



Tableau Server Implementation Services

Our Tableau Server Implementation and Custom Instruction value-added services augment Tableau's server quick-start program.

▶ Tableau Server Organization

We work with your team to organize the Tableau Server environment and implement the best practices customized for your organizations specific needs. Many topics are covered to ensure your Tableau Server environment is set up for scalability, data governance, security, and ease of use. Our recommendations are tailored to your organization's needs concerning project organization, inheriting default security, leveraging security groups, live/extract/published data sources, and Tableau administration best practices.

▶ Publishing Guidelines

We work with your team to create and document a process for distributing reports via Tableau Server. Working with your Tableau Administrator(s) we create a publishing procedure with quality checklists for analysts to use when distributing reports on Tableau Server to control quality, promote data governance, and avoid security breaches. Among other things, this process will ensure that:

- The dashboards and reports receive appropriate sign-off from technical and business stakeholders
- Data governance procedures have been followed to minimize the maintenance burden and performance toll of the reports
- Appropriate security has been added and verified to ensure a security breach does not occur
- There is an intuitive chain of promotion so end users do not make decisions based off development reports
- Recommendations based on our experience about who will manage the Tableau Server

▶ Tableau Server Custom Instruction

Once your Tableau Server environment has been organized and publishing guidelines have been established we provide customized instruction to Tableau Administrator(s) and job aides for analysts that will be publishing dashboards and reports to Tableau Server. This is not formal classroom training but rather hands-on instruction based on the Server environment established for your unique data sources, and security and governance requirements.

▶ Data Portal Development

It can be difficult for end users to find the workbooks they need on Tableau Server because the library of reports can grow very large and be filled with ad hoc and custom reports. Tableau Server also has an intimidating interface that can frustrate report audiences. A Data Portal showcases the highest value reports and dashboards to your end users with an interface that is clean, friendly, and easy to navigate. The workbook created and maintained as a separate Tableau Workbook that can be embedded into an intranet website and requiring no extra web development.



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