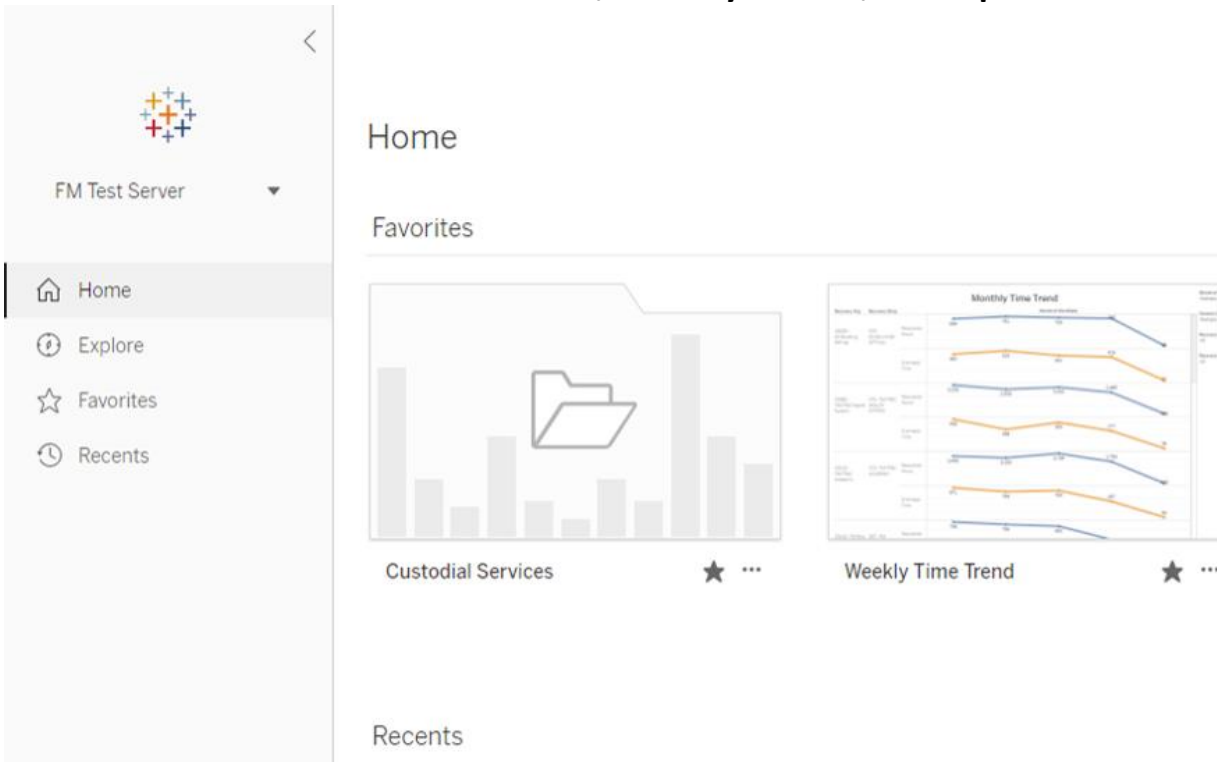


Tableau Server Basics

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



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

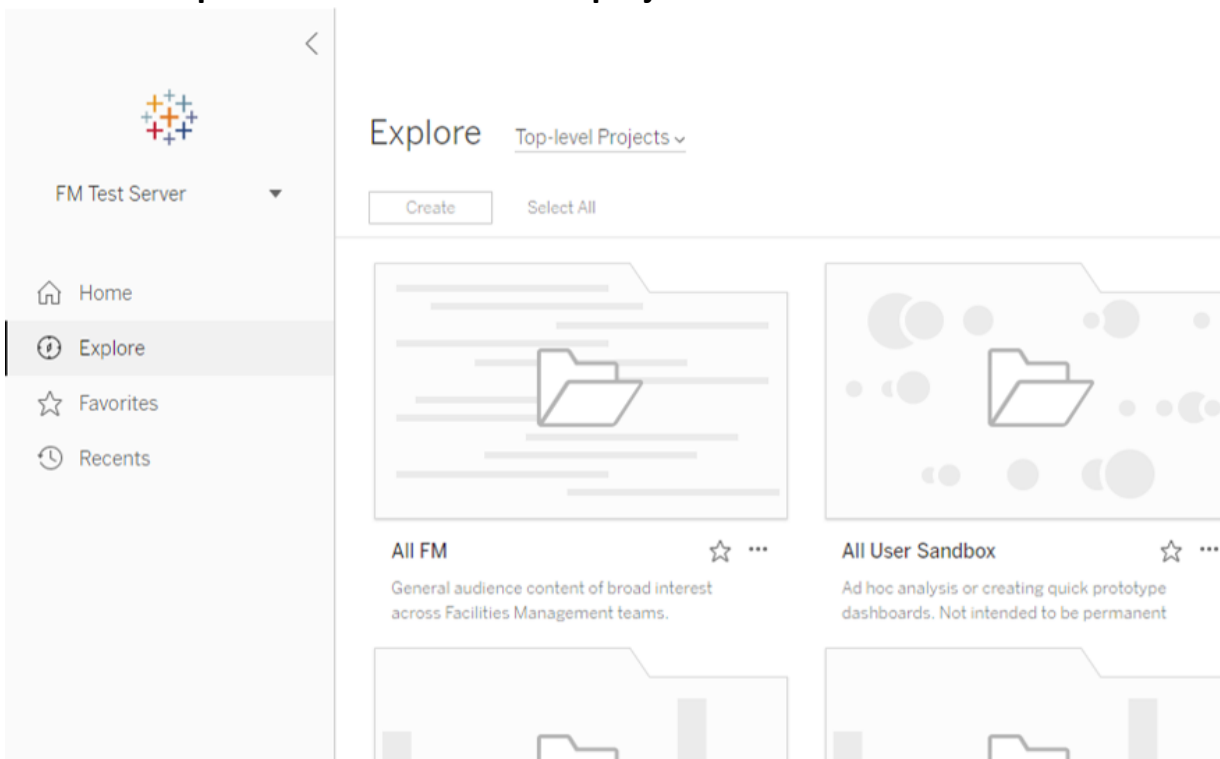
Favorites



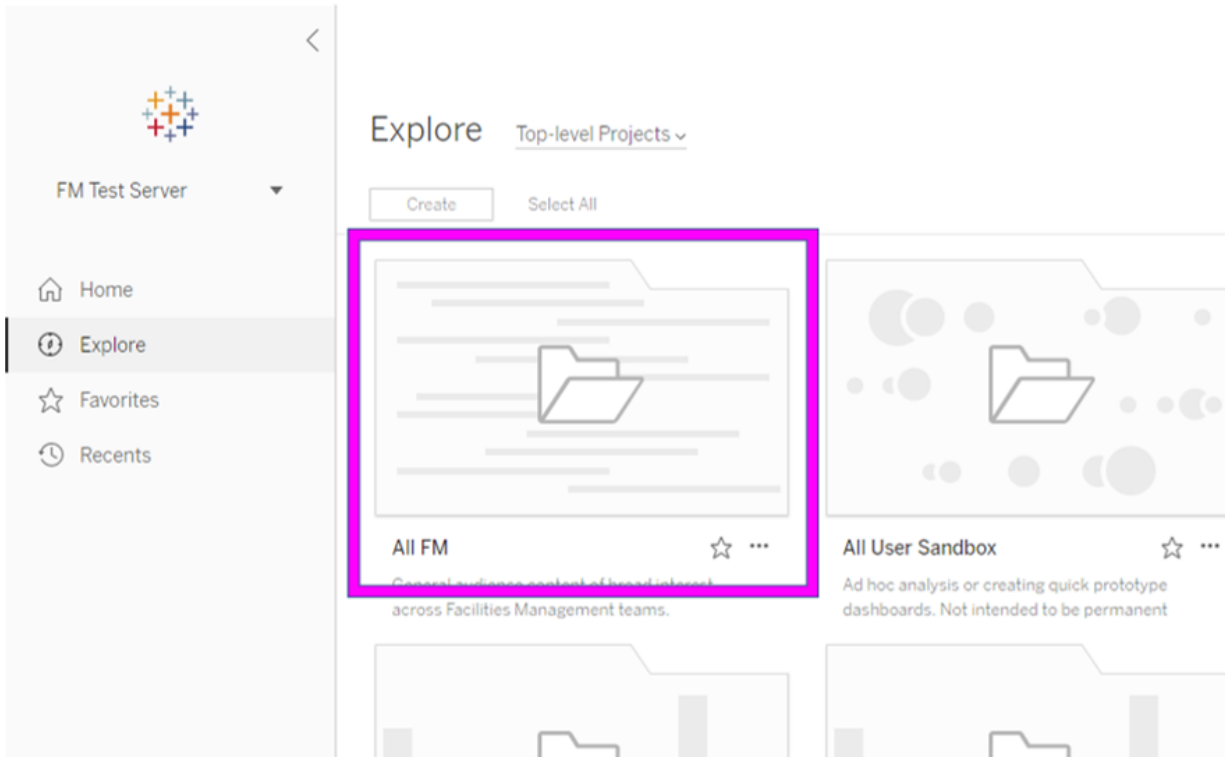
3. Favorite by clicking the star



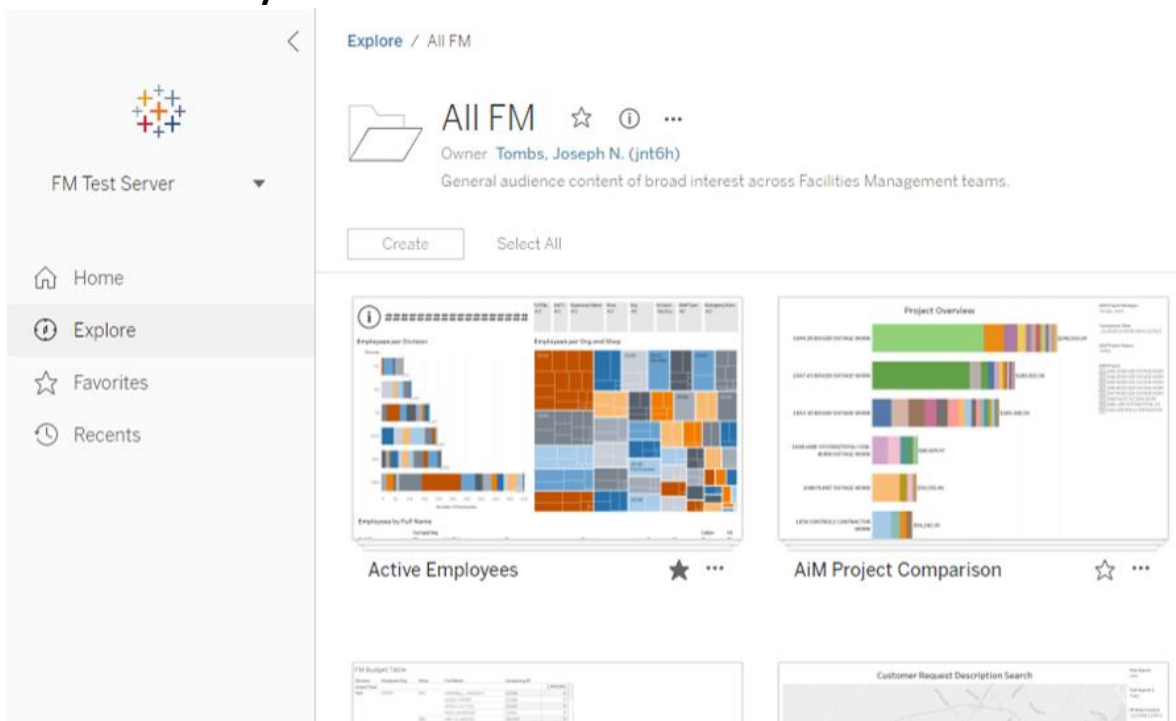
4. The explore tab contains all the project folders



5. Click on a project folder



6. This takes you to the workbooks inside the folder



7. Click on a workbook

Explore / All FM

All FM ☆ ⓘ ...
Owner Tombs, Joseph N. (jnt6h)
General audience content of broad interest across Facilities Management teams.

Create Select All

Active Employees ☆ ...

