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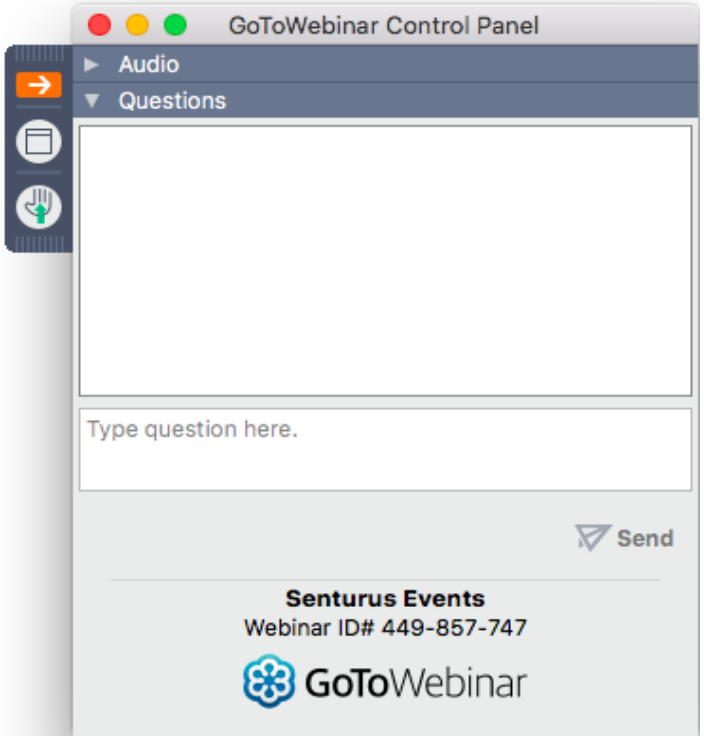
Our Favorite New Features in Tableau 2019.3

Data and Server Management Get a Big Boost

GoToWebinar Control Panel

Click arrow to restore full control panel



Submit questions here

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Presentation Slide Deck

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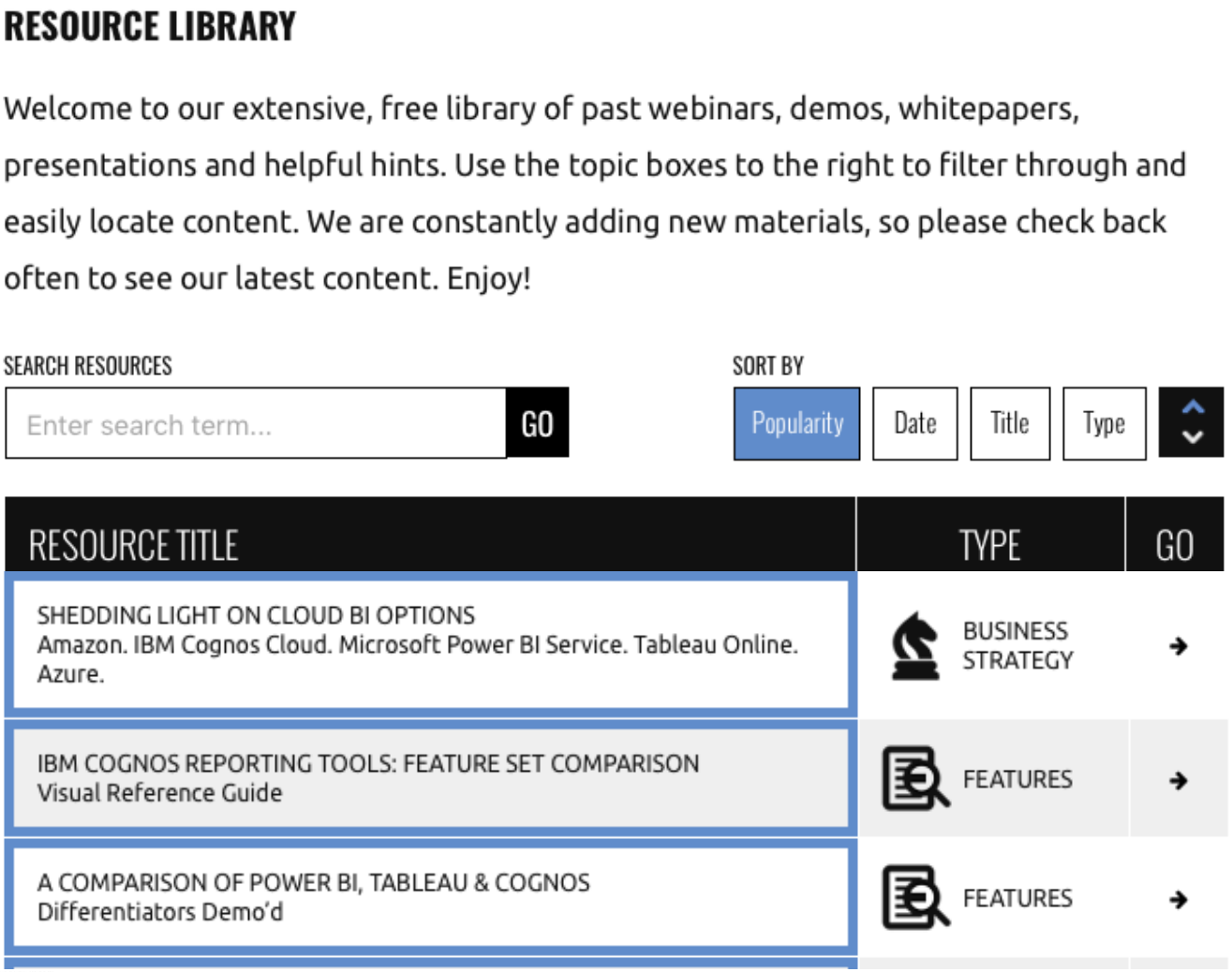

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Agenda

- Introductions
- Explain Data
- Tableau Catalog
- At rest encryption
- PDF attachment subscriptions
- Tableau resource management
  - Resource monitoring
  - Deployments
  - External repository
  - Workload optimization
- 2018.4 and Beyond
- Additional resources
- Q&A

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Introducing…Today's Presenters

Todd Schuman

Practice Lead Installations, Upgrades and Optimization

Senturus, Inc.

Michael Weinhauer

Practice Area Director /Solutions Architect

Senturus, Inc.

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Poll #1

What Tableau Server version are you using?

- 2019.X
- 2018.2/3/4
- 2018.1
- 10.X
- 9.X

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Poll #2

What are your biggest challenge in the Tableau environment?

