# The Ultimate Starter Guide for Tableau Admins in 2025

Johnnie Weathersby III

The State of Data and Tableau

In "Analyzing the History of Tableau Innovation" (an essential read for any data visualization enthusiast) - former Tableau Technical Fellow, Jock Mackinlay, featured a view of shock, awe, and likely the subconscious bane of existence (kidding) for many a Tableau Analyst: Tableau's History of Innovations (pictured left), which he keeps updated on his Tableau Public account.

I have been fortunate enough to have been along for this wild ride since 2009; traversing from the humble beginnings of a newbie Tableau user to the highs of being an enterprise Super-Admin at multiple corporations. And between performing my past day job duties as an analyst and working as a consultant in the after-hours, report consumers and creators alike tend to express some variation of the same idea at some point about Tableau...
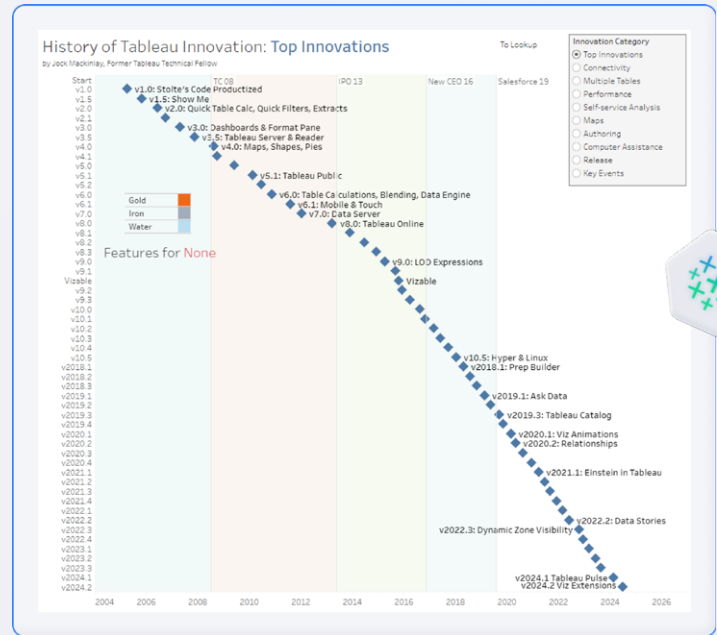
"Wow, that's a lot"

Word to the wise - it's not always good when you hear someone emphatically call something, "A lot," trust me. People, especially key business decision-makers, want things simple, yet effective.   New, but familiar.

Well... Looking at Tableau's history, their breakneck release schedule of features, and relentless core updates - whose job do you think it is to regularly contextualize, justify, and "simplify" the growing list of pros and cons related to sprawling analytical tech stack's ROI while making new features feel familiar? If you guessed the tools' administrators, you're right! But, if you also thought, "the people admins report to," you'd be correct, too!

In this paper, I want to dig into a few topics that may be relevant to admins and decision-makers as they relate to our collectively changing experiences with Tableau as a tool, even if they don't keep you up at night (yet)...

1. **For those users and organizations that may still be running on older versions of the software:** How does the "Tableau of the past" (or as I like to call it "Tableau Classic") compare to Tableau now?

2. **For those exploring simpler options because the myriad of BI solutions has gotten too murky:** Why do developments in this- or any modern tool matter? What can it impact, and where does AI fit?

3. **For those feeling like there's already too much out there and all of this is just adding to the fire:** What approaches can be adopted to stop some of the growing pains associated with your analytics?

4. **And for the busy people wanting "the simple, yet effective" without having to read all of this:** Where is everything leading our bottom line efficiencies, and who (or what) can guide or empower you?

The content you're about to go over here isn't all-encompassing, and will likely lead to a few more questions beyond the answers you find here, BUT **the hope is that it helps you ask the right questions.** As largely adopted industry standard tools like Tableau continue to evolve along with other trends, perspectives like these will prove invaluable for those who need to see issues from multiple sides to stay ahead.

