



Tableau Server - User Guide

Published by Vanderbilt University – Office of Data and Strategic Analytics – March 2022 – Version 1.1

Contents

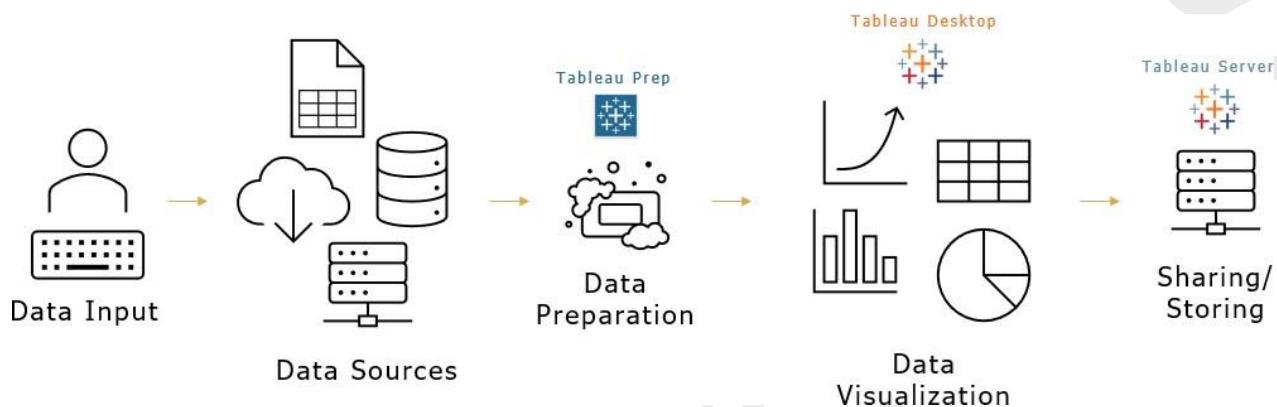
What is Tableau Server?	2
Gaining access to Tableau Server.....	2
Links to Video Tutorials	3
Logging In.....	3
Navigating Tableau Server.....	4
Explore	4
Favorites.....	7
Recents	7
Shared with Me.....	8
Recommendations	8
Collections	8
Interacting with Data in Tableau Server	9
Hovering.....	9
Highlighting	9
Navigating within workbooks	10
Filtering	10
Downloading	11
Sizing	12
Extra information about the data	13
Ask Data	13
Further support.....	13



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](#).



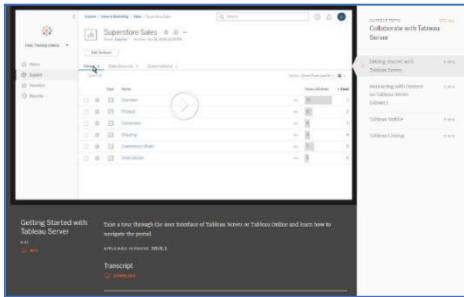
[Tableau Server Home](#) - <http://tableau.app.vanderbilt.edu/>



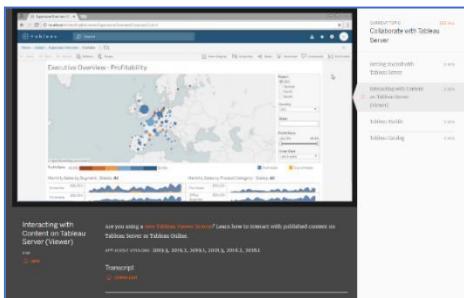


Links to Video Tutorials

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

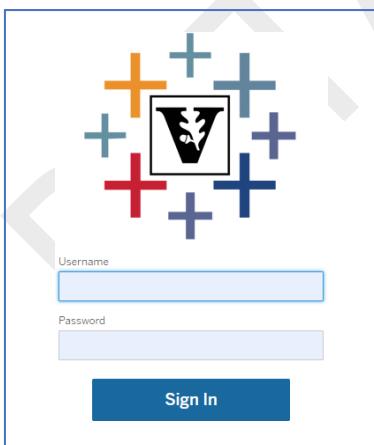


[Video on interacting with content on Tableau Server](#) – 3 mins



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

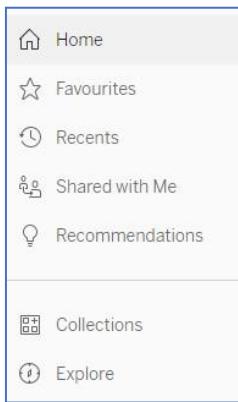


4. Type your normal VUNetID and password and you will be straight through to Tableau Server



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:

Two screenshots are shown side-by-side. On the left is a screenshot of the Tableau Explore page, showing a grid of project folders. On the right is a screenshot of the Tableau Home tab menu, with the "Explore" option circled in yellow. Both screenshots have a large diagonal watermark reading "AUTORIALS".