AiM Project Comparison ☆ ...

8. This takes you to the views inside the workbook

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

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 ☆ ...

Employee Contact Info

Full Name	Job Title	Supervisor Name	Shop	Org	Division	Staff Type	Emergency Event Status
Abdulsalam, Zouzek	Plumber Apprentice	Roberts, David	166 FM-CENTRAL GROUNDS ZONE ELECTRICAL/PLUMBING	20217 FM-Central Grounds Zone		University Staff Operational and Administrative	July 23, 2018
Ackerman, Steven	Senior Electronic Technician-ELECS1	Persinger, Lewis	973 FM-AUTOMATION SERVICES CONSTRUCTION 973	20322 FM-Automation Services		University Staff Operational and Administrative	August 4, 2003
Acree, Dennis	Trades Utility Senior Worker	Branch, Kelly	351 FM-HSPP ZONE 1 NORTH 351	20355 FM-Health Sys PP Zone 1		Classified	March 25, 1994
Acree, Edward	Fire and Life Safety Systems Manager	Payne, Michael	180 FM-FIRE PROTECTION AND LIFE SAFETY 180	20270 FM-Fire Protection		University Staff Managerial and Professional	September 3, 1998
Adams, Garnett	HVAC Installation and Repair	Branch, Kelly	347 FM-HSPP ZONE 1 SOUTH HVAC 347	20355 FM-Health Sys PP Zone 1		Classified	July 1, 1993
	Cabinet Builder Assistant	Harris, Walter	584 FM-PS CABINET SHOP 584	20170 FM-Project Services-Carpentry/Masonry		University Staff Operational and Administrative	March 7, 2016

Contact Info Dash ☆ ...