Now, let's dive in!

Tableau has shifted from being a tool, to a suite of products, to a full-on enterprise-level platform; and now it's a fully realized ecosystem (for those willing to invest in the necessary infrastructure). The difference between the phases I mention above is their level of interconnectivity and ability to handle necessary data wrangling from end-to-end. Tableau has always been a visionary analytics solution, but it was incomplete. Thankfully, time allows for evolution.

Tableau expanded from Desktop (as a tool) to Server and Reader, offering users a suite of product options to satisfy some of their needs. This is also what I'd say is "Tableau Classic" at this point. If your stack is still just these offerings, you're not dead in the water - but you're behind. Officially.

Then Tableau Public debuted, plus numerous add-ons were added for specific Tableau features; growing the list of product solutions. Once competitors began offering things more akin to end-to-end ecosystems beyond just tools (Domo is a personal favorite that comes to mind for me here), Tableau Online (now Tableau Cloud) entered the scene. Tableau officially now had what I consider to be a platform-based solution more worthy of enterprise-level scaling beyond what Server originally offered.

Tableau Prep began to allow for low-code and no-code data pipeline management (shifting some people away from their reliance on excellent third-party partners like Alteryx). And once the

Salesforce acquisition of Tableau came along - the era of "making Tableau a more fully realized ecosystem" had just begun.

You see, it was the interconnecting pieces that made things work. Rather than seeking outside tools to work around Tableau's shortcomings, they now had the resources from Salesforce at their disposal to begin filling the gaps in their ecosystem in various ways. Things such as pipeline management, access permissions and security, alerting, custom applications, natural language processing, data lineage, AI capabilities, and the list will surely continue to grow.

Tableau hasn't created the best-in-breed fixes just yet under Salesforce, and I feel like they know that so they keep a healthy listing of partners dealing with a variety of specializations around to continue to fill in the gaps. But this is a known and accepted part of the magic of Tableau for many, and Salesforce has wisely continued to embrace that aspect of the company's culture. People want data more than ever, and that's good because we have more data at our fingertips than ever before. Salesforce and Tableau are just wisely positioning themselves in a way that allows their customers more flexibility for working with that data all in one place.

Why does this matter?

With growing capabilities like Tableau Pulse, Einstein Copilot for Tableau (now Tableau Agent), and Pulse for Salesforce, analysts are being given new capabilities they didn't even ask for (and honestly may not immediately want). But if analysts don't adopt it, data-savvy stakeholders, whom they assist, will. Tableau Marketplace, Tableau Public innovations, a new Workspace collaboration feature. It is all the tip of the iceberg.

Tableau and Salesforce are enabling this through their growing implementation of AI throughout their offerings to the greater data professional populace, and their adjacent stakeholders. We are in a new wild west of data capabilities and democratization via AI further enabling people who may have traditionally been non-tech-oriented to explore data trends and insights.

This is low-code and no-code on steroids so strong that they'd make Captain America jealous! And the amount of content this will unleash on the world, as more people are educated and grow comfortable with what's in front of them, will be staggering.

If you haven't seen the "Future of Tableau Innovation Preview" from August 2024, or the later more refined "Tableau Keynote at Dreamforce" from September 2024 - I encourage you to watch them or play them in the background, because, "Tableau is an entirely different tool now." And if not now, then it will be soon.

Anyone using an antiquated version of any modern BI data visualization tool, or the associated tools for orchestrating the transportation of their data from one place or format to another, will find a vastly different experience when they finally update. Users of "Tableau Classic" will be hit with the learning curve of new features and standards,

beyond anything before the last couple of more current core versions, all at once.

They will see that many duct tape methodologies of data gymnastics they may have used in the past, sometimes admittedly due to inheriting legacy systems, are now handled with a few well-placed button clicks. They will see new panes and GUI elements that weren't there before but are suddenly all that Tableau Visionaries, Ambassadors, and their associated companies rave about. And as all of this is going on, they'll realize the true cost of their-, or someone before them-, having decided to hold to past tech so tightly because "it works" and keeps the budget down: They and their workforce have fallen behind on vital skillsets.

