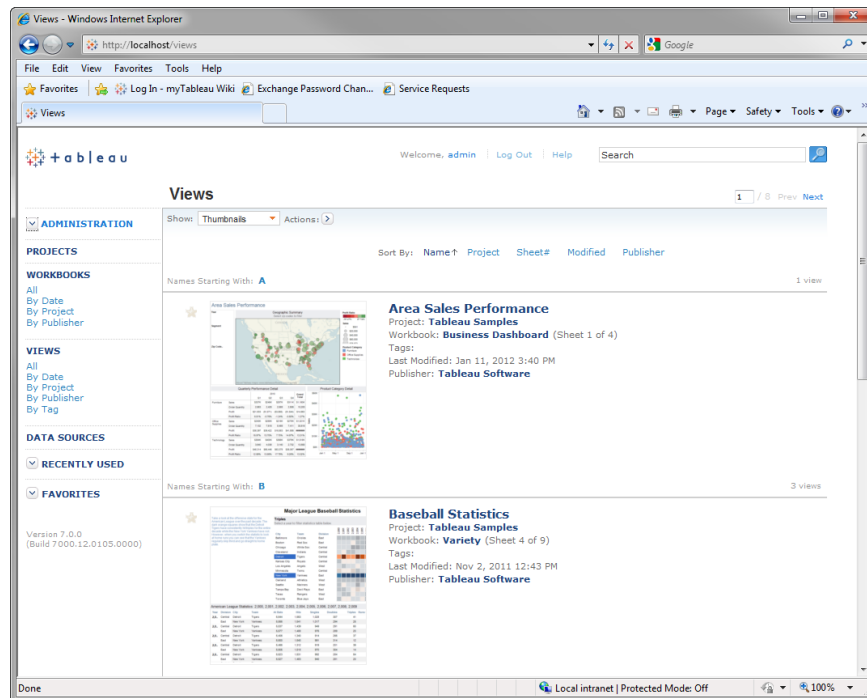


Getting Started with Tableau Server 7.0

Welcome to Tableau Server. This guide will walk you through the basic steps to install and configure Tableau Server, then use some sample data to explore a view. You'll also learn how to add users to the server. While this guide gets you started, be sure to also see the full Administrator Guide in the server online help (also available as a [PDF](#)).



What's in this Guide

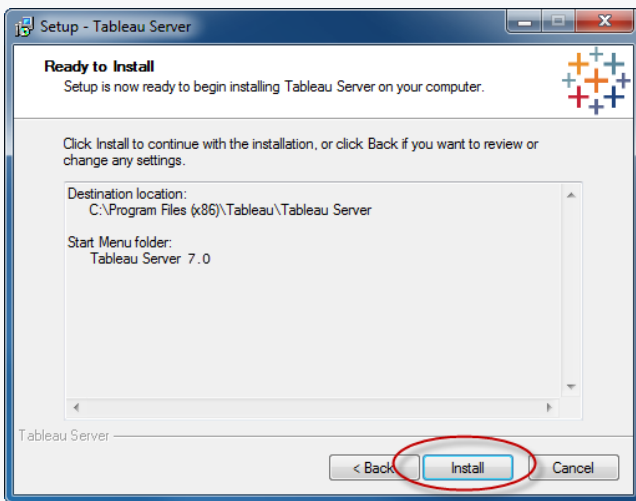
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Installation and Configuration

After you download the Tableau Server installation file from the [Tableau Customer Account Center](#), follow the instructions below to install the server.

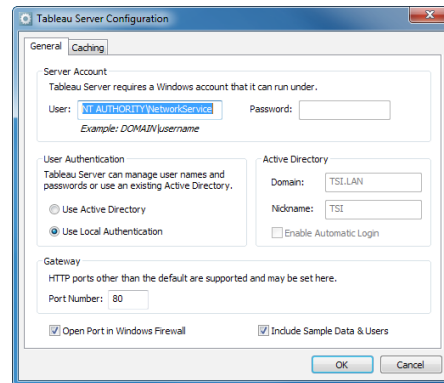
1. Double-click the Setup file

Double click the Setup file and follow the on-screen instructions.



