On-Demand Training: Upgrading Tableau Server

Transcript

Welcome to this video on Upgrading Tableau Server. Upgrading Tableau Server is designed to be as straightforward as possible. The new installation will automatically migrate workbooks, users, groups, permissions, configuration settings, and licensing information.

At various times in this training video, the process of running a command will take several minutes to execute. This recording will be paused during those times.

Pre-Upgrade Checklist

It is important to review the pre-upgrade checklist. Before you upgrade, make sure you have the following

- User account credentials (with local admin permissions) on the computer hosting Tableau Server

- The Run As User account credentials used to configure Tableau Server

- Setup .exe files for your current version of Server (in case you need to revert and restore) and for the upgrade version

    - It is important to note the bit version – if upgrading from 32 to 64 bit with a distributed install, the entire cluster must run the same bit version

Several pre-upgrade items must be done on the Server.

- Verify you have a current maintenance for your product key

- You must be current with your maintenance to upgrade to new Tableau Server versions.

Preliminary Steps

In addition to your regular Tableau Server backups, it is a best practice to create a "clean" backup prior to upgrading your environment. This video will demonstrate using tabadmin cleanup to remove non-essential files from your backup.

- This video describes the steps to create a clean backup

- Depending on your goals for the backup, you could backup prior to cleanup.

    - Running cleanup will remove some log files and empty Tableau Server temp folders. If you want to save all the logs prior to upgrading you can use the ziplogs command as discussed in the tabadmin video.

- The steps to take a Tableau Server backup are covered more in depth in the tabadmin training

Creating a Clean Backup

Open the command prompt running as administrator, type

- *cd C:\Program Files\Tableau\Tableau Server\[version]\bin*

    - I'm on 8.3, so that's my version

- *tabadmin status* This will check if the server is running

- *tabadmin cleanup* – executing tabadmin cleanup while the server is running will remove log files older than

7 days and remove entries of the http_requests table in the Tableau Server PostgresSQL database older than 7 days.

- Now Stop Tableau Server using **tabadmin stop**

- Run **tabadmin cleanup** again. This removes more log files and content from the Tableau Server temp folders.

- Now that the server is cleaned up we can take our backup

- **tabadmin backup serverupgradebackup –d**

  - this saves the backup file with the name serverupgradebackup followed by the date

  - The serverupgradebackup will be created and placed in the bin folder of the Tableau Server.

  - We recommend copying it and moving it to a different computer

Upgrading Tableau Server

Upgrading a single server installation is very straightforward.

- Use Add/Remove Programs on the server to uninstall the earlier version

  - During the uninstallation, you will notice Tableau Server takes a backup that it will later restore during the installation process.

- Next, Install Tableau Server on the machine

- Tableau will prompt you for the destination location for Tableau Server.

  - Make sure it is the same folder of the previous Tableau Server installation. This is important so the content will automatically restore from the backup. If for whatever reason the content is not automatically restored after this installation process, refer to the tabadmin video to restore from the manual backup.

- Accept, and click through these screens, and Tableau Server will install.

- As Tableau initializes, it will open the configuration dialog. The settings should be the same as the previous version.

- Enter the Run as User account password and select ok. Tableau will continue the initialization process.

- Tableau Server will start and automatically prompt you to login.

- Double check that all of the processes are green and up and running on the Status tab. Make sure all of your content and users were migrated to the Tableau Server.

Upgrading Tableau Server with a Distributed Installation

Upgrading a distributed server installation requires the same preliminary steps as a single server,

- All machines in a distributed installation need to be the same bit version.

- For major version upgrades, for example, 8.3 to version 9.0

    - Use Add/Remove Programs on the primary Tableau Server to uninstall the earlier version

    - Use Add/Remove Programs on the worker servers to uninstall the earlier version

    - Install Tableau Worker Server on the worker servers

    - Install Tableau Server on the primary Tableau Server

- If you are upgrading to a maintenance release on the same version, for example 9.0 to 9.0.x, you can simply uninstall the primary and install the new version on the primary.

    - There is no need to uninstall the workers, and the primary will automatically push the needed updates to the workers.

Refer to the Online Help Pre-Upgrade Checklist and Upgrading a Distributed Installation for detailed information

Conclusion

Thank you for watching this Upgrading Server video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.