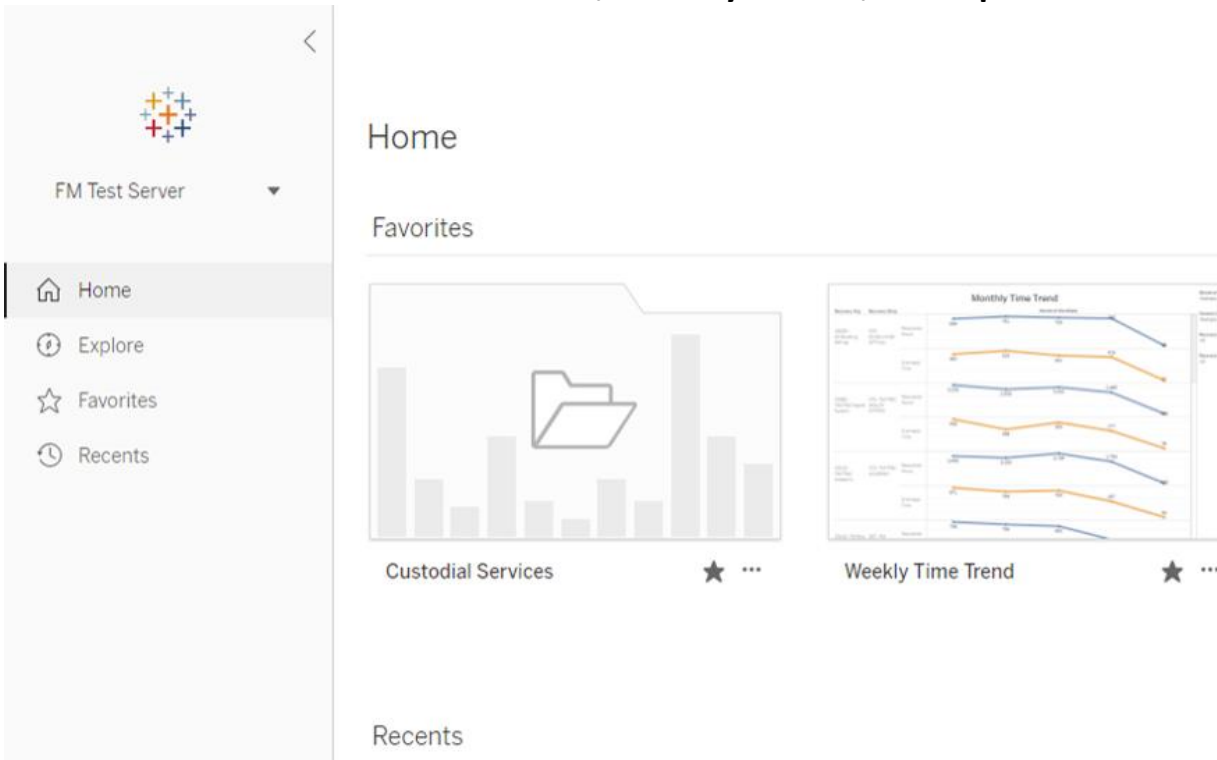


# Tableau Server Basics

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



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

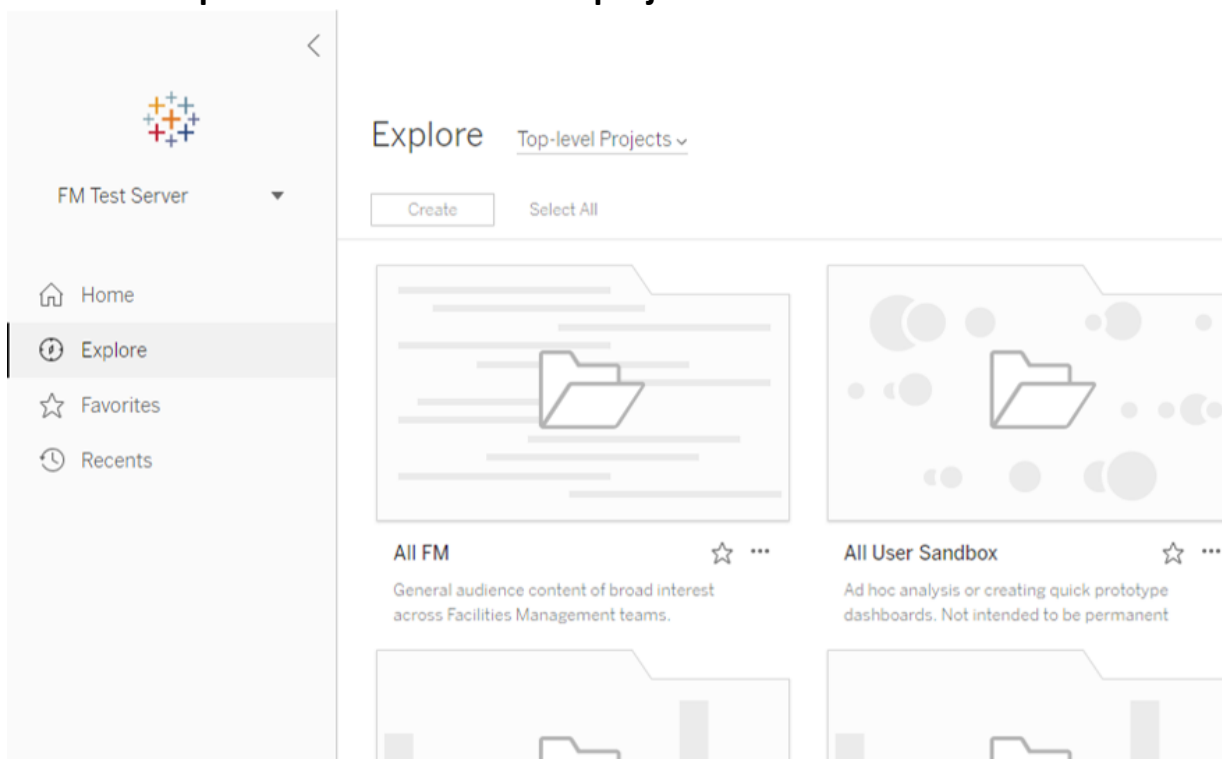