Features meant to help with communicating insights more swiftly in the workflows of agile and innovative teams and their stakeholders will be foreign. Data management capabilities that would've saved them hours of work, and the sunken costs associated with those activities, will slam their current processes to a screeching halt as they try to re-tool. Employed analysts will dread the amount of training they now have to take on and fit into their busy schedules, while internal leaders may (rightfully) wonder, "Why didn't these transitions happen sooner, and why are we so behind industry norms here? Who dropped the ball?"

Top New Features	Release	Server	Cloud	Desktop
Tableau Pulse	GA Now		✓	
Metric Bootstrapping	GA Now		✓	
10 Additional Linux OSes Supported	GA Now	✓		
Prep Enhancements	GA Now	✓	✓	✓
Tableau Desktop Public Edition with Local File Saving	GA Now			✓
Einstein Copilot for Tableau Catalog	Beta Now		✓	
Viz Extensions	24.2	✓	✓	✓
Tableau Cloud Manager	24.2		✓	
Migration SDK Improvements	24.2	✓	✓	
Shared Dimensions	24.2	✓	✓	✓
Line Buffer for Geospatial Analysis	24.2	✓	✓	✓
Describe Sheet Shows Source Tables for Measures	24.2	✓	✓	✓
Tableau on Apple Silicon	24.2			✓
Subrange Refresh - Incremental Extracts	24.2	✓	✓	✓
Hyperforce	24.2		✓	
VizQL Data Service APIs	24.3		✓	
Composable Data Sources	25.1	✓	✓	✓
Custom Themes for Easy Formatting	25.1			✓
Resource Monitoring Improvements	25.1	✓		
PrivateLink for AWS	25.1		✓	
Public Profile Page Custom Ordering	25.1		✓	

140+ features delivered in 12 months

Fast forward a few months, and once those skills begin to ramp up across the organization, a later obstacle may come up - for some - if they didn't utilize a little foresight. And that wall is dealing with the various types of sprawl all of these new toys will bring. Think of it as a somewhat odd and specific type of adjacent tech debt you'll eventually pay across the board without the appropriate amount of preparation and consideration taken into account as you update your analytical tech stack.

Why does this matter?

How do you reduce risks, increase trust, and cut costs while continuously monitoring the objectives that stakeholders value? The answer lies in a series of best practices plus tried and true methodologies from others who have already been where you may be heading. And it can also be helpful to employ the appropriate resources - and by that, I mean it may be time to seek a third-party tool to help you over the hump.

From a very high level, speaking specifically with my Tableau Admin Hat on here, you want to try to keep a small set of useful guardrails in practice on your system at all times...

1. **(The 4 E's)** Establish + Enforce Effective and Efficient Standards

2. **(Lighten the Load)** Trim the fat from your reporting, data sources, and updates.

3. **(Keep it Modern)** Stay reasonably current, and don't miss crucial maintenance.

4. **(Always Look Closer)** Investigate your edge cases to learn more about the norms.

I will dig into each of these a bit more in this section, and I've even called in a few Tableau users representing different potential perspectives of the experience to help carve out some of the ideas presented here.

The 4 E's: Establish + Enforce Effective and Efficient Standards

The process described in this first step doesn't pertain to standards around report creation, that should be left up to what's best as determined by analysts and architects within the scope of any ruling style guides that may exist. But, what about guidance that's offered related to reports put out in your Server or Cloud instance? Things like: When should a Tableau Report Creator publish a data source vs. just embedding it into their report? For that matter, who can publish and who can't? What times should they avoid setting their extract updates for? What happens to under-utilized licenses? What can/can't specific groups access? Who maintains which data sources? Are measures and dimensions defined in data source metadata for users?