2. Verify configuration options

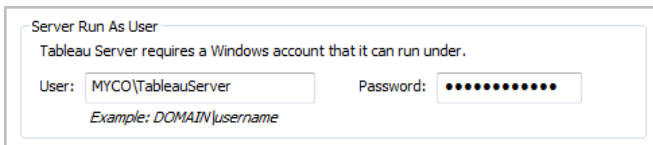
By default, Tableau Server runs on a machine account called Network Service and uses an internal user management system.



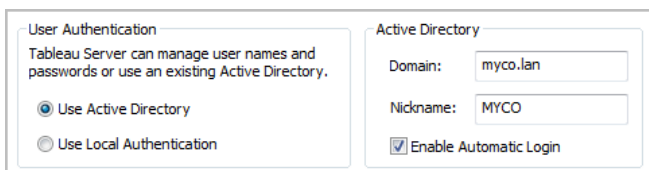
If you would like to use a specific user account or Active Directory instead, continue to Step 3, otherwise, skip to Step 4.

3. Set up User and Active Directory (Optional)

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**.

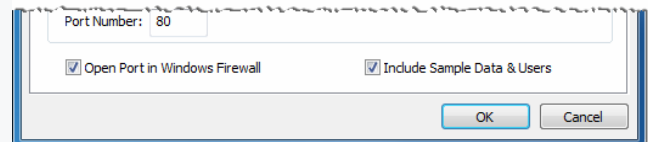


To use Active Directory, select **Active Directory** as the type of Authentication. Type the Active Directory domain and nickname into the corresponding text boxes.



4. Select whether to install sample data

Select whether to install sample data along with three sample user accounts. You can use the samples to help get you started using Tableau Server.



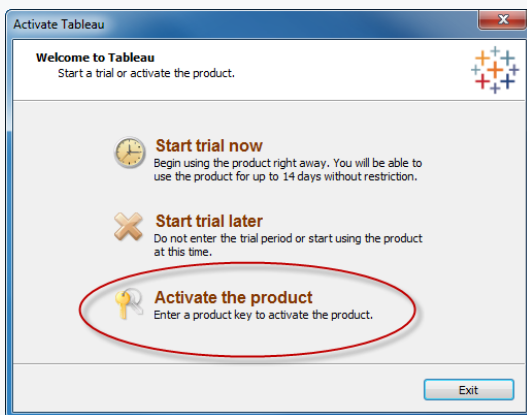
Click **Save**.

License Activation

To begin using Tableau Server, you must first activate it. You need at least one product key. You can access your keys on our online [Tableau Customer Account Center](#). After installing and configuring the server, the product key manager automatically opens where you can enter your key and register.

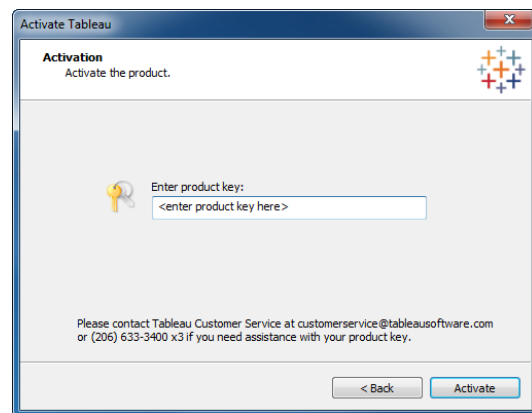
1. Activate the product

Select **Activate this product** when the product key manager opens.



