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Server Qualified Associate

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 Qualified Associate. This title is active for two 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 environment and approximately 4-6 months of experience. Typical roles include System Administrator or Consultant.

System Preparation

For a successful exam experience, ensure your computer, network, and the physical environment are properly configured. This includes running a system tech-check before the exam. Review our Required: Exam Setup document for complete details.

Learning Resources

While there are no required prerequisites for this exam. To be successful, you are strongly encouraged to complete the **Desktop I: Fundamentals** and **Server Administration** courses. Information on these courses can be found here.

Explore additional resources here:

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

Exam Format

Time Limit: 90 minutes (please plan for extra time for online exam setup)
Passing Score: 75%
Number of Questions: 80
Scoring: Automatically scored
Question Format: Multiple choice, multiple response, true/false
Language(s) Offered: English, Japanese, Simplified Chinese, German, French, Brazilian Portuguese, International Spanish
Delivery Platform: Windows Virtual Machine containing Tableau Server

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

Skills Measured

Preparation - 20%

User Experience

- User Interface
- Navigation

Topology

- Identify client components
- Identify server components
- Describe how they work together
- Differentiate Public v. Server
- Tableau Mobile

Versions

- Understand:
  - How to identify the current version of Tableau Server
  - Where to obtain the latest release of Tableau Server
  - Where to access release notes of Tableau Server

Minimum Hardware Requirements

- Understand:
  - RAM requirements
  - CPU requirements
  - Hard disk requirements

Software Requirements

- List the supported Operating Systems
- Understand:
  - Browser requirements
  - Options for email alerts
  - Anti-virus concerns
- Identify the SMTP Server
- Be familiar with potential port issues
- Explain the purpose and benefits of a dedicated server
- Identify the considerations for running in the cloud

Licensing

- Understand user-based licensing

- Describe the different license types
- Describe how license types map to site roles

Server Processes

- Describe each Tableau Services Manager and Tableau Server process
- Understand:
  - Default process count at installation
  - Multiple-instance processes
  - Process-to-process workflows
  - Processes in distributed and high-availability environments
  - Purpose of a load balancer

Data Source Identification

- Identify the ports required
- Identify the necessary database drivers
- Understand the differences between:
  - File vs. Relational vs. Cube
  - Extract vs. Live Connections
- Explain the benefits of published data sources

Infrastructure Network

- Understand network latency implications
- Explain the risks of Dynamic-IP addressing

Installation & Configuration - 25%

Installation

- Understand installation steps and options:
  - Install Path
  - Gateway port
- Understand Identity Store options:
  - External (Active Directory) vs. local
  - Trusted Tickets
  - SAML
  - Kerberos and OpenID Connect
- Describe the impact of the automatic-login option
- Understand how to set up SSL
- Understand Tableau best practices for installing a single-machine environment

Skills Measured (cont'd)

- Understand silent installs

Windows Server Configuration

- Understand cache settings
- Understand how to:
  - Apply process distribution
  - Configure Email alerts/ subscriptions
  - Configure SSL
  - Configure optional customizations

Tableau Server Configuration

- Describe:
  - Site configuration options
  - User quotas
  - Storage quotas
  - How to enable and edit site subscriptions
  - Project configuration options
  - Group and User Configuration options
- Understand who can add users

Adding Users

- License type and site role
- Admin level
- Publisher level
- Importing via Active Directory or Local

Security

- Describe the security configurations for:
  - Site level
  - Project level
  - Group level
  - User level
  - Data source level
  - Workbook level

Permissions

- Understand:
  - System permission composition
  - The ramifications of permission design
  - The Tableau Security Model
- Describe the differences between Allow v. Deny v. None

Administration - 36%

Understand how to:

- Maintain Data connections
- Create schedules
- Create, edit and delete Subscriptions
- Perform Server analysis
- Complete a backup and restore
- Perform cleanup
- Add, remove, or deactivate users
- Update licenses
- Start, stop or restart
- Utilize tsm and tabcmd
- Use REST API
- Work with Log Files
- Understand Embedding
- Monitor Desktop license usage
- Manage workbook and datasource revision history

Describe how to:

- View server status in multiple ways
- View email alerts
- Set data-driven alerts
- Use built-in administrative views
- Create custom admin views
- Create a performance recording
- Create a nested project
- Work with Sites and Site Admin options

Contrast Content and System administrator rights

End-user Abilities

Understand:

- Table recommendations
- Publishing views and data sources
- Renaming a workbook
- Interacting with a view via the Web
- Web authoring & editing
- How to share views
- Data Source Certification

Skills Measured (cont'd)

- Extract caching

Troubleshooting - 13%

Understand requirements of third party cookies in a browser

Understand how to:

- Reset passwords for a Tableau user or Tableau Run-As Service account
- Package log files for reporting
- Use tsm to validate site resources
- Rebuild the search index
- Use maintenance analysis reports
- Create/open support requests

Migration & Upgrade - 6%

Understand the upgrade process
Explain how and why to perform a clean reinstall
Describe how to migrate to different hardware
Understand backwards compatability

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.

Sample Questions

The questions below are examples intended to give you a sense of how questions will look on the exam. They are not intended as a learning resource for the Server product, nor do they provide the experience necessary to pass the exam.

1. The minimum amount of RAM recommended for any production use of Tableau Server is:
    a. 8 GB
    b. 16 GB
    c. 32 GB
    d. 64 GB
    e. 128 GB
    f. There is no minimum.

2. Which of these user interactions will utilize the Data Server? (Select all that apply.)
    a. A user publishes a workbook that uses an extract.
    b. A user publishes a data source.
    c. A user creates a new workbook from a Tableau Server Data Connection.
    d. A server administrator accesses an administrative view.

3. What is the best way to see a list of individual users affected by a particular workbook permissions rule?
    a. Navigate to the host project's Permissions page, and then click the permissions rule.
    b. Click Content on the menu, click Workbooks, and then click the List icon.
    c. Navigate to the workbook's Permissions page, and then click the permissions rule.
    d. Click Groups on the menu, and then click All Users.

4. A user with a Viewer license type and site role can create data-driven alerts.
    a. True
    b. False

5. How will an administrator subscribe a user to a view?
    a. By using parameters in the view's Embed Link
    b. By clicking Subscribe on the view, and then clicking Manage
    c. By clicking Subscribe on the view, and then clicking Add under Subscribe Others
    d. By using URL parameters in the view's Share Link

Answers: 1 (c), 2 (b & c), 3 (c), 4 (b), 5 (c)

Sample Questions (cont'd)

6. What options are available for performing Active Directory group synchronization? (Select all that apply.)
    a. Use the Settings page to synchronize on demand.
    b. Set the site role for users who have been removed from Active Directory.
    c. Use the Settings page to set a regular schedule for synchronization.
    d. Set the minimum site role for group users to be applied during Active Directory synchronization.

7. Which are valid ways to open a Tableau Support case?
    a. Contact the Developer Community Forum.
    b. Contact Consulting Services.
    c. Use the Tableau Community site.
    d. Use Tableau's Support website.

Answers: 6 (a,c & d), 7 (d)