**Tableau Upgrade Steps**

1)Hardware recommendations for production installations.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| INSTALL TYPE | PROCESSOR | CPU | RAM | FREE DISK SPACE |
| Single Server | X64 | 16 vCPU | 64 GB | 500 Gb to 1 Tb |

Important: Do not install a beta version of Tableau Server in your production environment.

Suitable instance type in AWS For Tableau Production Environment.

* r5.4xlarge (suitable for development, testing, or production environments)

|  |  |
| --- | --- |
| **Component/Resource** | **Amazon Web Services** |
| CPU | 16+ vCPU |
| Operating System | * Tableau Server 2021.3.0 and later:   + Windows Server 2016   + Windows Server 2019 |
| Memory | 64+ GB RAM (4GB RAM per vCPU) |
| Storage | Two volumes: 30-50 GiB volume for the operating system  100 GiB or larger volume for Tableau Server |
| Storage type | EBS recommended (SSD (gp2) or Provisioned IOPS) |
| Disk latency | Less than or equal to 20ms as measured by the **Avg. Transfer disk/sec** Performance Counter in Windows. |

# 2) **What's Changed & Things to Know Before You Upgrade.**

There are no new features added in the tableau portal for this 2021.3.6 to 2021.3.15 version upgradation.

# 3) **Server Upgrade - Gather Configuration Details**

For in-place upgrades no need to gather configuration details. Here we are not taking a new V.M.

But for record of configuration details, we should have screenshots of below

1. TSM web interface pages

* [Sign in to Tableau Services Manager Web UI](https://help.tableau.com/current/server/en-us/sign_in_tsm.htm)

b) Tableau Server admin area.

* [Sign in to the Tableau Server Admin Area](https://help.tableau.com/current/server/en-us/sign_in_server_admin.htm)

When you are in the Tableau Server admin area, count and record the following in each site:

* Projects, workbooks, views, data sources
* Users and groups

## Gather asset files like-SAML certificate file,SAML key file,SAML IdP metadata file,OpenID.static.file,Kerberos.keytab file,LDAP Kerberos keytab file,LDAP Kerberos conf file,Mutual SSL certificate file, Mutual SSL revocation file,Customization header logo file,Customization sign-in logo file,Customization compact logo file.

# **4) Server Upgrade - Verify Licensing Status**

Step 1: View license expiration information.

Run the following command :

tsm licenses list

Then check LIC EXP and MAINT EXP fields displayed in the output

Step 2: Compare license expiration dates from TSM to your licenses in [Tableau Customer Portal](http://customer.tableausoftware.com/)

Step 3: If required, update licenses.

If your TSM maintenance date is not current or the expiration date will occur soon or is not the same as the date listed in the Tableau Customer Portal, refresh the license.

To refresh the license:

1. If the computer where you are running Tableau Server has been configured to connect to the internet through a forward proxy, follow the procedure in the topic, [Configure Product Key Operations with Forward Proxy](https://help.tableau.com/current/server/en-us/activate_proxy.htm), before continuing.
2. Open TSM in a browser:

http://<tsm-computer-name>:8850

1. Click **Configuration**and Licensing and click Refresh All

# 5) **Server Upgrade - Verify Accounts**

Before you upgrade Tableau Server, verify that you have passwords for two accounts:

* An account that is a member of the local administrator’s group: The account that you use to install Tableau Server must be a member of the local administrator’s group.
* Run As service account: If your organization uses Active Directory as the identity store and/or if you have configured Tableau Server to connect to data sources in Active Directory, then it's a best practice to keep the Run As service account credentials at hand as you run upgrade.

Tableau Server Setup will not modify existing directory permissions during the upgrade process. But it's a best practice to verify any non-default permission configurations before you run Setup:

* If you have installed Tableau Server onto a non-default drive (default is typically C:\Program Files), then verify that permissions for the Run As service account are compliant with the required permissions specified in [Installing in a non-default location](https://help.tableau.com/current/server/en-us/runas_confirm_read_ex.htm#Installi).

# 6) **Server Upgrade - Back Up Tableau Server**

Make a backup of your installation of Tableau Server before beginning the upgrade process. This provides data that you'll need to set up a test version of the upgraded environment. It also lets you recover if the upgrade process fails.

**Notes:**

* We recommend you disable subscriptions and scheduling in your production environment immediately before taking the backup, and reenable them after the backup is complete. Doing this will help avoid having your users receive duplicate subscriptions and email messages when you restore your backup in your test environment.
* The full backup can take a while if you have a large installation or a lot of extracts.
* Any changes made between the time you took the backup and the time you do the upgrade are lost because they aren't included in the backup.
* [Remove Unneeded Files](https://help.tableau.com/current/server/en-us/maintenance_cleanup.htm).

To back up server configuration data, use the tsm settings command. When you use the tsm maintenance backup command, the current date is appended to the backup file:

tsm maintenance backup -f <backup\_file> -d

# 7) **Server Upgrade - Download Setup**

* Go to the Tableau customer portal-Register with the tableau portal- then you will get mail from [Reghelp@tableau.com](mailto:Reghelp@tableau.com)
* Activate the account using the link received in the mail- then sign in – you will get the below information

# You are almost there!

**You are logged in, but it appears you are not associated with a Customer Portal.**

Customer Portals are managed by your internal Tableau Portal Administrator or by someone in your IT department. Please contact your administrator or your IT department who will be able to grant you access from within the Customer Portal. See instructions for admins below:

How to add users to customer portal:  
<https://kb.tableau.com/articles/howto/manage-users-in-the-customer-portal>

##### If you are a Partner- go to this link- <https://partner.tableau.com/>

##### If a coworker or your buyer forwarded you an email with an activation link-contact admin

If you do not know an admin and neither does your IT department-Please provide us with an invoice number or order number, and specify which feature or service you are trying to access. You can email us at [customerservice@tableau.com](mailto:customerservice@tableau.com)

# 8) **How Tableau Server Upgrade Works**

When upgrading from Tableau Server 2018.2 or later, you do not uninstall the previous version. The upgrade process is designed to install a new version side-by-side with your existing version, and then switch from the earlier version to the latter one.

After installing the new version and upgrading, you can uninstall the previous version when you choose to do so.

Upgrading Tableau Server requires a stop and start of the server as part of the upgrade process. During this stop/restart Tableau Server is unavailable.