Position Details

Full Name	Job Title	Supervisor Name	Shop	Org	Division	Staff Type	Emergency Event Status
Abdulsalam, Zouzek	Plumber Apprentice	Roberts, David	166 FM-CENTRAL GROUNDS ZONE ELECTRICAL/PLUMBING	20217 FM-Central Grounds Zone		University Staff Operational and Administrative	July 23, 2018
Ackerman, Steven	Senior Electronic Technician-ELECS1	Persinger, Lewis	973 FM-AUTOMATION SERVICES CONSTRUCTION 973	20322 FM-Automation Services		University Staff Operational and Administrative	August 4, 2003
Acree, Dennis	Trades Utility Senior Worker	Branch, Kelly	351 FM-HSPP ZONE 1 NORTH 351	20355 FM-Health Sys PP Zone 1		Classified	March 25, 1994
Acree, Edward	Fire and Life Safety Systems Manager	Payne, Michael	180 FM-FIRE PROTECTION AND LIFE SAFETY 180	20270 FM-Fire Protection		University Staff Managerial and Professional	September 3, 1998
Adams, Garnett	HVAC Installation and Repair	Branch, Kelly	347 FM-HSPP ZONE 1 SOUTH HVAC 347	20355 FM-Health Sys PP Zone 1		Classified	July 1, 1993
	Cabinet Builder Assistant	Harris, Walter	584 FM-PS CABINET SHOP 584	20170 FM-Project Services-Carpentry/Masonry		University Staff Operational and Administrative	March 7, 2016

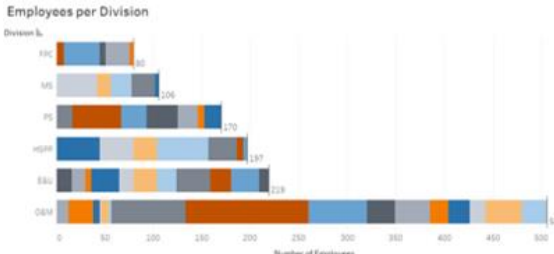
Position Details

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

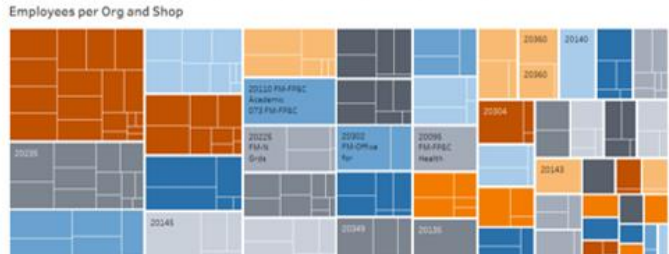
Explore / All FM / Active Employees / Employee Counts

