

Tableau Server Upgrade

- Deciding an Upgrade
- What to do Pre-upgrade
- During the Upgrade
- What if Upgrade fails

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Where to find the Server Admin TUG Recording?

<https://enterprisetableau.com>



SCALING TABLEAU



Scaling Tableau Roadmap

Scaling Tableau How T

Recently in Tableau



2020.2

- New Data Model: Relationships
- Metrics
- Set Controls
- Prep incremental refresh
- Oracle Spatial Support
- Reorder favorite
- Dashboards in lineage

2020.3

- Prep write-back
- Subscription on Refresh Extract
- "IN" operator
- Spatial File Union
- "Shared with me"
- Expert crosstab to Excel or CSV

2020.4

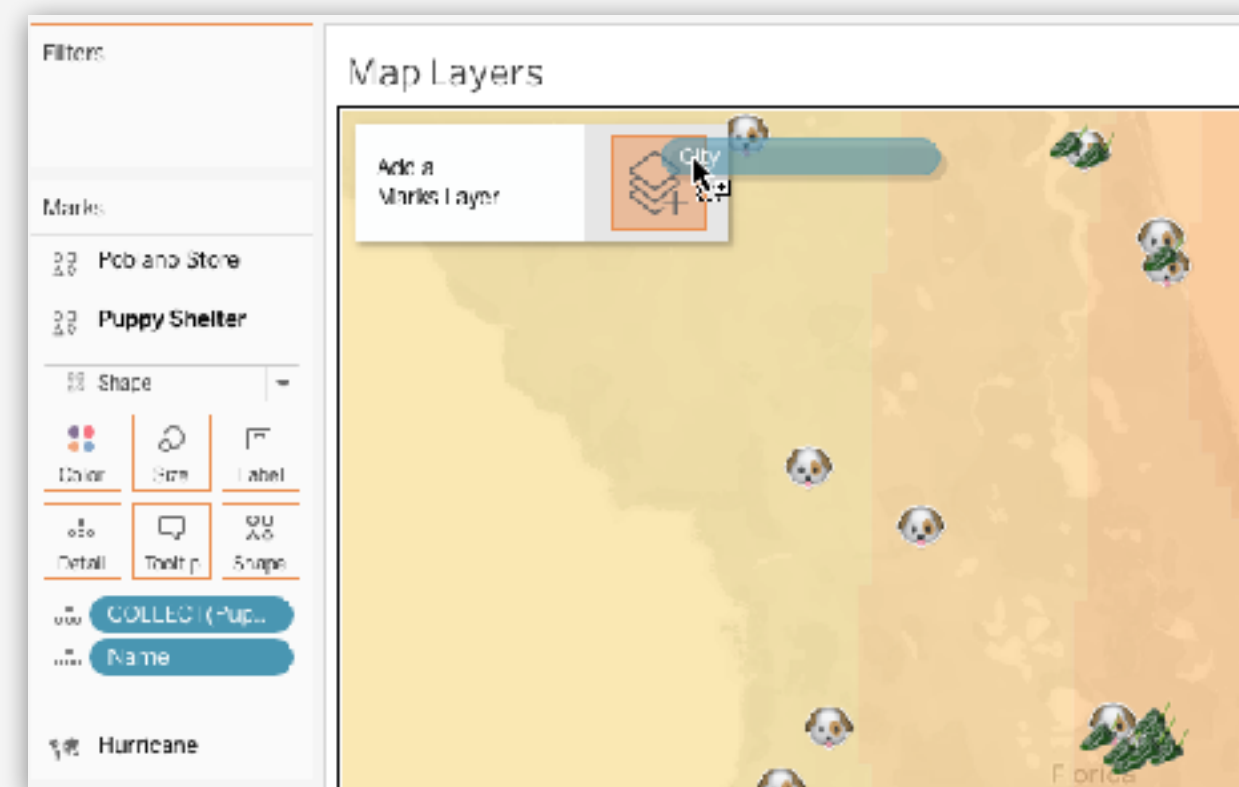
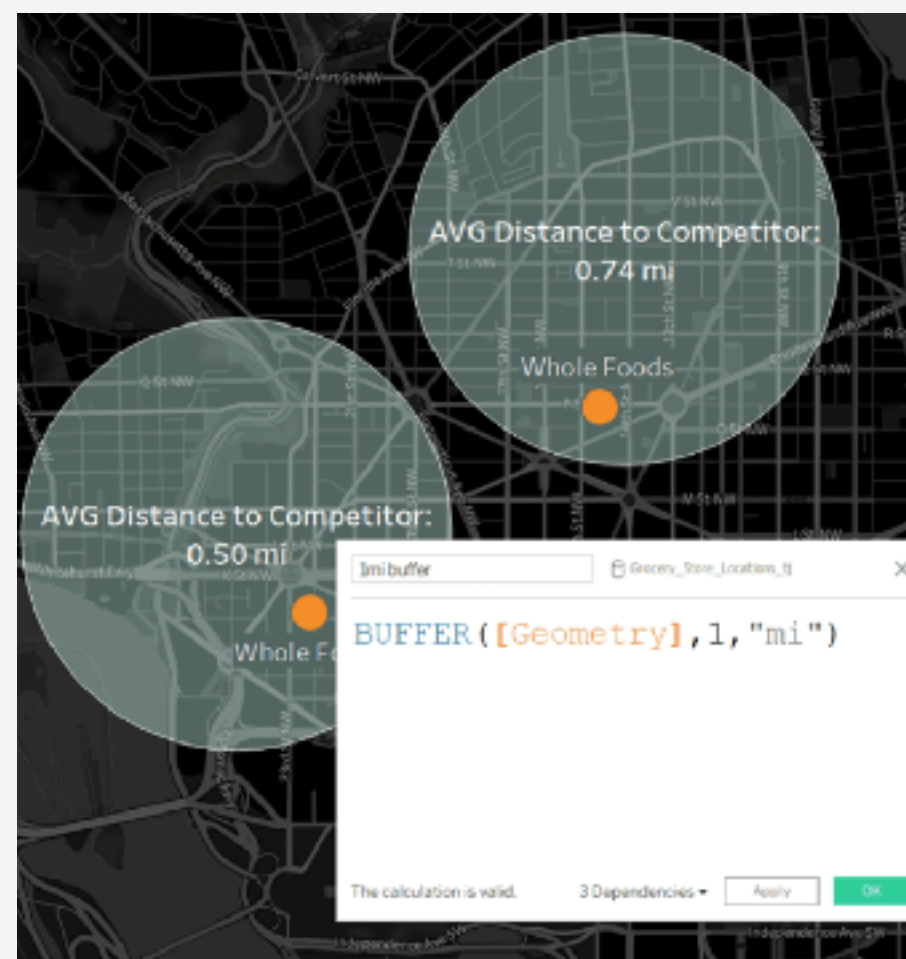
- Build Prep Flows in web
- Map Layer
- Date Extension Controls
- Custom View Tab
- More Web Authoring
- Better Data Quality Warning