## Favorites



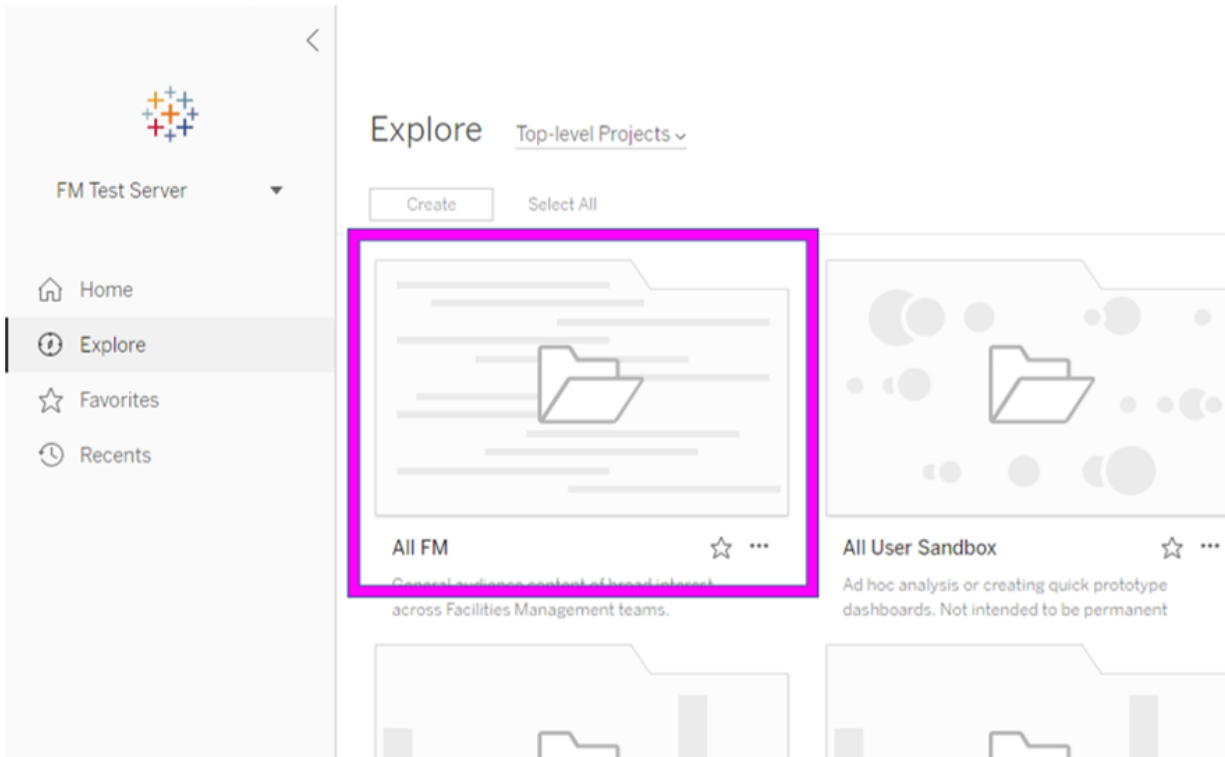
### 3. Favorite by clicking the star



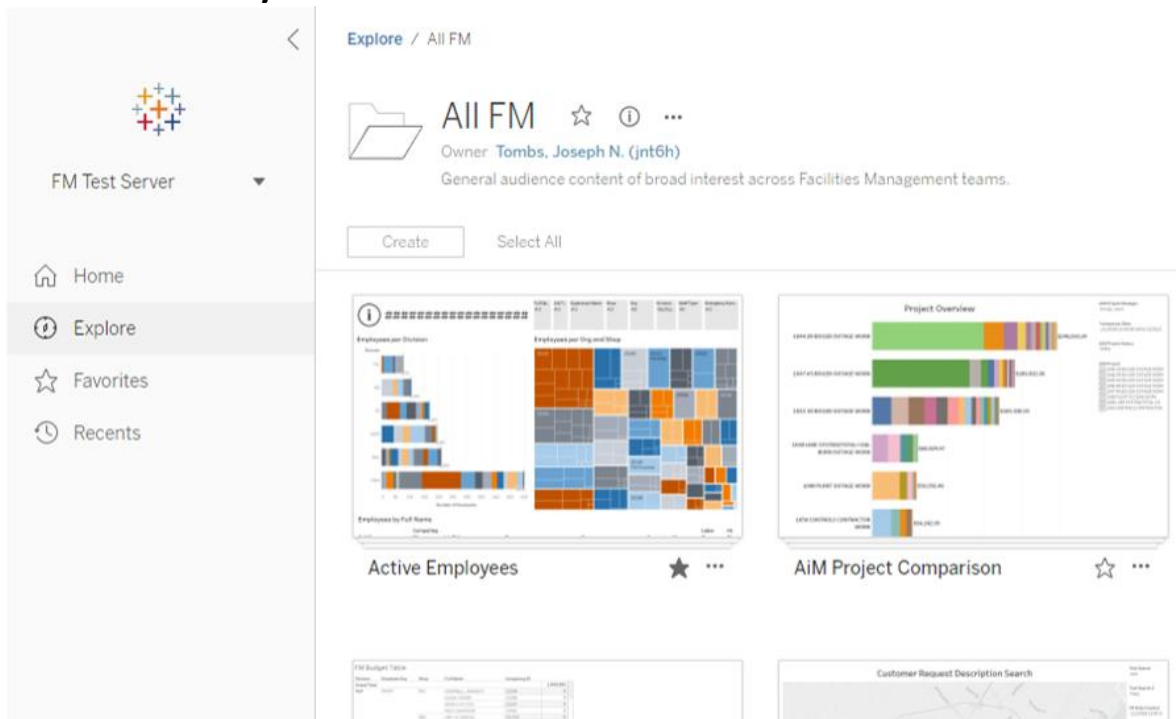
### 4. The explore tab contains all the project folders



