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# Salesforce Certified Tableau Consultant

## Salesforce Analytics-Con-301

**Version Demo**

**Total Demo Questions: 11**

**Total Premium Questions: 117**

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# Topic Break Down

| Topic | No. of Questions |
|---|---|
| Topic 1, Discovery | 8 |
| Topic 2, Data | 39 |
| Topic 3, Calculation | 35 |
| Topic 4, Dashboarding | 18 |
| Topic 5, Deployment | 17 |
| Total | 117 |

QUESTION NO: 1

A dashboard allows users to select several customers in a scatter plot. The client wants all customers to remain visible, while selected customers are colored blue and all other customers are colored gray. The selection must update interactively without filtering customers out of the view.

Which approach should the consultant recommend?

**A.** Use a set action and place set membership on Color.

**B.** Use a filter action to pass selected customers to the target worksheet.

**C.** Use a highlight action to filter unselected customers from the scatter plot.

**D.** Use a parameter action to store the selected Customer ID.

**ANSWER: A**

**Explanation:**

Use a set action to update a customer set and use set membership on Color. A set action captures the customers selected in the scatter plot, while the set can classify every mark as In or Out. This preserves all customers in the view and provides the required selected-versus-other visual comparison.

A filter action would remove unselected customers from the target view. A highlight action can emphasize related marks but does not provide the same reusable In/Out set membership for calculations and color encoding. A parameter action changes one parameter value and is not designed to retain a multi-member customer selection.

## QUESTION NO: 2

A client is considering migrating from Tableau Server to Tableau Cloud.

Which two elements are determining factors of whether the client should use Tableau Server or Tableau Cloud? Choose two.

**A.** Whether or not the client plans to leverage single sign-on (SSO)

**B.** Whether or not there are large numbers of concurrent extract refreshes

**C.** Whether or not the client needs the ability to connect to public, cloud-based data sources

**D.** Amount of data storage used on the client's existing server

**ANSWER: B D**

**Explanation:**

Whether or not there are large numbers of concurrent extract refreshes is a key deployment consideration because refresh processing consumes Backgrounder capacity. Tableau Cloud is a managed SaaS service with governed capacity, whereas Tableau Server lets an organization size, configure, and scale Backgrounder processes and underlying infrastructure for its own workload. A client with substantial simultaneous refresh demand should assess its peak refresh schedule, refresh duration, required completion windows, and whether the workload requires the control available with a self-managed Server deployment. Tableau documents the Backgrounder role and its responsibility for extract refresh and other background tasks in its Backgrounder Process documentation.

Amount of data storage used on the client's existing server is also a determining factor. Tableau Cloud applies site-capacity and storage-entitlement considerations, so the existing content footprint must be measured and compared with the capacity available to the target Cloud site. This assessment needs to include published extracts, workbooks, data sources, flows, and expected growth, rather than considering only the database size. If the organization requires storage beyond its Cloud entitlement or needs a storage model it controls directly, that can materially affect the platform choice. Tableau provides guidance on monitoring and managing these limits in Tableau Cloud Site Capacity.

## QUESTION NO: 3

A client needs to design row-level security (RLS) measures for their reports. The client does not currently have Tableau Data Management Add-on, and it

may be an option in the future.

What should the consultant recommend as the safest and easiest way to manage for the long term?

**A.** Create User filters based on data policies and apply them to views using set filters and option Server/Create User Filter.

**B.** Create User filters for each report using a table joined to its data source and using the option Apply to All Sheet Using the Data Source.

**C.** Create User filters based on data policies and apply them to a published data source.

**D.** Create User filters in each view of each report using set filters and option Server/Create User Filter.

## ANSWER: C

**Explanation:**

Create User filters based on data policies and apply them to a published data source is the strongest long-term approach because it establishes row-level security once at the shared data-source layer rather than separately in every worksheet or workbook. All reports that connect to the published source inherit the same enforced filtering logic, which reduces administration, prevents inconsistent implementations, and makes security updates more reliable as the reporting estate grows. A consultant can base the user filter on Tableau identity functions, such as `USERNAME()` or group membership, together with an entitlement or policy table that maps users to the rows they may access. Publishing the secured source also makes it easier to govern certification, permissions, refreshes, and downstream reuse from a single managed asset. This design remains practical without the Data Management Add-on and provides a clear centralized foundation if the organization later adopts Data Management capabilities, such as virtual connections and data policies, for broader governance. Tableau documents that user filters can be published with a data source so connected workbooks use the secured data source: Tableau Help: Publish User Filters. For related server-side data-source security concepts, see Tableau Server Help: User Filters and Data Sources.

