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.
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

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

16. Filters are used to choose what data reaches the view
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.
19. Don’t forget to save!