

Tableau Server Migration and Optimisation on Linux

Ubuntu deployment, scaling, resiliency and container trade-offs

FA-0699 · 2 days

DevOps, Cloud & Infrastructure · Data & Analytics

Introduction

This two-day course helps Tableau administrators plan and practise a Windows-to-Linux migration in a controlled environment. It covers a supported Ubuntu deployment, version and identity compatibility, content restore, configuration reconciliation and validation.

The second day examines workload baselines, process placement, scaling, availability and ongoing operations. Container deployment is evaluated as a distinct supported packaging approach with limitations, not as a guaranteed simple conversion of an Ubuntu installation.

Learning outcomes

- Assess platform, version, identity and dependency requirements for a migration.
- Install and configure a supported Ubuntu lab deployment.
- Practise selected backup/restore and post-migration checks, including configuration differences.
- Measure representative workload bottlenecks before proposing tuning changes.
- Compare vertical/horizontal scaling and multi-node availability choices.
- Evaluate supported container use, persistence, authentication and operational constraints.
- Draft a backup, monitoring, capacity and upgrade roadmap.

Prerequisites

- Basic Linux administration knowledge, preferably Ubuntu

- General understanding of Windows Server environments
- Familiarity with networking, DNS, SSL, and load balancing concepts
- Basic exposure to Tableau Server administration or Tableau platform concepts
- Comfort with infrastructure and system troubleshooting

A prepared licensed Tableau Server lab with a supported release/OS pairing; production migration is outside the course exercise.

Training outline

1. Day 1 — Installation, configuration and migration

Course overview and architectural context

- Reasons and trade-offs for moving Tableau Server from Windows to a supported Linux deployment
- Operational and support considerations for Linux-based deployments
- Common migration goals, risks, and expected outcomes

Tableau Server architecture fundamentals

- Core Tableau Server services and how they work together
- Single-node versus distributed architecture

Planning the Ubuntu deployment

- Assessing infrastructure readiness
- CPU, memory, storage, and network planning
- Supported Ubuntu release, package readiness, drivers and OS-level prerequisites

Installing Tableau Server on Ubuntu

- Installation workflow and platform preparation
- Initial setup and configuration steps
- Identity, authentication, and access considerations
- SSL configuration and gateway setup
- Post-install validation and baseline checks

Hardening and production readiness

- Backup planning
- Upgrade planning and environment stability

Migrating from Windows Server to Ubuntu

- Current-state assessment of the existing Windows environment
- Identifying version, topology, authentication, and dependency considerations
- Migration planning and pre-cutover preparation
- Version- and identity-store-compatible content backup/restore; Windows configuration/customisations are not restored automatically
- Reconcile authentication, dependencies, customisations and separately configured nodes after restore

Validate users, content, connections and representative workflows before planning a production cutover; document rollback and any platform differences.

2. Day 2 – Performance, scaling and operations

Performance optimization fundamentals

- Establishing a baseline before tuning
- Understanding common bottlenecks in CPU, memory, storage, and process design
- Tuning Tableau Server for interactive users versus background workloads
- Scheduling strategy for extracts and refresh operations

Vertical scaling

- What vertical scaling means in a Tableau Server environment
- When scaling up is the right decision
- Benefits of increasing CPU, memory, and storage performance
- Limits and risks of vertical scaling

Horizontal scaling

- What horizontal scaling means in practice
- Adding nodes and redistributing Tableau Server processes
- High availability concepts and practical topology planning

Vertical scaling versus horizontal scaling

- How to decide between scaling up and scaling out
- Performance-driven versus availability-driven decisions
- Cost, complexity, and supportability trade-offs

Distributed architecture and high availability

- Multi-node Tableau Server design principles
- Process placement strategy
- Repository failover and coordination considerations
- Load balancer integration

Dockerization and containerization

- Why organizations ask for Dockerization
- Tableau Server in a Container as a distinct image/setup workflow, not an arbitrary Ubuntu image
- Licensing/activation, authentication and monitoring limitations; verify the selected supported configuration
- Ubuntu deployment versus container-based deployment trade-offs
- When containerization is worth considering
- When a conventional Ubuntu deployment is the better choice
- Operational impact of persistence, patching, networking, and orchestration
- Evaluate platform and orchestration support boundaries before selecting a container approach

Ongoing operations and lifecycle management

- Monitoring and health checks
- Backup and recovery strategy
- Upgrade planning in standalone and distributed environments
- Capacity planning and growth forecasting

Recommended audience

- Tableau Server administrators
- Linux and infrastructure administrators
- Platform engineers
- BI support teams

- Solution architects responsible for analytics platforms