If you don't know the answers to questions along these lines, you'll find it harder to establish those rules once your environment is beyond a certain capacity and non-conforming processes are normalized. Talk to your stakeholders and get on these now if you haven't already, and once that's done - enforce those standards and train people! Temporarily block or permanently revoke the access of those who continuously refuse to adhere to the standards after a few warnings. Also, be sure to measure the impact of your standards to ensure they are effective, and check their efficiency. No point in putting something in place that adds 2 hours onto someone's workday. Let practicality be your guide there.

Experienced Perspectives...

"Standards need to be well communicated. Analysts change. Environments change. Needs change. Plan to have at least one Standards Training Session each year. These serve to 1) Onboard new analysts, 2) Remind current analysts of current standards and update them on new standards, and 3) Evaluate existing standards to see if any are obsolete or if new standards are needed."

Diane Kakareka
Data Visualization Specialist & Tableau Consultant

> "Understanding your business users' needs is key to establishing your standards. Nothing goes to production without their involvement and sign-off - from framing the business question, validation, timing, and frequency. From an Admin perspective - Ensure you have a schedule of schedules in place alongside your users' roles to avoid a domino effect of refresh failures at critical times on your server/cloud. User roles and groups are an effective way of ensuring data governance (minimize the Creators and increase the Viewers). If you have creators, then give them dedicated training and help them become a Data Champion. They will inherently upskill those around them and bring more opportunities to the table to demonstrate additional business value."

Jamie Allcock
BI/Reporting Manager & Tableau Admin

Lighten the Load: Trim the fat from your reporting, data sources, and updates.

When was the last time you went into your instance and removed reports that hadn't been used in 2 years? How often do you check to see if multiple data sources are publishing the same info? And when that occurs, do you replace them with single source of truth data sets at the appropriate grain for Creators? Are all of the data sources being updated frequently (think hourly or daily) tied to reports that are actually used that often?

Taking the time to audit the inventory of your Tableau instance can be a vital part of keeping things running smoothly. Remember, Tableau isn't an archival system. You should try to help instill the mindset that Tableau is for actionable reporting that helps the organization make meaningful decisions, and set up somewhere else for things that don't quite fit that criteria. Also, a bonus, turn off features that you aren't using on your instance.

Experienced Perspectives...

> "We need to ensure all of our daily extracts refresh before the start of business. Reusing data sources across multiple reports and eliminating unnecessary data sources are both essential to keep down the number of refresh jobs."

Raffaele Notaro
Senior Systems Data Analyst & Tableau Admin

> "Keeping your Tableau repository clean and trim is an essential practice for helping your stakeholders find the correct and most updated data. Sometimes I'll look for a dashboard with a certain metric, and when I find something promising, I find out that the report has been stale for 2 years. You want users to be able to find the correct metrics with current data."

Se-Gil Louis Feldsott
Senior Data/Tableau Analyst

> "While I was at Facebook, we set up a process of requiring reports to be published to a Dev server and reviewed by the BI team before they could be moved to Prod. What a mistake that was! Instead, Dev essentially became Prod. Users couldn't wait for the central BI team. The business moved too fast. We decided to trust our users to do what was best and we would monitor for (1) abuse, (2) whether the reports were being used, (3) if extracts were too frequent, and (4) who was using their licenses. This helped us drive savings by optimizing the use of computing resources, improving performance performance and only providing licenses to those that were actually using them."

Andy Kriebel
Tableau Blogger/Trainer/Consultant & Hall of Fame Tableau Visionary

Keep it Modern: Stay reasonably current, and don't miss crucial maintenance.

I have seen clients whose systems were exposed to serious vulnerabilities because they didn't update their BI tools to versions that had at least dealt with those issues. I have seen companies sink hours into longer processes because they didn't update to newer versions that recognized the popularity of the utility they were trying to perform and made it easier to accomplish. I have seen analysts with outdated skills and methodologies, not because their employers hadn't updated their instance(s) in an update or two - but because they haven't updated their tech in literal years.