2021.1

- Einstein Discovery in Tableau
- Quick LOD
- Unified Notifications
- In-Product Extension Gallery
- Prep Writes to Excel
- See existing Metrics
- Web Authoring Public

2021.2

- Ask Data Lenses
- Collections
- Explain Data on server
- Server in a container
- Connected Desktop for web authoring
- Multiple Analytics Services per Site
- Subsc timeout for single view

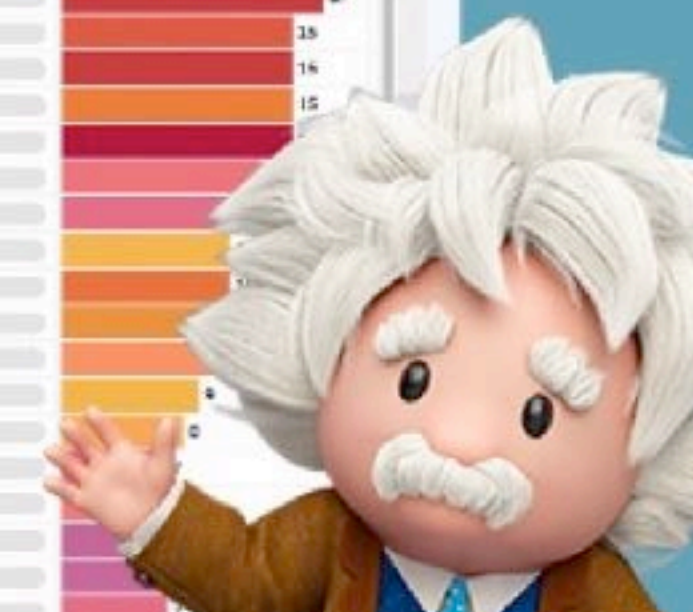


Analytics Extensions

Enable and configure analytics extensions on the site to extend Tableau dynamic calculations with programs and data from other external tools and platforms. [Learn more](#)

