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| --- | --- |
| **case submission template** |  |

**Partner Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_ Customer Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Partner Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_ Customer Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Partner Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Customer Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Impact:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Urgency:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Product** | **Environment** | **Preferences** |
| DESKTOP ONLINE SERVER READER | Production [ ]  | Preferred Time Zone: (APAC / EMEA / USCA) |
| VERSION:BUILD #: | QA/UAT [ ]   | Preferred Language:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Development [ ]   | Availability |

1. Please provide a brief description of the issue. (a concise statement describing the problem)
2. Thoroughly describe the issue. What are the desired results/behaviors?
3. If applicable, please provide the steps to reproduce the described issue with screenshots.
4. When did this issue first start occurring? What (if any) changes have been made to the environment that may have impacted the issue?
5. What troubleshooting steps have you already tried? (please also list any Knowledge Base articles you have reviewed)

**STEPS TRIED:**

* What happened?
* What did we do?
* What did we confirm?

**NEXT STEPS:**

* What is the next step that needs to occur?
* Who is that next step waiting on?
* What is blocking the next step?

**THEORY:**

What do you think is happening (it’s ok to be wrong).

1. Additional Comments

**HOW TO USE THIS DOCUMENT:**

**Product:** Does this issue occur in Tableau Desktop, Tableau Reader, Tableau Server or Tableau Online?

**Version:** Please enter the complete version number. Where possible, please also include the complete build number.

**Environment: I**n which environment does the issue occur? Is this a Production, Test or Development environment?

**Language:** In which language does the customer prefer to receive support?

**Availability:** If this is a P1 issue, is the customer available to work around the clock on this issue?

**Timezone:** Please enter the timezone most appropriate for the customer. This time should reflect the customer’s availability rather than their geographic location.

USCA – 08:00-16:00 PST

APAC – 16:00-00:00 PST

EMEA – 00:00-08:00 PST

**Attaching Files:** When attaching screen shots and other files, please attach them directly to the case rather than putting them into another file, such as a Word document. Putting multiple files into a ZIP archive and sending the archive is acceptable. If the file(s) are too large to attach via the Partner Portal, please send those files via Egnyte and include the link in “Additional Comments” above. For instructions on using Egnyte, please refer to the following article:

<http://kb.tableau.com/articles/howto/alternative-method-for-sending-large-files>

**For Analytics cases, please attach all of the following:**

* Sample workbook which reproduces the issue
* Complete diagram indicating the desired behavior
* Screen shots indicating incorrect behavior
* In the event that the behavior is not reproducible with our Superstore sample data, please include data which does reproduce the issue.

**For Tableau Desktop Cases, please attach all of the following:**

* Clean Tableau Logs which cover the time of the issue.
	+ Desktop Logs: <http://kb.tableau.com/articles/knowledgebase/sending-tableau-desktop-log-files>
* Timestamp(s) for occurrences of this issue.
* Screenshots of any error messages and/or unexpected behaviors. If there is an error message, please click the 'Show Details' button prior to taking the screen shot.
* Case numbers of any previous or current related support cases.
* PRO-TIP: It is sometimes easiest to take a screen shot of the entire screen including the system clock.
* Mapping and licensing issues will also require a Fiddler trace. Please see below for additional detail.

**For Tableau Server Cases, please attach all of the following:**

* Clean Tableau Logs which cover the time of the issue.
	+ Server Logs: http://onlinehelp.tableau.com/current/server/en-us/logs\_archive.htm
* Timestamp(s) for occurrences of this issue.
* Screenshots of any error messages and/or unexpected behaviors.
* Case numbers of any previous or current related support cases.
* PRO-TIP: It is sometimes easiest to take a screen shot of the entire screen including the system clock.

**For Performance cases, please attach all of the following:**

* Performance recording obtained from Tableau Desktop running on the Tableau Server Host machine.
* Performance recording obtained from Tableau Desktop running on a workstation.
* Performance recording obtained from Tableau Server
* Instructions for obtaining performance recordings can be found here:
	+ Tableau Server - <https://onlinehelp.tableau.com/current/server/en-us/perf_record_create_server.htm>
	+ Tableau Desktop - <https://onlinehelp.tableau.com/current/pro/online/mac/en-us/perf_record_create_desktop.html>

**For Security / Penetration testing, please attach all of the following:**

* Tableau Server Logs covering the time of the penetration or security scan.
* Complete copy of the Security Scan report including the name and version number of the scanning software.

**If this case is in regards to a major event (such as a complete outage) or a performance related issue, we may also request the following additional information:**

* Clearly labeled MSINFO32 files for each machine in the cluster
* Windows Event Viewer logs for each machine
* Performance recordings for the affected workbooks from Tableau Desktop and Tableau Server, run from the same machine.
* Network Diagram. This should include and load balancers, proxies and security appliances in the tableau server environment even if they may not seem immediately relevant.
* Wireshark trace: Wireshark is a network packet monitoring tool which we frequently use to track non-HTTP traffic. This information is extremely useful when troubleshooting Active Directory, SAML or Kerberos issues. More information is available at: <https://www.wireshark.org/>
* Fiddler trace: Fiddleris an HTTP specific monitoring tool. This information is useful when troubleshooting port blockages and inter-process traffic. More information is available at: <http://www.telerik.com/fiddler>