## QUESTION NO: 4

A client is establishing a governed collection of published data sources for self-service authors. The client wants authors to identify the approved source for a business subject and understand the source before using it in a workbook.

Which two actions should the consultant recommend? Choose two.

**A.** Certify the approved published data source.

**B.** Add a meaningful description to the published data source.

**C.** Rename the worksheets that use the data source.

**D.** Remove authoring permissions from all self-service users.

**E.** Publish a separate copy of the data source for each department.

## ANSWER: A B

**Explanation:**

Certifying the approved published data source provides a visible indication that the source has been reviewed and endorsed by the organization. Adding a meaningful description documents the source’s purpose, ownership, and intended use, helping authors make an informed choice before connecting.

Changing worksheet names does not document a published data source, and restricting all authoring permissions would prevent the intended self-service use. Creating separate copies for each department increases the risk of inconsistent definitions rather than establishing a governed reusable source.

## QUESTION NO: 5 - (SIMULATION)

Use the following login credentials to sign in

to the virtual machine:

Username: Admin

Password:

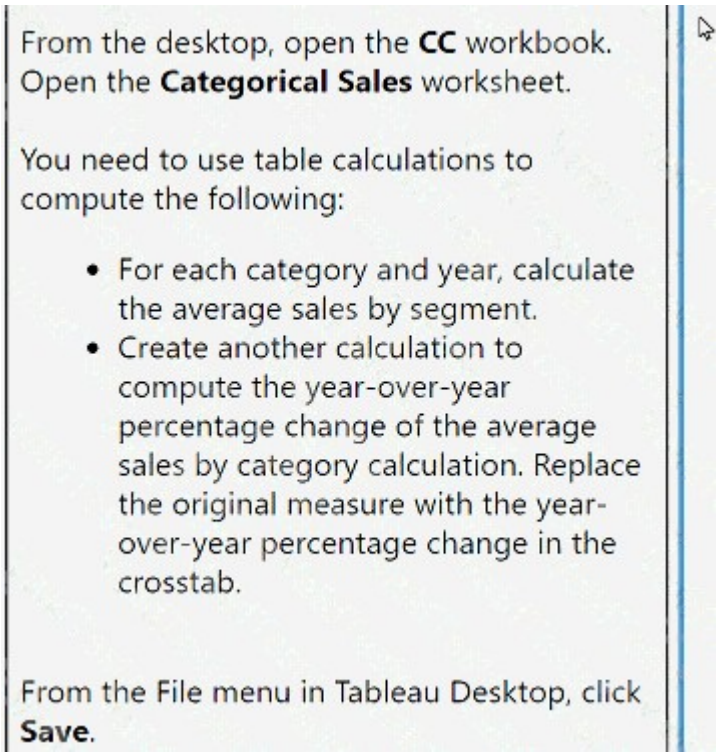
The following information is for technical

support purposes only:

Lab Instance: 40201223

To access Tableau Help, you can open the

Help.pdf file on the desktop.




From the desktop, open the CC workbook.

Open the Categorical Sales worksheet.

You need to use table calculations to

compute the following:

. For each category and year, calculate

the average sales by segment.

. Create another calculation to

compute the year-over-year

percentage change of the average

sales by category calculation. Replace

the original measure with the year-

over-year percentage change in the

crosstab.

From the File menu in Tableau Desktop, click

Save.

**ANSWER: See the explanation for the answer**

**Explanation:**

In **CC**, open the **Categorical Sales** worksheet and use table calculations (not a normal `AVG([Sales])` aggregation).