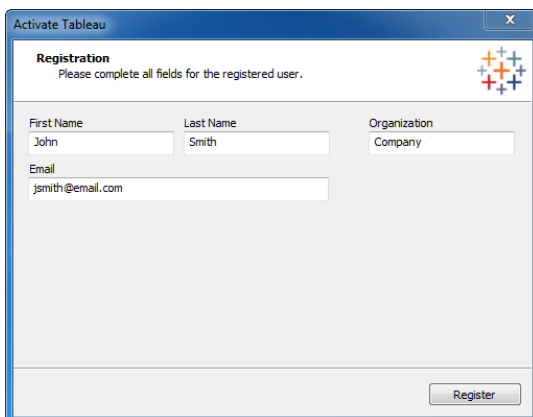
2. Enter your product key

Paste your product key into the corresponding text box and click **Activate**.



3. Register the product

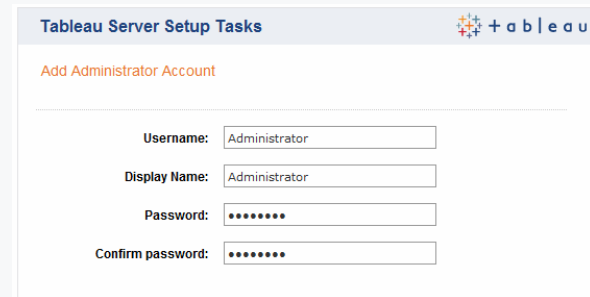
After you activate you must register the product. Provide the necessary information and then click **Register**.



4. Create the administrator account

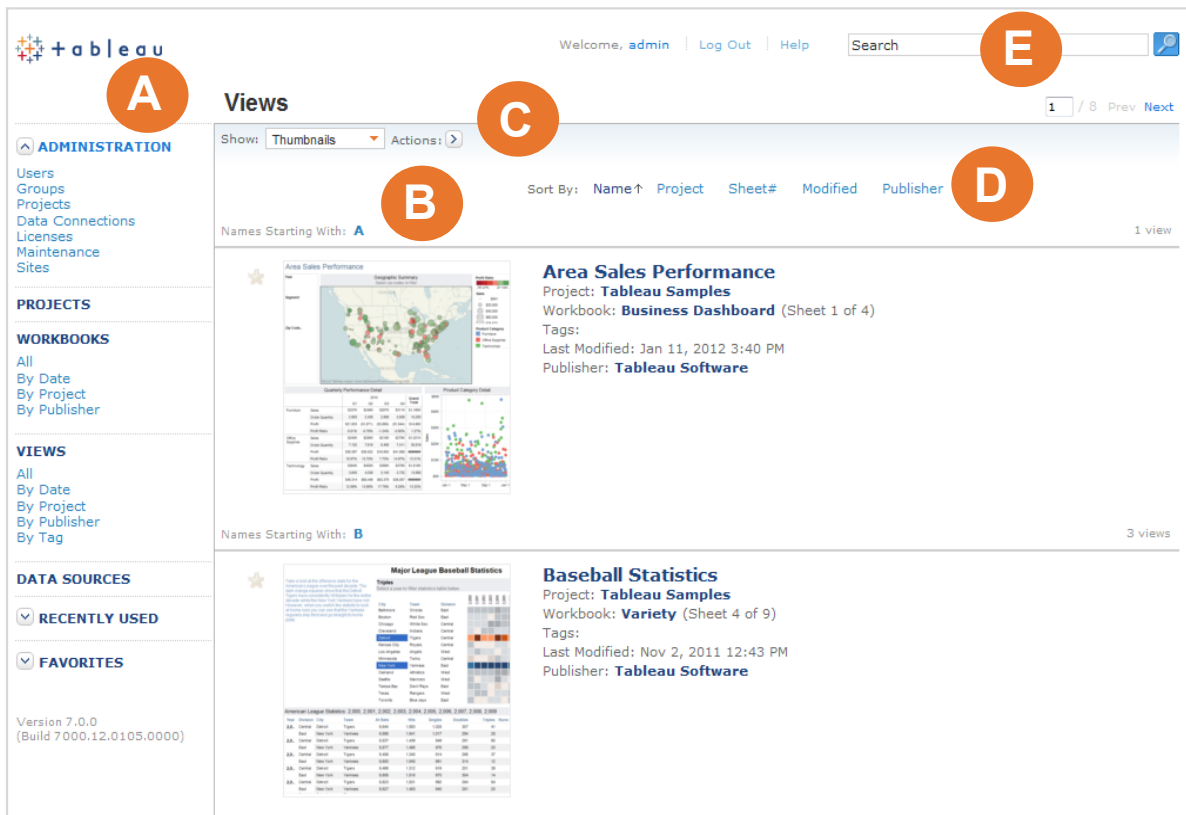
If you are using Active Directory, type an existing **Username** and **Password** for the Active Directory user who will be the administrator.