Enable analytics extension for site

- | Name |
|--------------------------|
| Data Science Team Python |
| Finance Team Python |
| EINSTEIN_DISCOVERY |
| Finance Team R |



Decide a version



Risk, Efforts, Downtime

New Features





Which Version? Get the Latest

2020.2

- **New Data Model: Relationships**
- Metrics
- Set Controls
- Prep incremental refresh
- Oracle Spatial Support
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2020.3

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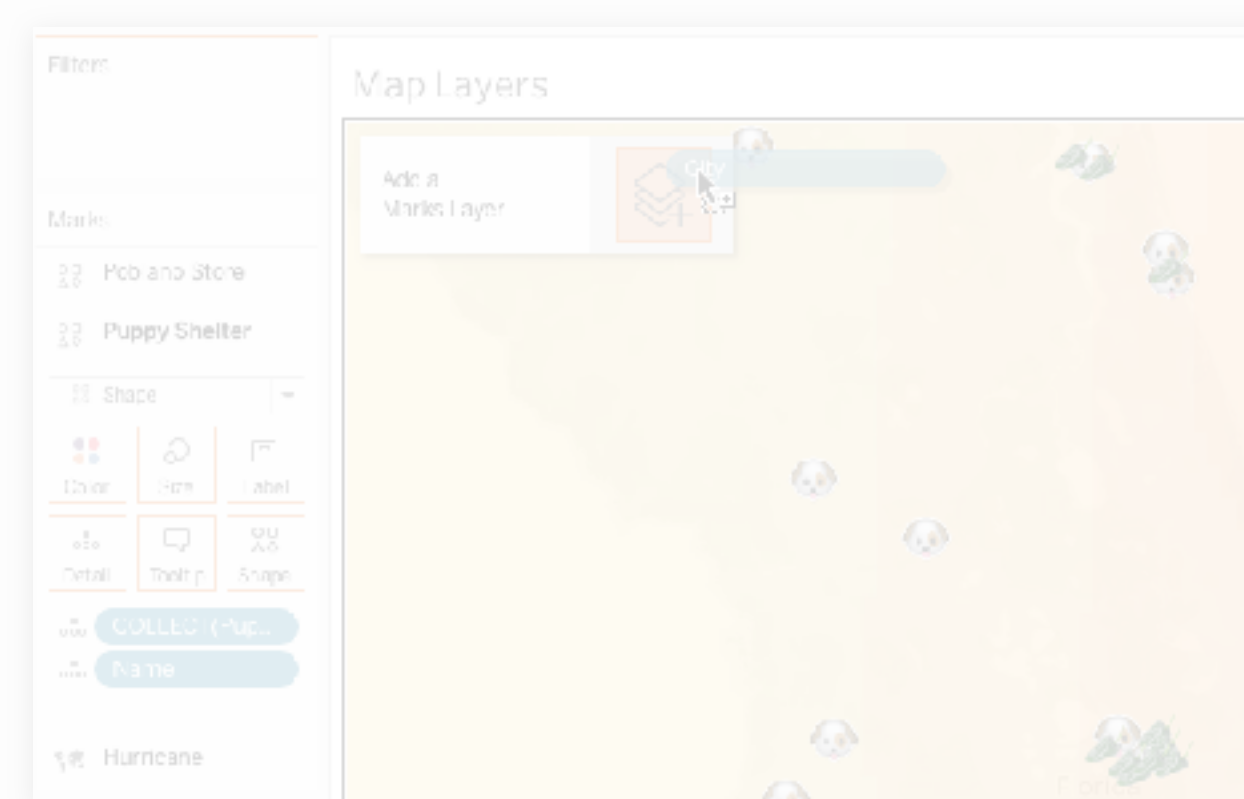
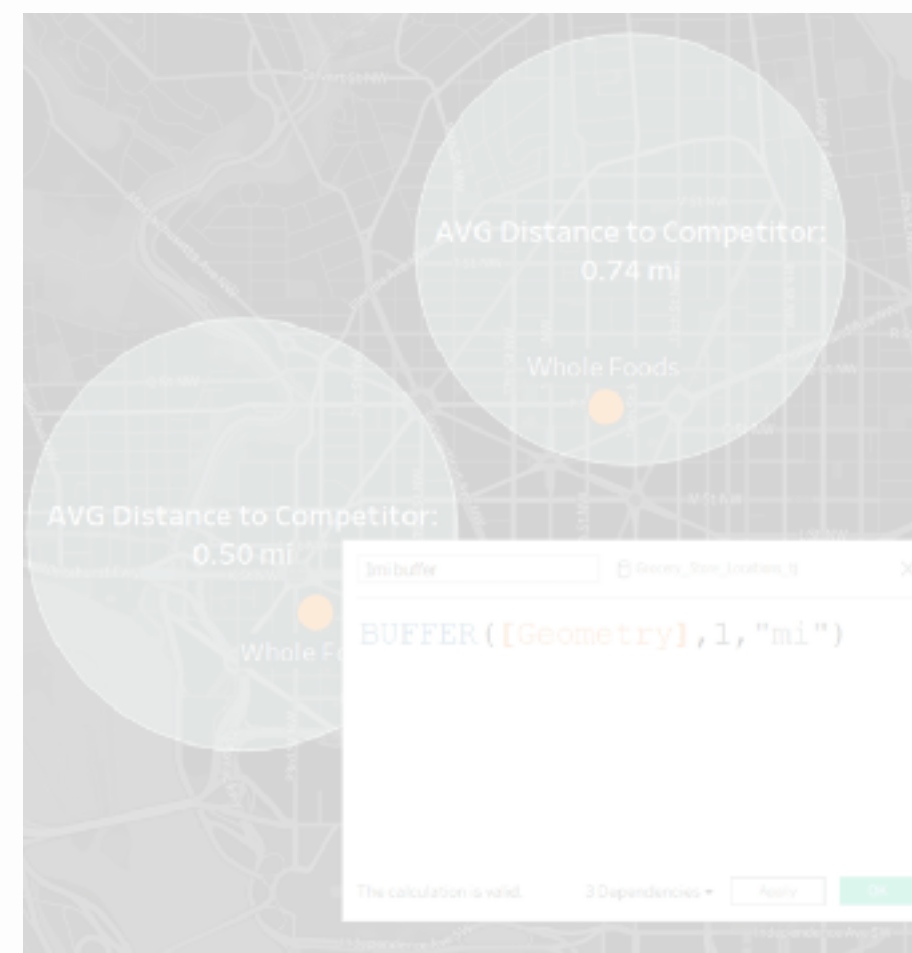
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Do not upgrade to 2021.1 or older