- Setting up trusted authentication
- Performance issues
- Self-service security and data governance
- Installations and upgrades
- User adoption

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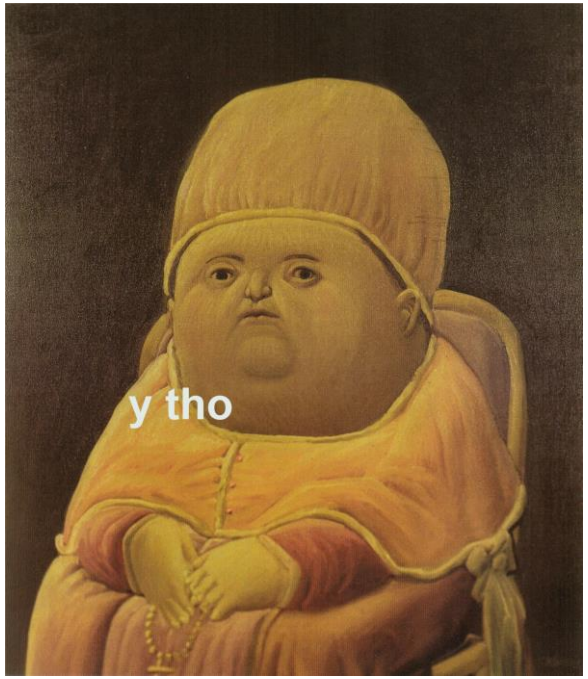
EXPLAIN DATA

Explain Data

- Add additional insights into your data
- Custom created visualizations based on insights
- Dive into new viz
- Continue to dive into more insights



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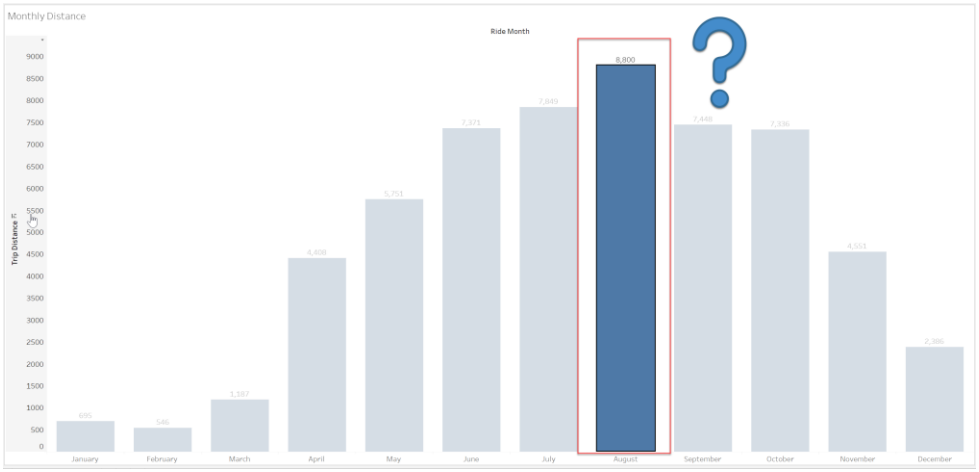
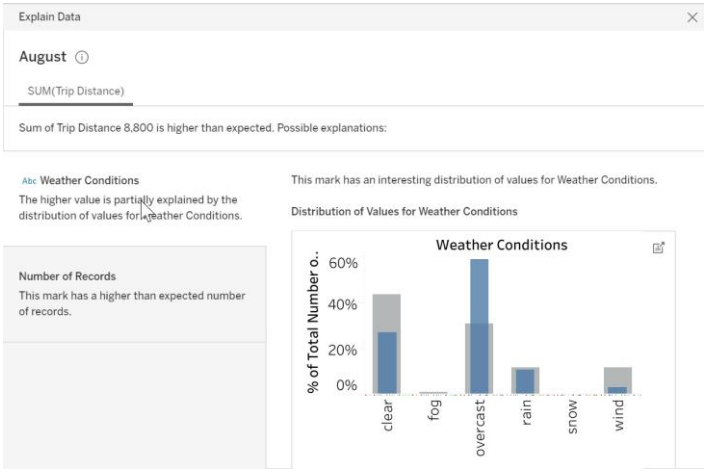
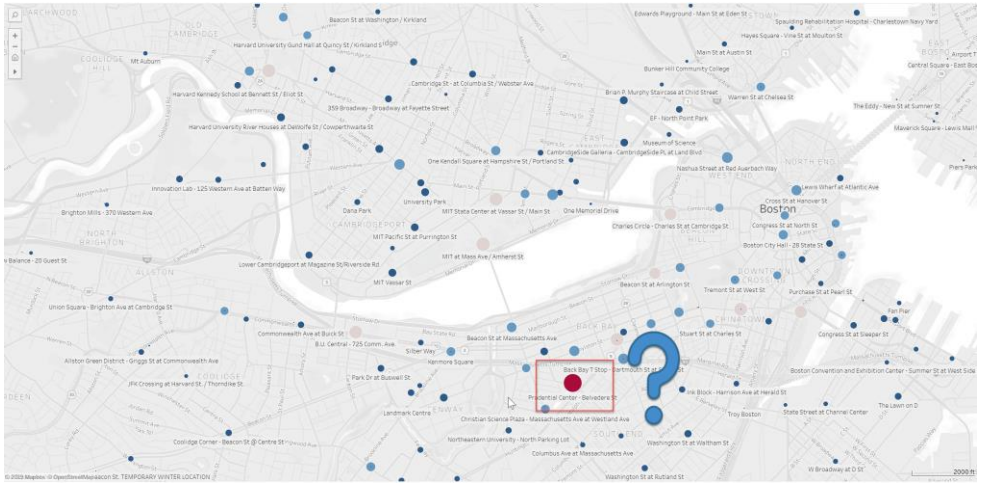
Explain Data - Sample Usage







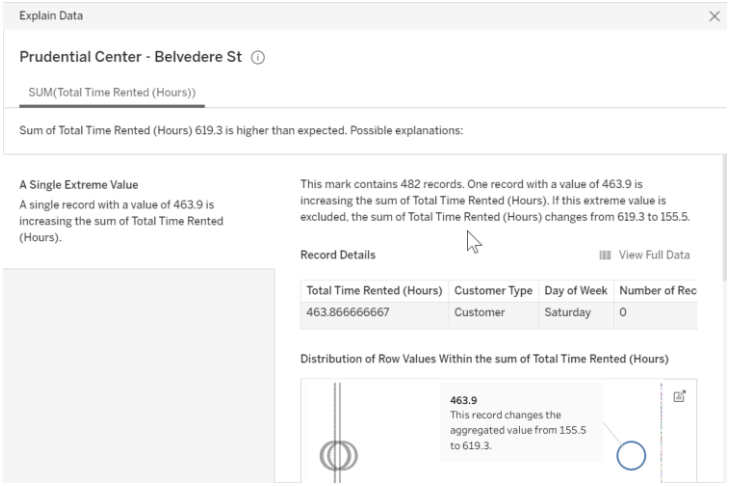


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TABLEAU CATALOG

Tableau Catalog

- Index metadata content on your site
  - Workbooks
  - Data sources
  - Worksheets
  - Flows
- Maps metadata to databases/tables
- Enable with command line "*tsm maintenance metadata-services enable*"