Total Active Employees: 1,278

Employees per Division



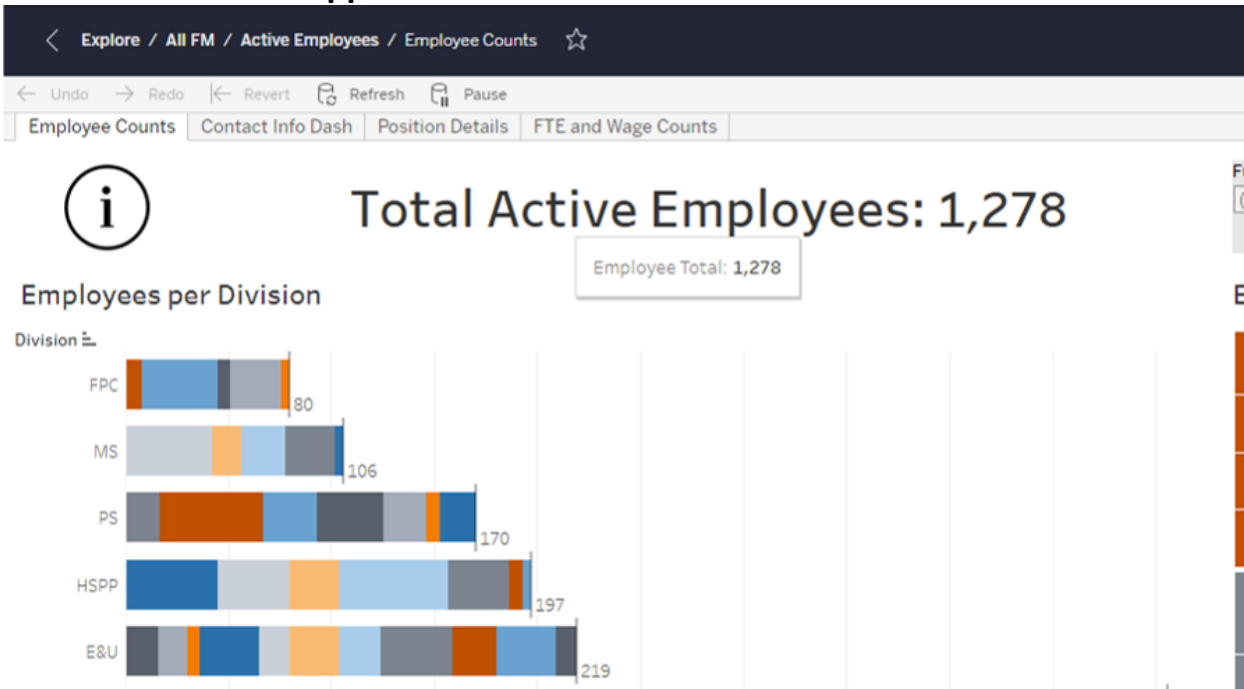
Employees per Org and Shop



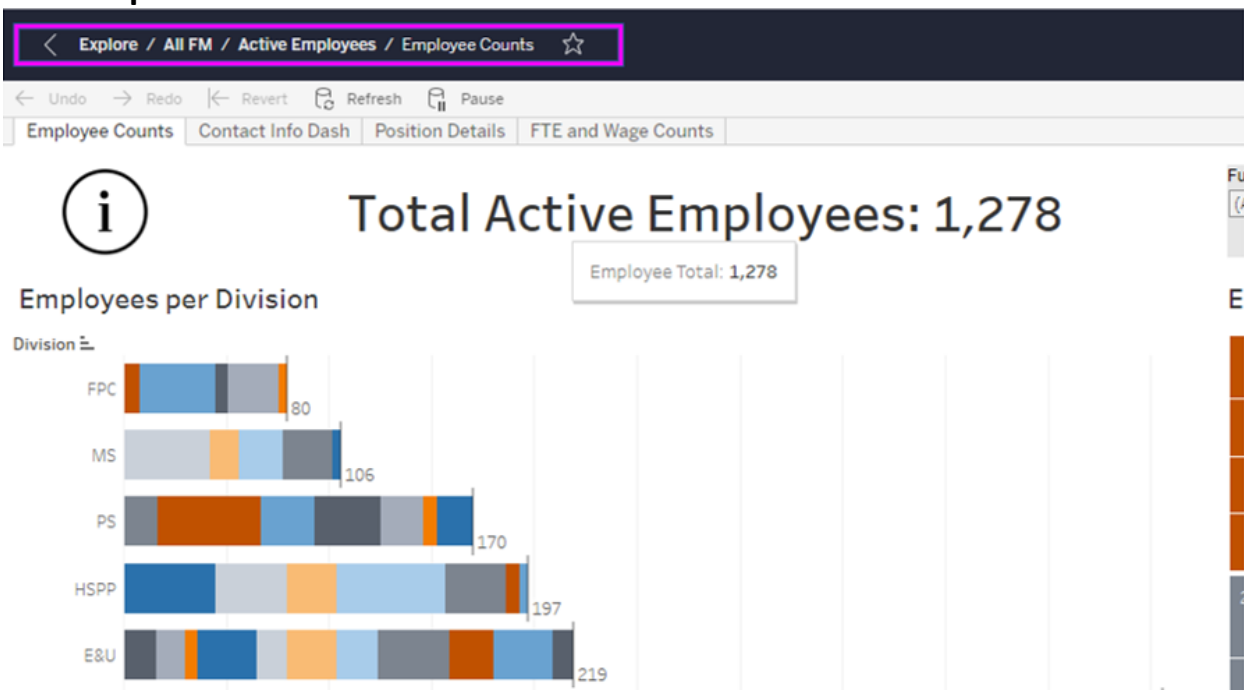
Employees by Full Name

Full Name	Computing ID	Job Title	Shop	Org	Supervisor Name	Labor Class	Hourly Billable Rate	Staff Type	Day of Original Hire Date	
Abdulsalam, 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-ELECS1	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 351	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	➔

