



# University of California Tableau User Group (UC TUG)

**PRESENTATIONS BY:**

**UC OFFICE OF THE PRESIDENT (PROCUREMENT)**

**UC OFFICE OF THE PRESIDENT (UCOP)**

**FEBRUARY 8<sup>TH</sup> 2019**

# Agenda

- ◇ Tableau Server Management – Krishna Malipatel (**20 minutes**)
- ◇ Feedback Viz – Neil Kronenthal (**20 minutes**)
- ◇ Best Practices: Dashboard Design – Ola Popoola (**10 minutes**)
- ◇ Call for Regular Hosts/Presenters (**1 minute**)
- ◇ Q & A (**7 minutes**)
- ◇ Next Meeting (**1 minute**)



# Introducing Tableau Services Manager







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## Tableau Services Manager (TSM)

- ◆ Tableau Services Manager (TSM) is the comprehensive tool for installing and managing Tableau Server. It contains an enhanced user experience with both a command-line interface (CLI) and a web interface for server administrators.
- ◆ TSM includes a new distributed architecture that addresses key customer pain points such as eliminating the need for a dedicated backup primary machine. It also adds the ability to dynamically add/remove certain server processes without restarting server.

## Benefits of TSM

1. Manager (TSM) replaces multiple tools from previous versions of Tableau Server
2. Flexibility & Ease of Automation
3. No more primary + worker(s)
4. Hot Topology
5. Faster Upgrades

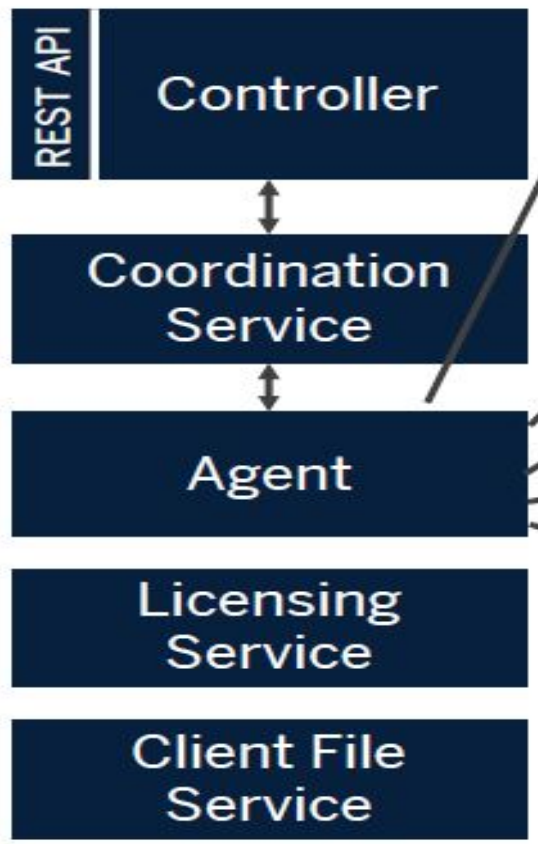


# Sever Upgrade Process

- ◆ When upgrading to 2018.3 from a prior version, you will uninstall the prior version first, then install 2018.3 on each node individually.
- ◆ For subsequent versions, TSM introduces a new way to do upgrades of Tableau Server.
- ◆ As a final step to initialize TSM, you will run an upgrade script to complete the upgrade.
- ◆ You can run the new TSM installer to lay down the bits on to the Tableau Server nodes ahead of time while Tableau Server is running.
- ◆ When you are ready to proceed with the upgrade, you can just run the upgrade script to complete the upgrade process; this is the only part of the upgrade process that will require some downtime.
- ◆ On one of UCOP's internal 5-nodes clusters, an upgrade that would normally require 75 minutes of downtime can now be completed in about 15 minutes with TSM.