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Estimating the Catalog Index

```
C:\Users\senturusadmin>tsm maintenance metadata-services enable
When enabling this option, some services used by Tableau Server must be restarted. This will make some functionality on Tableau Server temporarily unavailable. Do you want to continue?
(y/n): y
Job id is '43', timeout is 10 minutes.
11% - Checking if required services to create the Metadata API Store are running.
22% - Stopping Metadata API Store related services.
33% - Enabling the maintenance app.
44% - Waiting for the maintenance app to start.
55% - Disabling database services.
66% - Waiting for database services to disable.
77% - Recreating Metadata API Store.
88% - Setting Metadata API Store related settings.
100% - Starting Metadata API Store related services.
Metadata API Store was created successfully.

C:\Users\senturusadmin>_
```

- Can be time consuming to run
- Can increase threads/memory
  - Increase threads
  - Increase RAM

Components	Baseline values
Content	12,000 workbooks, published data sources, and flows
Threads	2
JVM heap size (memory)	64 MB (minimum) – 4 GB (maximum)
Ingestion	**~6 hours**

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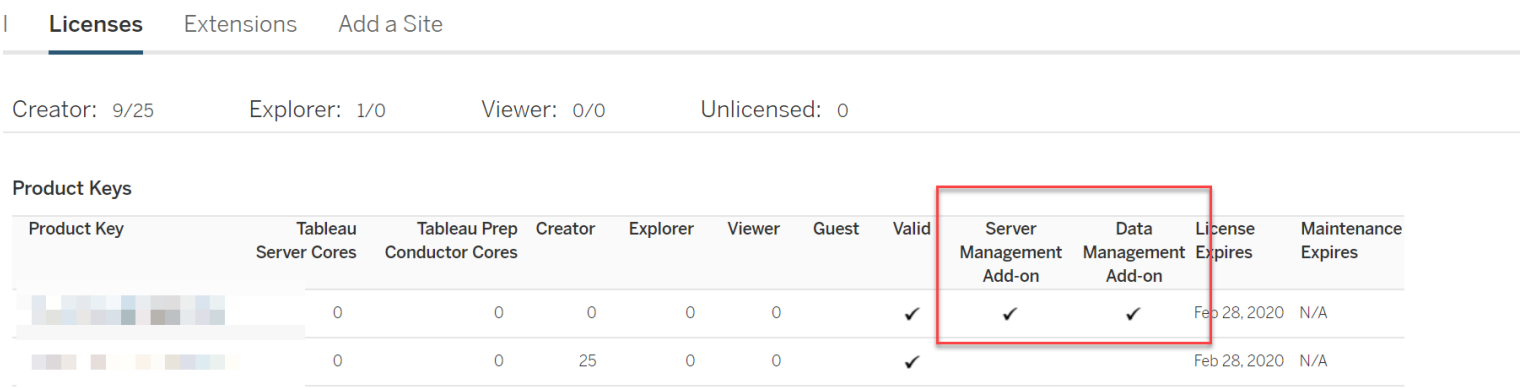
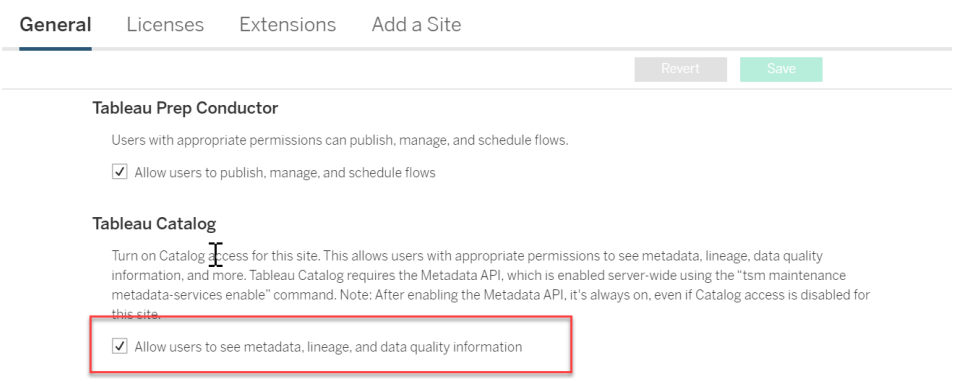
Don’t See the Catalog?

- Check your licenses
  - Data management add-on



- Was it hidden/disabled?



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At Rest Encryption

Lock Down Extracts

- Encrypt .hyper extracts while they are stored on Tableau Server
- Administrators can enforce encryption of all extracts on their site or allow users to specify to encrypt all

Extract Encryption at Rest

You can specify whether extracts stored on this site are encrypted.

- ○ Disable: Do not allow encrypted extracts on this site.
- ◉ Enable: Allow users to optionally encrypt extracts on this site.
- ○ Enforce: All extracts published and stored on this site are encrypted.

Encryption not running.
0/10 Encrypted
10/10 Unencrypted

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Encryption Limitations

- .tde file extracts must be upgraded to .hyper file extracts before they can be encrypted
- Temp and cache files not encrypted
- Workbooks (.twb) and data sources (.tds) are not encrypted
- Excel/JSON not encrypted unless they are converted to .hyper
- Extracts downloaded from server are decrypted

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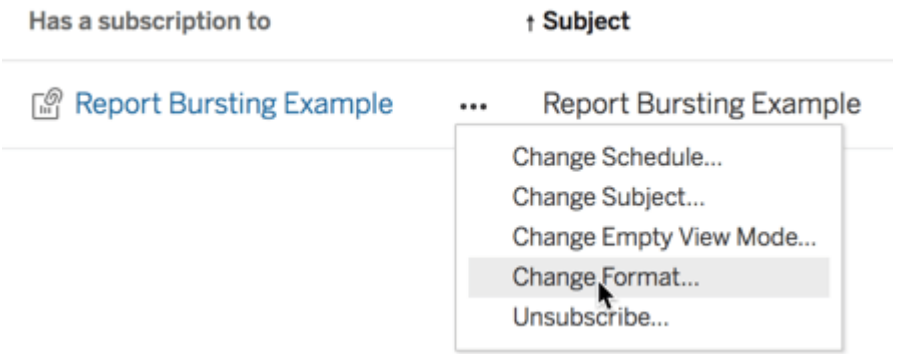
PDF Attachment Subscriptions

PDF Format in Subscriptions

- Select PDF as format for subscriptions
- Setup subscriptions to burst to PDF
  - Personalized report for each recipient
- Change existing format subscriptions created pre- 2019.3



