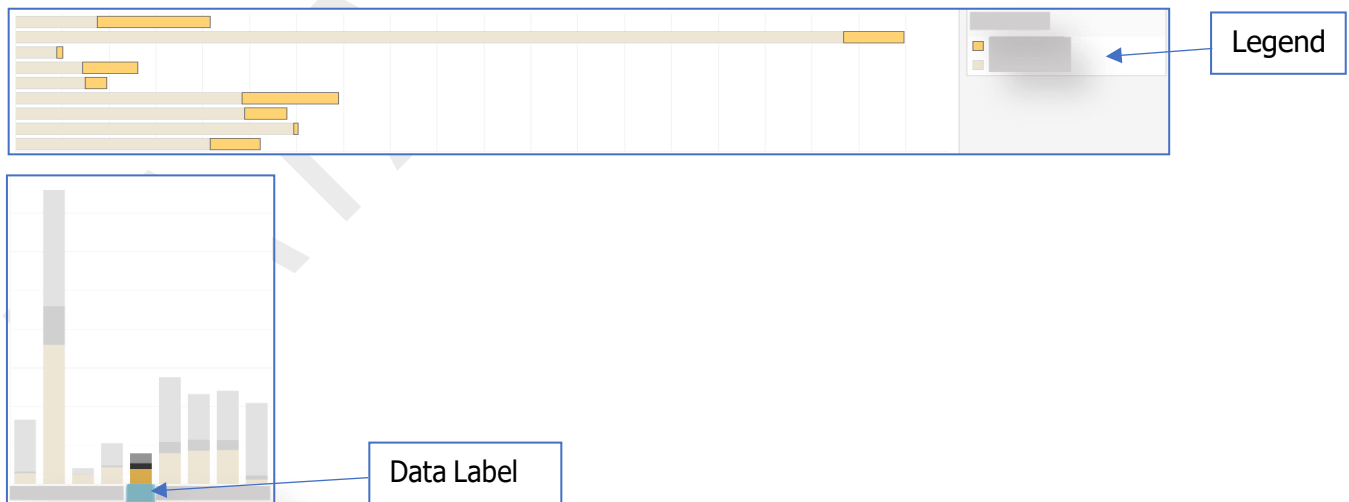

An example of a tooltip which appears when hovering over a button:

Highlighting

Clicking on legends and data labels may highlight everything in that category:
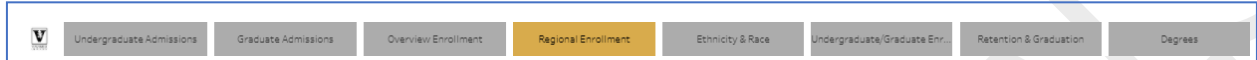

You can highlight multiple data points by holding down ctrl.

Navigating within workbooks

The workbook may have tabs along the top, which you can switch between to see more data views:

| Faculty Overview | Faculty by Tenure Level | Full Time Faculty |

Or navigation buttons within the workbook:

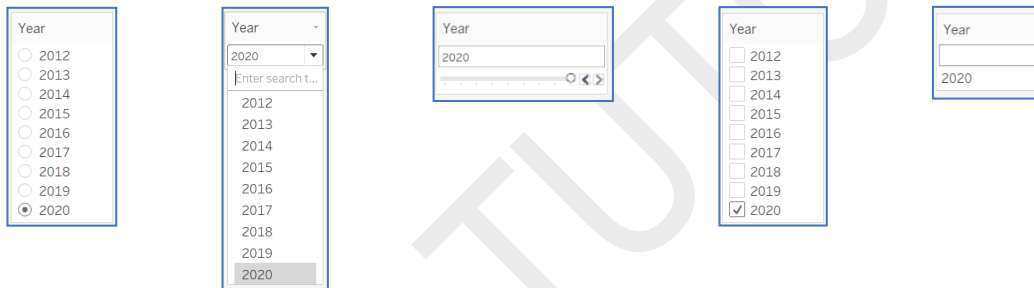| V | Undergraduate Admissions | Graduate Admissions | Overview Enrollment | Regional Enrollment | Ethnicity & Race | Undergraduate/Graduate Enr. | Retention & Graduation | Degrees |

Or you can return to the views page if no navigation is available.

Filtering
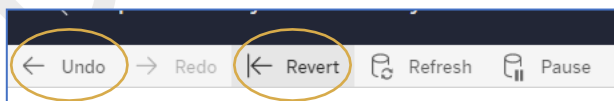
You may be able to filter the data in the view.

Some filters will allow you to select multiple options and others you select one at a time:

Depending on how the workbook has been created these filters may apply to multiple views.

To remove filters you can:

- Undo (Top-left of screen)
- Revert (Top-left of screen)
- Clear (Above filter itself)
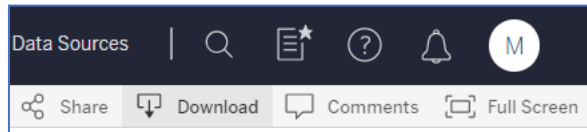- Select all the possible filter options

← Undo   → Redo |← Revert   Refresh   Pause

Revert will return the view to all its default filter and highlight settings.
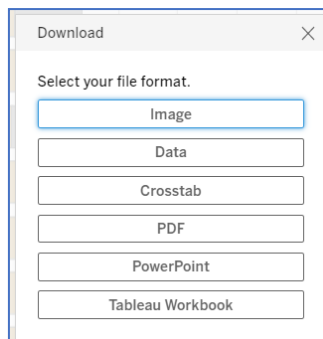
Downloading

You may be able to download the data within the workbook.