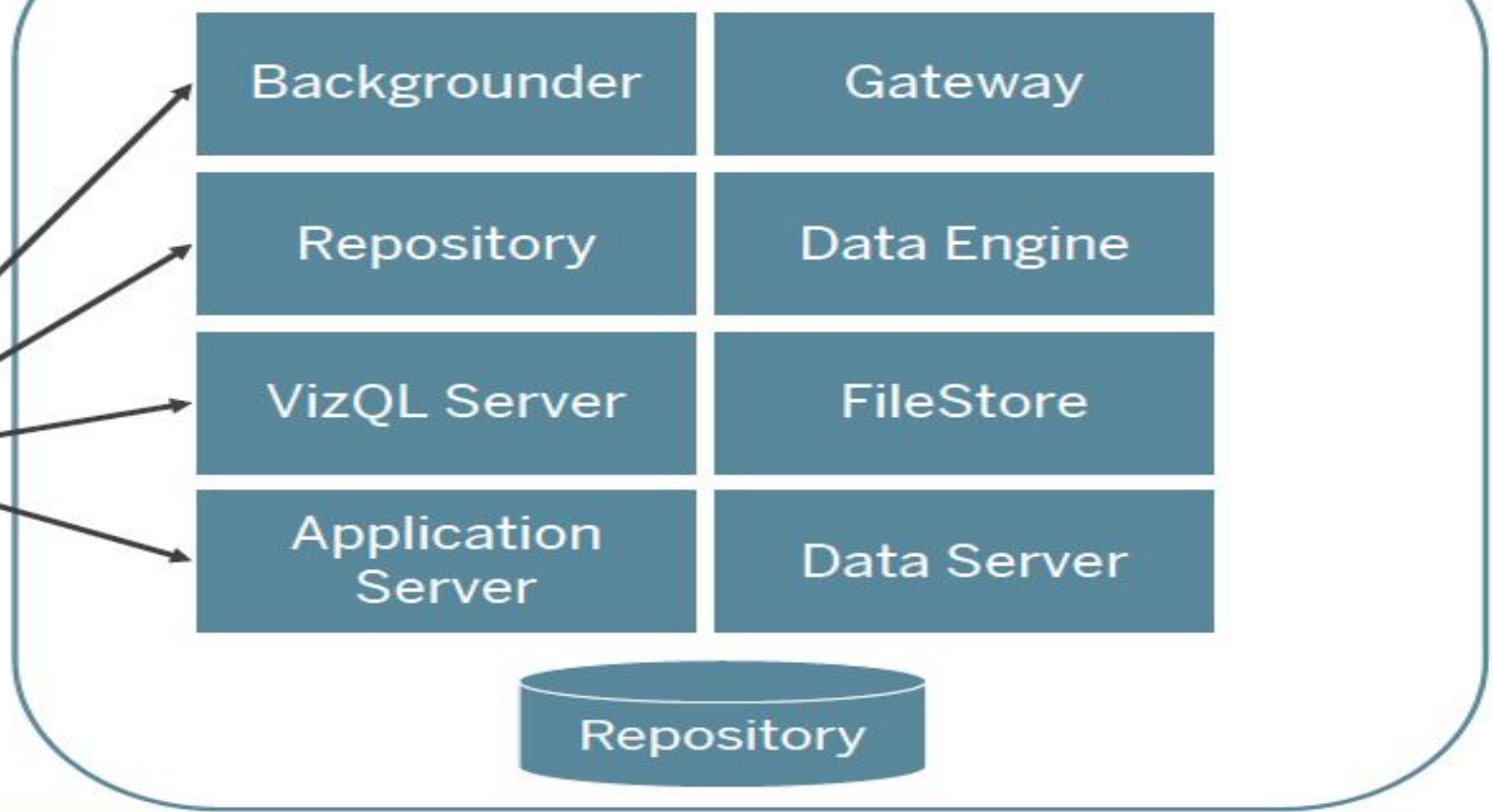
# Tableau Server

## TSM Processes



## Service Manager

## Application Processes



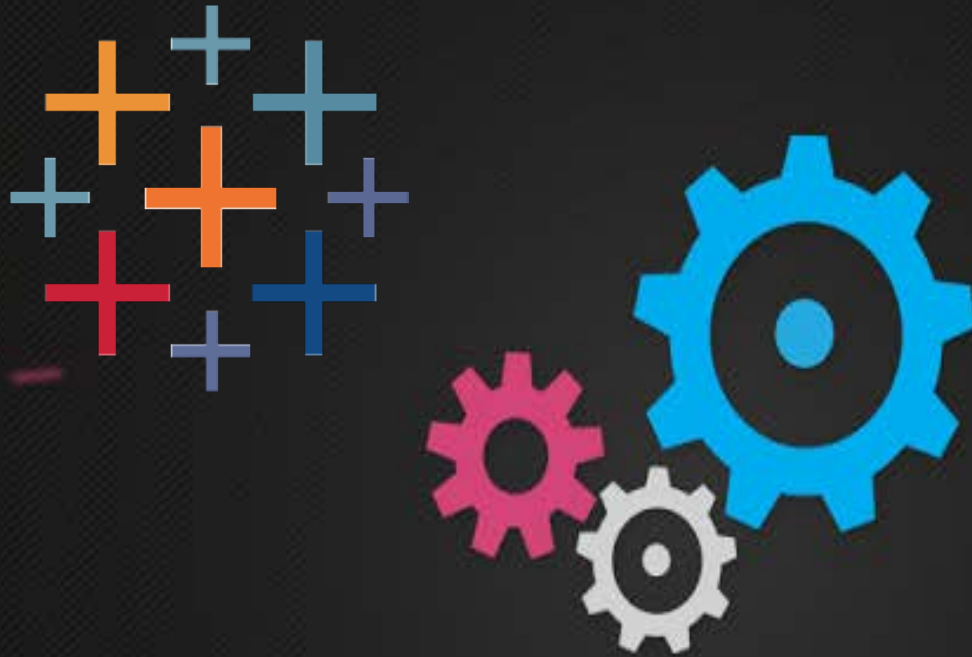
Backup/Restore

DB Maintenance

Site Import/Export

## TSM Maintenance Processes

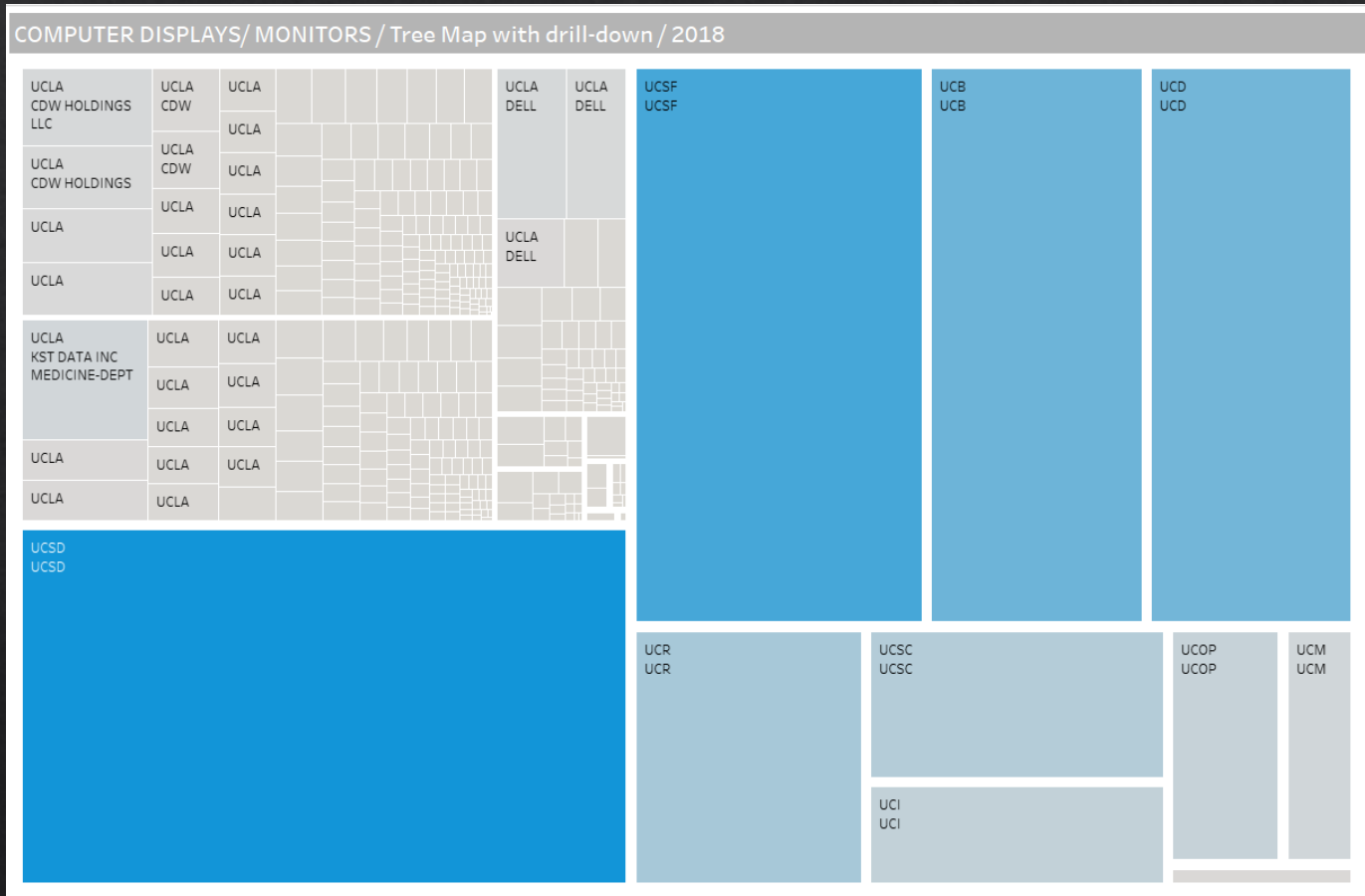




# **New** Feature Tableau 2018.3



# Set Actions in Tableau





# 5 BEST PRACTICES



# Best Practices #1

- ◆ Always start with the end in mind.
  - ◆ What is the goal of the dashboard?
  - ◆ What message do you intend for it to convey?



## Best Practices #2

- ◆ Consider a visual hierarchy to impact effectiveness (naturally, the human eyes goes top to bottom or left to right)
  - ◆ Put your ‘driver’ worksheet on top and use it to filter detail worksheets below.
  - ◆ Your ‘driver’ worksheet could also be on the left to provide detail to sheets on the right





## Best Practice #3

- ◆ Use the chart that works best for your data and goals.
  - ◆ Visualizations mean ‘visual’.
  - ◆ Do not be tempted to dump an Excel worksheet on a dashboard.