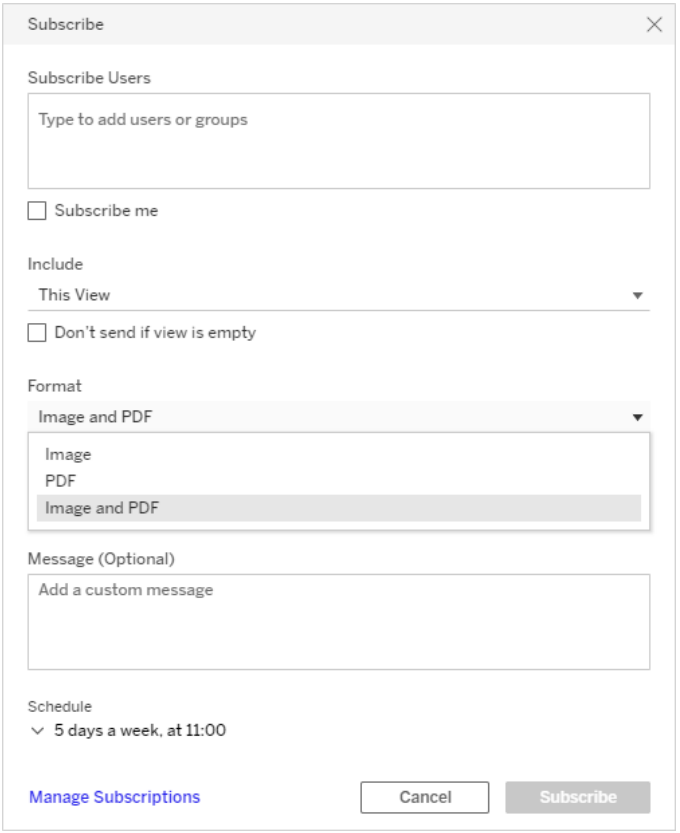


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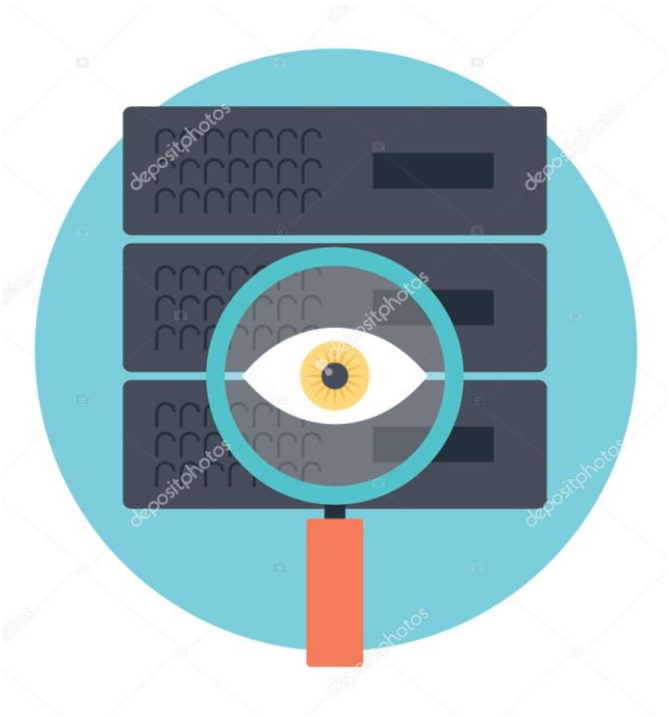
TABLEAU RESOURCE MANAGEMENT

Resource Monitoring

- Environment or individual server
  - Server performance monitoring
  - Tableau processes
  - Background tasks
  - Concurrent users
  - Load times
  - External data requests
- Insights
  - Slowest views
  - Longest extract refresh



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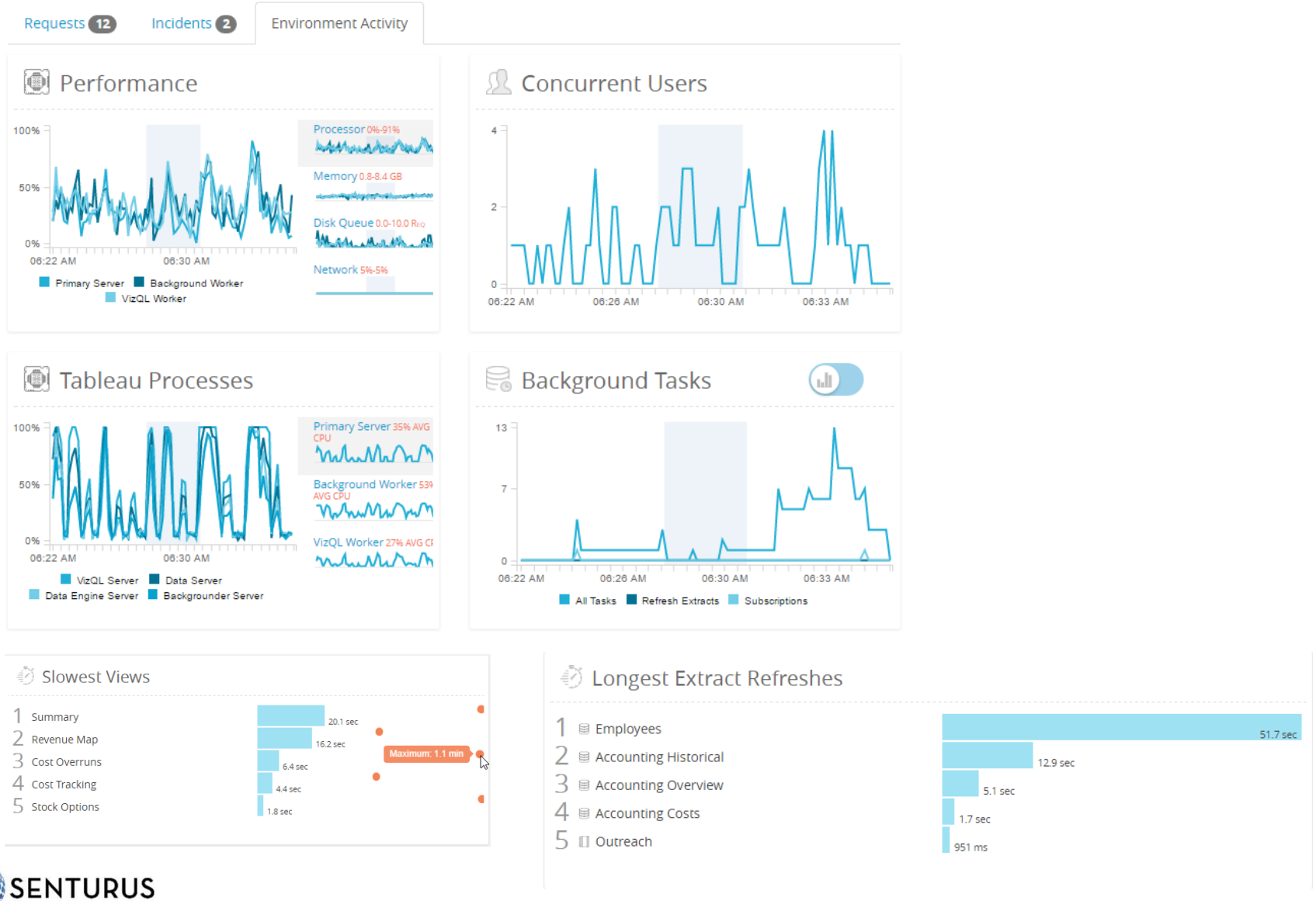
Monitoring – Sample Charts