Workbooks:

A screenshot of the Tableau Explore interface. At the top, there's a navigation bar with "Explore /" and a search bar. Below it, a folder icon indicates the current location is "Owner". There are buttons for "New" and "Select All". Three workbooks are displayed as cards: 1) A treemap visualization with many small blue rectangles. 2) A bar chart with orange bars of varying heights. 3) A bar chart with blue bars of varying heights. Each card has a star and three-dot menu icon at the bottom.

Views:

A screenshot of the Tableau Views interface. At the top, there's a navigation bar with "Explore /" and a search bar. Below it, a folder icon indicates the current location is "Owner". There are buttons for "Edit Workbook", "Views 10", "Data Sources 2", "Connected Metrics 0", "Custom Views 0", "Extract Refreshes 0", and "Subscriptions 0". There is also a "Select All" button. Ten view cards are displayed in a grid: 1) A dashboard with multiple smaller visualizations. 2) A treemap visualization with green and yellow rectangles. 3) A dashboard with multiple smaller visualizations. 4) A bar chart with blue dotted lines. 5) A bar chart with blue dotted lines. 6) A dashboard with multiple smaller visualizations. Each card has a star and three-dot menu icon at the bottom.



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

A screenshot of the Tableau Server interface. At the top, there's a search bar, a help icon, a bell icon, and a user profile icon. Below the header, there are navigation links for 'Edit Workbook', 'Views 10', 'Data Sources 2', 'Connected Metrics 0', 'Custom Views 0', 'Extract Refreshes 0', and 'Subscriptions 0'. A dropdown menu on the right is circled in yellow, showing options for 'Grid View' and 'List View'. The main area displays a list of items with columns for 'Actions', 'View', '...', and a numerical value. The items are:

Actions	View	...	
...	109		1
...	166		2
...	103		3
...	122		4
...	248		5

You can search all content across the Server by using the Search bar (top-right of the screen):

A screenshot of the Tableau Server interface showing search results for 'superstore'. The search bar at the top contains 'superstore' and a note 'Press Enter to see all'. The results are organized into sections: 'Views 9', 'Workbooks 1', 'Data Sources 1', and 'Flows 1'. Each section shows a thumbnail, title, owner, views, and star rating. For example, the 'Views' section includes 'Overview', 'Product', 'Customers', 'Shipping', 'Performance', and 'Commission Model'. The 'Workbooks' section includes 'Superstore'. The 'Data Sources' section includes 'Superstore Datasource'. The 'Flows' section includes 'Superstore Flow'.



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:

The screenshot shows the Tableau 'Explore' tab interface. On the left, there's a small chart visualization labeled 'Default'. To the right is a dropdown menu titled 'Top-Level Projects' with a checkmark next to it. The menu lists several options: 'Top-Level Projects' (selected), 'All Projects', 'All Workbooks', 'All Views', 'All Metrics', 'All Ask Data Lenses', 'All Data Sources', 'All Flows', and 'All Data Roles'. The background of the interface is light blue.

Favorites

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

This screenshot shows a portion of the Tableau interface. It includes tabs for 'Views' (1) and 'Data'. Below these are sections for 'Select All' and 'Type'. At the bottom, there are three icons: a square, a star (which is highlighted in red), and a bar chart. The overall background is white.

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

This screenshot shows the Tableau navigation sidebar. It includes links for 'Home', 'Favourites' (which is highlighted with a yellow oval), 'Recents', 'Shared with Me', 'Recommendations', 'Collections', and 'Explore'. The background is white.

Recents

This shows Views you have been on recently.

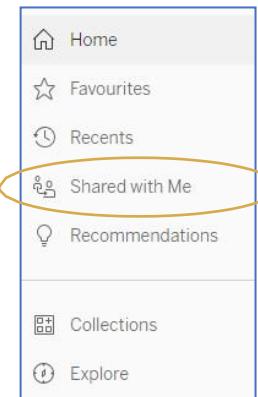
This screenshot shows the 'Recents' tab in Tableau. It displays a list of recent views, each with a star icon indicating if it's favorited. The columns include 'Type', 'Name', 'Actions', 'Value', 'Workbook', 'Last accessed at', 'Project', and 'Owner'. The background is white.

This screenshot shows the Tableau navigation sidebar. It includes links for 'Home', 'Favourites', 'Recents' (which is highlighted with a yellow oval), 'Shared with Me', 'Recommendations', 'Collections', and 'Explore'. The background is white.