When I encourage you to stay reasonably current, I'm just saying to try to evaluate updated features at least once a year and see if the juice is worth the squeeze for you and your organization. You may find many improvements to be worthwhile and solve several issues you and your users have been having. It is also your responsibility, as the system's administrator, to stay on top of any major security issues your workplace may be exposed to as a result of missing a key update. Typically, Tableau will send you communications letting you know when something vital is released, and they'll make multiple attempts to do so. You will be able to tell the difference between those messages and the marketing sizzle for the new hottest feature.

Experienced Perspectives...

"Tableau leverages community feedback to drive new features in updates, enabling developers to create visuals more easily than before. Consider designating passionate individuals to stay current on new functionalities and explore how they can enhance business dashboards. Encourage regular reviews of content from experts on blogs, Tableau Public, and challenges like Workout Wednesday. Form a small group to test the latest version and build demo dashboards to share with the larger team."

Tabitha Maier
Data/Tableau Analyst

"When I first became involved with the Admin side of Tableau, one of our first responsibilities was upgrading our current version of Tableau to a newer one. At that point, our Server had been behind by two and a half years. We successfully tested the upgrade on both the Test and Dev servers, but when the time came to do it, we ran into multiple issues. It took the team 16 hours to resolve the problems on a Saturday. Not how you want to spend your weekend. This wouldn't have happened if we had kept up with the Updates instead of having such a big jump in versions."

Juan Duran
Data Engineer & Tableau Admin

"You want to always be up to date with the major new features, especially if there is a big impact for your team. Tableau Cloud is not an issue since they are updating it for you, [and] from my experience updating Tableau Server is not very difficult/time-consuming unless you have a very complex environment setup (multiple servers/nodes) or very large disk from extracts. I also consider the new versions to be very reliable (but to be safe, always keep a backup before updating so you are able to go back to an older version if needed)."

Shay Hayo
Data Analytics & Tableau Consultant

Always Look Closer: Investigate your edge cases to learn more about the norms.

If you want to learn the ropes quickly on versions of Tableau you may manage, take the time to embrace the weird exceptions you come across. If you notice everything else is running smoothly, but one extract keeps failing - click into it and research the issue. If you see the performance of one particular report is notably sluggish, don't just ignore the signs there - experiment based on different recommendations you encounter in the Tableau community to see if you can make things more performant.

When you do this, you will notice that you begin to find documentation, blog posts, board discussions, and other resources that tell you how things SHOULD work along the way. In doing this, you'll better understand WHY the other things are running well. You'll figure out things related to the order of operations behind the scenes and so on. People ask me how I know so many random tidbits about Tableau, and this has been one of the vital hacks over my years of experience. You want to dive into the edge cases so that you can learn on your journey to the boundaries!

Experienced Perspectives...

"Tableau User Groups (TUGs) are at the heart of how I stay connected and informed. TUGs provide invaluable opportunities to network, learn from real-world use cases, and gain firsthand insights on Tableau's updates. Coupled with other community resources like forums, blogs, and YouTube channels, they equip me with the knowledge to troubleshoot, tackle edge cases, and continuously optimize our Tableau environment. Leveraging this community-driven support ensures I stay ahead of Tableau's rapid evolution and any new developments."

Luigi Cicciari
VP of Operations & 2024 Tableau Ambassador

"The best part of edge cases is they show you both the good and the bad. Sometimes it's understanding why a specific report isn't performing well, but there's also a flipside where someone in the org pushed the boundaries of Tableau and how it can be used. When continuing to grow and modernize, those edge cases can be guiding pillars to head towards as well as flags of what to ignore. A great Tableau instance is a collection of data lovers continuing to push boundaries and test the limits of how we think about data and reporting."

Jake Hughes
Senior Manager & Tableau Analyst

Doing these things will help you more confidently manage some of the rampant issues you'll come across as your analytical tech stack advances with time. The larger your environment grows, the more you will likely begin to hear about things like cost reduction, compliance, trust, benefits, and more. You are now entering the realm of your bosses and their bosses, and you'll need to start convincing them why their investment into furthering your internal reporting empire has been worth it to the company.