If you are using Local Authentication, create an administrative account by typing a **Username** and **Password** (twice) of your choosing.



Explore the Server

When you first log into the server, you see a list of views and a navigation area on the left side of the page. Take a moment to explore the Tableau Server interface. The major areas are described below.



A. Navigation Area

The navigation area helps you browse the projects, workbooks, and views on the server. You can use the quick links to jump to common filtered and sorted lists (e.g., views sorted by project). If you are logged in as an Administrator, the navigation area also includes links to help you manage the server.

B. List of Views

The list of views shows all the views on the server. Similarly, you can view a list of workbooks, projects, data sources, and so on. The list can be viewed as thumbnails or text.

C. Actions

The Actions menu contains several commands you apply to selected items in the list. For example, you can set permissions, modify tags, and even delete. Actions change based on your license level and rights.

D. Sort Options

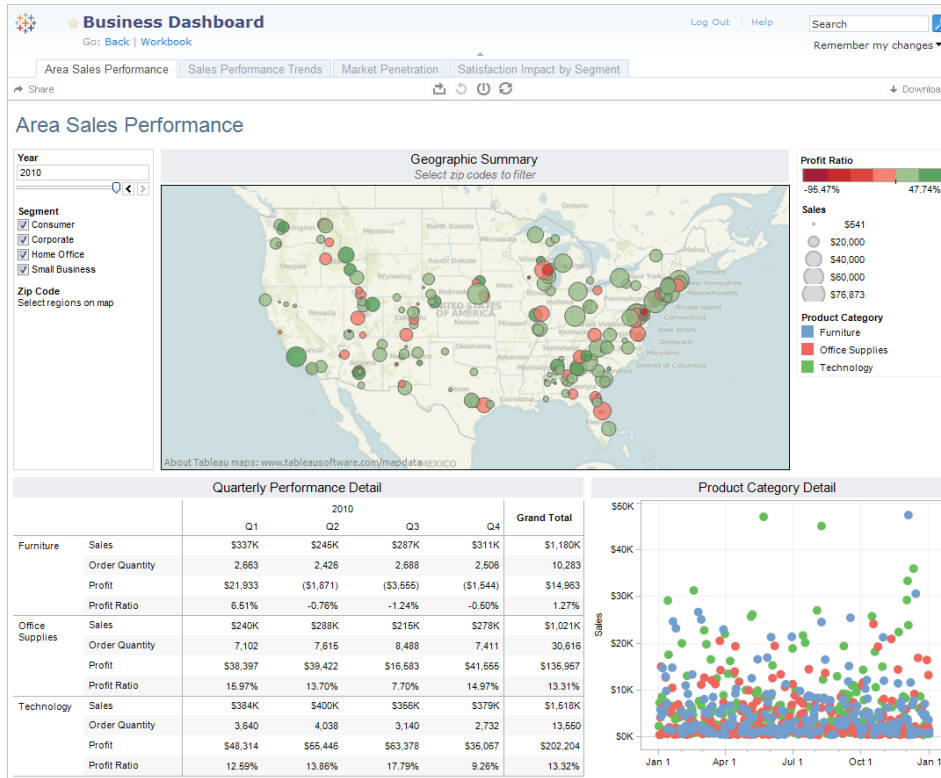
Sort the list by name, project, date modified, and so on. You can sort ascending or descending.

