***Case Opening Essentials***

*Clearly define the following key areas of the case/issue, to ensure rapid handling of the cause, and that it reaches capable resources with minimal need for back and forth communication:*

***Impact & Urgency***

*-          Number of users affected*

*-          Impact of issue on the business*

*-          Time constraints/Deadlines which have to be met (if any)*

*-          Clarify if the system affected is Production or QA/UAT/Development.*

***Issue Definition***

*-          Steps taken leading to the undesired behavior*

*-          When did the issue start to occur (precise date and time)*

*-          Description of issue, and what is expected*

*-          Annotated screenshots*

***Information***

*-          Troubleshooting steps taken so far.*

*-          Log files relating to the relevant time frame (ideally includes time before the issue became apparent):*[*Creating Tableau Server Log Files*](http://kb.tableau.com/articles/knowledgebase/creating-tableau-server-log-files)

*-          Clearly labeled MSINFO32 for each machine in the cluster:*

*1.       Log on the machine where Tableau is installed, either directly or through Remote Desktop Connection.*

*2.       Open "Start" > "Run" or go to the search box in the Windows menu and type "msinfo32" (without the quotes) in the "Open" box.*

*3.       A window labeled System Information will open. Click on "File" and select "Save..."*

*4.       Enter a save location, then collect the resulting .nfo file.*

*-          Windows Event Viewer logs for each machine:*

*1.       Click the "Start" button on the machine in question and type "eventvwr" (without the quotes) in the Search box.*

*2.       A window labeled Event Viewer will open. If the "Event Viewer (Local)" folder is not expanded, double-click on the folder icon to expand it.*

*3.       If the "Windows Logs" folder is not expanded, double-click on the folder icon to expand it.*

*4.       Right-click on "Application" and select "Save All Events As..."*

*5.       Chose the "Event Log (\*.evtx)" file type, name the file "Application" and enter a save location*

*6.       Repeat steps 5 and 6 for the "Security" and "System" logs, naming the .evt files "Security" and "System" respectively.*

*-          Performance issues:*

*o   Performance recordings for the same affected workbook from Tableau Desktop and Tableau Server, run from the same machine*

*o   A copy of the workbook*

***Key best practices***

*-          Create regular backups:*[*Server Backup and Maintenance Automation*](http://kb.tableau.com/articles/knowledgebase/server-maintenance)

*-          Use dedicated hardware*

*-          Install/Activate Tableau Desktop on all machines hosting Vizql processes*

*-          Ensure Tableau directories are whitelisted in Antivirus*

*-          Ensure appropriate ports are opened:*[*TCP/IP Ports*](http://onlinehelp.tableau.com/current/server/en-us/ports.htm)

*-          Use Distribution Lists to manage those who require updates on cases*