

**Tableau Server Private Site**

**UAT Deployment Checklist – QA to UAT to Production**

Below is a reference guide to ensure that your tableau viz is ready for deployment to Tableau UAT and Production private sites. Please review this checklist to make sure that each item has been thoroughly checked prior to requesting publication.

Requirements	Notes
<b>1 Design Checks: Unit Testing</b>	
<ul style="list-style-type: none"> <li>Are all filters functional?</li> </ul>	<ul style="list-style-type: none"> <li>Test all your filters to ensure that they work as expected.</li> </ul>
<ul style="list-style-type: none"> <li>Are all search fields functional?</li> </ul>	<ul style="list-style-type: none"> <li>If you have a search field, ensure that it works and returns results as expected.</li> </ul>
<ul style="list-style-type: none"> <li>Have you checked for typos on all your story points (if applicable), headings, text descriptions, data source information, tooltips and footnotes?</li> </ul>	<ul style="list-style-type: none"> <li>Make sure you check for any potential spelling mistakes throughout the viz and supporting text.</li> </ul>
<ul style="list-style-type: none"> <li>Do you see horizontal scrollbars?</li> </ul>	<ul style="list-style-type: none"> <li>Eradicate all horizontal scrollbars.</li> </ul>
<ul style="list-style-type: none"> <li>Is your Tableau workbook running slow?</li> </ul>	<ul style="list-style-type: none"> <li>A workbook that performs slowly in Tableau Desktop won't get any faster by publishing it to Tableau Server. In general, workbooks will perform slightly slower on Tableau Server because a) there are multiple users all sharing the server resources to generate workbooks simultaneously; and b) the server has to do the work to render the dashboards and charts rather than this being done on the client workstation.</li> </ul>
<ul style="list-style-type: none"> <li>Did you review the Tableau desktop messages?</li> </ul>	<ul style="list-style-type: none"> <li>Verify how long it took on desktop to 1) execute the query 2) Compute the visualization for all worksheets 3) Compute quick filters. If any of these takes a long time, it means the 1) the query is too slow 2) there is a need to review some of the techniques for calculation optimization and view design 3) quick filters may have too many values.</li> </ul>
<ul style="list-style-type: none"> <li>Is there a potential of removing any unnecessary views to aid performance?</li> </ul>	<ul style="list-style-type: none"> <li>If you have fields that are no longer required in the viz, remove them for efficiency.</li> </ul>
<ul style="list-style-type: none"> <li>What do we use - charts or crosstabs?</li> </ul>	<ul style="list-style-type: none"> <li>As a rule of thumb, charts generally perform better than crosstabs in Tableau. Displaying that same information on a tabular report took over twice as long and consumed significantly more memory while rendering the table.</li> </ul>
<ul style="list-style-type: none"> <li>Does your viz include any geographic data?</li> </ul>	<ul style="list-style-type: none"> <li>Include geographic data by joining or blending, rather than loading it as a custom geographic role. This allows the resulting workbook to just contain the custom geographic data, which will be much smaller and aid performance.</li> </ul>
<ul style="list-style-type: none"> <li>Are all views on the dashboard relevant?</li> </ul>	<ul style="list-style-type: none"> <li>Make sure all the views on your dashboard need to be there. Putting a lot of views on a dashboard result not only in a dashboard that is very difficult to read, but also in a dashboard that is very slow to render. Consider spreading the views across multiple tabs or consolidating multiple views together into a single combination chart especially if the filters you have do not affect all the views.</li> </ul>
<ul style="list-style-type: none"> <li>Are your worksheets and dashboards named appropriately?</li> </ul>	<ul style="list-style-type: none"> <li>Name all worksheets and tabs so that we do not have worksheet1 or story1 but meaningful names that represent the information that the viz is trying to convey.</li> </ul>
<ul style="list-style-type: none"> <li>Are unused tabs deleted or turned off?</li> </ul>	<ul style="list-style-type: none"> <li>Remove any unused tabs. When a workbook is published to Tableau Server and tabs are turned on, Tableau must process every view in every tab before the initial view can be displayed. This does not mean executing the queries for each sheet but it needs to understand the structure of the tabs in anticipation of any actions or filters.</li> </ul>
<b>2 QA Upload/UAT Migration</b>	
