

**Tableau Server Administration**

**Course Number:** TAB-120
**Duration:** 0.25 days

**Overview**

This live, online, 2-hour Tableau Server Administration training course is laser-focused on the high-level aspects of how to administer Tableau Server, rather than the nitty-gritty details of why it works the way it does. This course does not cover how to build dashboards or reports.

**Prerequisites**

No prior experience is presumed.

**Materials**

All Tableau training students receive comprehensive courseware.

**Software Needed on Each Student PC**

* Tableau Server or Tableau Online
* Internet Access
* Tableau Desktop is preferred but not required

**Objectives**

* Set up security
* Manage users, groups, content, and data sources
* Apply permissions best practices
* Automate server tasks and bridge extracts
* Schedule data-driven alerts
* Monitor server status

**Outline**

* 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
	+ The 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
* Refreshing Schedules and Tasks
	+ Data extracts and why they are important
	+ Understanding and creating refresh schedules
	+ How these get set within a Tableau file
	+ Tasks and triggers
* Settings, Status Reporting, and Site Usage
	+ The various reports and how to use them
	+ How to customize them, if desired
	+ Settings and what information is allowed and tracked
* Conclusion