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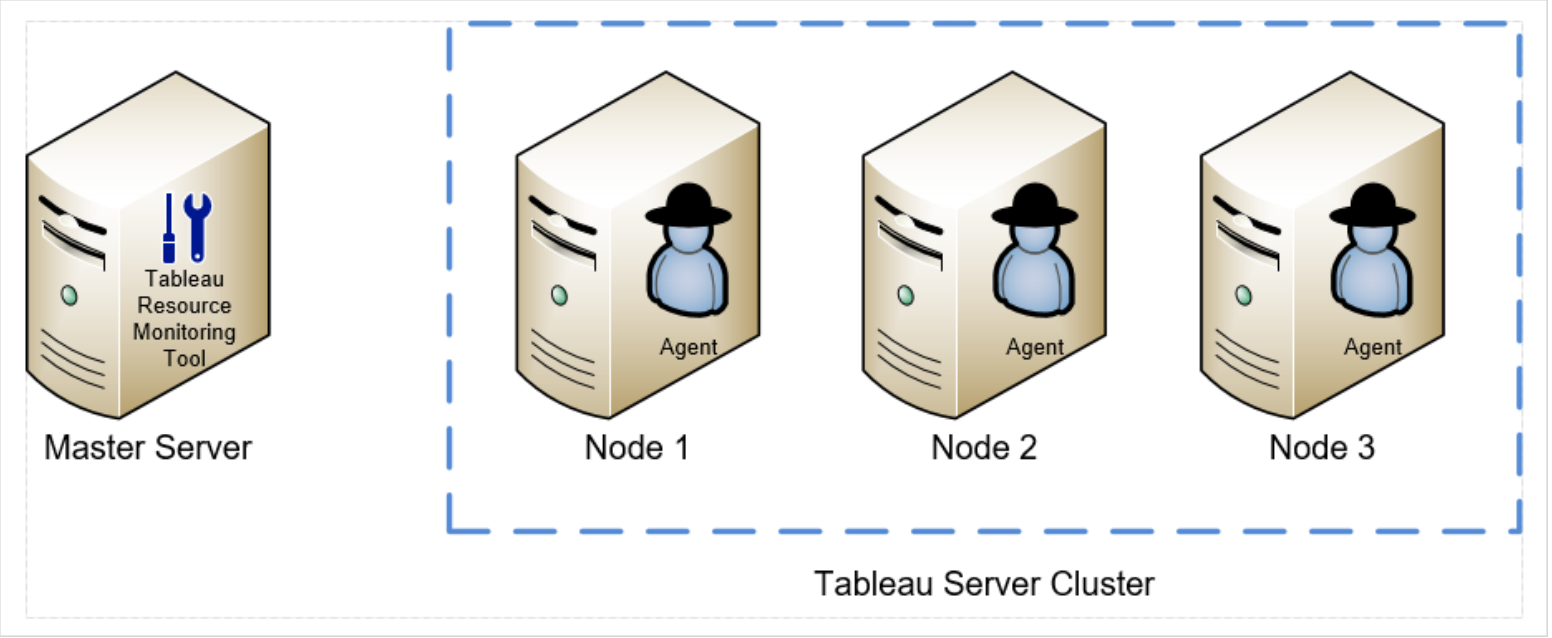
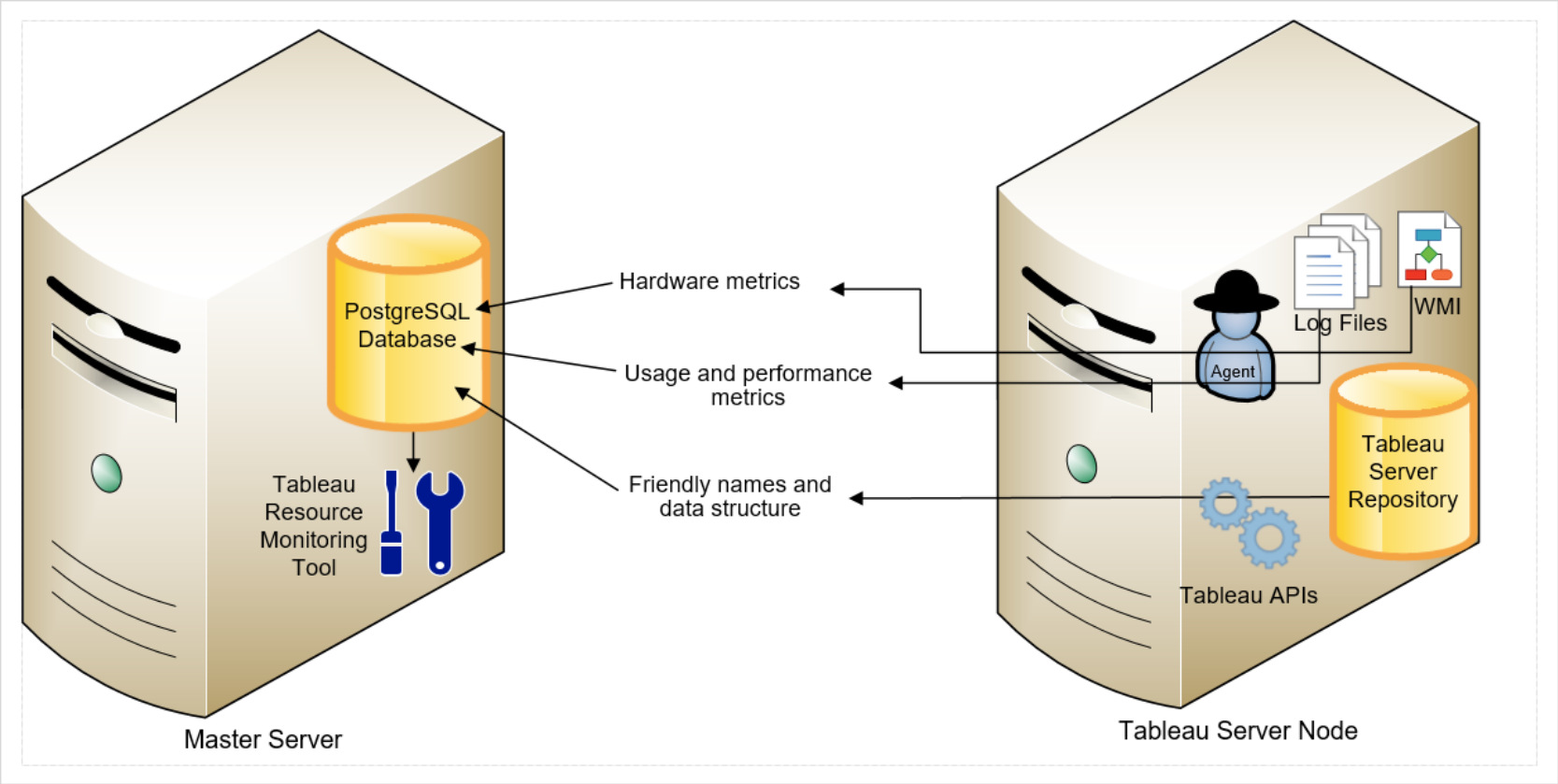
TRM

