University of California
Tableau User Group (UC TUG)

Presentations By:
UC Office of the President (Procurement)
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February 8th 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
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.
New Feature
Tableau 2018.3
Set Actions in Tableau
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
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=MO6ISMSYQgg
Next Meeting

March 8th, 2019