

Tableau Server Administration - TSA201 (TSA201)

Delivery and Pre-work Information

Pre-work

- Pre-work Title: Tour the Tableau Environment
- Pre-work Link: https://trailhead.salesforce.com/en/content/learn/trails/tour-the-tableau-environment

---

Course Information

Code

TSA201

Course Name

Tableau Server Administration - TSA201

About This Training

Learn best practices around Tableau Server installation and configuration in this foundational course for Tableau Server administrators. In this 3-day instructor-led course, our expert instructors focus on enterprise governance, security, performance, scalability, and more to help you get the most out of your Tableau deployment.

Who should take this training?

This is a technical course designed for Tableau Server administrators who are responsible for installing and configuring Tableau Server, in addition to site implementation, management, or monitoring.

Please Note: This course is taught using a Tableau Server in a Windows Server environment. Students using their own computer are expected to follow the steps outlined in this Computer Setup Guide.

When you complete this training, you will be able to:

- Plan a Tableau Server deployment.
- Configure Tableau Server.
- Manage users.
- Implement a functional security model.
- Certify data sources.
- Publish workbooks.
- Manage extract refreshes, alerts, and subscriptions.

What lessons and topics will be covered?

Introduction to Tableau

Tableau Server Deployment

- Build a Tableau Blueprint

Tableau Server Installation

- Select an Installation Method
- Install Server Software

- Configure After Installation

Security Features Setup

- Harden Security
- Set Security Features

Tableau Desktop Installation on the Server

- Deploy Tableau Desktop

Tableau Server User Interface (UI)

- Define Server Content Types and Objects
- Search on Tableau Server
- Import Users from a CSV
- Change a User’s Site Role
- Import Individual Active Directory (AD) Users
- Import AD Groups
- Update Account Settings
- Review the Server Status Page
- Assess the General, Licenses, and Extensions Pages
- Create and Delete a Site
- Edit a Project Name and Description
- Add a Workbook Description

Functional Security and Permissions

- View Project Permissions
- Remove Permissions on the Default Project
- Compare Workbook Permissions in Unlocked and Locked Projects

Functional Security Implementation

- Create Functional Local Groups
- Add Users to Groups
- Create Projects Using tabcmd
- Set Permission Rules for Projects Using the UI
- Establish Default Permission Rules for Projects Using the REST API

Data Source Publication, Security, and Certification

- Publish a Data Source with a Live Connection
- Review a Published Data Source in Ask Data Using a Lens
- Create and Publish a Structured Query Language (SQL) Extract
- Create and Publish an Extract of a Local File
- Automate Workbook User Filter
- Implement Data Source User Filter
- Certify a Data Source

Workbook Publication

- Publish Content to a Sandbox Project
- Publish Content to a Production Project
- Use a Backup To Populate Content

Recommended Data Sources and Revision History

- Access Recommended Data Sources
- View Data Source Revision History
- Review Workbook Revision History

Schedules, Tasks, and Jobs

- Set Extracts on a Refresh Schedule
- Establish a Data-Driven Alert
- Run an Extract Refresh
- Troubleshoot an Extract Refresh Failure
- Republish the Local Extract
- Verify the Resolution of the Extract Refresh Failures
- Subscribe to a View
- Run a Subscription

Server Status

- View Admin Alert Emails

Server Activity Audits

- View Server Status
- Archive Log Files from the TSM UI
- Deprecate Log Files from the TSM Command Line
- Use Logshark
- Publish a Repository Data Source

Server Performance

- Create a Performance Recording

Daily Maintenance

- Automate Daily Backups

Server Customization

- Customize Tableau Server

© 2026 **Salesforce, Inc. All rights reserved.**