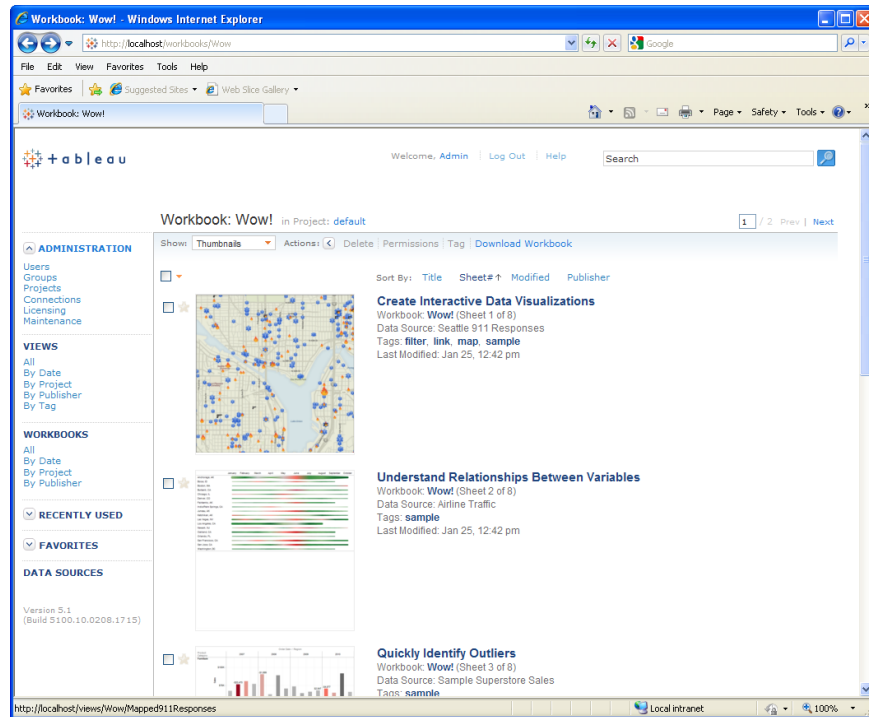


Getting Started with Tableau Server 5.1

Welcome to Tableau Server. This guide will walk you through the basic steps to install and configure Tableau Server. Then follow along using sample data and users to learn about the different types of users you can add. While this guide gets you started, make sure to download the full [Administrator Guide](#) for more help.



What's in this Guide

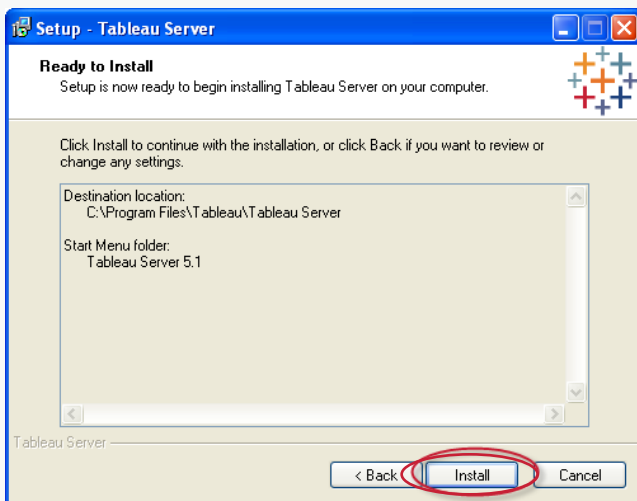
| | |
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| Installation and Configuration..... | 2 |
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Installation and Configuration

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

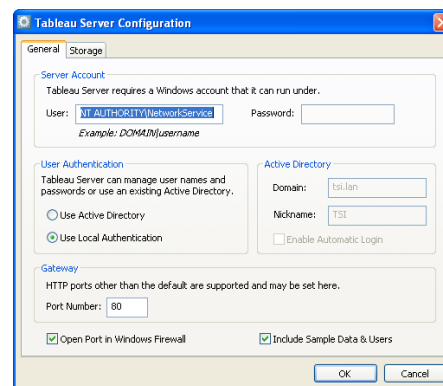
1. Double-click Install File

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



2. Verify Configuration Options

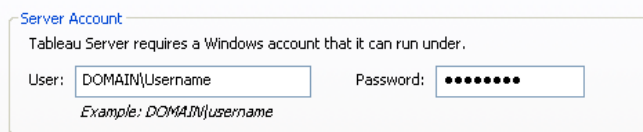
By default, Tableau Server runs on a machine account called Network Service and uses an internal user management system.



