

**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