  - ◆ Experiment with different visuals.
  - ◆ Try the five second rule.



## Best Practice #4

- ◆ Understand color types and how they ought to be used.
- ◆ Gradient color for scale
- ◆ Divergent color for profit
- ◆ Categorical colors for categories/breakdowns – year, region



**Primary**  
RED, YELLOW, BLUE  
Colors that can not be mixed. All other colors are derived from these 3 hues.



**Secondary**  
GREEN, ORANGE, PURPLE  
Colors formed by mixing the primary colors.



**Tertiary**  
YELLOW-ORANGE, RED-ORANGE,  
RED-PURPLE, BLUE-PURPLE,  
BLUE-GREEN, YELLOW-GREEN  
colors formed by mixing  
a primary and a secondary color.



## Best Practice #5

- ◆ Design for ultimate performance.
  - ◆ Use indexed databases if you can rather than Excel spreadsheets.
  - ◆ Start with summaries.
  - ◆ Provide options to drill to detail.
    - ◆ This way, users only drill to the lowest level when they want to narrow their focus specific, year, discipline...







# Useful Resources

1. Tableau Server Management - <https://www.youtube.com/watch?v=MO6ISMSYQqg>
2. Dashboard Best Practices - <https://www.tableau.com/learn/whitepapers/10-best-practices-building-effective-dashboards>
3. Visual Analysis Best Practice - <http://www.dataplusscience.com/files/visual-analysis-guidebook.pdf>
4. Set Actions in Tableau - <https://www.tableau.com/about/blog/2018/11/8-ways-bring-powerful-new-comparisons-viz-audiences-set-actions-97207>
5. Heatmaps, Set Actions, new dashboard formatting and more – now available in Tableau 2018.3 - <https://www.tableau.com/about/blog/2018/10/heatmaps-set-actions-new-dashboard-formatting-and-more-now-available-tableau>
6. Step-by-Step Tutorial on Set Actions - [https://onlinehelp.tableau.com/current/pro/desktop/en-us/actions\\_sets.htm](https://onlinehelp.tableau.com/current/pro/desktop/en-us/actions_sets.htm)
7. 8 Ways to Bring Powerful New Comparisons to Viz Audiences With Tableau Set Actions - <https://www.tableau.com/about/blog/2018/11/8-ways-bring-powerful-new-comparisons-viz-audiences-set-actions-97207>



# Next Meeting

◇ March 8<sup>th</sup>, 2019