

Title: Tableau Server Certified Associate

Exam Level: Professional

Course Duration: 40 Hours

Course Description:

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.

Prerequisite:

Tableau Fundamentals

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

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Module 0: Tableau Overview

Module 1: The Class Environment

- Superstore Scenario

Planning a Tableau Server Deployment

- Tableau Blueprint

Module 2: Installing a Tableau Server

- Installation Methods
- Installing Server Software
- Post Installation Configuration

Module 3: Setting Security Features

- Security Hardening
- Setting Security Features

Module 4: Installing Tableau Desktop on the Server

- 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

Module 5: Understanding Functional Security and Permissions

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

Module 6: Implementing Functional Security

- 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

Module 7: Publishing, Securing, and Certifying Data Sources

- 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

Module 8: Publishing Workbooks

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

Module 9: Reviewing Recommended Data Sources and Revision History

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

Module 10: Working with Schedules, Tasks, and Jobs

- 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

Module 11: Monitoring Server Status

- 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

Module 12: Monitoring Server Performance

- Creating a Performance Recording

Automating Daily Maintenance

- Automating Daily Backups

Customizing Your Server

- Customizing Tableau Server