

Tableau Server Certified Associate

Learn to install, secure, administer and monitor Tableau Server deployments for enterprise governance and performance.

40 Hours

DURATION

13

MODULES

58

TOPICS

COURSE OVERVIEW

Learn best practices around Tableau Server installation and configuration in this foundational course geared towards Tableau Server administrators. This course focuses on enterprise governance, security, performance, scalability, and more to help you get the most out of your Tableau deployment.

WHO THIS COURSE IS FOR

Tableau Server Administrators

System Administrators

BI Administrators

Data Governance Teams

IT Infrastructure Staff

PREREQUISITES

- Tableau Fundamentals

LEARNING OBJECTIVES

- Plan a Tableau Server deployment using the Tableau Blueprint
- Install and configure Tableau Server software
- Apply security hardening and configure security features
- Implement functional security with groups, projects and permission rules
- Publish, secure and certify data sources and workbooks
- Configure schedules, tasks, extract refreshes and subscriptions
- Monitor server status, activity logs and admin alerts
- Analyse server performance recordings and automate maintenance

13 Modules, 58 Topics

00

Tableau Overview

01

The Class Environment

TOPICS

Superstore Scenario

PLANNING A TABLEAU SERVER DEPLOYMENT

Tableau Blueprint

02

Installing a Tableau Server

TOPICS

Installation Methods · Installing Server Software · Post Installation Configuration

03

Setting Security Features

TOPICS

Security Hardening · Setting Security Features

04

Installing Tableau Desktop on the Server

TOPICS

- Deploying Tableau Desktop

REVIEWING THE TABLEAU SERVER UI

- Server Content Types and Objects
- Searching on Tableau Server
- Importing Users from a CSV
- Changing a User's Site Role
- Importing Individual AD Users
- Importing AD Groups
- Updating Account Settings
- Reviewing the Server Status Page
- Reviewing the General, Licenses, and Extensions Pages
- Creating and Deleting a Site
- Editing a Project Name and Description
- Adding a Workbook Description

05

Understanding Functional Security and Permissions

TOPICS

- Viewing Project Permissions
- Removing Permissions on the Default Project
- Comparing Workbook Permissions in Unlocked and Locked Projects

06

Implementing Functional Security

TOPICS

- Creating Functional Local Groups
- Adding Users to Groups
- Creating Projects Using tabcmd
- Setting Permission Rules for Projects Using the UI
- Setting Default Permission Rules for Projects Using the REST API

07

Publishing, Securing, and Certifying Data Sources

TOPICS

- Publishing a Data Source with a Live Connection
- Reviewing a Published Data Source in Ask Data Using a Lens
- Creating and Publishing a SQL Extract
- Creating and Publishing an Extract of a Local File
- Automatic Workbook User Filter
- Automatic Data Source User Filter
- Certifying a Data Source

08

Publishing Workbooks

TOPICS

Publishing Content to a Sandbox Project · Publishing Content to a Production Project · Using a Backup to Populate Content

09

Reviewing Recommended Data Sources and Revision History

TOPICS

Viewing Recommended Data Sources · Viewing Data Source Revision History · Viewing Workbook Revision History

10

Working with Schedules, Tasks, and Jobs

TOPICS

- Setting Extracts on a Refresh Schedule
- Setting a Data-Driven Alert
- Running an Extract Refresh
- Troubleshooting an Extract Refresh Failure
- Republishing the Local Extract
- Verifying the Resolution of the Extract Refresh Failures
- Subscribing to a View
- Running a Subscription

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Monitoring Server Status

TOPICS

Viewing Admin Alert Emails

AUDITING SERVER ACTIVITY

Viewing Server Status · Archiving Log Files from the TSM UI · Archiving Log Files from the TSM Command Line · Using Logshark · Publishing a Repository Data Source

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Monitoring Server Performance

TOPICS

Creating a Performance Recording

AUTOMATING DAILY MAINTENANCE

Automating Daily Backups

CUSTOMIZING YOUR SERVER

Customizing Tableau Server

NOTES

- Demonstrations will be conducted on Tableau Cloud.
- Content related to Tableau Server will be covered theoretically.

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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