

As the first user on the account, you have to complete the following steps before other people can dig into your organization's data.

Before you start, review these talks to identify your ideal use case. The context helps you make account-related decisions and use ThoughtSpot effectively.

ThoughtSpot Success Series

Defining a ThoughtSpot Use Case



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Use Case Prioritization



[Watch video→](#)

Ready to get started?

Step 1: Create a ThoughtSpot Community account

A ThoughtSpot Community account lets you ask questions in our product forums, explore best practices from other customers, sign up for events, and contact support.

[Create a Community account →](#)

Step 2: Activate your ThoughtSpot Cloud account

We will send you an email that contains the administrator credentials to log in for the first time. Check your inbox, then navigate to your new cluster. Stay logged in to complete the rest of the setup.

Step 3: Create users and groups, choose authentication method

Review the available user groups and privileges so you can assign people to the correct roles. We recommend that you create admins and analysts in this step, especially if you plan to collaborate on the remaining data setup.

[Understanding privileges →](#)
[Data security →](#)

[Managing authentication with SAML →](#)
[Managing local authentication →](#)

Step 4: Connect to your data source

Completing this step lets all users in your organization perform live queries. Choose your cloud data warehouse type, and follow the connection instructions.

[Amazon Redshift →](#)

[Azure Synapse →](#)

[Databricks →](#)

[Google BigQuery →](#)

[Oracle ADW →](#)

[Snowflake →](#)

[Starburst →](#)

Step 5: Model your data for searches

ThoughtSpot automatically optimizes your data for search. It models and configures most details. However, we recommend that you adjust the modeling settings to align with your identified use cases, and improve the experience for other users.

[Data modeling →](#)

[Join tables →](#)

Step 6: Create a worksheet

Worksheets make it easier for everyone in your organization to search data and create visualizations. Use the following step-by-step instructions to create your first worksheet.

[Create and use worksheets →](#)

Step 7: Learn search essentials

After you finish creating worksheets, you are ready to search. Review the key concepts to get started, and how to help others in your organization become effective searchers.

[Search overview →](#)

[Keywords reference →](#)

[Understanding charts →](#)

[Understanding formulas in searches →](#)

Step 8: Make a default pinboard

Pinboards are interactive collections of charts and tables. Set up a shared pinboard now, so everyone who joins your organization can access valuable information.

[Basic pinboard usage →](#)



Step 9: Onboard your colleagues

Any time you create a new user, immediately add them to a user group. Configure that user group to use a specific data source, choose initial pinboards, and specify the text of the person's welcome email. We recommend that you also prepare a support strategy for data-specific questions.

[Onboarding users →](#)

Step 10: Track your organization's usage

ThoughtSpot administrators have built-in pinboards to monitor adoption and usage.

[Performance tracking pinboard →](#)

[User adoption pinboard→](#)

Keep learning

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