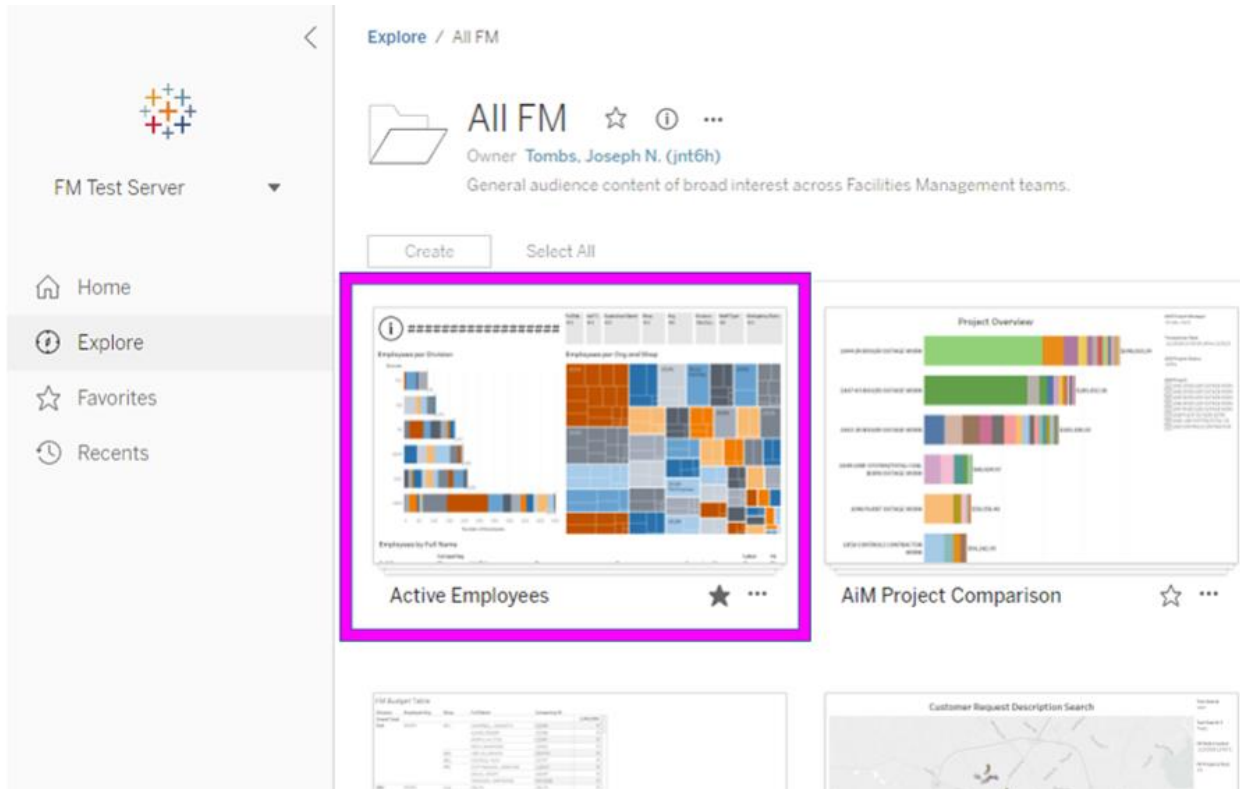
## 5. Click on a project folder



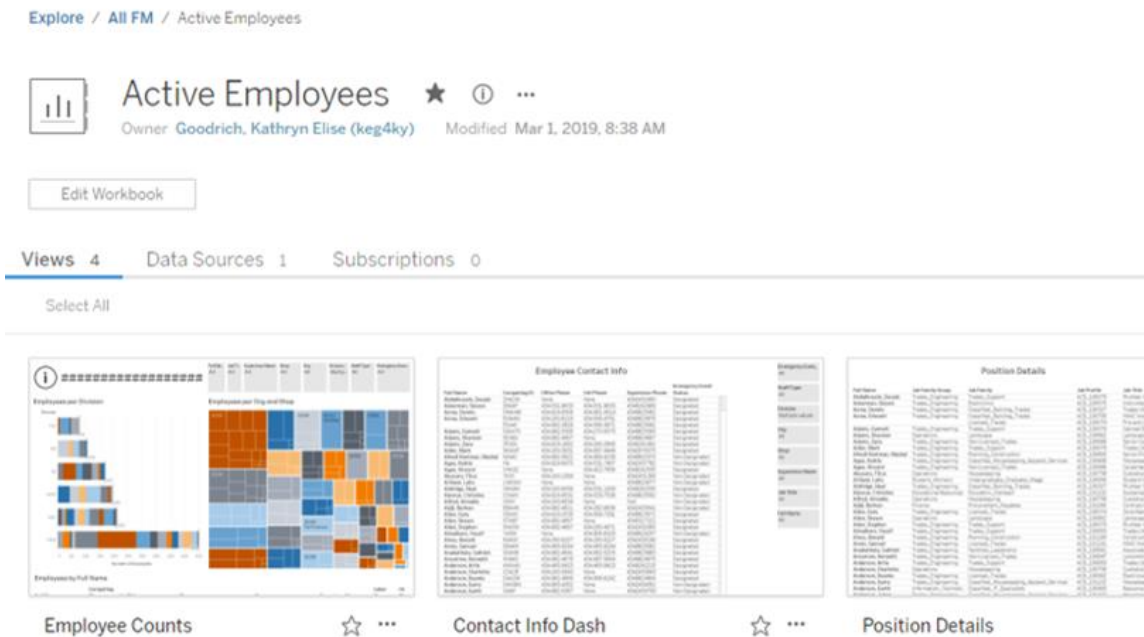
## 6. This takes you to the workbooks inside the folder



## 7. Click on a workbook



## 8. This takes you to the views inside the workbook



## 9. Click on a view

[Explore](#) / [All FM](#) / [Active Employees](#)

Owner: Goodrich, Kathryn Elise (keg4ky)

★ ⓘ ...