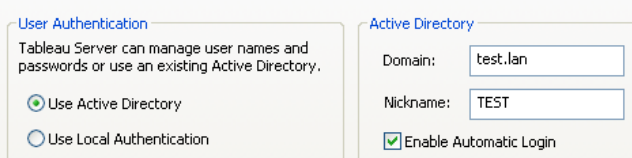
If you would like to use a specific user account or Active Directory instead, continue to Step 3, otherwise, skip to Step 4.

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**.

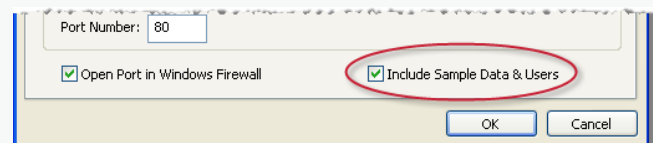


If you want to use Active Directory select **Active Directory** as the type of Authentication. Type the Active Directory domain and nickname into the corresponding text boxes.



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.



When finished, click **Save**.

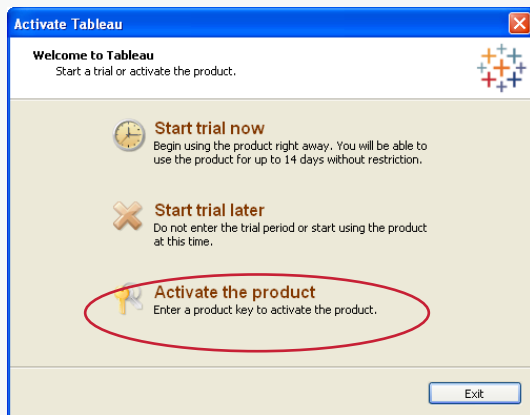
Note: If you have selected to use Active Directory, you will not be able to log into the sample user accounts.

License Activation

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

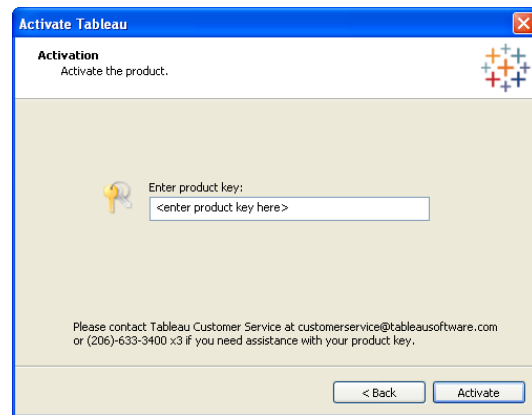
1. Activate the product.

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



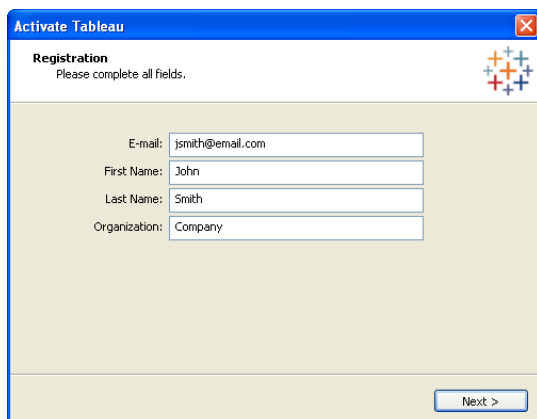
2. Enter your Product Key.