- Master Server
- Agent



TRM Agent to Master – Data Flow



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Installation - Multi-Step Process

- Install prerequisites
  - RabbitMQ
  - Erlang
  - PostgreSQL database
- Install master
  - 8 physical CPU cores (16 vCPUs)
  - 32 GB RAM
  - 500 GB disk space
- Install agent
  - Each server in cluster

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TRM - Installation Tips

Save prerequisites install account Info!!!

tmp3965.tmp - Notepad

File Edit Format View Help

```
!!!REVIEW THE FOLLOWING INFORMATION AND STORE IT IN A SECURE PASSWORD MANAGER IF DESIRED!!!
!!!THIS FILE WILL BE DELETED AUTOMATICALLY WHEN CLOSED!!!

RabbitMQ Username:
RabbitMQ Password:
PostgreSQL Superuser Username:
PostgreSQL Superuser Password:
PostgreSQL Interactor Username
PostgreSQL Interactor Password
PostgreSQL Readonly Username:
PostgreSQL Readonly Password:
```

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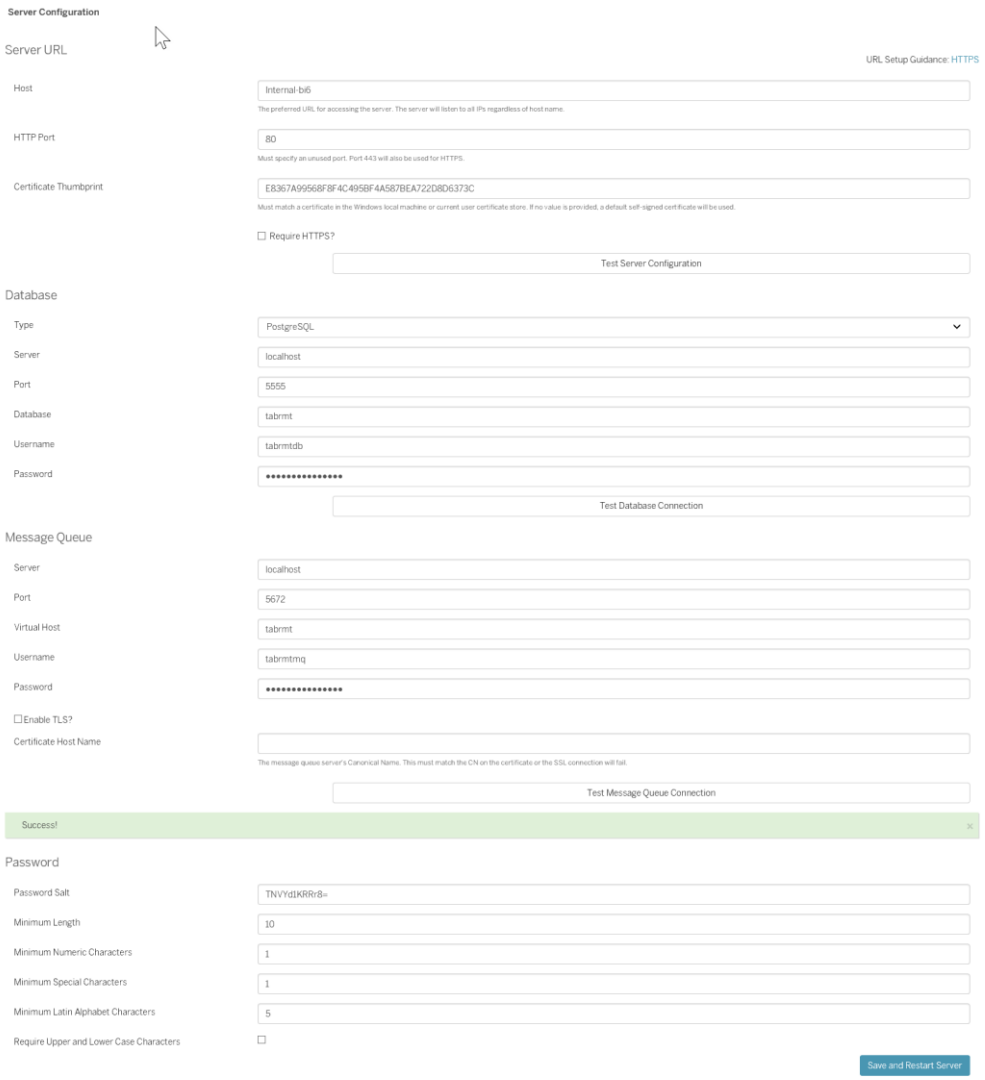
TRM - Install Master

- Setup
  - Server
  - Database
  - Message queue
- Should have values entered by default
- Will need to refer to account info in text file



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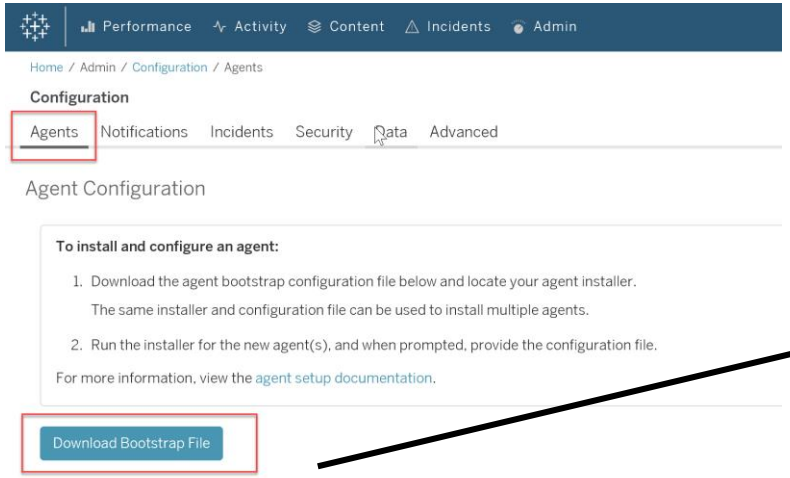
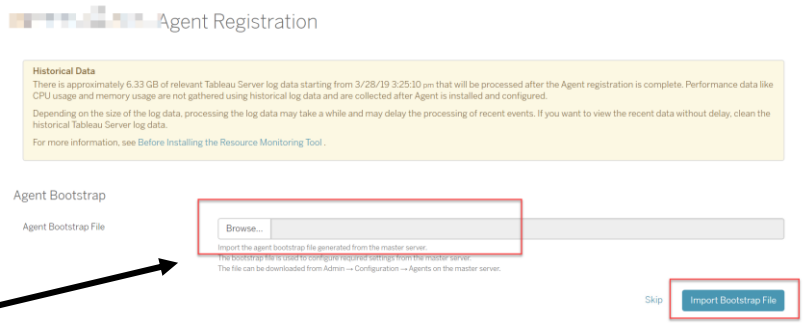
TRM – Agent Install