Modified: Mar 1, 2019, 8:38 AM

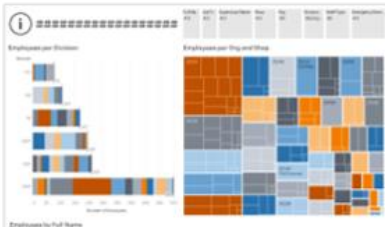
[Edit Workbook](#)

Views 4

Data Sources 1

Subscriptions 0

Select All



## Employee Counts



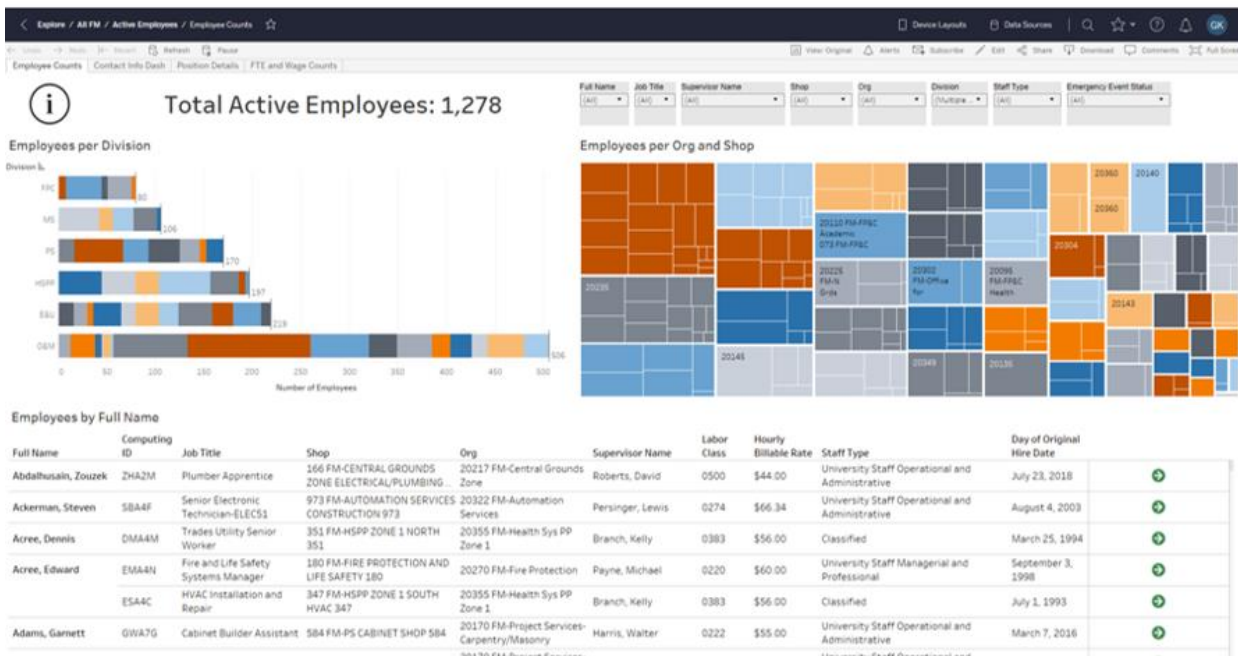
Employee Contact Info					
Full Name	Department	Other Names	Phone	Supervisor Name	Manager
John Smith	Engineering	John S.	555-123-4567	John S.	John S.
Jane Doe	Marketing	Jane D.	555-234-5678	Jane D.	Jane D.
Bob Johnson	Sales	Bob J.	555-345-6789	Bob J.	Bob J.
Emily White	HR	Emily W.	555-456-7890	Emily W.	Emily W.
Michael Brown	Finance	Mike B.	555-567-8901	Mike B.	Mike B.
Sarah Green	Operations	Sarah G.	555-678-9012	Sarah G.	Sarah G.
David Lee	IT	David L.	555-789-0123	David L.	David L.
Lisa Taylor	Legal	Lisa T.	555-890-1234	Lisa T.	Lisa T.
James Wilson	Product	James W.	555-901-2345	James W.	James W.
Anna Martinez	Design	Anna M.	555-012-3456	Anna M.	Anna M.
Chris Anderson	QA	Chris A.	555-123-4567	Chris A.	Chris A.
Kevin Thomas	Support	Kevin T.	555-234-5678	Kevin T.	Kevin T.
Nicole Garcia	Training	Nicole G.	555-345-6789	Nicole G.	Nicole G.
Benjamin Clark	Security	Ben C.	555-456-7890	Ben C.	Ben C.
Maria Rodriguez	Compliance	Maria R.	555-567-8901	Maria R.	Maria R.
Robert Evans	Facilities	Robert E.	555-678-9012	Robert E.	Robert E.
Stephanie King	Procurement	Stephanie K.	555-789-0123	Stephanie K.	Stephanie K.
Gregory Hill	Research	Greg H.	555-890-1234	Greg H.	Greg H.
Michelle Scott	Development	Michelle S.	555-901-2345	Michelle S.	Michelle S.
Timothy Adams	Testing	Tim A.	555-012-3456	Tim A.	Tim A.
Rebecca Baker	Documentation	Rebecca B.	555-123-4567	Rebecca B.	Rebecca B.
Jonathan Nelson	Project Management	Jonathan N.	555-234-5678	Jonathan N.	Jonathan N.
Victoria Perez	Business Development	Victoria P.	555-345-6789	Victoria P.	Victoria P.
Christopher Moore	Customer Success	Chris M.	555-456-7890	Chris M.	Chris M.
Amber Taylor	Partnerships	Amber T.	555-567-8901	Amber T.	Amber T.
Matthew Hall	Strategic Planning	Matthew H.	555-678-9012	Matthew H.	Matthew H.
Olivia Young	Brand Management	Olivia Y.	555-789-0123	Olivia Y.	Olivia Y.
Joshua King	Public Relations	Joshua K.	555-890-1234	Joshua K.	Joshua K.
Madison Wright	Event Planning	Madison W.	555-901-2345	Madison W.	Madison W.
Isaac Lopez	Community Outreach	Isaac L.	555-012-3456	Isaac L.	Isaac L.
Grace Green	Volunteer Coordination	Grace G.	555-123-4567	Grace G.	Grace G.
Samuel Adams	Non-Profit Relations	Sam A.	555-234-5678	Sam A.	Sam A.
Chloe Baker	Grant Writing	Chloe B.	555-345-6789	Chloe B.	Chloe B.
Benjamin Clark	Impact Reporting	Ben C.	555-456-7890	Ben C.	Ben C.
Emily Davis	Stakeholder Engagement	Emily D.	555-567-8901	Emily D.	Emily D.
Michael Evans	Policy Development	Michael E.	555-678-9012	Michael E.	Michael E.
Sarah Foster	Regulatory Compliance	Sarah F.	555-789-0123	Sarah F.	Sarah F.
David Garcia	Industry Advocacy	David G.	555-890-1234	David G.	David G.
Lisa Hill	Public Affairs	Lisa H.	555-901-2345	Lisa H.	Lisa H.
James King	Government Relations	James K.	555-012-3456	James K.	James K.
Anna Lee	Legislative Affairs	Anna L.	555-123-4567	Anna L.	Anna L.
Robert Miller	Policy Analysis	Robert M.	555-234-5678	Robert M.	Robert M.
Stephanie Nelson	Research & Analysis	Stephanie N.	555-345-6789	Stephanie N.	Stephanie N.
Gregory Ortiz	Thought Leadership	Greg O.	555-456-7890	Greg O.	Greg O.
Michelle Parker	Content Strategy	Michelle P.	555-567-8901	Michelle P.	Michelle P.
Timothy Quinn	Media Relations	Tim Q.	555-678-9012	Tim Q.	Tim Q.
Rebecca Ross	Press Outreach	Rebecca R.	555-789-0123	Rebecca R.	Rebecca R.
Jonathan Scott	Editorial Calendar	Jonathan S.	555-890-1234	Jonathan S.	Jonathan S.
Victoria Torres	Content Creation	Victoria T.	555-901-2345	Victoria T.	Victoria T.
Christopher Walker	SEO Strategy	Chris W.	555-012-3456	Chris W.	Chris W.
Amber Young	Analytics & Reporting	Amber Y.	555-123-4567	Amber Y.	Amber Y.
Matthew Ziegler	Website Management	Matthew Z.	555-234-5678	Matthew Z.	Matthew Z.
Olivia Bell	CRM Management	Olivia B.	555-345-6789	Olivia B.	Olivia B.
Joshua Bell	Marketing Automation	Joshua B.	555-456-7890	Joshua B.	Joshua B.
Madison Bell	Lead Generation	Madison B.	555-567-8901	Madison B.	Madison B.
Isaac Bell	Conversion Optimization	Isaac B.	555-678-9012	Isaac B.	Isaac B.
Grace Bell	A/B Testing	Grace B.	555-789-0123	Grace B.	Grace B.
Samuel Bell	Personalization	Sam B.	555-890-1234	Sam B.	Sam B.
Chloe Bell	Retention Strategies	Chloe B.	555-901-2345	Chloe B.	Chloe B.
Benjamin Bell	Churn Reduction	Ben B.	555-012-3456	Ben B.	Ben B.
Emily Bell	Customer Feedback	Emily B.	555-123-4567	Emily B.	Emily B.