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



3. Register the Product.

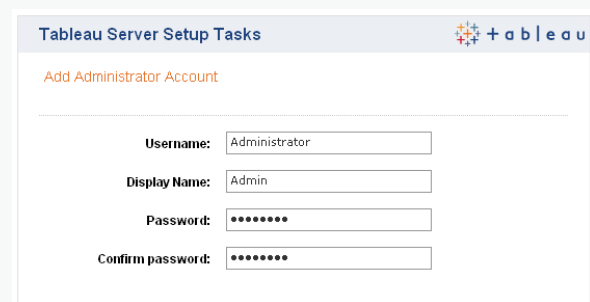
After you activate you must register the product. Provide the necessary information and then click **Register**.



4. Create Administrator Account

If you are using Active Directory, type an existing **User name** 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 **User name** and **Password** (twice) of your choosing.



Getting Started Tutorial

Anyone who wants to browse or publish to Tableau Server must first be added as a user. Each user's access is dependent on their License Level. When you purchase Tableau Server you purchase a set of license levels that you can distribute to users. This tutorial introduces you to the different License levels you can assign to users.

Viewer

The first license level we'll look at is the Viewer level. If you installed the sample data there is already a sample viewer user named Tableau Guest. Click the **Log Out** link at the top of the page so you can log in to the sample account now.

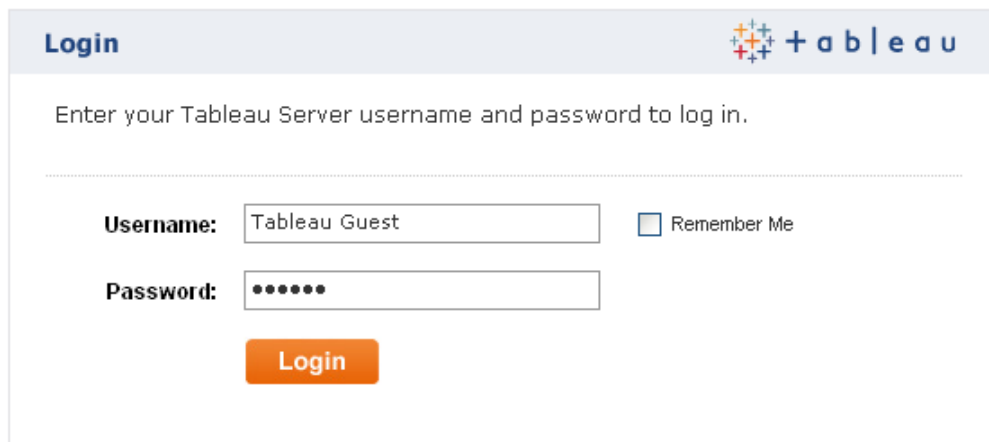
1. Log In to Sample Viewer Account

On the Log in Page, type the following into the corresponding text boxes:

User Name: Tableau Guest

Password: viewer

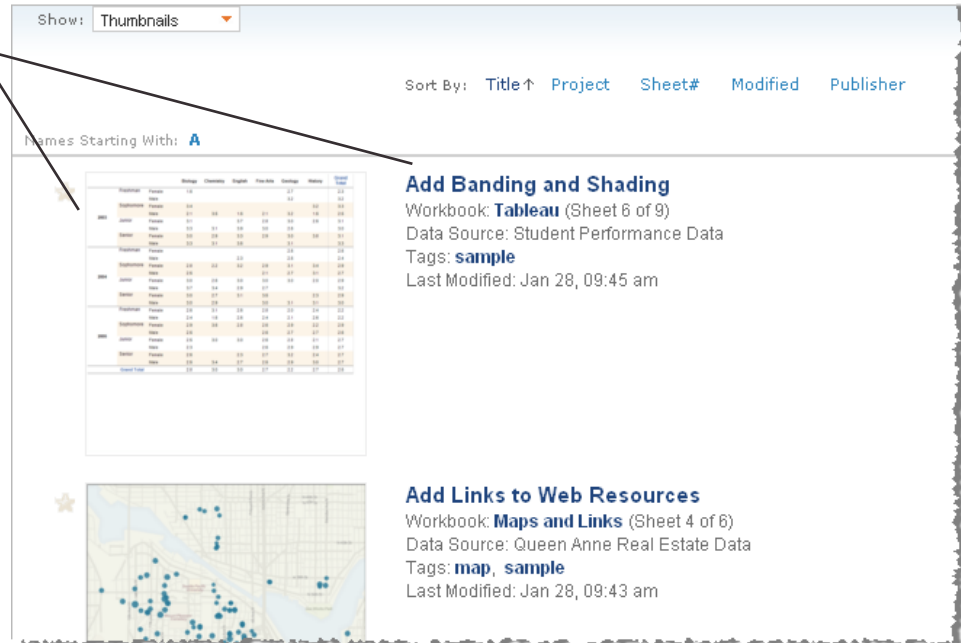
Then click the **Log In** button.