Shared with Me

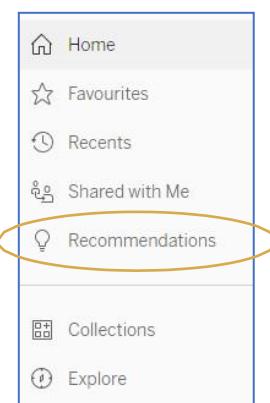
Items shared with you.



Recommendations

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

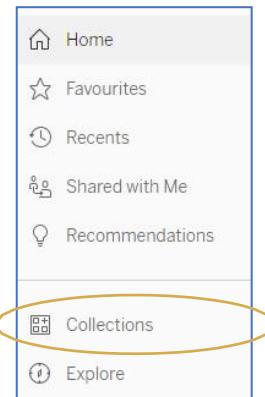
A screenshot of the Tableau Recommendations view. It displays three recommended dashboards. Each dashboard thumbnail includes a lock icon, a view count (5, 6, 23), a star rating (0, 0, 0), and a more options menu (...). The title "Recommendations" is visible at the top left.



Collections

You can create your own collection of workbooks to organize workbooks and views according to your own system.

A screenshot of the Tableau Collections view. It shows a collection named "Collection" which is marked as "Private". Below it, there is a link to "My Collection" and a "Select All" button. At the bottom, there is a "New Collection" button and a "... more" button.



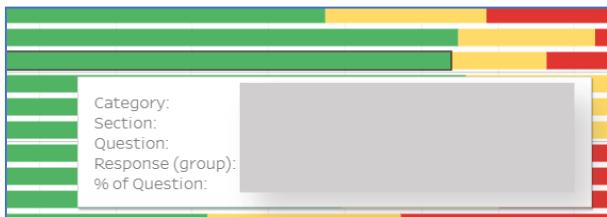
Interacting with Data in Tableau Server

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).

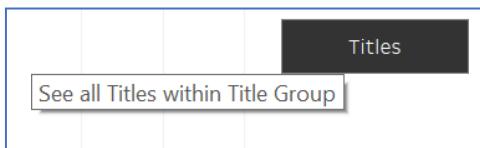
Hovering

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:

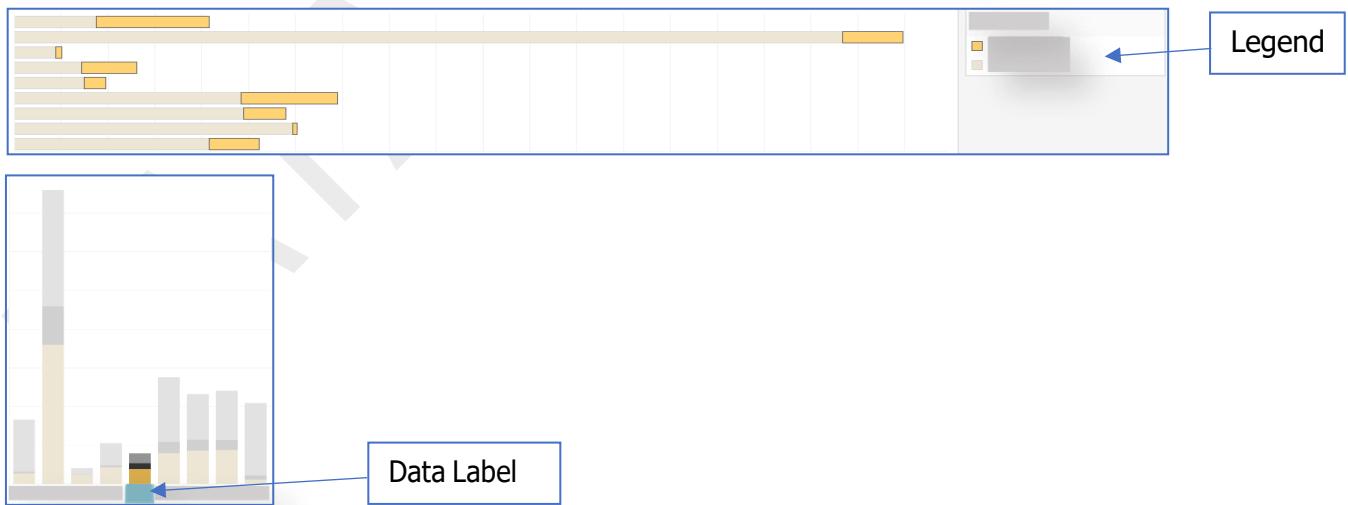


An example of a tooltip which appears when hovering over a button:



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:



Or navigation buttons within the workbook:

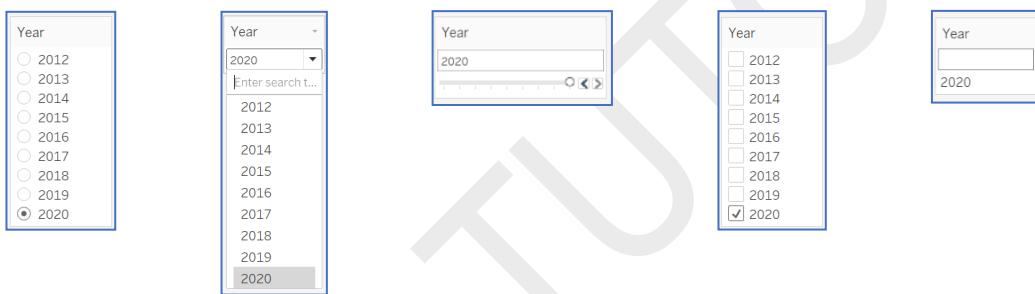


Or you can return to the views page if no navigation is available.

Filtering

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

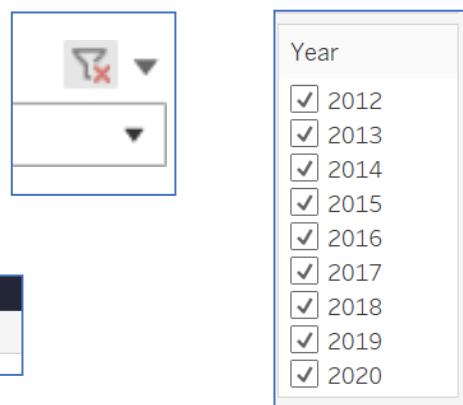
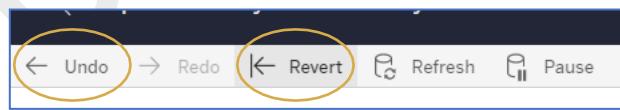
Some filters will allow you to select multiple options and others you select one at a time:



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



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

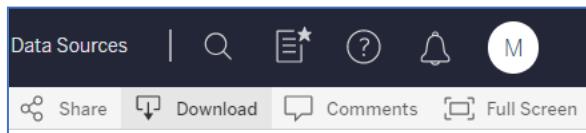


Downloading

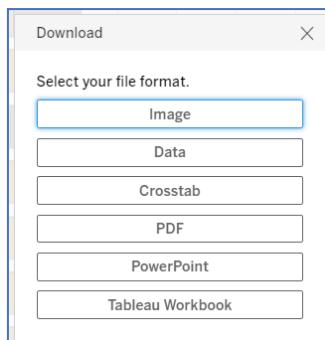
You may be able to download the data within the workbook.

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):

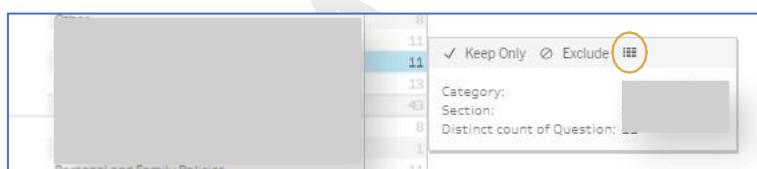


Download options:



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:

The screenshot shows the 'View Data' summary page. At the top, it says 'View Data' and has tabs for 'Summary' and 'Full Data'. Under 'Summary', it says 'Showing first 1 rows.' and provides a link to 'Download all rows as a text file'. Below this, there is a table header with columns: 'Category', 'Section', and 'CNTD(Question)'. At the bottom, it says 'Showing first 1 rows.' again and provides another link to 'Download all rows as a text file'.



