**1. For each environment, what was config setup(components & details).**

**Tableau Server Administration Details:  
  
1. Installation and Configuration:** Any guides or links related to the installation process and configuration best practices for Tableau Server.  
  
There are loads of different pages to read through for this but I would start [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/requ.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg947h0fZEA$) and then for the actual install process you can see [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/setup.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94c6fEBOo$)  
https://help.tableau.com/current/server-linux/en-us/requ.htm  
https://help.tableau.com/current/server-linux/en-us/setup.htm  
  
**2**. **User and Permission Management**: Resources detailing user management, permission assignment, and best practices for controlling access within Tableau server  
  
[Here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/manage_site.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94dup2YZQ$) for general how-to information and [here](https://urldefense.com/v3/__https:/help.tableau.com/current/blueprint/en-us/bp_governance_in_tableau.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94l0VsCl8$) for best practices on governance in general (which takes users/groups into consideration   
<https://help.tableau.com/current/server-linux/en-us/manage_site.htm>  
https://help.tableau.com/current/blueprint/en-us/bp\_governance\_in\_tableau.htm  
  
**3**. **Monitoring and Maintenance**: Any Documentation or recommended resource for monitoring server performance, system health check, and maintenance routines.  
  
Utilise AWS CloudWatch Metrics, Alarms and Logs for this (docs [here](https://urldefense.com/v3/__https:/docs.aws.amazon.com/AmazonCloudWatch/latest/monitoring/WhatIsCloudWatch.html__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94qnS9XiE$))  
https://docs.aws.amazon.com/AmazonCloudWatch/latest/monitoring/WhatIsCloudWatch.html  
  
**4**. **Backup And Recovery Procedures**: Guides or Documentation outlining backup strategies and recovery procedures specific to tableau server.  
  
How to take Tableau backups is described [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server/en-us/backup_restore.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94QQnmK_k$). Don’t take instance snapshots only, make sure you automate Tableau backup creation (some scripts from a TIL colleague for that can be found [here](https://urldefense.com/v3/__https:/www.theinformationlab.co.uk/community/blog/tableau-server-housekeeping-made-easy-linux-edition/__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94swGR72I$))   
<https://help.tableau.com/current/server/en-us/backup_restore.htm>  
https://www.theinformationlab.co.uk/community/blog/tableau-server-housekeeping-made-easy-linux-edition/  
  
**5. Security best practices**: Any recommended links or documentation for implementing security best practices, including SSL configuration, firwall setting,  
  and security updates.  
  
The Tableau security hardening checklist can be found [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/security_harden.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94o1kW2RE$)  
https://help.tableau.com/current/server-linux/en-us/security\_harden.htm  
  
**6. Version Upgrades and patching:** Links or resource detailing the process for version upgrades, patching, and staying updated with the latest tableau server release  
  
Docs on performing a blue / green upgrade for Tableau are [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server/en-us/server-upgrade-blue-green.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94T5tHjW0$)  
https://help.tableau.com/current/server/en-us/server-upgrade-blue-green.htm  
  
**7. Content Management Guidelines**: Resources or Guides for effective content management, organization, and maintenance within Tableau server.  
  
See the same governance page that I linked earlier ([here](https://urldefense.com/v3/__https:/help.tableau.com/current/blueprint/en-us/bp_governance_in_tableau.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94l0VsCl8$))  
https://help.tableau.com/current/blueprint/en-us/bp\_governance\_in\_tableau.htm  
  
**8. Performance Optimization Strategies:** Any recommended links or documentation to optimize server performance, including query performance tuning and resource allocation.  
  
