

# Performance Optimization

## Slow Workbook?

SERVER AND DATA SOURCES



Find the workbook(s) with the slowest load times.

[HERE'S HOW](#)

Test the workbook on Server and Desktop to see if one is noticeably slower.

Slower on **Desktop**

Slow on **both**  
or **Server N/A**

Slower on **Server**

Check system requirements and try it on faster machines.

Slow on all machines

What type of data connection?

Tools that can help.

[TABLEAU SERVER](#)  
[MANAGEMENT ADD-ON](#)

Faster on other machines

Upgrade your computer

Live

Extract

Shared (Tableau Server)

Check that the extract is optimized:

- Hide unused fields
- Aggregate to visible dimensions
- Roll up dates to the level needed
- Filter unneeded values before extracting

[CLICK FOR MORE](#)

Need real-time updates?

Are all calcs defined in the shared data source?

Yes

No

Yes

No

Does the data source use Custom SQL?

Yes

No

Create an extract and schedule refreshes (server only)

Create a local copy to troubleshoot, then follow the steps for the underlying connection type

### SOLUTIONS:

- Push all calcs to the published data source
- Create an extract of the published data source

Too big to download

Work with a smaller data sample to troubleshoot.

Still too slow?

Yes

No

Define joins using Tableau instead.

[WHY?](#)

Not possible with this query

Work with a data engineer to optimize the query

Work with a data engineer to tune the database

Still too slow?

No

Yes



ENJOY THE SPEED!

[GO TO WORKBOOK DESIGN SECTION](#)

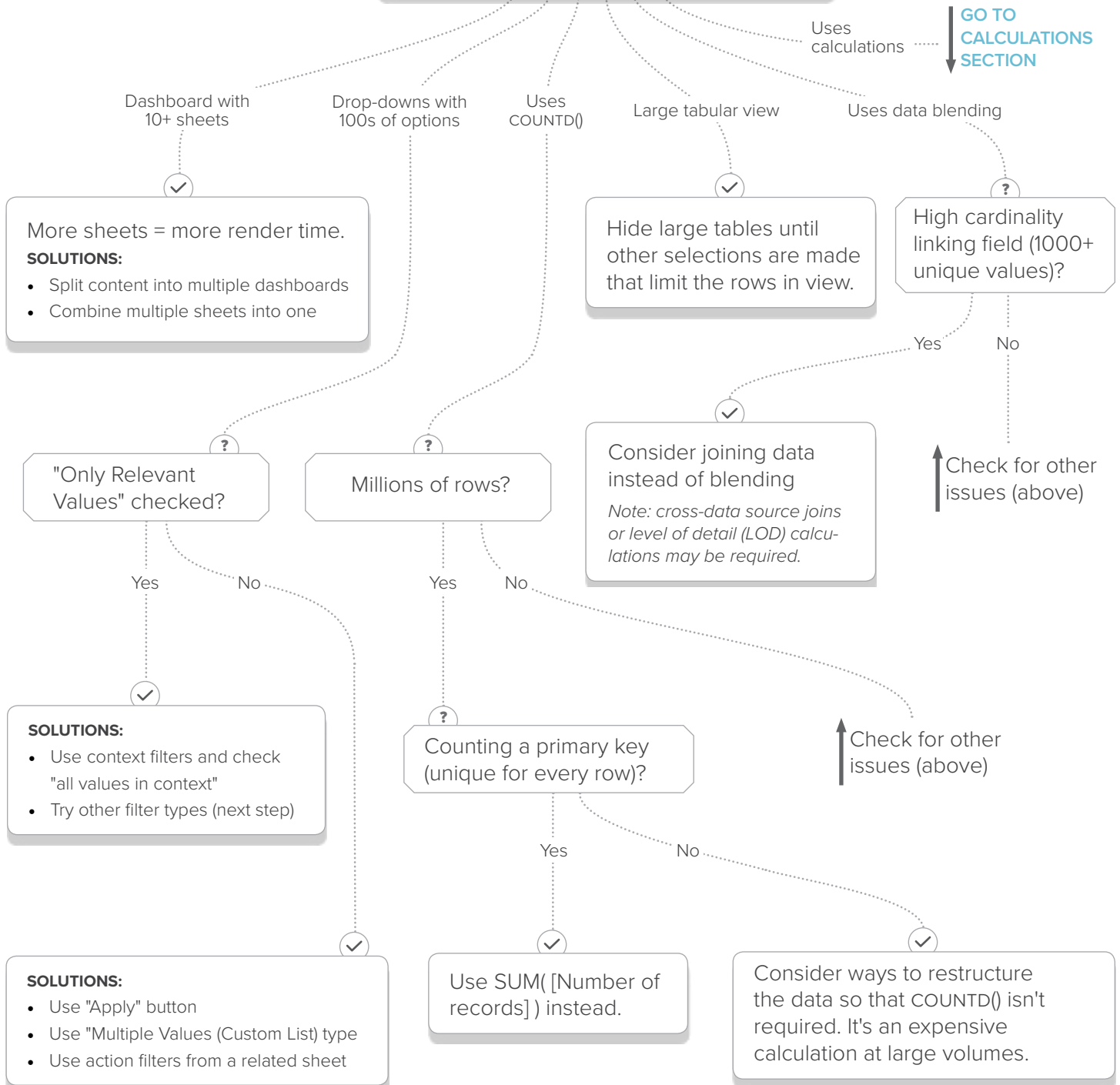
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WORKBOOK DESIGN

This section assumes you have ruled out issues caused by the database or Tableau Server.

Run a performance analysis to find the slowest views ([HERE'S HOW](#)), then follow all paths that apply.



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## Slow Workbook?

### CALCULATIONS

This section assumes you are using a Tableau Data Extract to optimize performance. If using a live connection, pre-compute as much as possible at the database layer.

