Free Training Transcript:
TSM: Tableau
Services Manager

Welcome to this video on the Tableau Services Manager. TSM is a comprehensive administration tool for installing and configuring Tableau Server. TSM replaces the Tableau Services Configuration utility, Manage License Keys, Tableau Server Monitor, and the tabadmin command line utility.

The key benefits of TSM include: Flexibility in the management experience—including a web UI, command line interface, and APIs, hot topology changes for certain server processes, and faster upgrades that minimize downtime

In the Browser

We can log into the Tableau Services Manager from a browser by entering the Server URL and appending the TSM web UI Port with a colon (8850 by default). (Note that your browser may not trust the self-signed certificate—if you get a warning, dismiss it and continue to log in). Log in with an admin account on the machine where Tableau Server is installed: note that this is logging into TSM, not Tableau Server.

Let's walk through the GUI. There are three tabs across the top: Status, Maintenance, and Configuration, and to the far right, a menu for stopping and starting the Tableau Server.

Status

We can see that my Tableau Server is stopped. We can also see via the process list that only the TSM controller and License Server are active. Using the menu in the upper right, we can start the Tableau Server.

I can see every process is now active. Because this is a single node install, there's only information for one node on the status tab. Note that with TMS, in a multi-node environment, there's no longer a concept of primary & worker machines—all nodes in the cluster are peers, so there's no backup primary required.

Maintenance

Let's switch to the Maintenance tab. From here, we can generate a log file simply by clicking the button. We're prompted for various options, and the log is shown in below once completed. With a log snapshot generated, we can upload it to a support case, download, or delete it.

Also on the maintenance tab, we can enable Server Crash Reporter. Note that when I turn this on, the "Pending Changes" option appears in the toolbar. When I click this, I see that I can either discard the pending changes or apply them, which requires a restart. I'll discard for now.

Configuration

The configuration tab is the most robust. The left hand pane has several tabs—as we click through them, keep an eye out for links to the Help for more information about each piece.

The **Topology** tab allows us to add or remove nodes and change process configurations. With hot topology changes, we can change things like the number of processes—I'll change VizQL Server to 4, and Backgrounder to 2. Click Pending Changes and apply these live. Now if we switch back to the Status tab, we'll see those changes.

Back on Configuration, the next option is **Security**, which controls the Run As Service Account and SSL configurations. **User Identity & Access** configures and manages user identities, including the Identity Store, Authentication Method, and Trusted Authentication. Next is **Notifications** – here we can configure the email server for email notifications, and determine which events will trigger these notification. Finally, **Licensing** allows us to manage product keys.

GUI and CLI

The web GUI allows easy, visual access to many of the maintenance and configuration tasks for Tableau Server.

Using the CLI opens up many more options. On the machine where Tableau Server is installed, open the command prompt as an administrator. We simply begin using TSM commands. TSM is added to the PATH, so it can be accessed from any directory—we're only required to log in as an administrator. This can be done with the command TSM login and providing the username, but by default, it will try the account currently being used on the machine. We'll enter the password and we're ready to go.

Note that some scenarios are only supported via the CLI, such as LDAP identity store setup and deploying a coordination service for High Availability. Check out the Online Help for the full list of TSM commands.

Let's walk through taking a backup.

Backups with TSM

With TSM, backing up the Server is done in two parts—settings and data are handled separately.

To back up the data, use the command TSM maintenance backup. We'll need to add the file name, and an optional date flag. Note that with TSM, the backup is generated in the default location. See the Online Help for information about default file paths with TSM.

Next, we'll export the settings. Note that here, we have to specify the location of the file as well as its name. I'll use the same default location as we used for the data backup. Once this is run, we'll navigate to that location, and I can see both my backup and the settings export. For directions on restoring a Tableau Server from a backup, check out the Online Help.

Upgrading Tableau Server with TSM

One of the administrative tasks that changed the most with TSM versus tabadmin is the process of upgrading. With TSM, your data is automatically preserved—no backup and uninstall necessary! Instead, the new version is installed while Server is running. A script is run to upgrade (or downgrade) Server—and this is the only step that requires downtime.

Note that the first time you're moving from a pre-TSM version to a TSM-version of Tableau Server, you will be prompted for an uninstall. This will automatically take a backup, which should be copied from the default location to another computer.

Next, run the installer for the new version. When prompted, choose the correct Installation type—be sure to start with the initial (old primary node) for multi-node environments, but the upgrade will need to be run on each machine.

TSM will then handle the installation process. A dialog will pop up when the extraction (files from the previous version) is complete. From here, we can chose to launch the upgrade script automatically, or open the Help with steps on how to complete the upgrade.

Since mine is a basic upgrade with no customizations and just a single node, I'll chose to launch the upgrade script automatically.

In the command line interface, I'm prompted for the password for the run as services account. The script will run, updating the progress at intervals. When fully installed, a browser window will open prompting to sign into TSM web interface. And you're done!

Conclusion

Thank you for watching this TSM training video. We invite you to continue with the Free Training videos to learn more about using Tableau.