# Tableau Server Backup and restore

## Nightly backup

Create nightly backup scripts and schedules that backup all the Tableau server related data automatically:

* Data (workbooks, extracts, users, etc)
* Server Configuration (timeout, port, etc)
* Logs (http requests, Tableau service logs, etc)

The backups have one set of copies at D:driver of tableau.corp.xxxx.com and one set of copies at remote machine tableau2.corp.xxxx.com

It is hot backup and happens once a day. To achieve maintenance free, Tableau Data & Server Configuration keep last 7 days’ daily backups while Logs keep last 14 days’ daily backups. The script automatically rotating the backups by deleting old backups.

All backups files are zipped and compressed to save storage. Some more technical details about the backups:

**On production server tableau.corp.xxxx.com**

* Backups scripts is @ d:\backups\ServerBackupScripts\Serverbackup.bat

Note: This backup script Tableau path variable needs to be changed whenever you upgrade Tableau server.

* Scheduling uses Windows Server Task Scheduler. Job Name is Tableau Server Backup. It is currently scheduled at 12:01am every day
* D:\backups\tableau\_data-mm-dd-yyyy.tsbak as tableau data backup
* D:\backups\tableau\_logs- mm-dd-yyyy.zip as tableau logs backup

**On backup server tablea2u.corp. xxxx.com**

* Backups scripts is @ c:\backups\ServerBackupScripts\ServerbackupCopyScript.bat
* Scheduling uses Windows Server Task Scheduler. Job Name is Tableau Server Backup. It is currently scheduled at 3:00am every day
* c:\backups\tableau\_data-mm-dd-yyyy.tsbak as tableau data backup
* c:\backups\tableau\_logs- mm-dd-yyyy.zip as tableau logs backup

## Restore process

The following restoring procedures are fully tested and verified on tableau2.corp.xxxx.com

When you initiate a recovery from a backup file, you must decide if you need to restore to a different machine or the same machine. When you restore to a different machine, you must not restore the Tableau configuration but restore only the Tableau Data (workbooks, extract).

1. The following instructions are to restore to the same machine, run these commands in the following order:

tabadmin stop

tabadmin restore d:\backups\ <backupfilename.tsbak>

* <backupfilename.tsbak> should be the latest tableau\_data backup file which you have.
* For example, if you want to restore d:\backups\tableau\_data-2016-05-01.tsbak, the command should be

tabadmin restore d:\backups\ tableau\_data-2016-05-01.tsbak

Note: When restoring from a backup, Tableau Server prompts for the password of the Run As user account.

tabadmin start

1. Alternatively, if you are restoring to another machine, run these commands in the following order:

Copy the <backupfilename.tsbak> which you want to restore from d:\backups\ to another machine

Install Tableau server on another machine and get to tabadmin command

tabadmin stop

tabadmin restore --no-config <backupfilename.tsbak>

* <backupfilename.tsbak> is the file name that tableau\_data backup file which you want to restore.

tabadmin start

Note: When restoring from a backup, Tableau Server prompts for the password of the Run As user account.

At this point of time, you should be able to access Tableau by using your same user name and password. Let’s say that you restored Tableau Data to tableau2.corp.xxxx.com. The URL is

1. [http://tableau2.corp.xxxx.com](http://tableau2.corp.bluejeans.com)
2. After login to Tableau, navigate to z\_admin project folder where all custom admin views are kept. Those custom admin views are still pointing to tableau.corp.xxxx.com. Open each workbook, click data source, edit connection, change server name from tableau.corp.xxxx.com to tableau2.corp.xxxx.com. Do this for each workbook in this folder.

CONGRTULATIONS!!! You are done with restoring

## Backups scripts

:: Tableau Server Backup scripted by Mark Wu (initially Created by Jonathan MacDonald)

::This scripts works for Windows Server 2012 and Tableau v9.2 or higher

:: VARIABLES SECTION - PLEASE CUSTOMISE THESE VARIABLES TO YOUR SYSTEM HERE!

set VERSION=9.2

:: Please customize this to the version of Tableau Server you are running.

set BINPATH=C:\Program Files\Tableau\Tableau Server\%VERSION%\bin

:: In case you don't have tabadmin set in your Path environment variable, this command sets the path to the Tableau Server bin directory in order to use the tabadmin command.

:: Customise this to match your the path of your Tableau Server installation. The version variable above is included.

set BACKUPPATH=D:\backups

:: This command sets the path to the backup folder.

