

From Chaos to Order

Guiding Principles for your content management strategy with Tableau Server

Madhav Kannan

Shilpa Bhatia



Data Source

Upfront modeling not required
(flat files / flat tables)

Upfront dimensional modeling
Required (IT built star schemas)

The Shift to Modern BI

According to Gartner

Modern

Traditional



Data Preparation & Ingestion

IT enabled

IT produced



Content Authoring

Business Users

Primarily IT staff, but also
some power users



Analysis

Free-form exploration

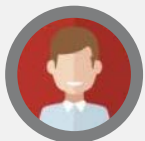
Predefined ad hoc reporting
Based on predefined model



Insight Delivery

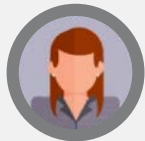
Sharing and collaboration,
storytelling Open APIs

Distribution and notifications
via scheduled reports or portal



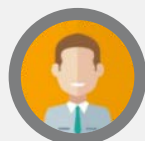
Prashant
Consumer

Filter
Subscribe
Interact



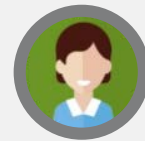
Sneha
Super Consumer

Refine
Expand
Question



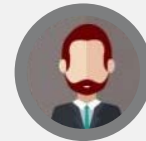
Rahul
Analyst

Answer for
Others
Analyze



Urmila
Data Steward

Define
Publish
Connect to Data



Dev
IT Admin

Secure Content
Manage Users
Secure Data



Tableau
Server



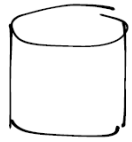
Tableau
Desktop



Tableau
Server

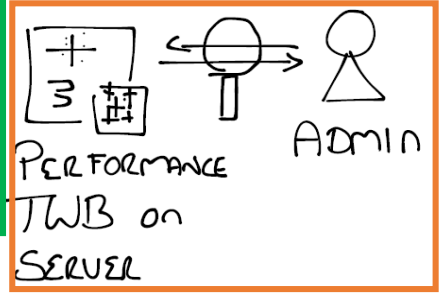
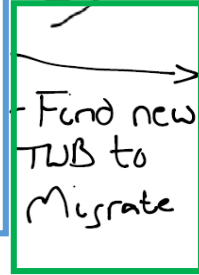
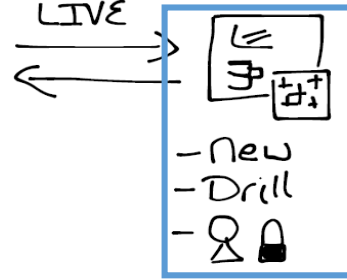
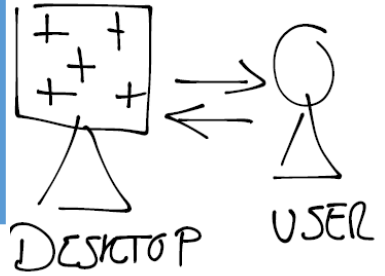
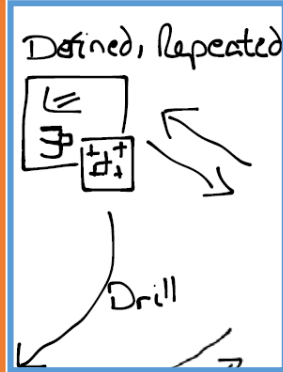
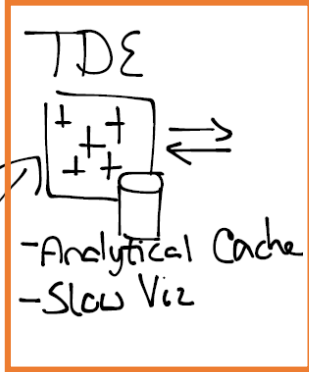
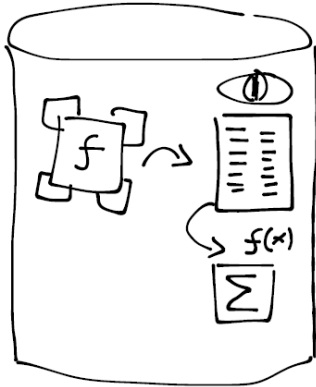
DATA STRATEGY

SOURCE



ETL

EDW/ADW



Agenda

- Best Practices in content management in order to–
 - Enable Self-Service
 - Promote content
 - Improve Performance

Enabling Self Service

Enabling Self Service (Publishing DS)

Publishing Data Sources

Enabling Self Service (Publishing DS)



Business User

“What if my users have more questions after playing with my dashboard? Are they able to ask and answer new questions on the fly?”