1. On the `SUM(Sales)` measure in the crosstab, choose **Quick Table Calculation > Custom** (or **Add Table Calculation**, depending on the Tableau version).
2. Create the first table calculation as:

   ```
   WINDOW_AVG(SUM([Sales]))
   ```

3. Edit that table calculation and set its addressing / **Compute Using** to **Segment**. Category and Year must define the partitions, so Tableau calculates the average over the segments separately for every Category-Year combination.
4. On this average-sales table-calculation pill, add a second table calculation: choose **Percent Difference From** (or **Year over Year Growth** if that is the available quick calculation). Set **Relative to** to **Previous** and set the calculation to address **Year**. Keep Category as the partition. This calculates:

   ```
   (current year's average sales - previous year's average sales)
   / ABS(previous year's average sales)
   ```

5. If using the nested-calculation settings, verify that the inner calculation addresses **Segment**, while the outer percent-difference calculation addresses **Year**.
6. Format the resulting outer calculation as a **Percentage**. Remove/replace the original `SUM(Sales)` measure so that the crosstab displays the year-over-year percentage-change result rather than the original sales values.
7. Select **File > Save**.

**Final result:** the view first uses `WINDOW_AVG(SUM([Sales]))` computed across Segment for each Category and Year, then displays the previous-year percent difference of that average, computed across Year.

**QUESTION NO: 6**

A dashboard contains a scatter plot of customers and several supporting worksheets. Users need to select customers in the scatter plot and compare the selected customers across the supporting worksheets. Customers that are not selected must remain available for analysis, and the selection must not filter records from the worksheets.

Which two actions should the consultant take? Choose two.

**A.** Create a set based on Customer ID.

**B.** Create a set action that updates the Customer ID set from marks selected in the scatter plot.

**C.** Create a filter action that passes selected Customer ID values to all supporting worksheets.

**D.** Create a parameter action that stores the selected Customer ID value.

**ANSWER: A B**

**Explanation:**

Create a set based on Customer ID and configure a set action that assigns the selected Customer ID values from the scatter plot to that set. The supporting worksheets can then use the set in calculations, color, or other encodings to distinguish selected customers while retaining all customer records in the view.

A filter action would remove nonselected customers from target sheets, which conflicts with the requirement. A highlight action can visually emphasize marks but does not provide a reusable set of selected values for calculations across worksheets. A parameter stores a single value and is not appropriate for a multi-customer selection.

## QUESTION NO: 7

A university has data on its undergraduate students and their majors by grade level (Freshman, Sophomore, Junior, Senior). The university is interested in

visualizing the path students take as they change majors across grade levels.

Which visualization type should the consultant recommend?

