Tableau Server Basics

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

<	Home Favorites		
 ᢙ Home ④ Explore ☆ Favorites ④ Recents 			
	Custodial Services Recents	★ 🚥 Weekly Time Trend 🖈	

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

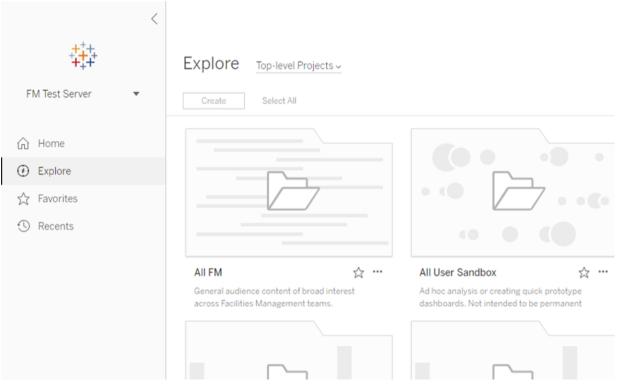


Favorites

3. Favorite by clicking the star



4. The explore tab contains all the project folders



5. Click on a project folder

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FM Test Server	Explore Top-level Projects ~	
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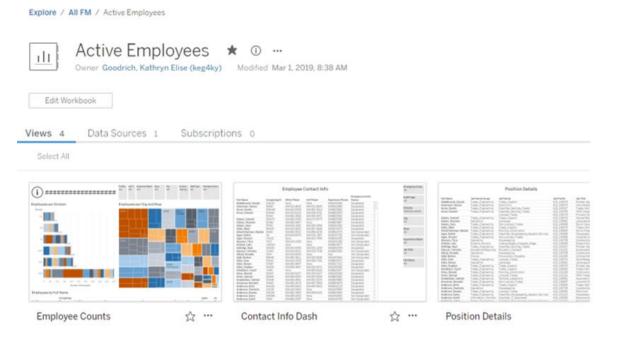
6. This takes you to the workbooks inside the folder

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7. Click on a workbook

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8. This takes you to the views inside the workbook



9. Click on a view

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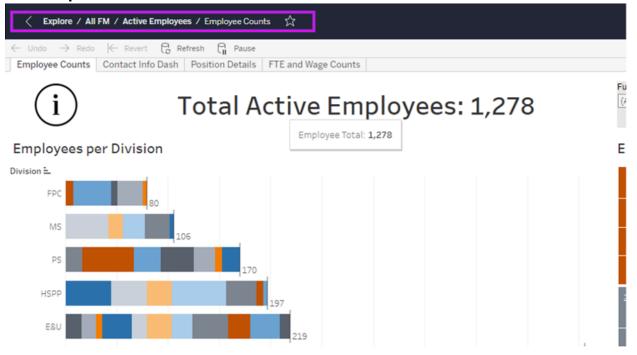
10. This is a view. Views can have graphs, tables, and filters.

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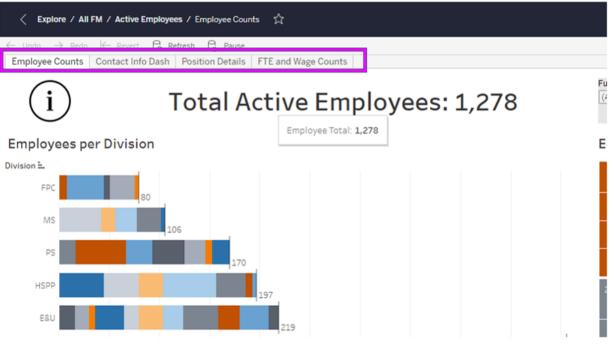
11. Focus on the upper left corner of the view



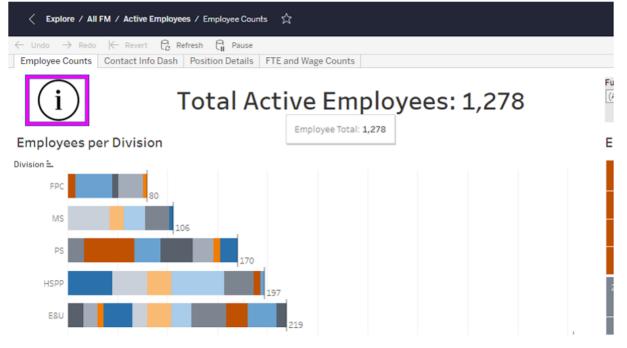
12. This is the directory of the view. Use this to go back to the workbook, folder, or explore



13. These tabs are the other views in the workbook



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

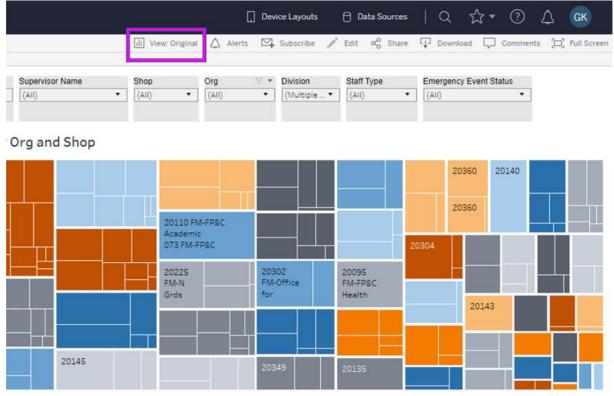


15. Focus on the upper right corner of the view

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

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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.

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351 FM-HSPP ZONE 1 NORTH 351	20355 Zone 1	FM-Health Sys PP	Branch, Kelly	0383	\$56.00	Classified	
180 FM-FIRE PROTECTION AND LIFE SAFETY 180	20270	FM-Fire Protection	Payne, Michael	0220	\$60.00	University Staff Professional	Managerial and

19. Don't forget to save!

