Tableau Server Administration

Course Content

Course Description:

This class is tailored to those who will be in an administration capacity for Tableau Server or Tableau Online, typically the IT department. This course will not cover how to use Tableau to build dashboards or reports. This course will focus on high-level aspects of what to do to administer Tableau Server, not the nitty gritty details of why it works the way it does or how it runs under the hood.

At Course Completion:

Students will learn:
- Security setup
- Management of Users, Groups, Content, and Data Sources
- Permissions best practices
- Automating server tasks and Bridge Extracts
- Schedule data driven alerts
- Monitoring server status

Topics:

Understanding Projects, Workbooks, Views, and Data Sources
- Project
- Workbook
- View
- Data Source
- Navigation

Working within a Project
- Nested or child projects
- Adjusting Permissions
- Adjusting Project Description or Images

Working within a Workbook
- Edit the workbook in the browser
- Download the file
- Tags
- Permissions
- Revision history
- Workbook stats
- Sorting and tiling options

Working with Views in a Workbook
- Hierarchical structure of your project and folders
- Tabs
- Setting view filters or lenses
- Alerts
- Subscriptions
- Sharing
- Comments
- Preview Device Layouts

Adjusting Users and User Permissions
- Adding new users
- Assigning permissions and site role access

Creating or Editing Groups
- Creating a group
- Adjusting group permissions

Refresh Schedules & Tasks
- Understanding data extracts and why they are important
- Understanding and creating refresh schedules
- How these get set within a Tableau file
- Understanding tasks and triggers

Settings, Status Reporting & Site Usage
- Understanding the various reports and how to use them
- Understanding how to customize them, if desired
- Understanding Settings and what information is allowed and tracked