A screenshot of the Tableau Server login page. The page has a light blue header with the word "Login" on the left and the Tableau logo on the right. Below the header, there is a text prompt: "Enter your Tableau Server username and password to log in." followed by a horizontal dashed line. There are two input fields: "Username:" with the text "Tableau Guest" and "Password:" with six dots. To the right of the Username field is a checkbox labeled "Remember Me". Below the input fields is an orange "Login" button.

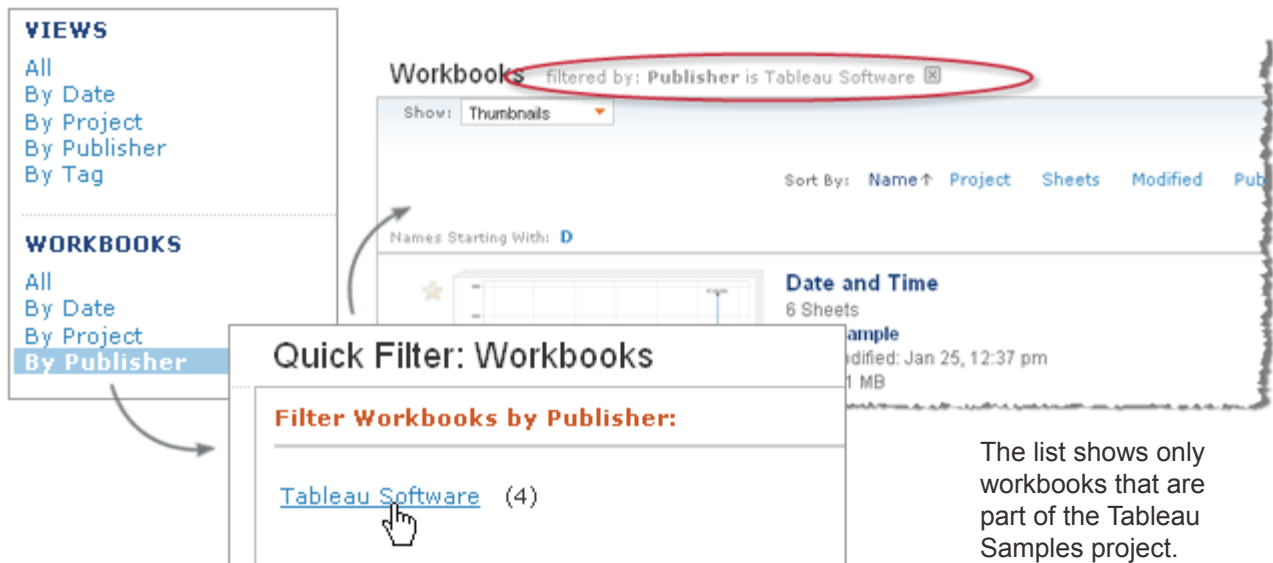
2. Browse the Server

As you can see, when you first log in, you are shown a list of recently published views.