Go for 2021.2

How often?

2+ times/year



Sprint



- **150 core server**
- **3-4 upgrades per year**
- **xxxx.x.1**



Walk

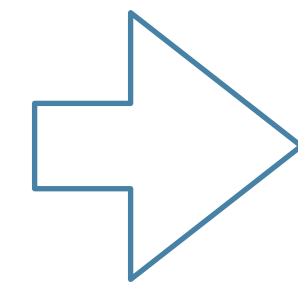


- **700 core server**
- **2 upgrades per year**
- **xxxx.x.3**



- *Test in Prod like HW and Data*
- *Upgrade more often to fix env issues*

Tableau Server Upgrade

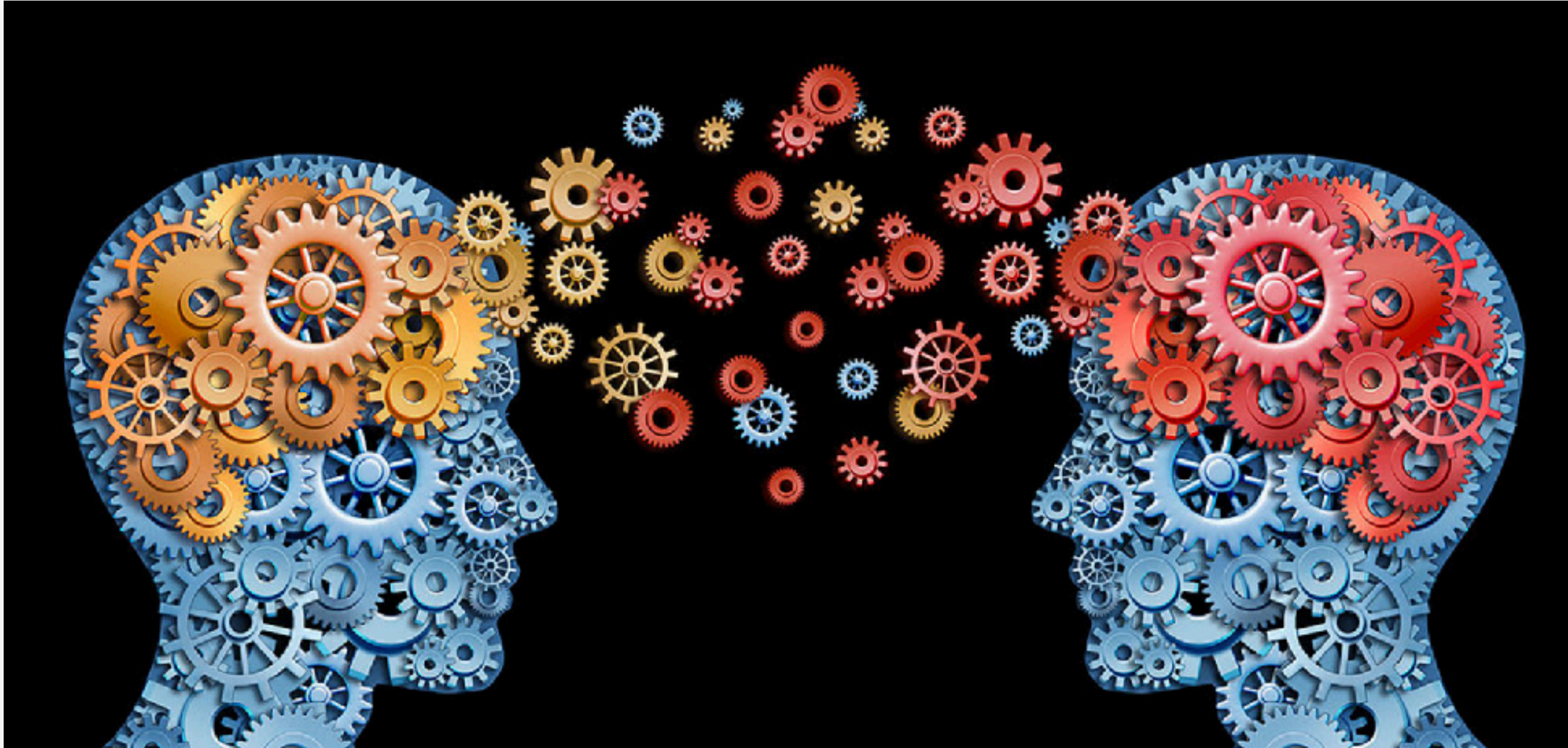


- Deciding an Upgrade
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- What if upgrade fails

- 12+ years in :
Designing architecture, administration, development, management and support of various Business Intelligence Platforms (Tableau, BusinessObjects and Qlik).
- 5+ years of experience in Amazon Cloud Technology

- Designing creative customized solutions for Tableau platforms to enhance the overall product experience.
- Keep acquiring new skillsets:
(AWS, Python, Networking, Databases etc)

What are we discussing today?



Discussion categorized into 3 key areas:

- What to do Pre-upgrade ?
- During the Upgrade
- What if upgrade fails?

What to do Pre-Upgrade ?

- Strategic Upgrade Approach

- Planning
- Upgrade Testing

- Platform Health Check

- Service State
- OS level Check

- *Minimal disruption to the user community*
- *Upgrade Testing*

What to do Pre-Upgrade ?

- Strategic Upgrade Approach

- Planning
- Upgrade Testing

- Platform Health Check

- Service State
- OS level Check



Be Smart about Test



1. Test in *Prod Like env and Data*
2. Run all *extracts* once to compare failure rate and avg execution time
3. Make *publishers* accounted for their own workbook test/validation
4. No need to over test

What to do Pre-Upgrade ?

● Strategic Upgrade Approach

- Planning
- Upgrade Testing

● Platform Health Check

- Service State
- OS level Check

- *Tableau service state*
- *Memory related issues*
- *Any service crashing?*
- *Do we have adequate Storage ?*
- *Can antivirus/firewall cause an issue?*

What to do During Upgrade ?

Monitor the Upgrade

- Monitor the Tableau logs
- Monitor Postgres DB
- Monitor your Environment

- Tableau Upgrade Maintenance Command execution has 3 phases.
 - a) Initial Information gathering
 - b) Executing the Upgrade
 - c) Finalization Steps
- Monitor the Filestore, Postgres, Searchindex, Tabadmincontroller etc
- Monitor Memory/Storage

What if Upgrade Fails?

- Always be ready with backup restore plan
- Be ready with your install scripts
- Be ready with your customization



 Tableau Community
Server Administration

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