Enabling Self Service (Publishing DS)



IT User

“Will Tableau help facilitate a single source of truth? Can I limit what the end users should access through Tableau? “

Enabling Self Service (Publishing DS)

- What is it?
 - Publishing data-sources allows Tableau Server to create a single source of truth for a specific schema.
- What does it do?
 - Efficient management of metadata changes, allowing their re-use by others in the organization.
 - Allows a bypass of unique configurations needed on individual machines.
 - Accounts for any changes to data model/ passwords

Enabling Self Service (Publishing DS)

Demo

Promoting Content

Promoting Content

Tab Migrate

Promoting Content (Tab Migrate)



IT User

“How can I seamlessly transition content from Development to QA to Production with least involvement?”

Promoting Content (Tab Migrate)

- What is it?
 - Content migration tool for Tableau Server, built on Rest API
- What does it do?
 - Move Tableau content between multiple Tableau Server environments
 - Provision sites with Workbooks and Data Sources from a local file system
 - Produce a CSV file containing an inventory of the site's users and content

Promoting Content (Tab Migrate)

Demo

Improving Performance

Scout

Data Strategy

Improving Performance

Scout

Improving Performance (Scout)



IT User

“How can I improve the performance of key dashboards that are most accessed in the company?”

Improving Performance (Scout)

- What is it?
 - Tool to capture performance metrics across any workbook on Tableau Desktop & Server
- What does it do?
 - Discovers, loads and interacts with vizzes (single user) on a configured Tableau Server instance
 - Records any errors associated with viz interactions in a generated Tableau Workbook
 - Helps validate performance improvements after making configuration changes
 - Can be used for Performance Testing & User Acceptance Testing

Improving Performance (Scout)

Demo

Improving Performance

Data Strategy
(Cold-Warm-Hot)

Improving Performance (Strategy)



IT User

“My users want interactive experience when visualizing data of any size. What data strategy should I use?”

Improving Performance (Strategy)



Improving Performance (Strategy)

- What is it?
 - A recommended data strategy for high performance analysis with big-data

HOT

- In-Memory Computing
- Pre-computed aggregates to answer specific questions
- Known questions & known answers
- Analytical dashboard already constructed
- Analytical Query

WARM

- Data Warehouses
- Data Marts prepared for Entity Analytics
- Known questions with unknown answers
- Regularly refreshed business concepts
- Entity Query

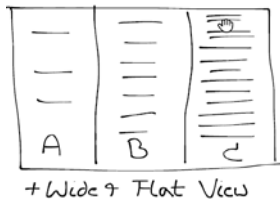
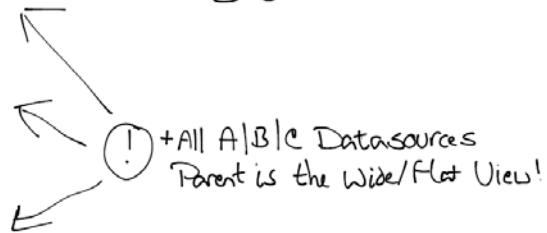
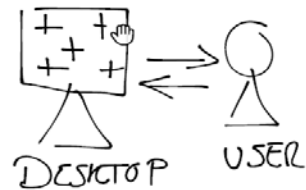
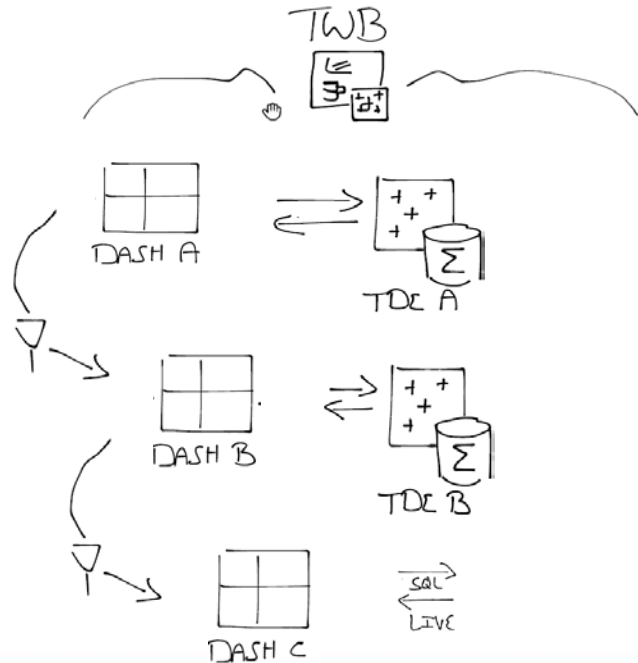
COLD

- The Data Lake
- Store anything & everything
- Unknown questions with unknown answers
- Unstructured/Data Mining
- Data Discovery

Improving Performance (Strategy)

- What does it do? (example)

THE GUIDED APPROACH



Summary

Summary

- Modern BI requires a greater focus on good content management practices to cultivate a culture of analytics and data discovery.
- 3 key applications of good content management –
 - Enabling Self Service (Publishing Data Sources)
 - Easy Promotion of Content (Tabmigrate, REST API)
 - Improving Performance (Scout, Data Strategy)

Resources

Resources

- [Publishing Data Sources](#)
- [Tabmigrate](#)
- [REST API](#)
- [Scout](#)