The list shows a thumbnail of the view along with a description.



On the left, you can see the different ways you can browse and filter the views and workbooks. In this example let's look at the list of workbooks filtered by project. Click the **Workbooks** link then click **By Project**. On the filter page, select **Tableau Samples**.

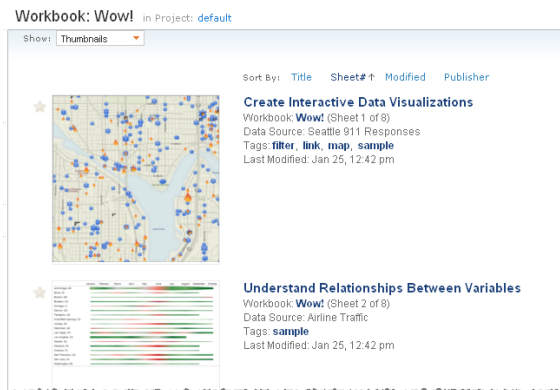


The list shows only workbooks that are part of the Tableau Samples project.

3. Analyze an Individual View

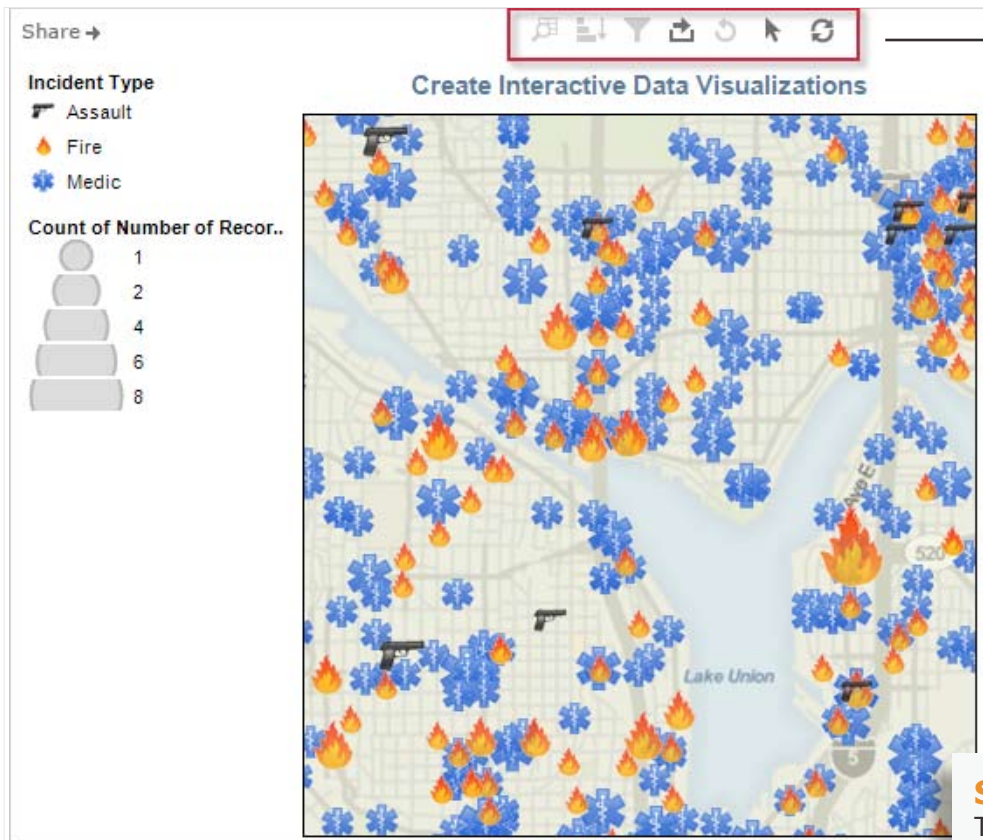
Now let's look at an individual view. Click the **Wow!** workbook.

When you click on the workbook, you next see a list of the views that are part of the workbook.



