Getting Started with Tableau Server

Welcome to Tableau Server 9.0. This guide walks you through the basic steps to install and configure Tableau Server, then introduces the main areas of the server interface. You'll also work with a view and learn about key features. While this guide gets you started, be sure to also see the Tableau Server online Help, which includes an Administrator Guide.
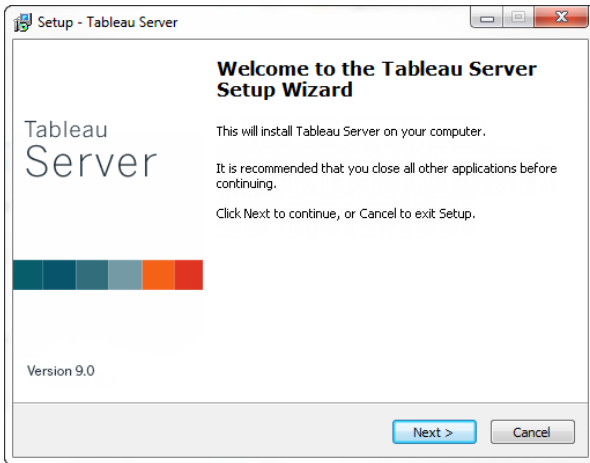
1. Install and Configure

## 2. Explore the Server

3. Work with a View

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Install and Configure

After you download the Tableau Server installation file from the Tableau Customer Portal, follow the instructions below to install Tableau Server.

1 Double-click the installation file

Follow the steps in the Setup wizard and click **Next** to continue through each step.

2 Activate Tableau Server

When the product key manager opens, click **Activate the product**.
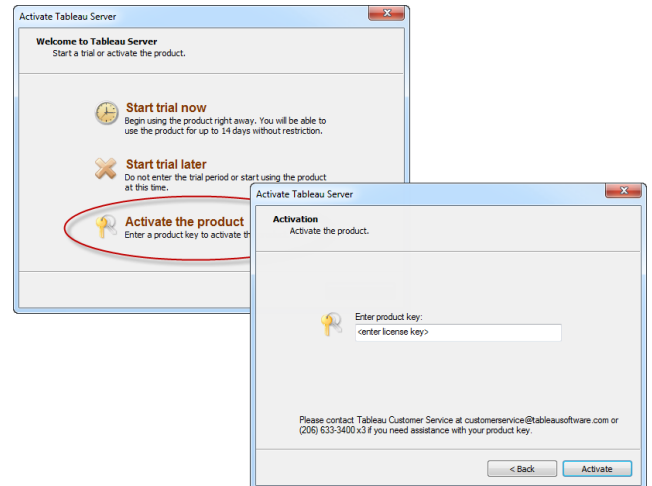
Enter your product key in the corresponding text box and click **Activate**. You can access your product keys online, on the Tableau Customer Portal.

3 Verify your configuration options

By default, Tableau Server runs under the **Network Service** account, and uses its own system to authenticate server users. You can enter custom settings if needed.
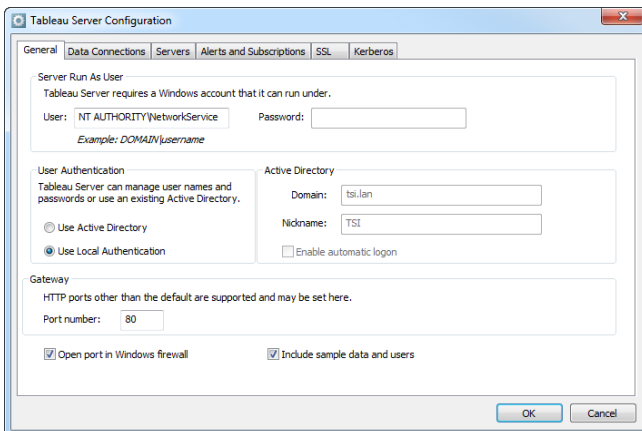

To use a specific account for the server user account, or to use Active Directory for user authentication, continue to step 4.