<ul style="list-style-type: none"> <li>Is your viz uploaded correctly into the QA Tableau server?</li> </ul>	<ul style="list-style-type: none"> <li>Accessing the viz through your desktop installation, ensure that you have published to the QA server: <a href="https://qa.visualizedata.ucop.edu">https://qa.visualizedata.ucop.edu</a>.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified that the viz works as expected in the QA environment?</li> </ul>	<ul style="list-style-type: none"> <li>Once again, check all filters, tabs, spellings for typos, search fields and scroll bars to make sure things look the same as they did in desktop.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified performance in the QA environment?</li> </ul>	<ul style="list-style-type: none"> <li>Verify query execution, worksheet computations and quick filters for rendering timelines to ensure things look the same as they did in desktop.</li> </ul>
<ul style="list-style-type: none"> <li>Have you submitted the request to Data Services to migrate the viz to the Tableau UAT server?</li> </ul>	<ul style="list-style-type: none"> <li>Send an email to ITS/Data Services (<a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a>) to request migration from QA to UAT. Indicate which UAT folder/project you would like the viz to be migrated into.</li> </ul>
<ul style="list-style-type: none"> <li>Is the viz a brand new viz or an existing viz with a new name?</li> </ul>	<ul style="list-style-type: none"> <li>If the viz is brand new or an existing viz with a new name, specify what folder/project the viz will be migrated into. If you need a new project created in UAT, send an email to <a href="mailto:Ola.Popoola@ucop.edu">Ola.Popoola@ucop.edu</a>.</li> </ul>
<ul style="list-style-type: none"> <li>Is the viz an existing viz with no changes to structure?</li> </ul>	<ul style="list-style-type: none"> <li>If the viz is an existing viz with no changes to the structure, i.e. data is simply being refreshed, contact ITS/Data Services (<a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a>) indicating the folder/project the viz will be migrated into in UAT.</li> </ul>
<ul style="list-style-type: none"> <li>Is the viz an existing viz that has some structural changes, i.e. new tabs, new views, updated charts?</li> </ul>	<ul style="list-style-type: none"> <li>If the viz is an existing viz with changes to the structure, contact ITS/Data Services (<a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a>) indicating the folder/project the viz will be migrated into in UAT.</li> </ul>
<b>3 UAT Verification</b>	
<ul style="list-style-type: none"> <li>Is your viz uploaded correctly into the UAT Tableau server?</li> </ul>	<ul style="list-style-type: none"> <li>Log into <a href="http://uat.visualizedata.ucop.edu/">http://uat.visualizedata.ucop.edu/</a> to verify that the viz migration to UAT is successful.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified that the viz works as expected in the UAT environment?</li> </ul>	<ul style="list-style-type: none"> <li>Verify that the viz works appropriately on the UAT server. If the viz presents differently than it does in QA, send an email to <a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a> describing the issue.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified performance in the production environment?</li> </ul>	<ul style="list-style-type: none"> <li>Verify that the viz performs in the same manner as on the QA server. If it does not, send an email to <a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a> explaining the performance issue. If performance is consistent with QA, send an email to ITS/Data Services (<a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a>) to request migration from UAT to production indicating the folder/project the viz will be migrated into. Remember, deployments to production are only done on Tuesdays and Thursdays.</li> </ul>
<b>4 Production Verification</b>	
<ul style="list-style-type: none"> <li>Is your viz uploaded correctly into the production Tableau server?</li> </ul>	<ul style="list-style-type: none"> <li>Log into <a href="http://visualizedata.ucop.edu/">http://visualizedata.ucop.edu/</a> to verify that the viz migration to production is successful.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified that the viz works as expected in the production environment?</li> </ul>	<ul style="list-style-type: none"> <li>Verify that the viz works appropriately on the production server as it did on the UAT server. If there are any problems, contact <a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a> by email.</li> </ul>
<ul style="list-style-type: none"> <li>Have you verified performance in the production environment?</li> </ul>	<ul style="list-style-type: none"> <li>Verify that the viz performs in the same manner as on the UAT server. If there are any performance issues in production, contact <a href="mailto:Krishna.Malipatel@ucop.edu">Krishna.Malipatel@ucop.edu</a>.</li> </ul>