

Backing Up Tableau Server



Backing up your server should be part of your regularly scheduled server maintenance. Backups provide peace of mind because they allow you to restore the server configuration and content to a previous state if anything unexpected happens.

During installation and configuration of Tableau Server, you should create backups at several key points to save yourself extra work if something goes wrong. We will point out the places when you should create a backup throughout this guide.

Back up Tableau data

A proper backup of your Tableau Server installation saves all your configuration information, user information, and content.

Even if you're already making backups of your server or software using third-party utilities or snapshots, you still need to follow this procedure. The only way to restore Tableau Server to a previous state is from the files you will generate in the procedure below.

As a matter of safety, you should never keep your backup files on the same computer you are backing up, in this case the computer that is running Tableau Server. Copy them to a separate location so that it is available if something happens to your Tableau Server computer.

Creating backup files

To back up Tableau Server, you must generate two backup files:

- **Repository data:** Tableau Server data consists of the Tableau PostgreSQL database. This database is referred to as the Tableau Server repository, which contains workbook and user metadata, data extract files, and site configuration data. The procedure below describes how to use TSM to create a repository backup, which will result in a single file with a .tsbak extension. The repository backup is the most critical element of your backup assets since it holds all the user and content data on your Tableau Server.
- **Topology and configuration data:** This is the data that defines how your Tableau Server is configured. The procedure below describes how to use TSM to generate a single json file that includes the important configuration information you'll need if you have to restore your Tableau Server from scratch.

To create back up files

1. Generate a repository backup with the date appended to the file name. Run the following command:

```
tsm maintenance backup -f <backup_file> -d
```

For example, if you want to generate a backup file called `repository-<date>.tsbak`, run the following command:

```
tsm maintenance backup -f repository -d
```

TSM will append the file name with the date and the file extension, .tsbak. The file will be saved to the following location:

```
C:\ProgramData\Tableau\Tableau Server\data\tabsvc\files\backups\
```

2. Generate a topology and configuration backup. Run the following command:

```
tsm settings export -f <path-to-file.json>
```

We recommend saving the file to the same directory where the respository backup is saved. The `tsm setting export` command does not append the file extension, nor does it provide an option to append the date. You must add these elements in the command.

Run the following command to create a topology and configuration backup file with the proper file extension (.json) and date in the file name. The command example also includes the path to the same location as the respository backup:

```
tsm settings export -f C:\ProgramData\Tableau\Tableau  
Server\data\tabsvc\files\backups\topology-config-<date>.json
```

Where `<date>` is the date of the backup, for example `30-Nov-2018` .

3. Save the backup files to another computer or to a portable hard drive.

What if I get an access denied error when I attempt to run TSM commands?

Verify that the account you are using is a member of the Local Administrators group on the Windows computer where you are installing Tableau Server.