Now click on the **Create Interactive Data Visualizations** view to see the analysis.

With the Viewer license level you can see the view but can't interact with it. That is, you cannot filter, view underlying data, export the view to an image, and more.



Notice that most of the tools at the top of the view are unavailable for Viewer users.

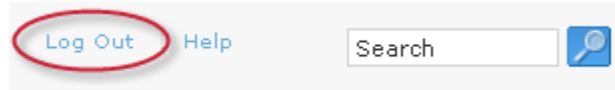
Summary

The Viewer license level allows you to see views, read and add comments, and add tags. With the Viewer license level you cannot interact with the views.

You can, however, view and add comments, as well as add tags.

Interactor

The next License level we'll discuss is the Interactor level. First let's log out of the Tableau Guest account by clicking the **Log Out** link at the top of the window.

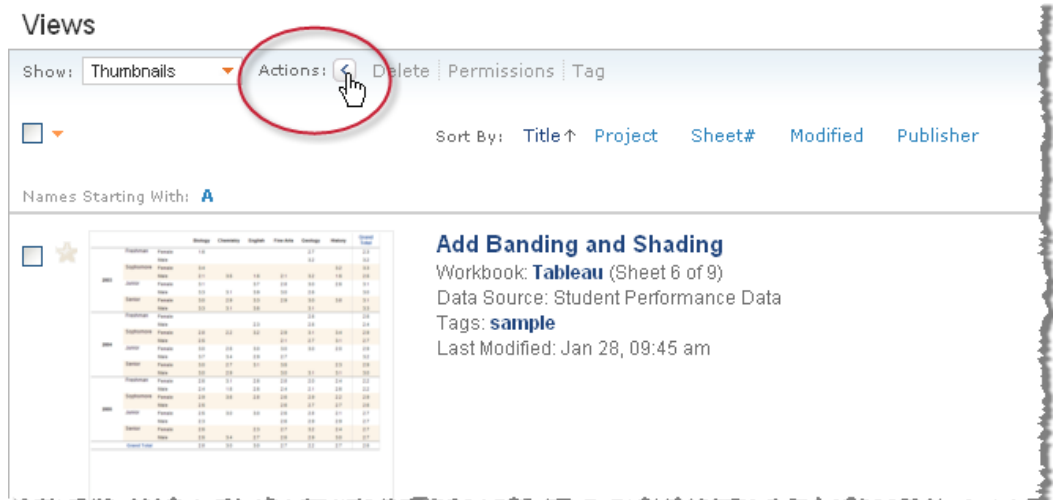


Now log in as an interactor. There is no sample interactor account so you may need to add a user first.

1. Browse the Server

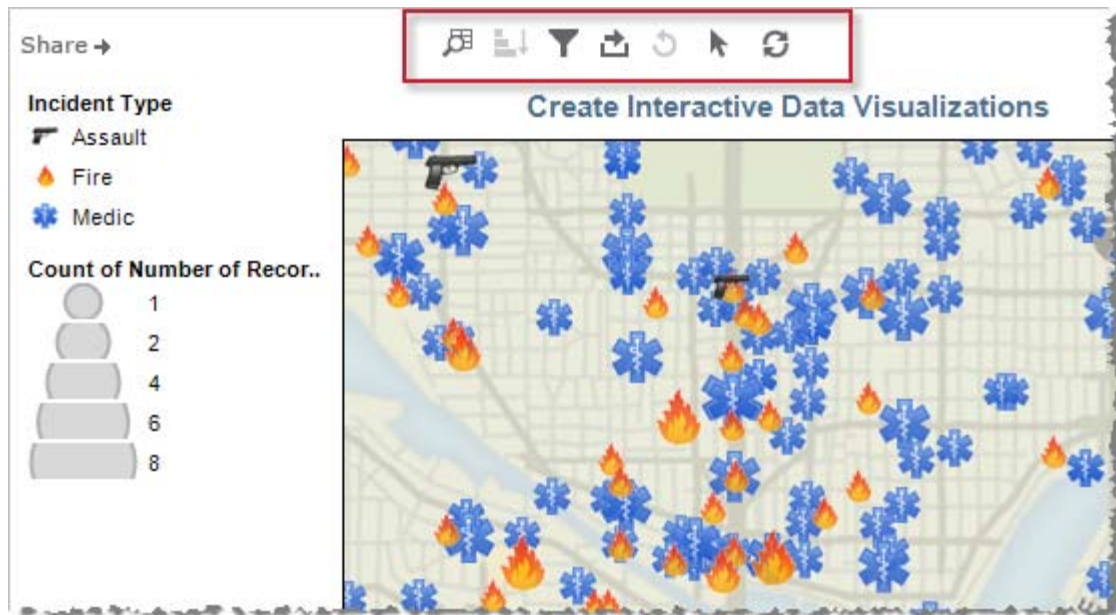
When you log in as an interactor, the list of views looks the same as before except now you have a **Tools** link at the top left of the list.

