

Tableau Deployment Best Practices

Set up your analytics platform for long-term, scalable success



Content Organization

- Organize projects by function or department
- Maintain DEV/QA in separate projects
- Avoid overly nested projects (makes navigation easier)
- Use content tags to improve searchability



Security & Permissions

- Leverage user groups & group-level permissions
- Set up locked projects for ease of security controls
- Stick to pre-defined security templates & explicit 'allow' access
- License types provide functionality, permissions can further define



Data Source Strategy

- Start with using extracts (often better performance)
- Published datasources promote self-service & governance
- Avoid custom SQL; use Tableau's data relationships
- Refresh extracts during off-peak business hours



User Adoption & Training

- Create dashboard templates for better user experience
- Provide ongoing "doctor's hours" to improve adoption
- Implement data definitions & business content in dashboards
- Track log-ins, views, & performance to measure usage

Expert Tableau Implementation Team

DataDrive is a Premier Tableau Partner having served 200+ organizations from F500 to small/mid-sized organizations on their data-driven journey with Tableau. Dashboard development, customized training, data integration & automation - we got you covered!

