



Server Certified Professional

Exam Guide

Exam Details

This document provides information on the structure of the exam, along with the knowledge and skills being measured. It will also guide you to resources to help you prepare for success. This document is not intended to build product knowledge.

Awarded Credentials

Upon successful completion of this exam, you will be awarded the title of Tableau Server Certified Professional. This title is active for three years from the date achieved.

Target Audience

This exam is for those who have a comprehensive understanding of Tableau Server functionality in a single-machine and enterprise configuration. You should have at least nine months of hands-on Tableau Server experience. Typical roles include System Administrator, System Architect, IT Representative, Implementer or Consultant.

Prerequisites

To be eligible to take this exam, you must be an active Tableau Server Qualified Associate.

Learning Resources

To be successful for this exam, we strongly encourage you to complete the Server Architecture course. Information on this course can be found [here](#).

Explore additional resources here:

- <http://www.tableau.com/support/help>
- <https://onlinehelp.tableau.com/current/server/en-us/admin.htm>
- <http://onlinehelp.tableau.com/current/server/en-us/help.htm#perf.htm>

Exam Format

Time Limit: Seven hours

Passing Score: Pass/Fail based on a detailed scoring rubric and Tableau Server best practices

Grading: By committee

Question Format: Application mastery: hands-on, short essay

Language(s) Offered: English

Delivery Platform: In-person delivery only

For questions, email certification@tableau.com or visit tableau.com/certification.

Exam Format (cont'd)

This is a hands-on, application mastery exam. Questions will be presented in a variety of ways.

- You will be presented with a network/use scenario and asked to design a system that will provide the best performance and functionality for your users. This will be in written form with detailed explanation expected.
- You will be given a scenario with a number of specific requirements and access to an enclosed network. At the completion of the exam time, a grading committee will review your configuration to verify it matches all requirements and Tableau Server best practices.
- In the hands-on portion of the exam, you will be asked to create files and other materials that are generated in the day-to-day use of Tableau Server.

Sample Questions

The questions below are examples intended to give you a sense of how questions will look on the exam.

- a. Using server X, perform a full single-machine installation connecting to the Active Directory Server. Import all Groups and give all Users the ability to publish workbooks.
- b. Publish an extract to Tableau Server that will be updated at 7:00 PM Mondays. The extract's data source should be in a location accessible by Tableau Server. Use the appropriate view to verify the connection.
- c. Create a project that will allow only the HR team permission to view/publish. The HR Manager should also have complete control of that project.
- d. With a limitation of two servers, how would you architect a deployment so that it can handle heavy extract usage? Explain your logic for the configuration.

Skills Measured

Architecture & Planning

Topology

- Identify client components
- Identify server components
- Understand best practices for Tableau scalability and configuration
- Architect Tableau Server configuration based on user requirements and resources

Preparation

Versions

- Identify the current version of Tableau Server
- Obtain the latest release of Tableau Server
- Access Tableau Server release notes
- Research configuration and installation details with Tableau Online Help

Hardware Requirements

- RAM Requirements
- CPU Requirements
- Hard disk requirements
- Access requirements with Tableau Online Help

Software Requirements

- List the supported Operating Systems
- Understand browser requirements
- Identify the SMTP Server
- Explain the purpose and benefits of a dedicated server
- Understand anti-virus issues
- Understand port configurations and potential conflicts for required software or server machines
- Research software requirements with Tableau Online Help

Licensing

- Explain user-based licensing

- Activate and update any type of license key
- Execute steps for offline activation

Process Configuration

- Describe the function of each Tableau Services Manager and Tableau Server process
- Verify if a process is running
- Verify correct processes are running on the appropriate servers
- Understand the difference between simple distributed environments, redundant environments for disaster recovery and high availability

Data Source Identification and Administration

- Identify required ports
- Verify runtime user permissions on the database
- Identify, locate, and install database drivers
- Understand file, relational, and cube differences
- Understand extract and live connection differences
- Know the benefits of published data sources
- Publish live data source connections and extracts using Tableau Desktop
- Administer published data sources and embedded passwords

Infrastructure Network

- Understand network latency implications
- Explain the risks of Dynamic IP addressing
- Create and troubleshoot a Run As Service account

Installation

- Installation steps and options (including path to install, gateway port, etc.)
- Authentication options
- Install Tableau Server components with various authentication options

Skills Measured (cont'd)

- Know the impact of the automatic login option
- Set up SSL security
- Understand Tableau best practices
 - Single machine environment
 - Distributed configuration
 - High availability configuration
- Install Tableau Server
 - Single machine environment
 - Distributed configuration
 - High-availability configuration

Configuration

Windows Server Configuration

- Configure cache settings for the desired performance
- Apply process distribution
- Configure email alerts and subscriptions
- Configure SSL
- Configure optional customizations

Tableau Server Configuration

- Configure site options
- Configure user quotas
- Understand who can add users
- Set storage quotas
- Enable and edit site subscriptions
- Set default page for user or user group
- Add and configure projects and nested projects
- Use tsm to modify configuration settings, verify status, stop and start the server
- Use tabcmd to aid in configuration and daily tasks

Adding Users

- Manually add users
- Set site roles
- Import users via Active Directory or CSV file

Security

- Configure security and permissions
 - Sites
 - Projects
 - Groups
 - Users
 - Data Sources
 - Workbooks

Understand Permissions

- System permission composition
- Ramifications of permission design
- Differences between allow, deny, and none
- Tableau security model

Maintenance & Administration

- Maintain data connections
- Create schedules
- Edit and delete subscriptions
- Perform server analysis and cleanup
- Mitigate initial-node failure in a cluster
- Add, remove, and deactivate users
- Update licenses
- Start, stop, and restart
- Use the TSM browser client and command line
- Contrast site and sever administrator rights
- Connect to and analyze data from the Tableau PostgreSQL database
- Understand the global nature of schedules
- Explain differences between extract and subscription schedules

Troubleshooting

- Understand requirements of third-party browser cookies
- Reset Tableau user or Tableau Run As Service passwords
- Package log files for reporting
- Use tsm to validate and configure

Skills Measured (cont'd)

- Rebuild the search index
- Use maintenance analysis reports
- Troubleshoot performance
- Create a performance recording
- Create and open support requests
- Troubleshoot Tableau Desktop and Server interactions
- Implement options for email alerts
- Troubleshoot potential port issues
- Troubleshoot anti-virus issues
- Understand different process flows to pinpoint issues like logging in and viewing a workbook

Migration & Upgrade

- Perform point version and full version upgrades
- Perform a clean install
- Migrate to different hardware

Interactions with Tableau Desktop

- Publish a data source
- Publish a workbook
- Publish an extract as a data source
- Set automatic refresh

Timeliness

Completing a task effectively and efficiently has become a standard that organizations expect from employees. This exam is timed because we view time as a critical competency needed to be successful.