**A.** Chord Chart

**B.** Tree Chart

**C.** Radar Chart

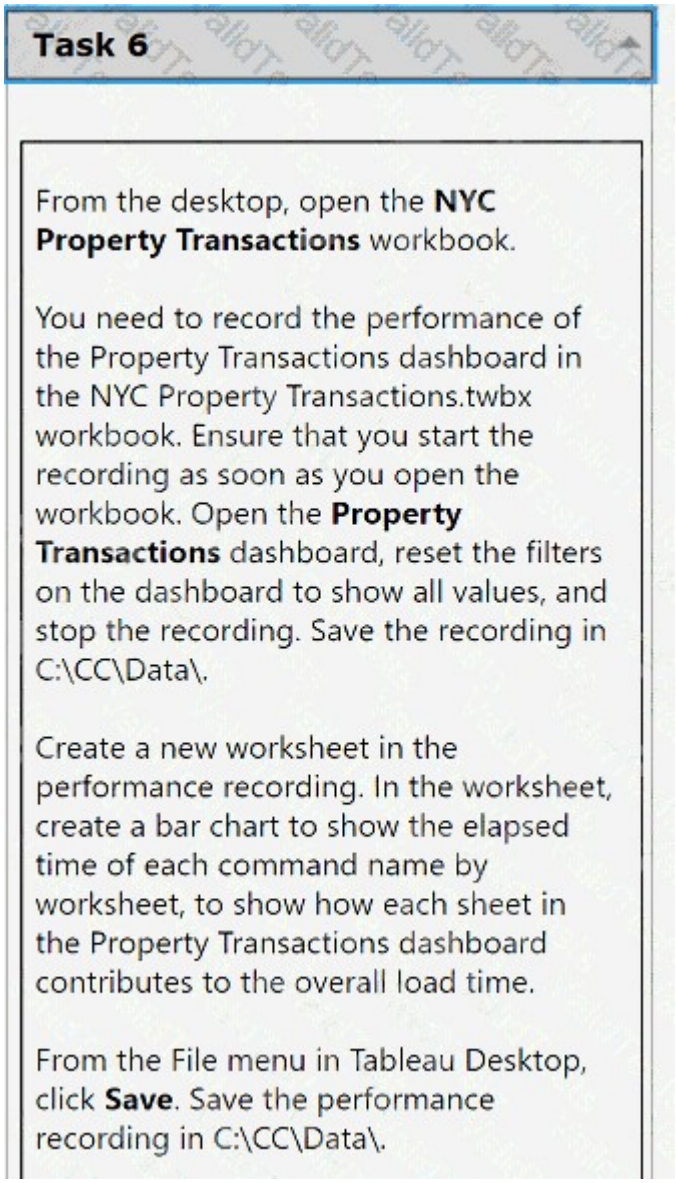
**D.** Sankey Diagram

## ANSWER: D

**Explanation:**

Sankey Diagram is the appropriate visualization because the analytical goal is to show movement between categorical states over successive stages. In this case, each grade level is a stage, each academic major is a category within that stage, and a student's transition from one major to another is a flow. A Sankey diagram displays these connections as bands between stages, with band width representing the number of students following a particular path. This enables the university to see both continuity—such as students who remain in the same major—and changes, such as students moving from one major into another between freshman and sophomore years. It also makes high-volume pathways and major destinations immediately apparent while retaining the sequential grade-level context needed for cohort analysis. In Tableau, Sankey diagrams are typically built with calculated fields and a densified path structure, rather than selected as a standard Show Me chart type. Tableau's guidance describes how to construct the curved flow paths and size them by a measure, which fits a student-count-based analysis. See Tableau's Sankey diagram build example and its Sankey diagram overview.

## QUESTION NO: 8 - (SIMULATION)




From the desktop, open the NYC Property Transactions workbook.

You need to record the performance of the Property Transactions dashboard in the NYC Property Transactions.twbx workbook. Ensure that you start the recording as soon as you open the workbook. Open the Property Transactions dashboard, reset the filters on the dashboard to show all values, and stop the recording. Save the recording in C:\CC\Data\.

Create a new worksheet in the performance recording. In the worksheet,

create a bar chart to show the elapsed

time of each command name by

worksheet, to show how each sheet in

the Property Transactions dashboard

contributes to the overall load time.

From the File menu in Tableau Desktop,

click Save. Save the performance

recording in C:\CC\Data\.

**ANSWER: See the explanation for the answer**

**Explanation:**

**Complete the simulation as follows:**

1. Open `NYC Property Transactions.twbx` from the desktop in Tableau Desktop.
2. Immediately start recording: select **Help > Settings and Performance > Start Performance Recording**.
3. Open the **Property Transactions** dashboard.
4. For every filter on the dashboard, select **(All)** / **All** so the dashboard is reset to show all values.
5. Select **Help > Settings and Performance > Stop Performance Recording**. Tableau opens the resulting performance-recording workbook.
6. Create a **New Worksheet** in the performance-recording workbook.
7. Build the required horizontal bar chart:
   Drag **Worksheet** to **Rows**.
   Drag **Command Name** to **Rows**, to the right of Worksheet, so command names are broken out within each worksheet.
   Drag **Elapsed Time** to **Columns** as `SUM(Elapsed Time)`.
   If Tableau does not render bars automatically, select the **Bar** mark type.
8. Select **File > Save**. When prompted for the save location, save the performance-recording workbook in `C:\CC\Data\` (retain the default performance-recording workbook name unless the dialog requires a name).