Contact Info Dash

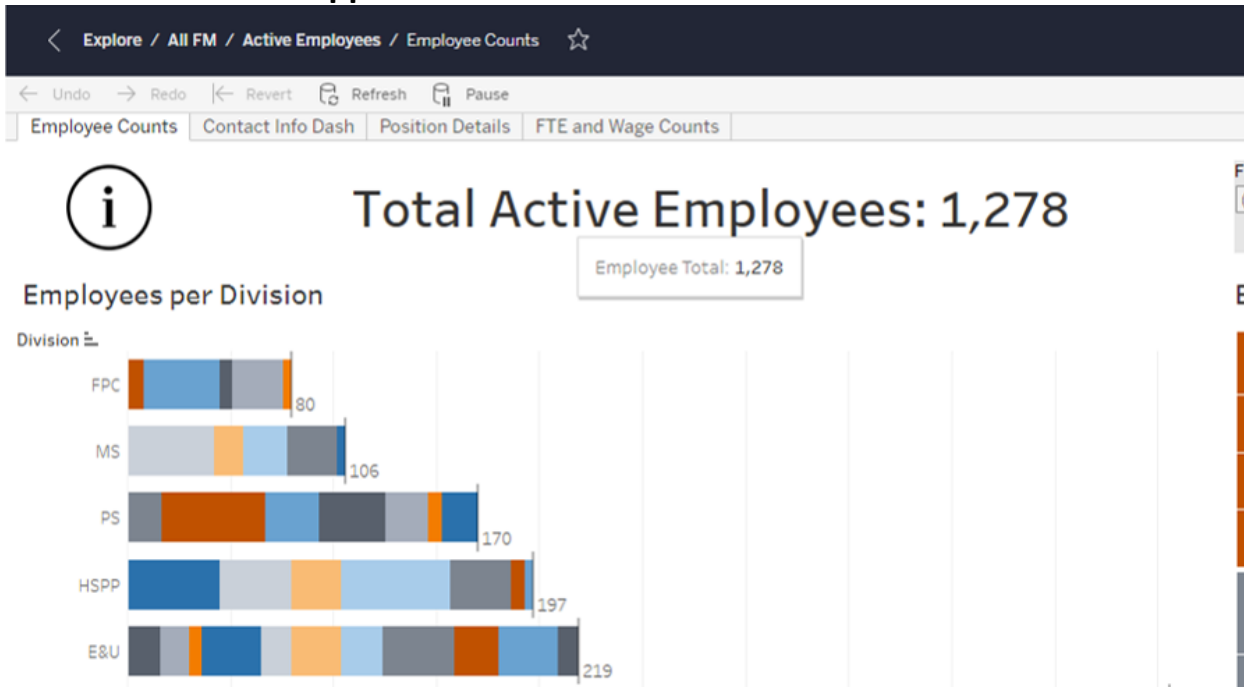
[illegible]

