

# Customer Success Grant - Server Health Check

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## Grant Details

Goal of this document is to outline program details, grant requirements and any expectations of applicants that you can also use to prepare your application to request resources & support.

### What You Get

- Server Health Check Specialist reviews your Tableau Server
- Analysis on the results of your “check-up” with your Tableau Account team
- Recommendations on best practices and adjustments
- ...and more!

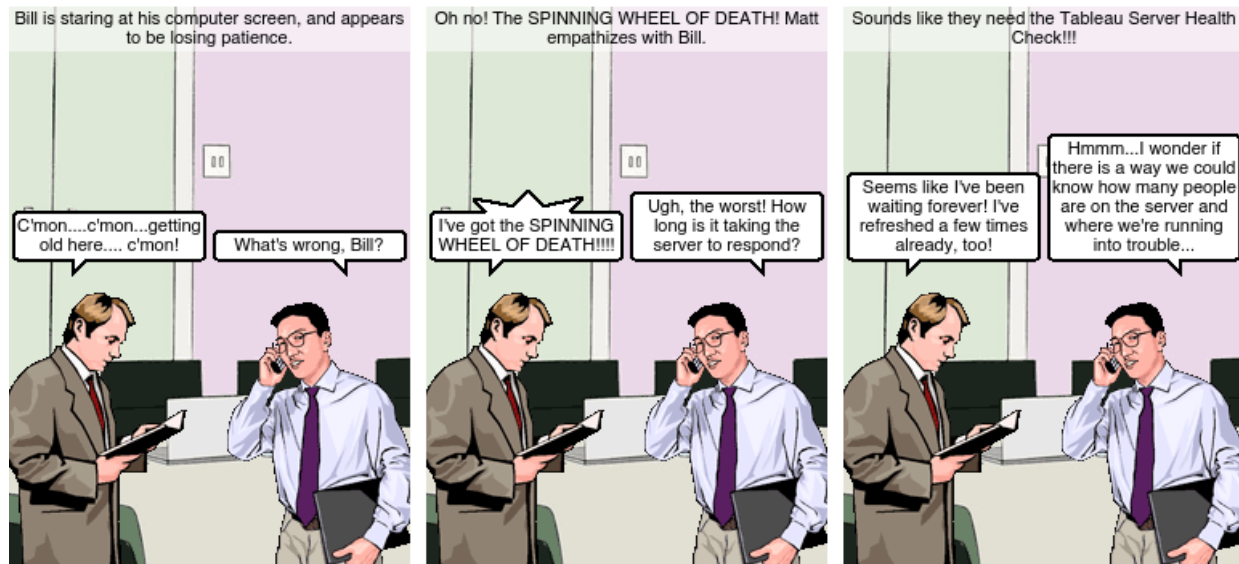
### What You Gain

- Experience analyzing current state Tableau Server data
- Time that may have been spent resolving issues after it was “too late”
- ...and more!

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## Today vs. Future State

Today as a server owner, there are many best practices you can employ to manage your environments and communities. But identifying and addressing trouble spots can be very tricky and we often rely on communication from the end users to address problems. We want to empower you with our server health check and perform a light analysis on your Server to uncover basic common issues such as poor-performing content and basic common issues. Our expert will then return with recommendations on next steps and best practices we can employ.



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## Program Description

The Tableau Server Health Check is an important tool for establishing and maintaining a highly performant server and keeping your Tableau team engaged in supporting your environment. The "Check-up" expert works with your Server Team to analyze important health markers, identify potential trouble and take preemptive action before disruptions occur.

Our Tableau Server health expert will guide you through the analysis process. They will present you with the results and interpretation of the results and share their expert advice and considerations for next steps. They will cover critical to quality areas within the analysis and provide recommendations that can include: Performance & Health, User Management, Content Auditing & Upgrade Recommendations

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## How It Works

The SHC is a light version of the Deployment Review you would typically receive for a fee, by our Professional Services team or by the Technical Account Manager, as a benefit of having the upgraded Premium Support offering. While this will be a lighter version of the Deployment Review, we will still provide insights and recommendations that touch around topology, general usage, content, activity, response times, delays and it will help with profiling the users for a conversion from cores.

### What we need from you

We will need you to share Tableau Server log files from your server to perform the analysis. From there, we'll use some tools internally to provide you with additional analysis, ideas and feedback, for review on our follow-up call - which

we'll schedule after receiving your logs. Below are some of the key areas we will dive into with you.

## **Performance & Architecture Reviews**

Keeping track of Tableau Server processes and the capacity of its underlying system is key to maintaining server reliability. It's also a vital part of future capacity planning. When connection issues arise or performance degrades a workbook, we help you to identify and fix the server problems before they are realized. We review topology architecture and backgrounder schedules to provide our analysis of the state of the server as well as condition of the environment.

