Customer Success Grant - Server Health Check

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
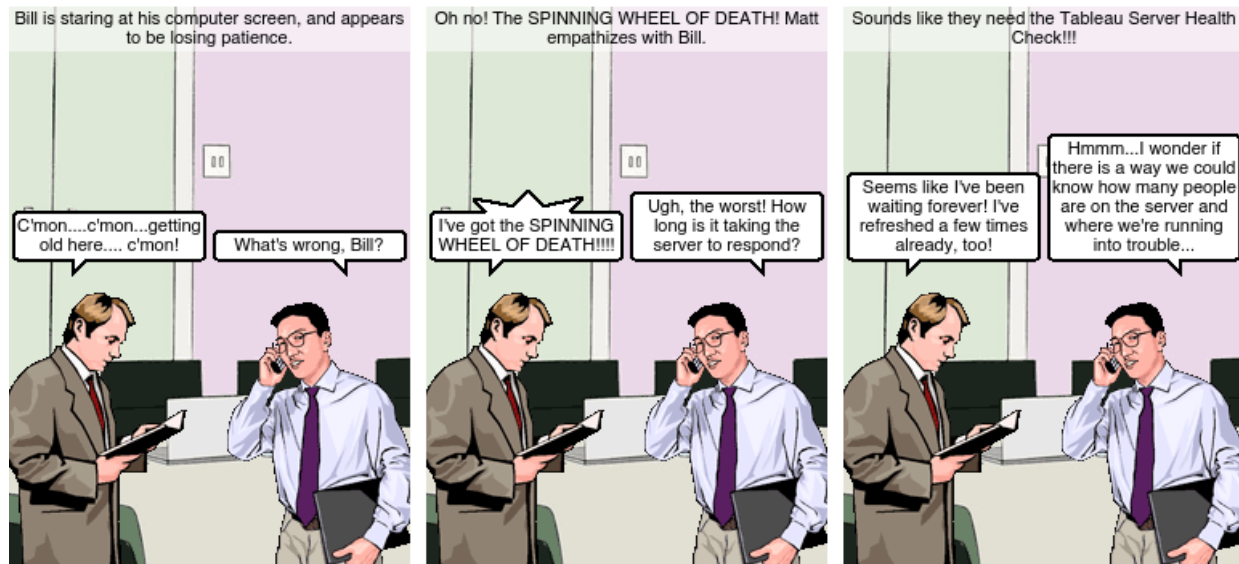
Award Package (see below, 'How It Works')

What You Gain

Experience analyzing current state Tableau Server data

Time that may have been spent resolving issues after it was "too late"

Complete awareness of your Server's capacity

...and more!

Why You Should

Problems are solved before they arise

No one wants to see the SPINNING WHEEL

Always be one step ahead of fire drills

You won't be able to move to the next level if you are constantly monitoring this one

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.

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

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

Share Tableau Server log files from your server to perform the analysis. We'll use some tools internally to provide you with additional analysis, ideas and feedback.

Use the provided Acceleration Grant Planner to organize the details. This will ensure your CSM is aware of your progress and can better support your efforts.

The first meeting with the Tableau team will cover these tabs in your Planner:

1. Goals
2. Checklist (which also serves as a timeline)
3. Review of analysis from log files - key areas for discussion are listed below.

You'll notice these topics are already listed in the "Planning Calls" tab of your Acceleration Planner, where you will find direction on executing this Grant Program.

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 ...

Award Package

Acceleration Planner to ensure perfect execution - includes direction and details from submitting your log files to implementing new processes.

If appropriate, Tier I Tableau Swag

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

START HERE

Click here to start the process for your Server Health Check:
https://ggani-tableau.github.io/BlueprintGrant/BlueprintGrant_Application.html

Link to Additional Information

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

Resource Opportunity Number:

BP-SHC-20-006

Resource Opportunity Title:

Server Health Check

Supporting Blueprint Pillar:

Agility

Posted Date:

August 3, 2020

Last Updated Date:

November 11, 2020

Original Closing Date for Applications:

December 31, 2020

Subcategory:	**Current Closing Date for Applications:**
Monitoring	December 31, 2020
Opportunity Category:	**Funding Instrument Type:**
Discretionary	Grant
Category of Funding Activity:	**Cost Sharing or Matching Requirement:**
Agility	No
Expected Number of Awards:	**Application Required:**
10	Yes
Version:	
Synopsis 1	

Blueprint Value Number(s):

1.003 -- Programs to Monitor Environment Performance & Response

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Eligibility

Eligible Applicants:

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

Additional Information on Eligibility:

• CSM Support Customer Accounts