Start with the page [here](https://urldefense.com/v3/__https:/help.tableau.com/current/pro/desktop/en-us/performance_tips.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94voW9UEg$) but note the whitepapers linked in the learn more section on that page. It focuses on workbook performance because you will get more gains improving that than trying to tweak the server. There is a section of the docs that starts [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/perf_toc.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94ymDE3LM$) related specifically to server performance   
  
<https://help.tableau.com/current/pro/desktop/en-us/performance_tips.htm>  
https://help.tableau.com/current/server-linux/en-us/perf\_toc.htm  
  
  
**10. Capacity Planning Recommendations**: Resources or Guides for capacity planning, resource Usage analysis, and scalability planning within tableau server.  
  
The repository will have the information you are looking for with regard to this (see [here](https://urldefense.com/v3/__https:/help.tableau.com/current/server-linux/en-us/perf_collect_server_repo.htm__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg946Y0sH7c$)). I would suggest you start with the workbooks [here](https://urldefense.com/v3/__https:/github.com/tableau/community-tableau-server-insights__;!!KLL8VBKIGhc0BcQ38Y9qmONVtVtEUw!2UjXIuHQ1Ih5eVXqBDkruxyfxKAA-xLLhLs1zABuR5CJLSYBlIkzPEaGKQbTBDcRk_CHTvNzsvf1PGcqSeXUGILU2n4ENPKMxg94L3eoOQc$) if you want to start analysing the data.  
[**https://help.tableau.com/current/server-linux/en-us/perf\_collect\_server\_repo.htm**](https://help.tableau.com/current/server-linux/en-us/perf_collect_server_repo.htm) **https://github.com/tableau/community-tableau-server-insights**

**Steps to Optimized Tableau Volume:**URL: https://tableaulove.com/elastic-ebs-volumes-hell-wheels-tableau-server-cloud/ **Volume Optimization Steps:**1. Stop Application first from 1st nodes:

tsm stop

2. Check Application Status:

tsm status

3. Stop EC2 instance.

4. Select volume -> click modify volume -> change volume size -> modify

5. Start EC2 instance

6. Start the application

tsm start

7. Check status

tsm status  
  
  
 **Tableau Post Upgradation Task**   
  
Step1: Server setup and Accessibility  
  
Once the server is set up and reachable via localhost, follow the steps below to ensure the website is up and running.  
  
1.1 SSL Certificate Creation   
  
-Ensure an SSL certificate is created and imported into the AWS Certificate Manager of the AWS Account where you plan to provision the server.  
  
-Ticket Request:  
-Ticket Name : Venafi - New Certificate Request  
- Ref Ticket: #SR-1261940  
- Contact Team Mail ID : GBTCertificateAdmin@amexgbt.com  
  
  
1.2 Import SSL Certificate  
  
-Create a ticket for the S3 bucket , as there is on specific ticket request to import SSL certificates  
  
-Ticket Name : AWS S3 Bucket  
-Ref Ticket: #SR-1297714  
-Contact Team Mail id : GBTCloud-ITOps@amexgbt.com  
  
Step 2: Certificate Mapping with Load Balancer  
  
- If the created certificates are not mapped with the tableau load balancer , raise the following ticket request:  
  
-Map domain with load Balancer  
-Ticket Name : DNS Record - Create/Modify/Delete  
-Ref Ticket: #SR-#1294989  
-Contact Team Mail id : GBTNetwork-ITOps@amexgbt.com  
  
Step 3: URL Allowance in GBT Network:

-After the above configuration, its essential to allow the URL in the GBT Network. Raise a request to the firewall team for URL allowance.  
  
-Allow URL in GBT Network   
-Ticket Name: Egencia Palo Alto Firewall  
-Ref Ticket: #1293486  
-Contact Team Mail id : CyberNetOps@amexgbt.com  
  
  
  
  
Step 4 : Instance Attachment to target Group  
-Ensure that the instances are attached to the target group.

Step 5: URL Check and SSL Certificate Issues   
  
-After all configuration are completed, access the URL . if there are issues , especially if the website is not secure with an HTTPS error, check with the team that created the SSL certificate.  
-Possible Action :  
-Create a ticket to import SSL certificate into the AWS Certificate Manager ( as mentioned in Step1).