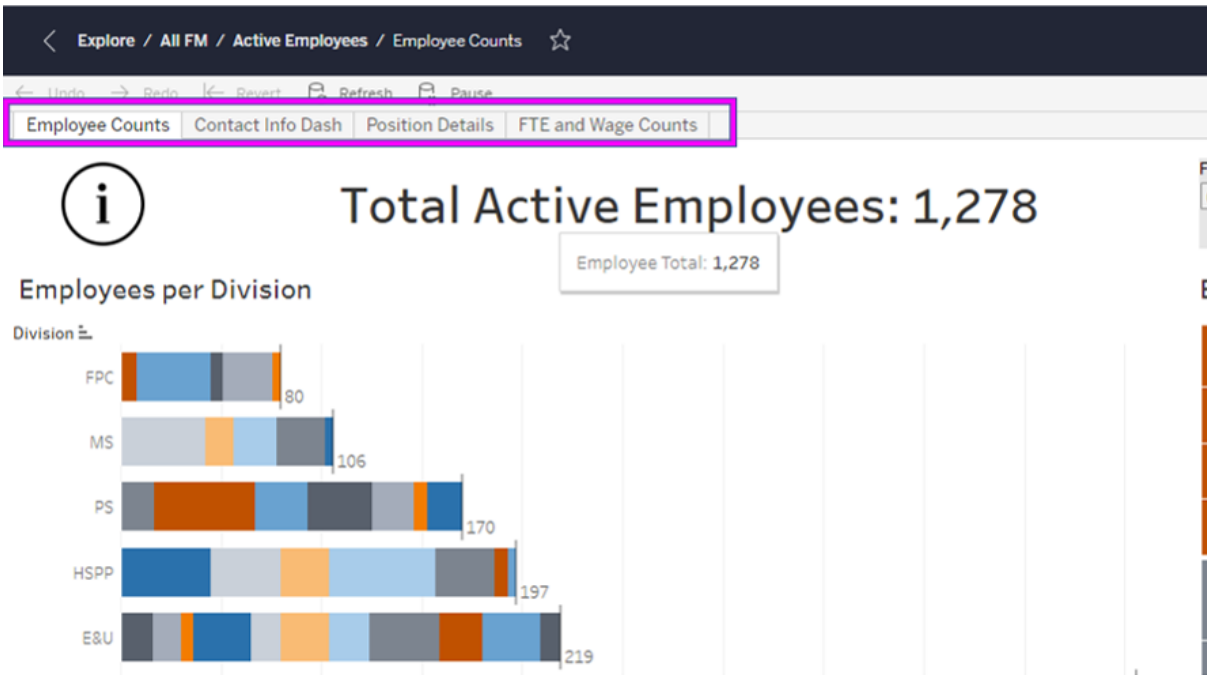
11. Focus on the upper left corner of the view



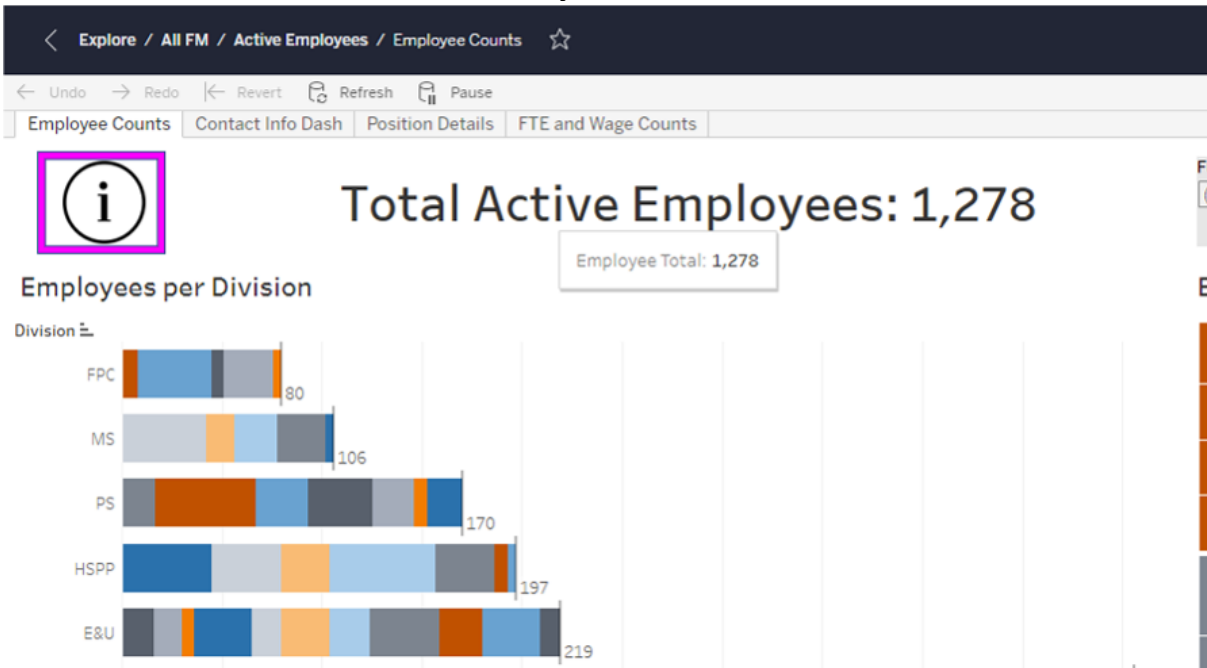
12. This is the directory of the view. Use this to go back to the workbook, folder, or explore