4 Set up users and Active Directory

If you'd like to use a specific user account (useful if you are using NT authentication with data sources), specify a **User** and **Password**.
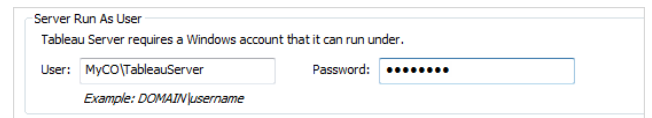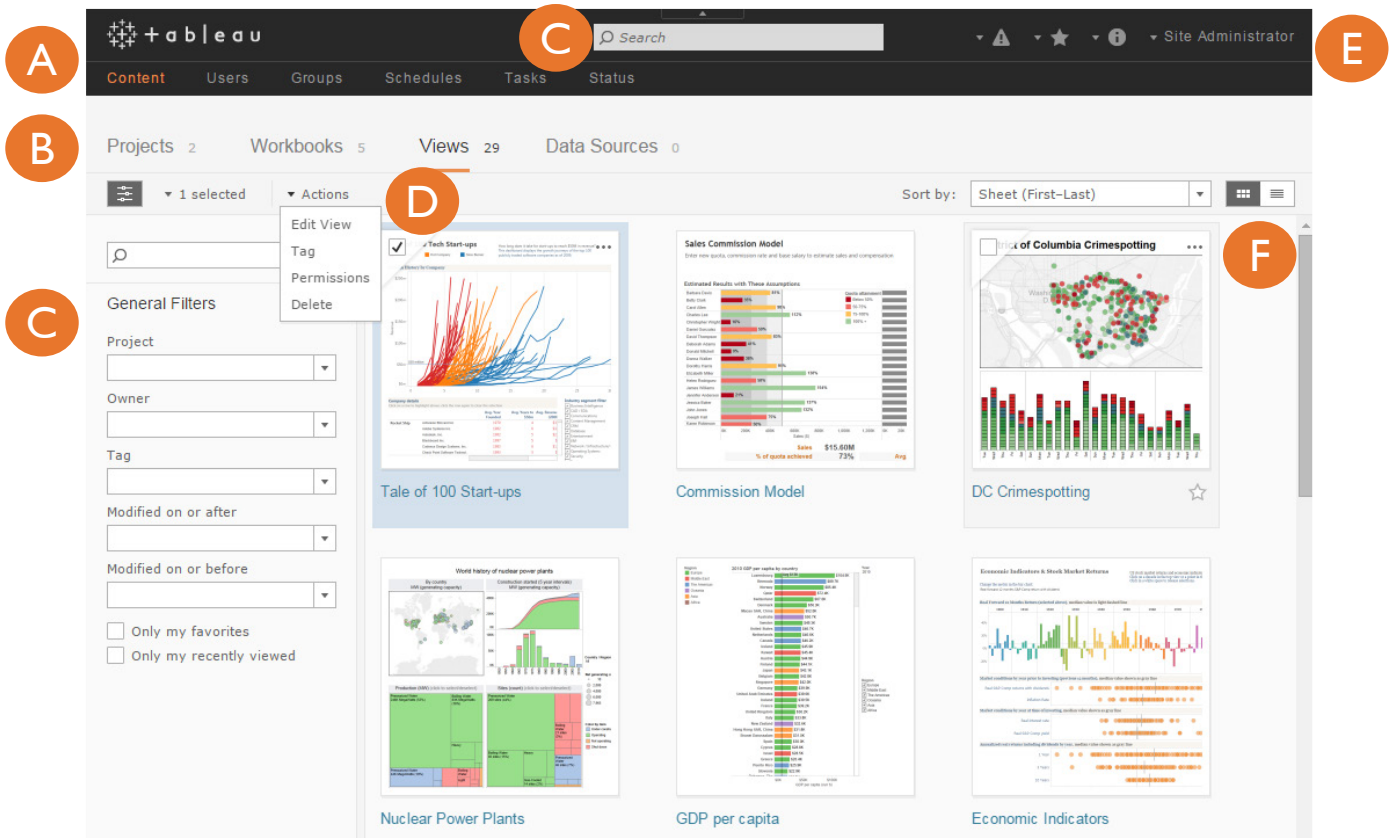

To use Active Directory, select **Use Active Directory** and enter the Active Directory domain and nickname in the corresponding text boxes.