### Position Details

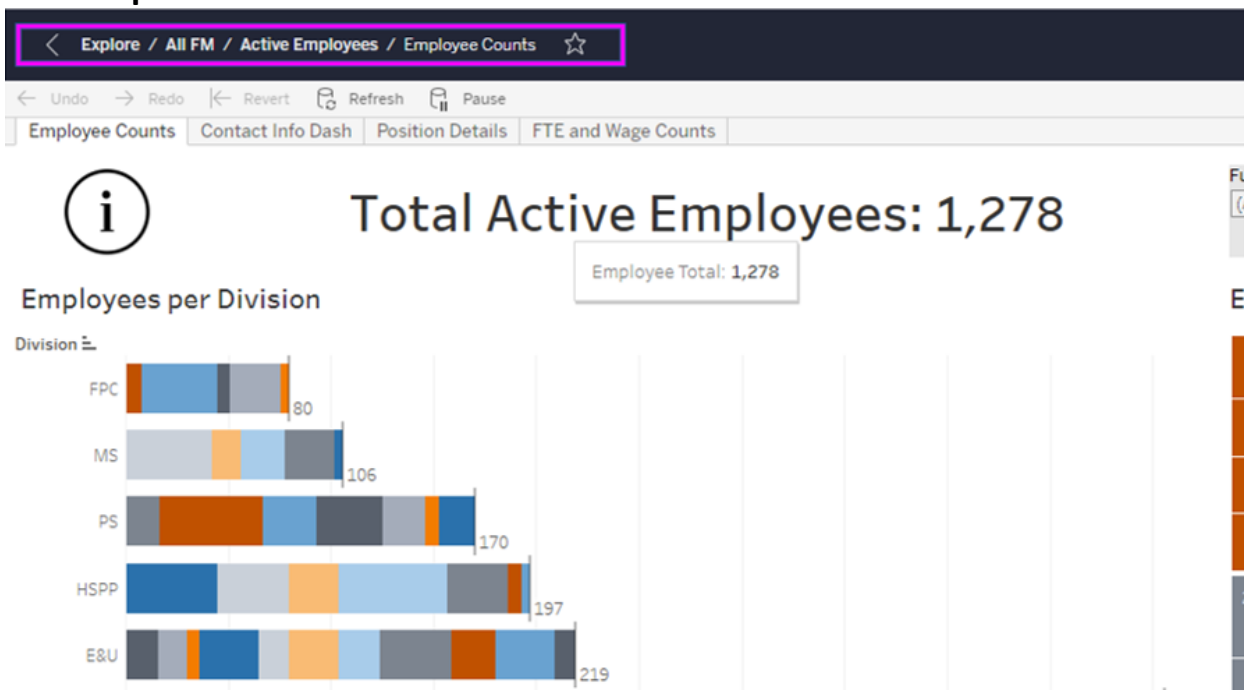
## 10. This is a view. Views can have graphs, tables, and filters.



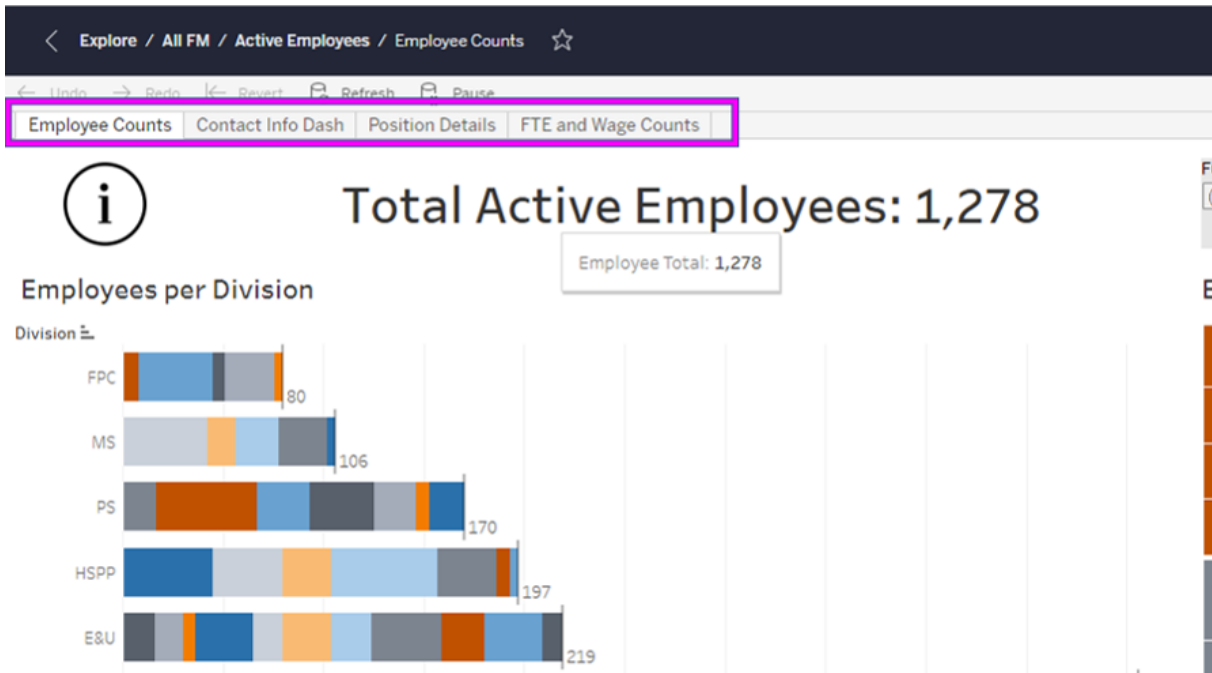
## 11. Focus on the upper left corner of the view