Speaking Your Leadership Team's Language

As I already stated, it's not just up to your boss and theirs to "contextualize, justify, and 'simplify' the growing list of pros and cons related to sprawling analytical tech stack's ROI while making new features feel familiar" (yes, that sentence is back to haunt you now). No, my friend - that responsibility will fall to you as one of the inherent subject matter experts on your system and its capabilities and shortcomings. So, you'd better be prepared to openly discuss it in terms of the value it brings the company and your stakeholders (while also having the wherewithal and acumen to compare it to any alternatives that may be presented).

I have personally sat in on a few of these discussions at different organizations at this point in my career, and you will find that there are kind of two different modes you typically deal with…

1. They are exploring alternatives and actually looking for cogent arguments for or against your status quo when it comes to your data management and reporting capabilities. They may even be willing to expand your resources for your BI endeavors if you make a strong enough case that's still considered to be financially prudent. Or…

2. The powers that be have already decided they want something else, and unless you provide them damningly good reasons to support you - the outcome may or may not go your way. You will intuitively learn when you're in either circumstance after enough run-ins with this issue, and you'll have to pick and choose your hills to die on.

I want to help prepare you for the former of the two situations, rather than the latter, based on some common situations you may find yourself in. This will require that you have an understanding of what matters most to the deciding entities present in the conversation and that you know when to pull which levers.

I have been involved in discussions where connectivity was most important and how well a potential tool could be blended into our current objectives while being flexible enough for our future needs. In this case, I was able to argue for the number of connectors at Tableau's disposal, the familiarity that a majority of report developers at the company already had, and the growing desire from end-users to be switched to the platform.

I have been involved in open, but crucial, discussions regarding the overall utility of Tableau compared to other options out in the market. In this case, I led a concurrent running Proof of Concept (POC) 2-month-long evaluation period of Tableau vs. 3 competitors with a group of stakeholders. We all evaluated each solution based on a 30-question scoring rubric that rolled up to the categories of…

1. End-User Consideration
2. Ease of Use
3. Desired Features (Note: AI-related bells and whistles should fall into this bucket)
4. Data Platforming Duties
5. (and) Intangibles

After this, I summarized the findings and presented them, along with my preferred and alternative recommendations. Important factors such as costs, potential rate discounts, and interviews with existing clients of each product were considered as well. The goal here is to stay objective and pick the best option.

There were also times when knowing when certain features were coming for Tableau vs. something else that already had a desired capability was important, and weighing the switching costs to the entire organization. BI tool migrations can be painful for all parties involved if you're deeply entrenched, and that's why it's important to understand the features you'd realistically use from any new tool. In many cases, it was a matter of knowing that costs were low to stay still and explore an existing feature in Tableau, or wait for its parity feature release.

Discussing any of these matters openly with your Tableau or Salesforce account reps around the time of a contract renewal may work in your favor and get you even deeper discounts - further saving your organization's capital. Remember, likely, no one involved in these types of discussions with your decision-makers will know the ins and outs of your analytical tech stack like you do.
It is also on you to remind them of productivity gains or losses in various scenarios you may be

presented with during these discussions. Leaders have a fiduciary responsibility to make the best monetary decisions they can for the companies they represent, but some of them also genuinely like to know whether or not they're making work more effective and pleasurable or downright miserable for those making the sausage. You bring a special lens to the issues they lack, which can be a valuable asset for you when presented well.

So... Who (or What) Can Help Me With All of This?

Remember when I mentioned it may be time to seek a third-party tool to help you over the hump? Well, you're reading a paper provided by Datalogz, so you knew the tie-in was coming, right? Yes, this is based on the real lived experiences of myself and others, but I also want to share something that I came across that others can leverage (please note that this commentary

is from the author, not those users quoted in the earlier section).