![Tableau logo]
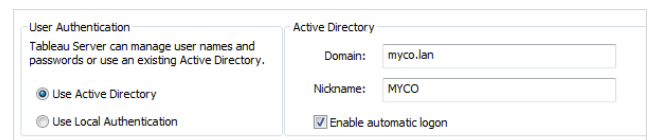
Explore the Server

After you create your administrative account and sign in to the server, take a moment to explore the Tableau Server interface. The major areas are described below.

A Site and server management pages
Administrators will see menus for the pages to help them manage server and site settings, and to configure, maintain, and monitor sites.

B Content pages
Administrators and users can access content by clicking **Projects**, **Workbooks**, **Views**, or **Data Sources**.

C Quick search and filtered search
The quick search box finds content anywhere in the site. Search filters help you find content using a combination of search criteria that are specific to the content, such as name and tag.

D Actions
Whenever you select content, a list of actions for that content becomes available based on your site role and permissions.

E Menus
The four drop-down menus at the top of the page give you access to Alerts, Favorites, Help, and your account profile and settings.

F Content views
View site content in lists or thumbnails. Use the **Sort by** options to sort and view items based on different aspects, such as modification date or owner.

Work with a View

1 **Click a view to open it**
Click a view to open and interact with it.
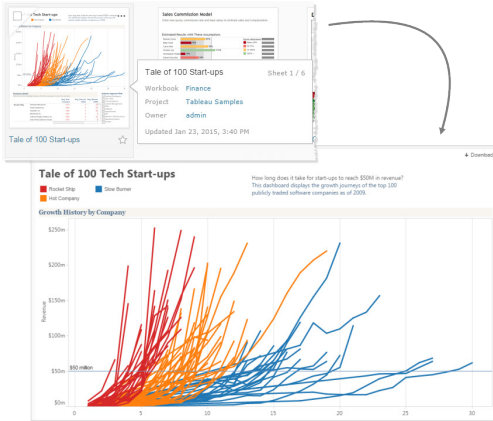
2 **Filter data in the view**
Select marks and click **Keep Only** to see only those marks or **Exclude** to see everything but those marks.
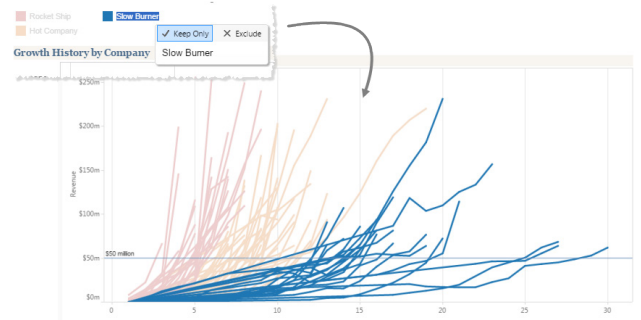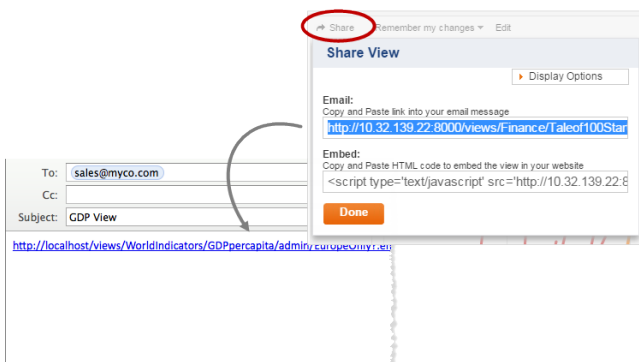

3 **Save your changes as a custom view**
Click **Remember my changes**, and type a name.

4 **Check who can see your custom view**
Click **Manage Custom Views** and click the person icon.

When the icon displays one person, the custom view is private; two persons is public.

5 **Share your custom view**
Click **Share**, copy the text of the **Email** field, and paste it into an email message.

6 **Edit, subscribe, and more**
You can edit views or create new ones by clicking **Edit**.
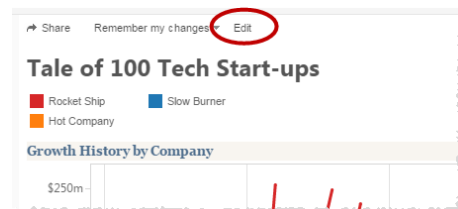
You can also receive views via email on a regular schedule by clicking the **Subscribe** icon.

To learn more about these and other features, see the
Tableau Server Help.