The **Actions** link opens a toolbar for selecting and applying actions to the items in the list.



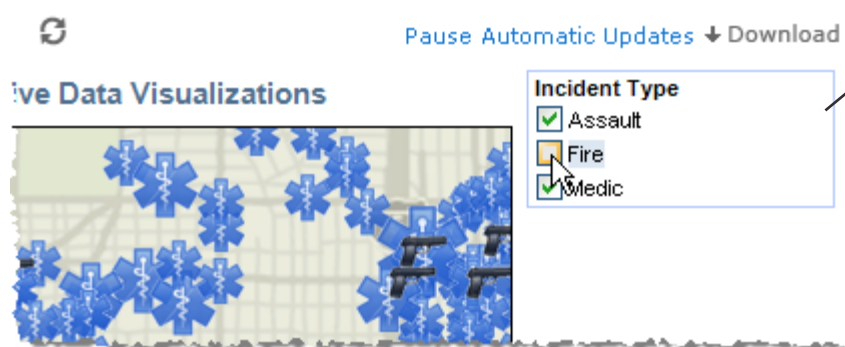
3. Analyze an Individual View

Another big difference between Interactor and Viewer license levels, is when you are looking at an individual view. Let's look at the same view as last time. Click the **Workbooks** link, then select the **Wow!** workbook and finally select the **Create Interactive Data Visualizations** view. This time, you'll see that the tools at the top of the view are available.



interactor, only can you e view, you so sort, filter, elected data, ore.

For example, this view shows different 911 responses. Use the quick filter on the left to exclude different types of responses.



Clear the **Fire** check box to exclude all fire responses from the view.

Summary

The Interactor license level allows you to see views, interact with the views (e.g., sort, filter, export the selected data, follow hyperlinks, etc.), read and add comments, and add tags. In addition, Interactors can be granted the right to publish and can be given administrative rights.

Notice, you can still read and add comments as well as add tags.

Managing Licenses

As an administrator you are responsible for adding users and assigning them license levels. Follow along to learn how.

To get started, log out of the Tableau User account and log in as the administrator. Use the user name and password you set up when you were configuring Tableau Server.

Once you've logged in, you'll see the Administration area is added to the left navigation column.



The Administration area offers tools for managing users, groups, projects, 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 four users listed: the administrator account you are currently logged into, Tableau Guest, Tableau User, 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.

| | Full Name ↑ | Last Login | License Level | Admin | Publish | Username |
|--------------------------|-------------------------|------------------|---------------|-------|---------|------------------|
| <input type="checkbox"/> | Admin | 10 minutes ago | Interactor | ✓ | ✓ | Administrator |
| <input type="checkbox"/> | Guest | | Guest | | | guest |
| <input type="checkbox"/> | Tableau Guest | 15 minutes ago | Viewer | | | Tableau Guest |
| <input type="checkbox"/> | Tableau Software | Jan 28, 03:33 pm | Interactor | | ✓ | Tableau Software |

[Add User](#) | [Add 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 page.