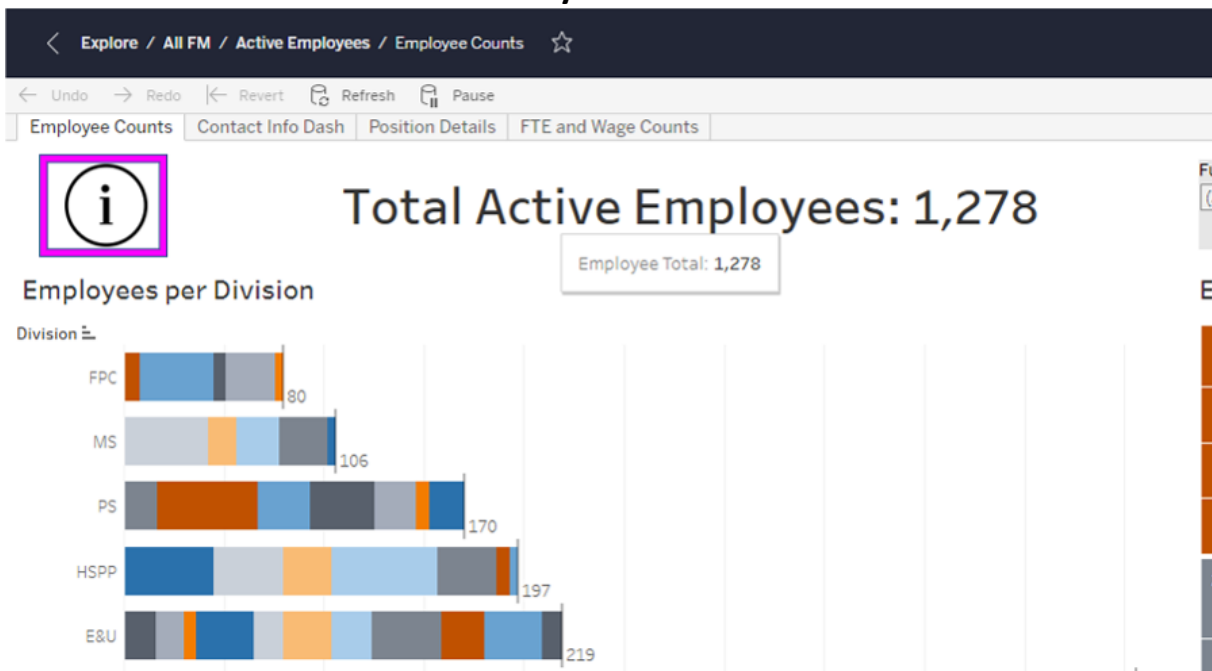
## 12. This is the directory of the view. Use this to go back to the workbook, folder, or explore



### 13. These tabs are the other views in the workbook



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



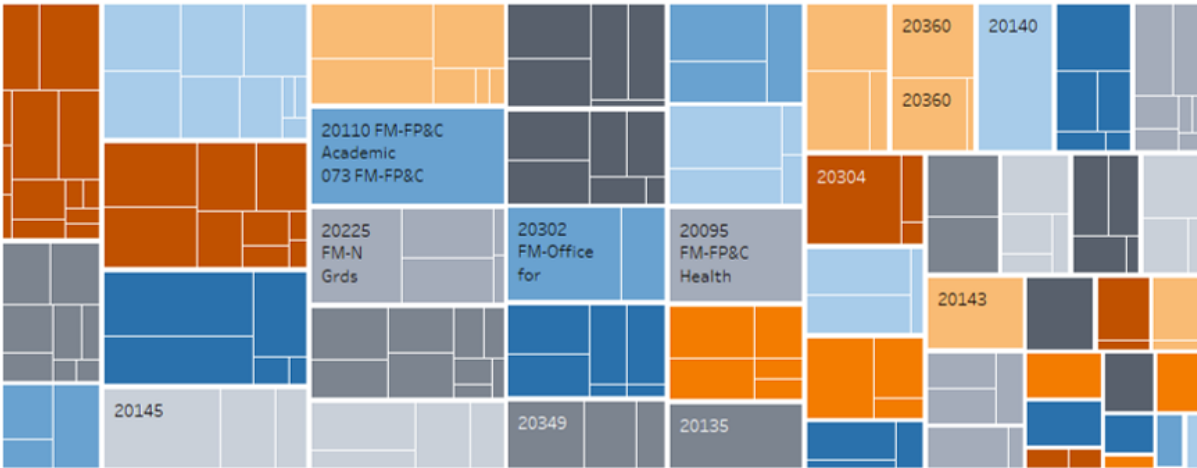
## 15. Focus on the upper right corner of the view

Device Layouts | Data Sources | Search | Star | Help | Notifications | GK

View: Original | Alerts | Subscribe | Edit | Share | Download | Comments | Full Screen