:: Change this to match the location of the folder you would like to save your backups to

:: set REMOTEBACKUPPATH=“\\\…\Tableau\Backups"

:: This command sets the remote path to the backup folder. The intent is to keep one set of backup files in remote machine as well

:: Change this to match the location of the folder you would like to save your backups to

set LOGPATH=D:\backups

:: This command sets the path to the log files folder

:: Change this to match the location of the folder you would like to save your zipped log files to

set SAVESTAMP=%DATE:~10,4%-%DATE:~4,2%-%DATE:~7,2%

:: This command creates a variable called SAVESTAMP which grabs the system time and formats in to look like MM-DD-YYYY

:: This gets rid of the slashes in the system date which messes up the commands later when we're trying to append the date to the filename

:: SCRIPT INITIATION

echo %date% %time%: \*\*\* Housekeeping started \*\*\*

:: Prints that text to the DOS prompt

cd /d %BINPATH%

:: changes directory to the above path and takes into account a drive change with the /d command

:: ROTATING THE LOG FILES

echo %date% %time%: Cleaning out old log files...

forfiles -p %LOGPATH% -s -m \*.zip /D -14 /C "cmd /c del @path"

:: Cleans out files in the specified directory that end with a .zip extension and are older than 14 days

:: If you are running this script weekly, this ensures that only 4 weeks of log files are saved.

:: You will likely want to adjust this if you plan to run this script more frequently.

echo %date% %time%: Backing up log files...

tabadmin ziplogs -l -n -f

copy logs.zip %LOGPATH%\tableau\_logs-%SAVESTAMP%.zip

:: Grabs the Tableau Server logfiles and zips them

:: Then copies the zip file to the specified directory appending the system date to the filename

:: BACKING UP THE TABLEAU SERVER

echo %date% %time%: Cleaning out old backup files...

forfiles -p %BACKUPPATH% -s -m \*.tsbak /D -7 /C "cmd /c del @path"

:: Cleans out files in the specified directory that end in .tsbak extension and are older than 7 days

:: If you are running this script weekly, this ensures that only 2 backup files are saved.

:: You will likely want to adjust this if you plan to run this script more frequently.

echo %date% %time%: Backing up data...

tabadmin backup %BACKUPPATH%\tableau\_data -d

:: Backs up the Tableau Server and creates a file tableau\_server\_backup.tsbak with the system date appended to the filename

:: CLEANUP

echo %date% %time%: Running cleanup...

tabadmin cleanup

:: Cleans out the Tableau server logs

echo %date% %time%: \*\*\* Housekeeping completed \*\*\*

:: Prints that text to the DOS prompt to show that the jobs are all done

:: copy the new backup to remote server. Then you will have to setup another batch command in the remote server to delete the old backups in remote location

:: xcopy %BACKUPPATH% %REMOTEBACKUPPATH%

:: echo %date% %time%: \*\*\* Housekeeping completed \*\*\*

## COPY Backup files to a remote server scripts

## (this scripts is better run on remote machine since deleting old backup network files is tricky)

:: This scripts copies new nightly Tableau server backups from \\tableau.xxxx.com\backups\ to this server

:: and delete old backups files on this server as well automatically

:: VARIABLES SECTION - PLEASE MODIFY THOSE WHEN YOU CHANGE FILE DIRECTORY!

set BACKUPPATH\_ORIGINAL=\\(enter your path here)

:: This command sets the path to where the production tableau server backup files are.

set BACKUPPATH\_TARTGET=c:\backups

:: This command sets the path to this machine where another the backup files will be copied over

set SAVESTAMP=%DATE:~10,4%-%DATE:~4,2%-%DATE:~7,2%

:: This command creates a variable called SAVESTAMP which grabs the system time and formats in to look like MM-DD-YYYY

:: This gets rid of the slashes in the system date which messes up the commands later when we're trying to append the date to the filename

:: SCRIPT INITIATION

echo %date% %time%: \*\*\* Housekeeping started \*\*\*

:: Prints that text to the DOS prompt

:: ROTATING THE LOG FILES

echo %date% %time%: Cleaning out old log files...

forfiles -p %BACKUPPATH\_TARTGET%\ -s -m \*.zip /D -14 /C "cmd /c del @path"

:: Cleans out files in the specified directory that end with a .zip extension and are older than 14 days

:: COPY BACKUP LOG FILES OVER TO THIS MACHINE

echo %date% %time%: Backing up log files...

copy %BACKUPPATH\_ORIGINAL%\tableau\_logs-%SAVESTAMP%.zip %BACKUPPATH\_TARTGET%\

:: Copy the latest the zip log file to the specified directory appending the system date to the filename

:: ROTATING THE TABLEAU DATA BACKUP FILES

echo %date% %time%: Cleaning out old backup files...

forfiles -p %BACKUPPATH\_TARTGET%\ -s -m \*.tsbak /D -7 /C "cmd /c del @path"

:: Cleans out files in the specified directory that end in .tsbak extension and are older than 7 days

:: COPY BACKUP DATA FILES OVER TO THIS MACHINE

echo %date% %time%: Backing up log files...

copy %BACKUPPATH\_ORIGINAL%\tableau\_data-%SAVESTAMP%.tsbak %BACKUPPATH\_TARTGET%\

:: Copy the latest the tableau data backup file to the specified directory appending the system date to the filename

echo %date% %time%: \*\*\* Backup logs and data copy over\*\*\*