E. Search

Search for content on the server. You can use attribute keywords to limit the search to a specific attribute. For example, searching for name:sales projections returns only items whose name contains the words “sales” or “projections”.

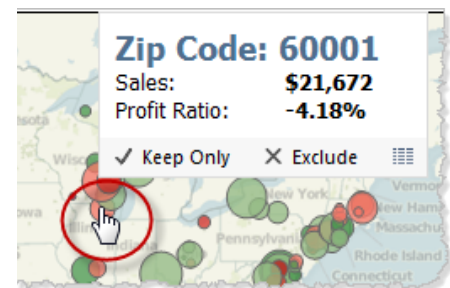
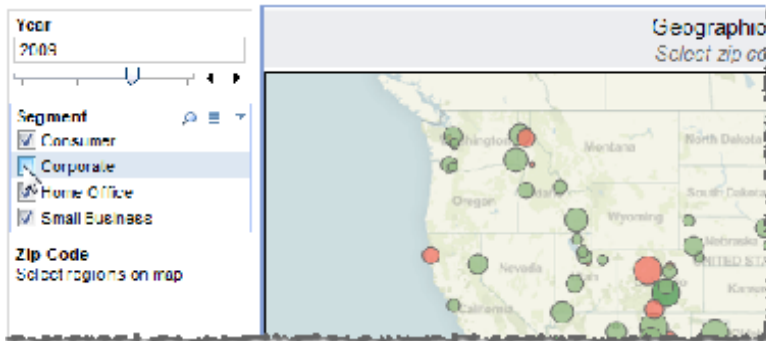
Open a View

When you navigate into a specific view, you can interact with the visualization. Let's look at the Area Sales Performance view that is installed with the sample workbooks and users. You can interact with the view using the toolbar, quick filters, and the highlighting and filter actions set up between the map, the text table, and the scatter plot.



Interactivity depends on your license level and permissions. With an interactor license level, you can sort, filter, view selected data, and more. The viewer license level can only see the view and tooltips.

For example, this view shows sales by customer segment and zip code. Use the quick filter on the left to exclude specific customer segments.



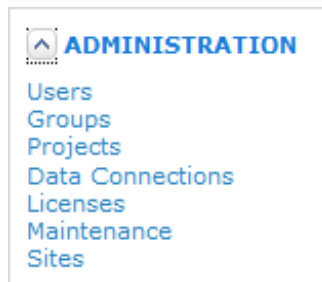
Hover over a mark to explore more details. Use the tooltip to quickly filter or remove marks, and view data.

Clear the **Corporate** check box to exclude all corporate sales from the view.

Administrate Users

As an administrator you are responsible for adding users and assigning them license levels. Log in as an administrator and then follow along to learn how.

The Administration section of the Navigation area offers tools for managing users, groups, projects, sites, licensing and more. For now, let's focus on the Users page. Click the **Users** link.



If you installed the sample data you will see two users listed: the administrator account you are currently logged into and Tableau Software. Looking across the table you can see each user's license level and other attributes.

You can modify any of these attributes by selecting the user and then selecting an action on the Actions toolbar.

ADMINISTRATION						
Users						
Groups						
Projects						
Data Connections						
Licenses						
Maintenance						
Sites						
Edit Delete Publishing Admin Group + Group - License User						
Search for Users:						1 Users Selected
<input type="checkbox"/>	Full Name ↑	Last Login	License Level	Admin	Publish	Username
<input type="checkbox"/>	Administrator		Interactor	✓	✓	Administrator
<input checked="" type="checkbox"/>	Tableau Software	Oct 28, 03:20 pm	Interactor		✓	Tableau Software
Add User Import Users from CSV File			Items per page: Less More Pages: 1 / 1 Prev Next			

Ready, Set, Go!

You are now ready to add your own users and distribute license levels. Click the **Add User** link at the bottom of the list to start adding users.

You can get help at any time by clicking the **Help** link at the top of each server page. The help system includes an online Administrator Guide (also available as a [PDF](#)) which includes information about configuration, security, and more.