Datalogz's areas of focus help with many of the issues brought up already: reducing risks, increasing trust, cutting costs, and continuously monitoring and managing sprawl. These are Datalogz's bread and butter, and they operate elegantly with Tableau and other BI Tools in analytical stacks (and their upcoming AI additions). Their solution monitors data usage and activity, indexes every existing API in your BI tools, scans for compliance risks, and analyzes all of the dashboards and reports created within your environment.

Powerful documentation capabilities found in Datalogz put information at your fingertips in a way that wasn't there before to help manage the unruly mess that users and new AI-infused automation may create. Even if you haven't considered something like this in your stack before, trust me – you will want this in your tech management going forward as we jump headfirst into a future of super-productivity.
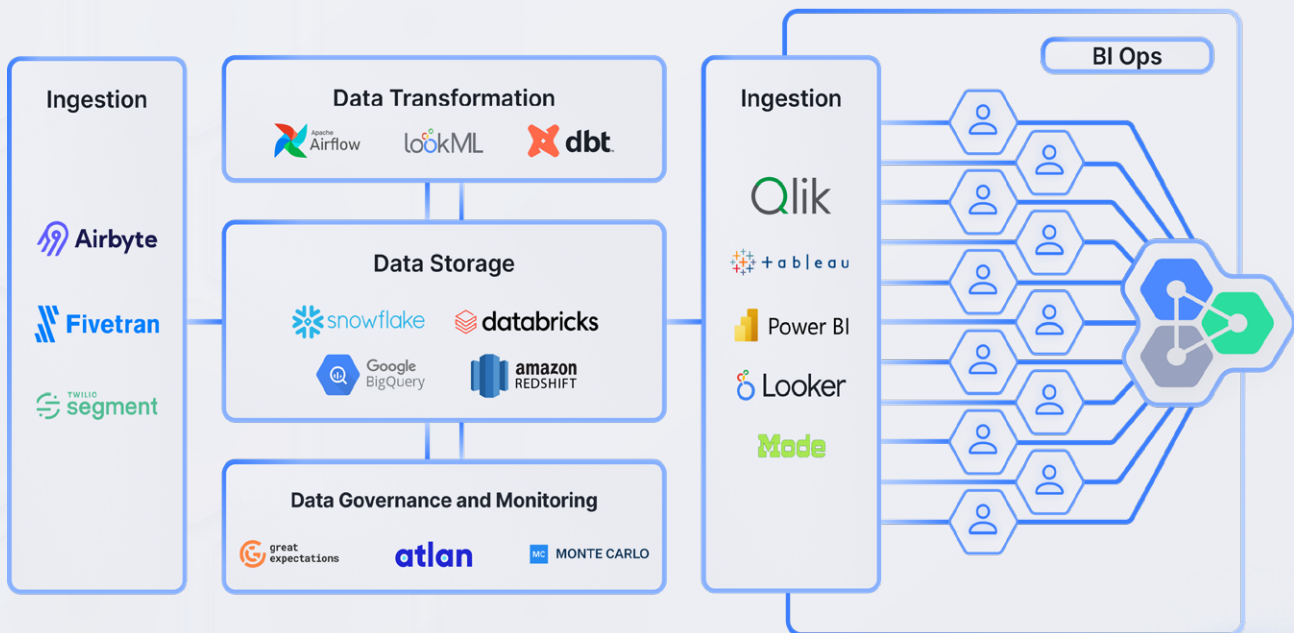
Datalogz securely connects to your actual data, allowing for automatic updating. Their solution documents not dataset metadata AND any work associated with a dataset (such as important dashboards). It also has sophisticated capabilities like monitoring for common issues, flagging quality issues, etc. Analyzing, recording, and displaying data as it flows from data sources to end-users (data lineage) is remarkably user-friendly in their Data Linkage visualizer. And it's web-based! You don't have to install anything; just access Datalogz anytime!

This will help you more easily discern the valuables from the garbage, and you'll be a hero across your company in no time. Check out their site ⊕ and socials in ✚ ▶ for more info (even a conversation featuring yours truly talking with their CEO), and to get in contact with them for a demo. This is simple, yet effective. New, but familiar.