The final view must show `SUM(Elapsed Time)` as bars for each `Command Name`, grouped by `Worksheet`, which identifies each dashboard sheet's contribution to load time.

**QUESTION NO: 9**

A client is using Tableau to visualize data by leveraging security token-based credentials. Suddenly, sales representatives in the field are reporting that they

cannot access the necessary workbooks. The client cannot recreate the error from their offices, but they have seen screenshots from the field agents. The client

wants to restore functionality for the field agents with minimal disruption.

Which step should the consultant recommend to accomplish the client ' s goal?

**A.** Ensure that " Allow Refresh Access " was checked when the data source was published.

**B.** Change the data source permissions for the connection to " Prompt User. "

**C.** Ask the workbook owners to republish the workbooks to refresh the security token.

**D.** Renew the security token via the Data Connection on Tableau Server.

**ANSWER: D**

**Explanation:**

Renew the security token via the Data Connection on Tableau Server. Token-based authentication can stop working when a token expires, is revoked, or is invalidated by a security-related change. Because the issue affects field users while office users cannot reproduce it, restoring the stored connection credential is the least disruptive remediation: it targets the authentication dependency used to reach the relevant data without requiring workbook redesign, republishing, or broad changes to user access. On Tableau Server, authorized administrators or content owners can manage a published data source's connection information and update its saved credentials so that Tableau can authenticate again for the workbook's data access. This preserves the existing workbook content, sharing configuration, and user workflow while restoring the connection upon which the field representatives depend. Salesforce security tokens are part of the authentication flow for API access when a login originates outside trusted network ranges, so a refreshed valid token is especially relevant for remote users and integrations. Tableau's guidance on managing saved data-source credentials is available in Tableau Server Help: Set Credentials for Accessing Your Data. Salesforce documents the purpose and management of security tokens in Salesforce Help: Reset Your Security Token.

## QUESTION NO: 10

A Tableau Cloud site administrator needs to build an internal dashboard that identifies licensed users who have not recently signed in. The dashboard must show user details and historical site activity.

Which two Admin Insights data sources should the administrator use? Choose two.

**A.** TS Users

**B.** TS Events

**C.** TS Groups

**D.** Workbook Optimizer

**E.** Metadata API

## ANSWER: A B

**Explanation:**

The TS Users data source provides user-related information, such as user identity and site role. The TS Events data source provides historical activity events, which can be analyzed to determine recent sign-in or content-access activity.

TS Groups describes group membership rather than historical activity. Workbook Optimizer evaluates workbook design, and the Metadata API can expose content relationships but is not the Admin Insights source intended for this user-activity analysis.

## QUESTION NO: 11

A client creates a report and publishes it to Tableau Server where each department has its own user group set on the server. The client wants to limit visibility of

the report to the sales and marketing groups in the most efficient manner.

Which approach should the consultant recommend?

**A.** Grant access to the report on Tableau Server only to the sales and marketing user groups.

**B.** Prepare a row-level security (RLS) entitlement table to define limitations of the access and use it to build user filters in the report ' s datasource.

**C.** Add user filters from Tableau Server to each worksheet and select only sales and marketing user groups.

**D.** Use user groups defined on Tableau Server to build user filters in the report ' s data source.

**ANSWER: A**

**Explanation:**

Granting access to the report on Tableau Server only to the sales and marketing user groups is the most efficient approach because Tableau Server permissions are designed to control access to published content centrally. The consultant can assign the relevant groups permissions on the appropriate content—such as the project, workbook, or view—so that users inherit access through their department's existing group membership. This keeps authorization administration in one place and allows future membership changes to be handled by updating the server groups rather than modifying the published report. Tableau's permissions model supports setting capabilities such as View for groups, and effective permissions are evaluated through the project and content hierarchy. Applying group-based permissions also gives the client a clear, maintainable way to ensure that report visibility follows its established departmental access model. Tableau recommends managing permissions with groups where possible because group membership simplifies administration as users join, leave, or change roles. For details on permissions and their inheritance, see Tableau Server Permissions. For guidance on managing users and groups, see Manage Groups on Tableau Server.