Several formats may be available: Image (.png), Data (.txt), Crosstab (.csv and .xlsx), PDF (.pdf), PowerPoint (.pptx), Tableau Workbook (.twbx).

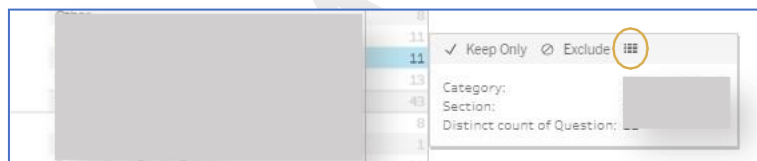Download button (Top-Right of screen):
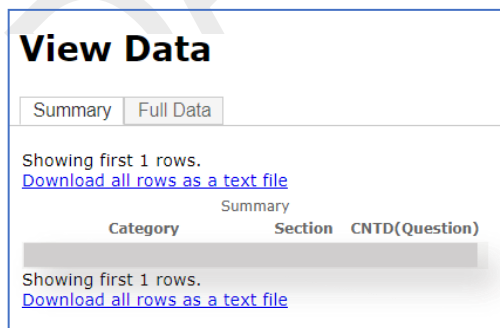

Download options:

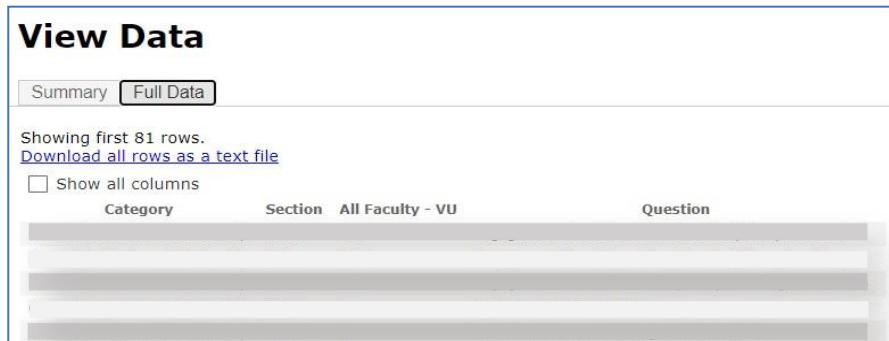Downloading as a .csv is often preferable to .xlsx as it removes formatting.

You can also see the data behind a data point by clicking it then seeing this menu pop up and selecting the view data button:

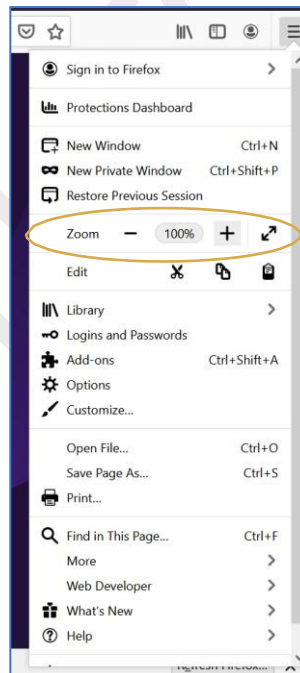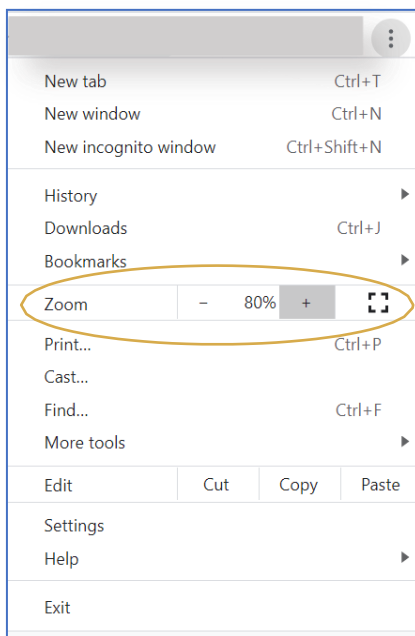

It will give you a summary version:

Then also a view of the full data:

View Data

Summary | Full Data

Showing first 81 rows.
Download all rows as a text file
☐ Show all columns

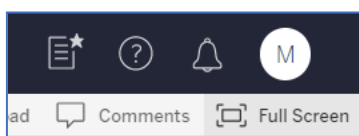| Category	Section	All Faculty - VU	Question

Sizing

Depending on your screen resolution, text and shapes may appear larger or smaller.

In your browser you can adjust the screen zoom by clicking the 3 dots/dashes in the top right of the screen:

You can also view the workbook in full screen mode (Top-Right of screen):

Extra information about the data

There may be an info icon within the workbook which when hovered over gives you extra information about the data set. This may have definitions and other helpful information for interpreting the data:

Ask Data

You may be able to connect to a data source using the 'Ask Data' feature. This allows you to ask questions using natural language. Please see [this video](#) for more information.