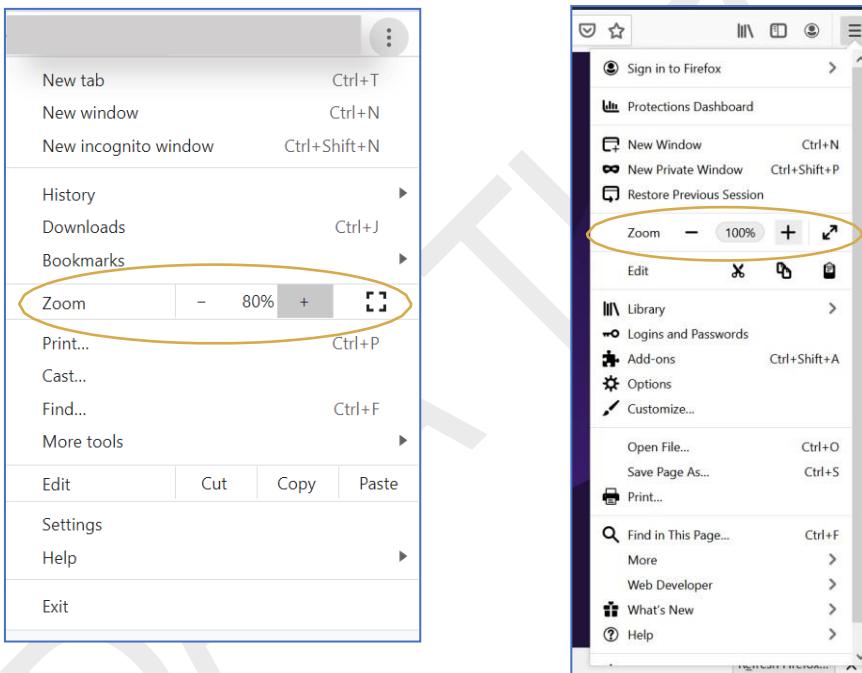
Then also a view of the full data:

A screenshot of the Tableau View Data interface. At the top, there are two tabs: "Summary" (unselected) and "Full Data" (selected). Below the tabs, it says "Showing first 81 rows." and "Download all rows as a text file". There is a checkbox labeled "Show all columns". The main area shows a grid with three columns: "Category", "Section", and "Question". Each row has a light gray background, and the column headers are bolded.

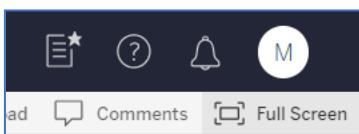
Sizing

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):



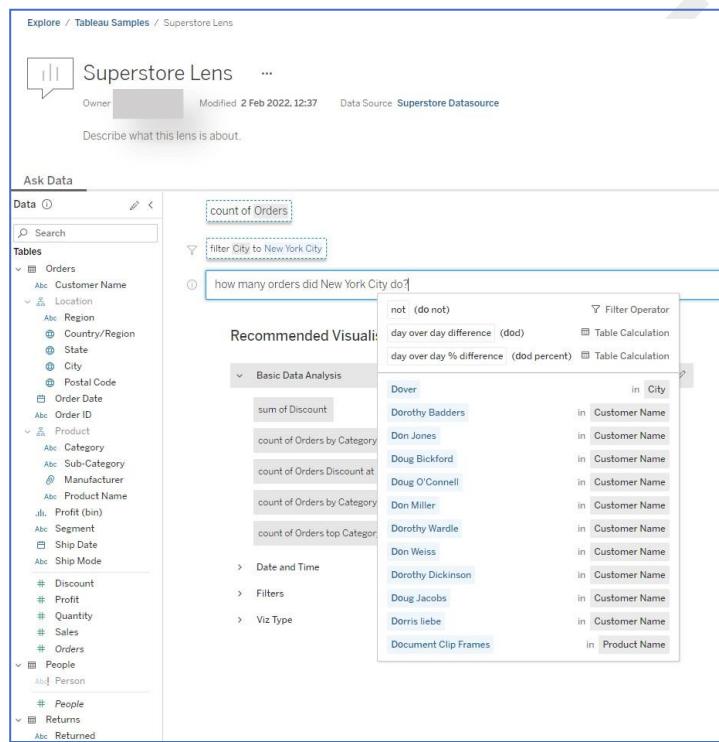
Extra information about the data

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.



The screenshot shows the Tableau interface for the Superstore Lens. At the top, it says "Explore / Tableau Samples / Superstore Lens". Below that, there's a "Superstore Lens" card with details like "Owner [redacted]", "Modified 2 Feb 2022, 12:37", and "Data Source Superstore Datasource". A text input field says "Describe what this lens is about." Below this, the "Ask Data" section is active. A question "how many orders did New York City do?" is typed into the search bar. A dropdown menu titled "Recommended Visualizations" appears, showing options like "Basic Data Analysis", "Date and Time", "Filters", and "Viz Type". Under "Basic Data Analysis", there are several options with dropdown menus for filters, such as "not (do not)", "day over day difference (dod)", "day over day % difference (dod percent)", and "Table Calculation". A list of names (Dover, Dorothy Badders, Don Jones, Doug Bickford, Doug O'Connell, Don Miller, Dorothy Wardle, Don Weiss, Dorothy Dickinson, Doug Jacobs, Dorris liebe) is shown, each with a dropdown menu indicating they are in "Customer Name".