- Bootstrap file – download from master
- Import in all agents





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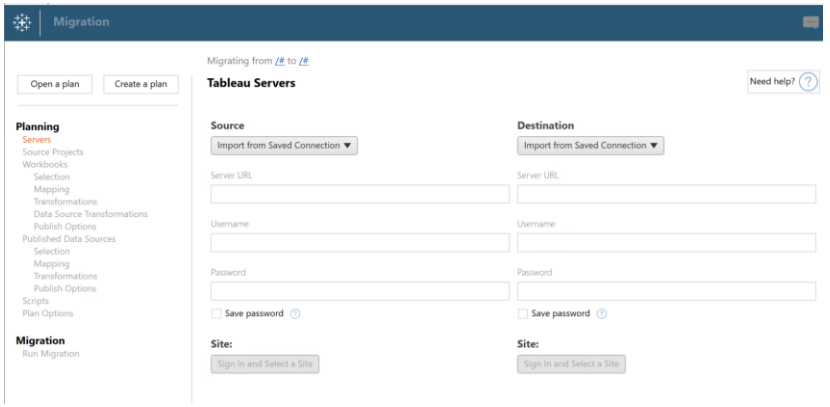
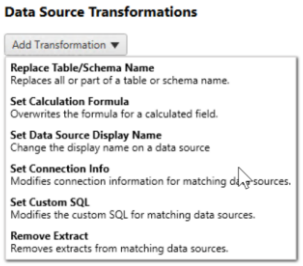
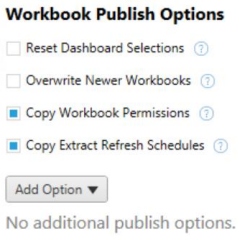
Deployments - New Migration Tool

- Create a plan (reuse)
  - Source and destination server
  - Select
    - Projects
    - Workbooks
    - Data sources
  - Transformations
    - Replace table/schema names
    - Custom SQL
    - Remove extracts
  - Publish options
    - Reset selections
    - Overwrite workbooks
    - Copy schedules/permissions







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Other Deployment Info

- Limitations
  - Not able to deploy
    - Data driver alerts
    - Custom views
    - Thumbnails
- Consolidate sites
- Rollback options
- Command line options
  - https://help.tableau.com/current/server/en-us/cmt-command_line.htm

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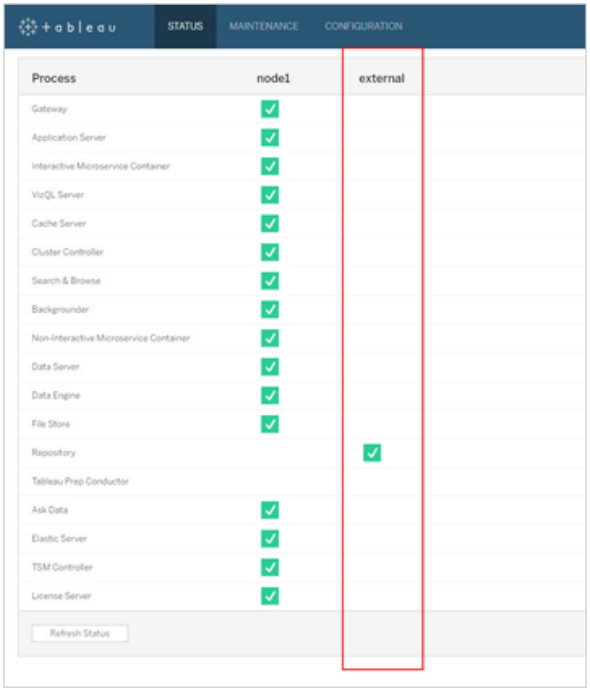
External Repository

- Amazon Relational Database Service (RDS)
  - Provides scalability, reliability, high availability and security built-in for PostgreSQL
  - Requirements
    - Your Tableau Server must be installed and running on Amazon Web Services (AWS)
    - Your Tableau Server must be using version 2019.3 or later
    - Your Tableau Server must have the Server management add-on keys activated
    - Familiarity with Amazon RDS setup and management
  - Migrations support
    - Local to Amazon RDS
    - Amazon RDS to local



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Workload Optimization

- Current backgrounder runs
  - Extract refreshes
  - Subscriptions
  - Flow tasks
  - ‘Run Now’ tasks
  - Tasks initiated from tabcmd

- Requires multi-node environment with more than 1 backgrounder node
- Dedicate nodes to specific tasks

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Workload Optimization Options

Configuration Options

Configuration	Jobs
all-jobs (default)	All Tableau Server jobs
flows	Flow run jobs.
no-flows	All jobs except flows.
extract-refreshes	Jobs that are created for: Incremental refreshes, full refreshes, encryption and decryption of all extracts including extracts that flow outputs create.
subscriptions	Subscription jobs
extract-refreshes-and-subscriptions	Extract-refreshes, encryption and decryption of all extracts including extracts that flow outputs generate, and subscription jobs.
no-extract-refreshes	All jobs except extract-refreshes, extract encryption and decryption of all extracts including extracts created from flow outputs.
no-subscriptions	All jobs except subscriptions.
no-extract-refreshes-and-subscriptions	All jobs except extract-refreshes, encryption and decryption of all extracts including extracts created from flow outputs, and subscriptions.

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2019.4 and Beyond!

