

Tableau Agile Server Install

Overview: TableauHelp's On-site Agile Server Install will deliver a powerfully quick jump-start to your Tableau Server deployment. We offer a full spectrum of server installation, configuration, and best practice tips for implementation. TableauHelp's consultation model ensures that your team is trained on how to administer and manage your new Tableau Server, *quickly*. We provide detailed business planning, data management strategy, disaster recovery plans, baseline system documentation, and Tableau dashboarding & publishing. *Our 3 step process:*

Step 1

Business Planning

- Explore how you plan to use Tableau Server
- Learn about your data requirements
- Discuss change control processes
- Define security requirements (Active Directory, SAML, Kerberos, SSL)
- Plan how to implement your metadata
- Discuss Tableau updates, patches, etc.
- Briefing on how to work with Tableau Support

IT Planning

- Create backup and disaster recovery plans
- Define distributed server architecture
- Outline how security is to be implemented
- Plan data connection strategy

Pre-Install Checklist

- Network access testing on Tableau Server hardware
- Test user and server accounts used for Tableau
- Source Tableau Setup files
- Source SSL certificates, if applicable
- Check for current product keys
- Confirm firewall and web proxy

Step 2

Install Server

- Install Tableau Server
- Test backup and restore
- Add distributed worker servers
- Configure SSL as necessary
- Verify Tableau Server functionality
- Configure optimal initial settings based on environment

Verify Installation

- Verify process health
- Test extract scheduling and refreshing
- Test Active Directory group synchronization
- Test user login & group functionality
- Test views and data source
- Confirm Tableau Desktop publishing task

Disaster Recovery

- Review backup & restore process
- Complete dry run of backup/restore

User, Groups and Security

- Add users & groups
- Configure initial security for users and groups projects

Step 3

Dashboard & Viz Publishing

- Tableau Desktop & Server walkthrough
- View and interact with a dashboard in Tableau Server
- Build interactive visualizations and reports
- Tell stories with your data
- Discuss table calculations

Implementation Workshop

- Build business-defined reports and publish to Tableau Server
- Create and publish visualizations with your data
- Review permissions of published workbooks
- Review created workbooks for Tableau best practices and efficiencies

Validate Security Configuration

- Test that security settings are honored by Tableau
- Test publish/view permissions
- Dry run of publishing process as defined by change management plan