13. These tabs are the other views in the workbook



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

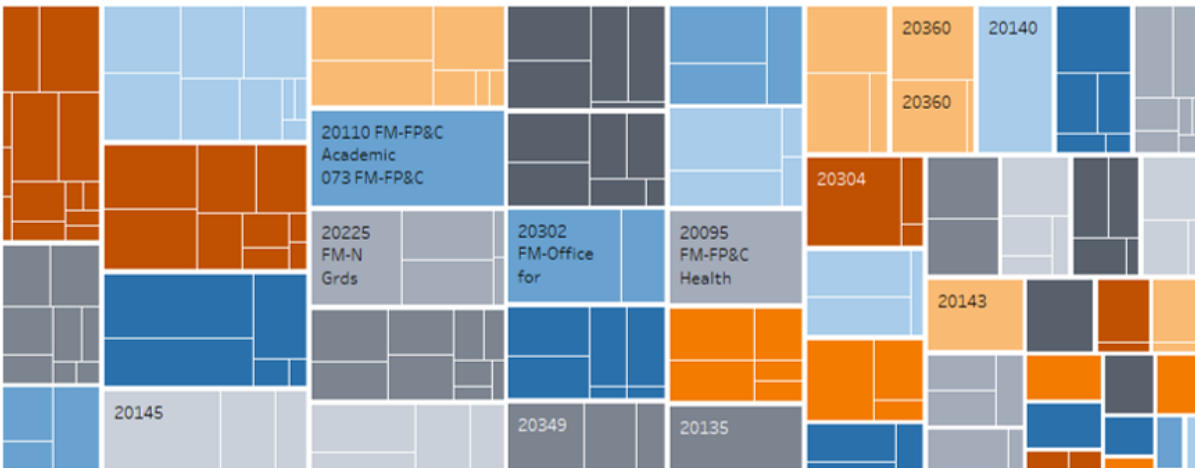


15. Focus on the upper right corner of the view

The screenshot shows a dashboard header with navigation icons for Device Layouts, Data Sources, search, star, help, and user profile (GK). Below the header is a toolbar with icons for View: Original, Alerts, Subscribe, Edit, Share, Download, Comments, and Full Screen. The main area contains a filter bar with the following options:

Supervisor Name	Shop	Org	Division	Staff Type	Emergency Event Status
(All)	(All)	(All)	(Multiple ...)	(All)	(All)