- 2019.4
  - Enhancements to Explain Data
  - Webhooks – Automated Workflows
  - Browser Extension Creation
  - Table Improvements
- 2020
  - Write to DB from Tableau Prep
  - Tableau Prep in Browser
  - Dynamic Parameters
  - Viz Animations

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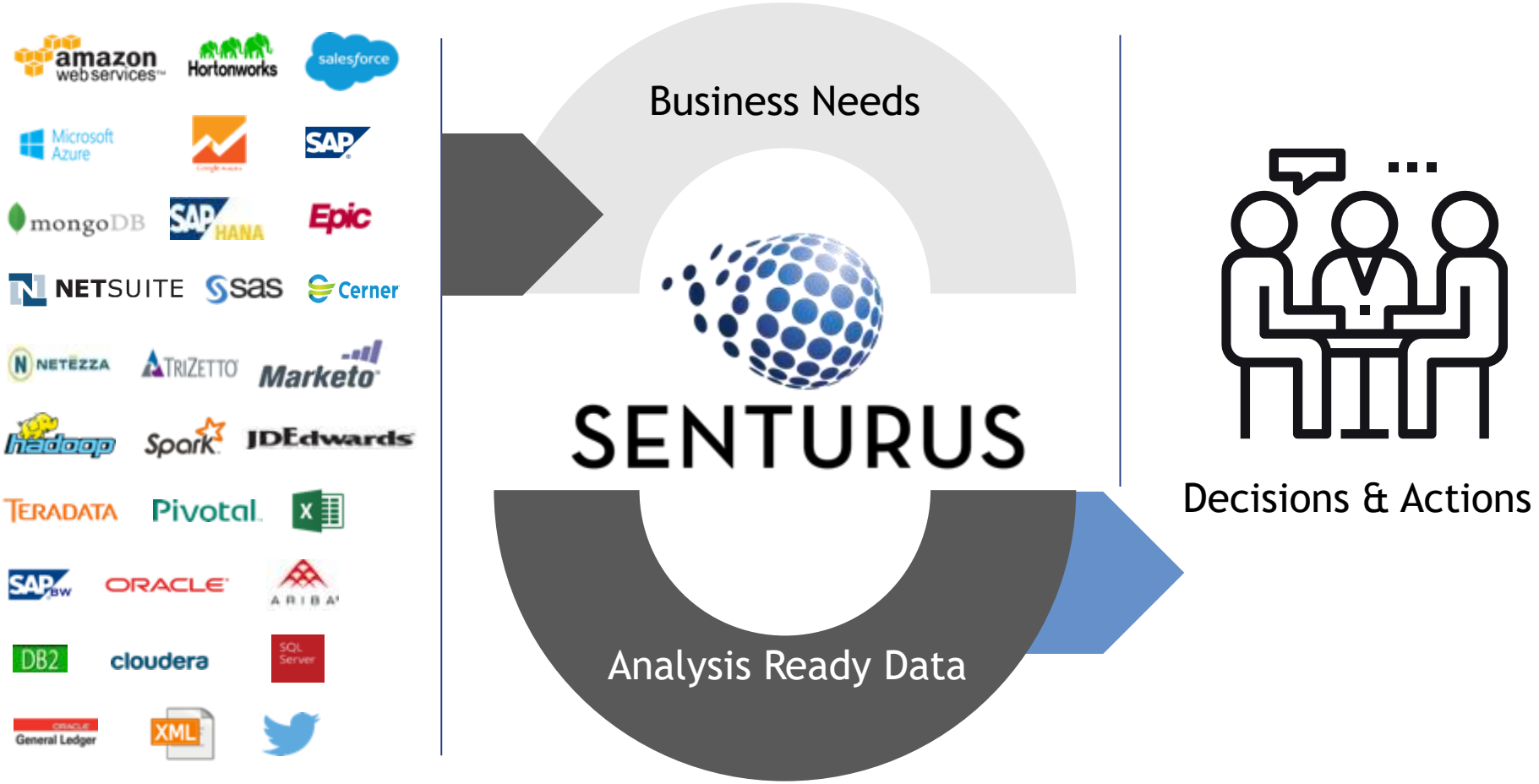
Who We Are

Full Spectrum of Services for BI

Bridging the Gap between Data & Decision Making



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- Data preparation and modern data warehousing
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- Software to enable bimodal BI and platform migrations
- Training and mentoring

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Additional Resources

Upcoming Events

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POWER BI DAX KICKSTART

OVERVIEW AND MECHANICS OF DATA ANALYSIS EXPRESSIONS

December 5 - 11am PT (2pm ET) - 60 minutes

TABLEAU DASHBOARDS: FROM DEFAULTS TO DAZZLING

HOW TO BUILD BETTER LOOKING CHARTS WITH CUSTOM FORMATTING

December 12 - 11am PT (2pm ET) - 60 minutes

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Free Resources

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UPCOMING EVENTS

RESOURCE LIBRARY

BLOG

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Training for Tableau, Power BI and Cognos

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- December 2 - Friday, December 6

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- Starting at $49
- Four classes: beginner intermediate advanced expert
- $499 access to all four classes for a full year

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$49.00 – $99.00

TABLEAU INTERMEDIATE DATA VISUALIZATION AND DASHBOARDING

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TABLEAU ADVANCED DATA VISUALIZATION AND DASHBOARDING

$199.00 – $249.00

EXPERT TABLEAU DEVELOPMENT

$199.00 – $249.00

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Q&A

If your question or issue is broader than what can be answered today, contact us at

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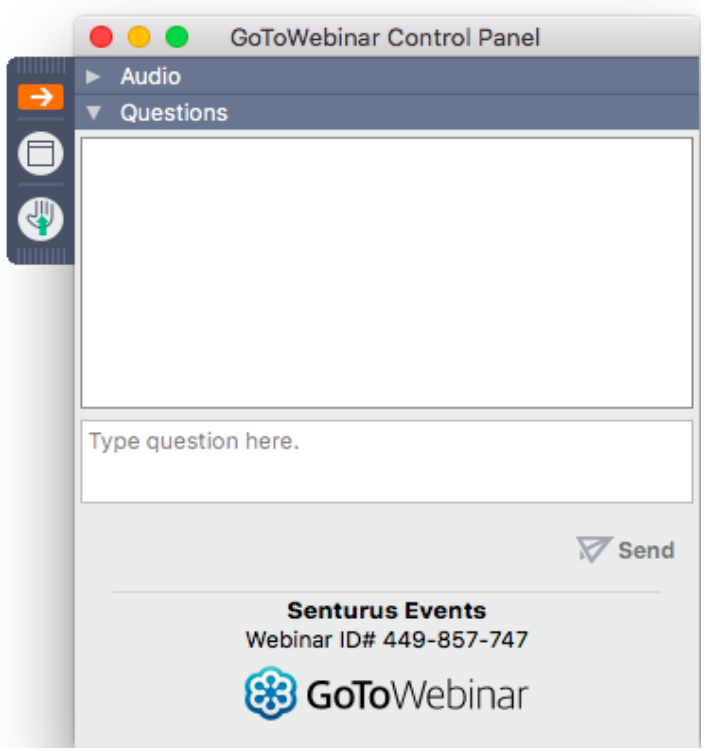
and we will set up a free consultation.



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