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

### Org and Shop



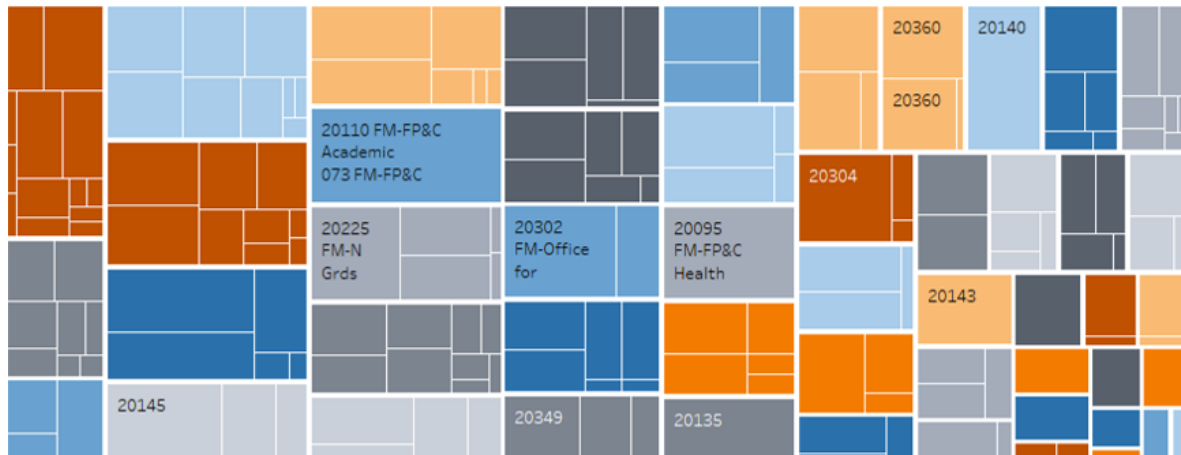
## 16. Filters are used to choose what data reaches the view

Device Layouts | Data Sources | Search | Star | Help | Notifications | GK

View: Original | Alerts | Subscribe | Edit | Share | Download | Comments | Full Screen

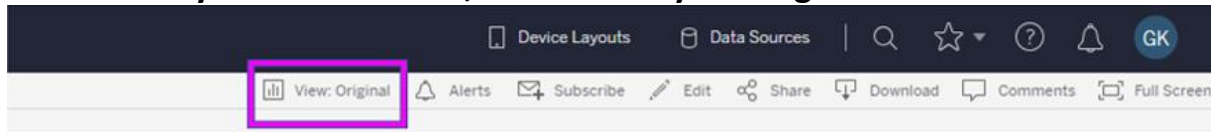
Supervisor Name	Shop	Org	Division	Staff Type	Emergency Event Status
(All)	(All)	(All)	(Multiple ...)	(All)	(All)

### Org and Shop



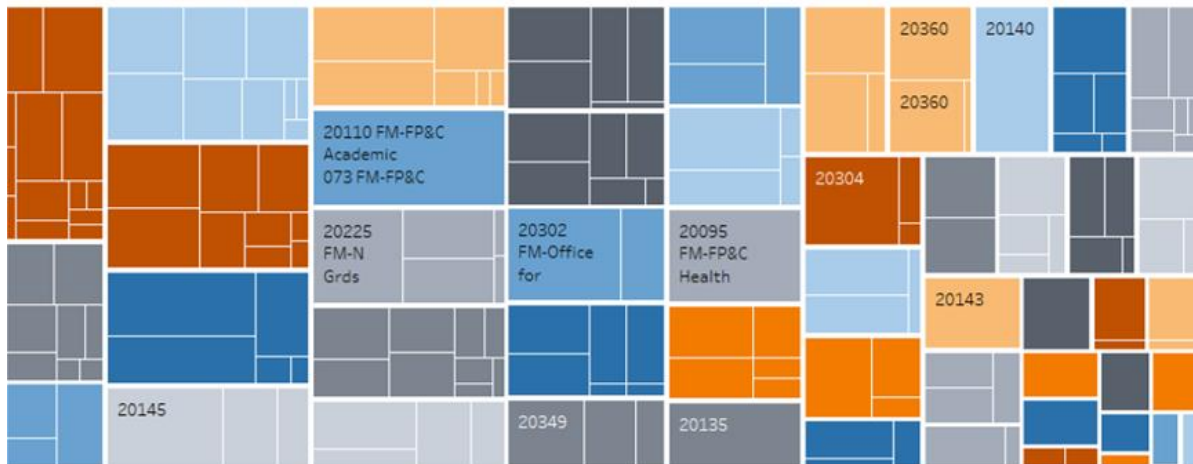


## 17. After you set the filters, save them by clicking on the view button



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.

A screenshot showing a 'Custom Views' dialog box overlaid on a treemap visualization. The dialog box has a 'Name this view' text field, a 'Save' button, and two checkboxes: 'Make it my default' and 'Make it public'. Below these are sections for 'My Views' (showing 'Nothing saved yet') and 'Other Views' (showing 'Original (default)' and 'Goodrich, Kathryn Elis...'). A 'Manage' button is at the bottom right of the dialog. In the background, the treemap is visible, and a table at the bottom shows employee data.

Shop	Org	Employee Name	Employee ID	Hourly Payable Rate	Staff Type
166 FM-CENTRAL GROUNDS ZONE ELECTRICAL/PLUMBING ...	20217 FM-Central Grounds Zone	Roberts, David	0500	\$44.00	University Staff Operational and Administrative
973 FM-AUTOMATION SERVICES CONSTRUCTION 973	20322 FM-Automation Services	Persinger, Lewis	0274	\$66.34	University Staff Operational and Administrative
351 FM-HSPP ZONE 1 NORTH 351	20355 FM-Health Sys PP Zone 1	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 Managerial and Professional

## 19. Don't forget to save!