Org and Shop

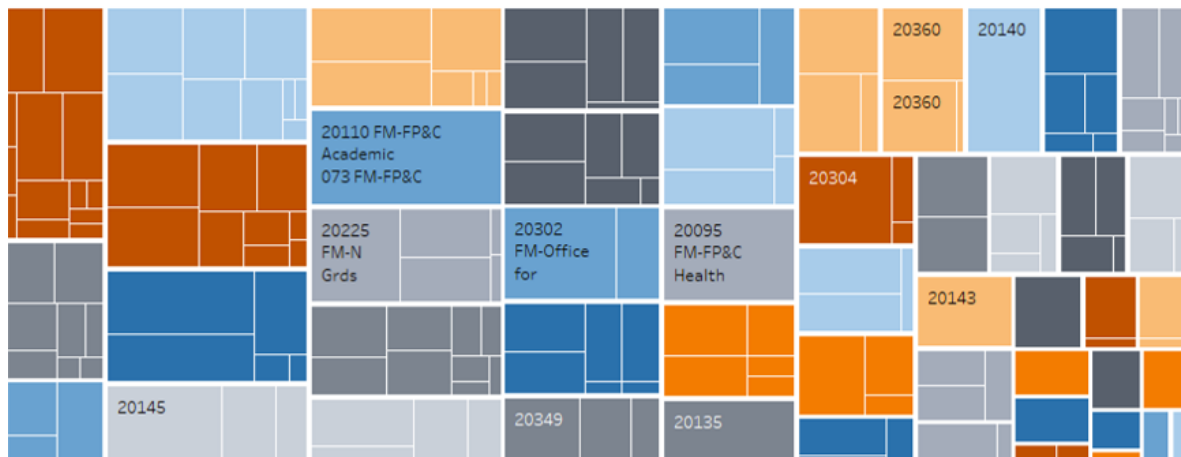


16. Filters are used to choose what data reaches the view

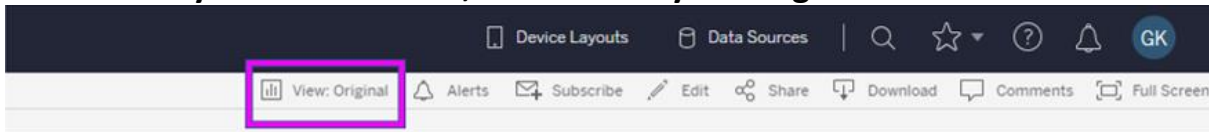
The screenshot shows the same dashboard interface as in section 15, but with the filter bar highlighted by a red box. The filter bar contains the following options:

Supervisor Name	Shop	Org	Division	Staff Type	Emergency Event Status
(All)	(All)	(All)	(Multiple ...)	(All)	(All)

Org and Shop

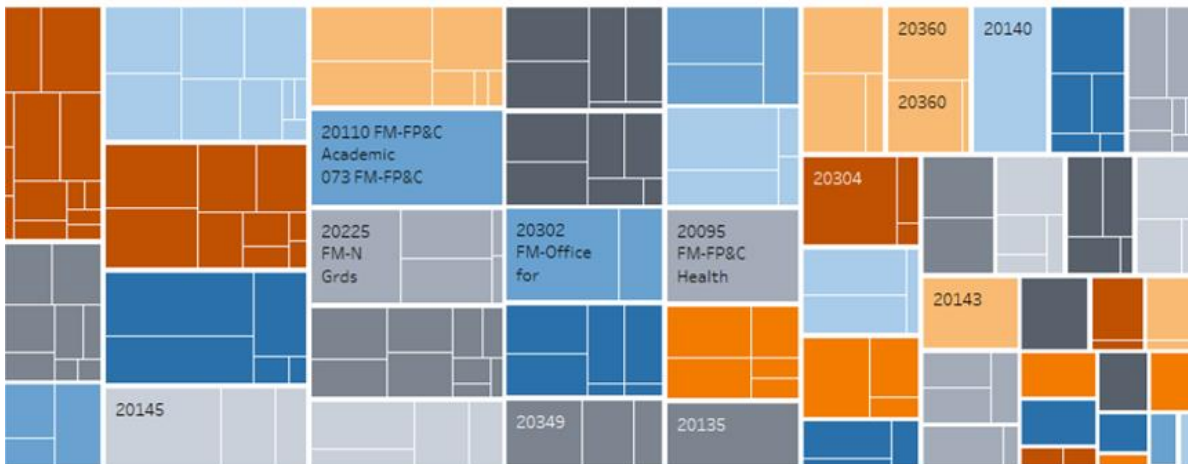


17. After you set the filters, save them by clicking on the view button



Supervisor Name (All) | Shop (All) | Org (All) | Division (Multiple ...) | Staff Type (All) | Emergency Event Status (All)

Org and Shop



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.

Employees per Org and Shop

The screenshot shows a 'Custom Views' dialog box overlaid on a treemap visualization. The dialog box has a 'Name this view' text input field, a 'Save' button, and two checkboxes: 'Make it my default' and 'Make it public'. Below the input fields is a section titled 'My Views' which currently shows 'Nothing saved yet'. Underneath is a section titled 'Other Views' which lists 'Original (default)' by 'Goodrich, Kathryn Elis...'. A 'Manage' button is located at the bottom right of the dialog box. In the background, the treemap visualization is partially visible, and a table at the bottom shows employee data.

Shop	Org	Supervisor	Staff Type	Hourly Payable Rate
166 FM-CENTRAL GROUNDS ZONE ELECTRICAL/PLUMBING ...	20217 FM-Central Grounds Zone	Roberts, David	University Staff Operational and Administrative	\$44.00
973 FM-AUTOMATION SERVICES CONSTRUCTION 973	20322 FM-Automation Services	Persinger, Lewis	University Staff Operational and Administrative	\$66.34
351 FM-HSPP ZONE 1 NORTH 351	20355 FM-Health Sys PP Zone 1	Branch, Kelly	Classified	\$56.00
180 FM-FIRE PROTECTION AND LIFE SAFETY 180	20270 FM-Fire Protection	Payne, Michael	University Staff Managerial and Professional	\$60.00

19. Don't forget to save!