## **User Management & Content Reviews**

Whether you're supporting 10 or 10,000 users, Tableau makes it easy for the Server Administrator. Our health check will provide you with detailed information how your Tableau server is used beyond your top users, top content. We help you understand concurrency and review impact of the content to the server. This directly informs your server team of what areas need attention or what steps should to be taken in order to provide top performance to your users.

## **Discuss Recommendations with Experts**

Managing data, content, and users across your analytics platform shouldn't have to be guesswork. Our Tableau Server Health Check expert will help you with interpreting the results and will provide you with recommendations and expert advice on how to improve your management of your server environment. Walk away from your server health check with a full understanding of your Server, the many ways you can improve it and the many ways that your Tableau team can support you better.

## **Do you want to discuss Automation of Tableau Server?**

Tableau Server maintains extensive log files of data connections, all server content, and user interactions. These robust logs can be used for troubleshooting and performance assessments, as well as, audit compliance. Each user's actions on Tableau Server are captured and stored for future reference. Tableau has created open source tools to help you analyze Tableau Server usage and performance data. With Tableau, you have the visibility and tools you need to optimize your platform and ensure it's running efficiently.

Tableau Server also has several ways to automate your server tasks using our comprehensive command line utilities for managing your entire server deployment. Like the Tableau REST API, which allows you to manage and change Tableau Server resources programmatically via HTTPS.

And if you need it, Tableau also offers professional service engagements that can support you on many of these server health areas and automation efforts. In fact, large enterprise customers choose to purchase a [premium support engagement](#) not only because it entitles them to a more comprehensive version of a Server Health Check called a Server Deployment Review, but you also receive your own Technical Account Manager, a team of support engineers dedicated to Premium Accounts and much more support ...

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# **Program Example**

**Jasmin Smith, Manager at ABC Company**

Jasmin Smith is the Tableau Server manager for ABC Company. Jasmin does not receive much feedback about performance being an issue for the server, but she wants to run periodic checks to see how the performance of the server is going. Jasmin requests a Server Health Check Light by filling out the grant application and explaining that her objective for the project is to run a highly performant Tableau Server and this aligns to her organization's goal of driving self service analytics.

Jasmin receives a call from Pat, Jasmin's Tableau Enterprise Engineer. Pat & Jasmin work together to gather data from the Tableau Postgres and they populate their Tableau Server Health Check workbook and perform an analysis on the data. They make great progress and are able to identify where there are issues, and what causes them.

They walk away with a few recommendations that they review with Jasmin. **One** is to separate schedules from running during peak hours. **Second** we added a backgrounder to support schedules without disrupting user visualizations and **lastly** we walked away with an estimation on how many cores would be necessary to support our expanding user base. Jasmin is satisfied that she has a plan for how she will continue to support her server environment and she will continue to grow her user base using the best practices outlined in the server health check..

## Marketing Example



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## Frequently Asked Questions

1. Can anyone apply for this grant program? Yes
2. How many employees can participate in this program?
3. How often can we expect to receive expert support? Is there any type of follow-up with us after the program is complete?

4. Will we always have access to LogShark and TabMon after completing this program?
5. How will I know if I need all of these resources for my server?
6. Do we have to provide our own marketing?
7. Who should be selected to complete this program?
8. Do I have a choice of rewards, or are they selected for me?

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### Link to Additional Information

<https://www.tableau.com/enterprise-it/monitoring>

### Grantor Contact Information:

If you have difficulty accessing the full announcement electronically, please contact: [ggani@tableau.com](mailto:ggani@tableau.com)

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#### Resource Opportunity Number:

BP-SHC-20-006

#### Posted Date:

Aug 3, 2020

#### Resource Opportunity Title:

Server Health Check

#### Last Updated Date:

Sep 29, 2020

#### Supporting Blueprint Pillar:

Agility

#### Original Closing Date for Applications:

Dec 31, 2020

#### Subcategory:

Monitoring

#### Current Closing Date for Applications:

Dec 31, 2020

#### Opportunity Category:

Discretionary

#### Funding Instrument Type:

Grant

#### Category of Funding Activity:

Agility

#### Cost Sharing or Matching Requirement:

No

#### Expected Number of Awards:

10

#### Application Required:

Yes

#### Version:

Synopsis 1

#### Blueprint Value Number(s):

## **Eligibility**

### **Eligible Applicants:**

Others (see text field entitled "Additional Information on Eligibility" for clarification)

### **Additional Information on Eligibility:**

- CSM Support Customer Accounts
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