Automating Business Application Management: Tableau Server Archive

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Problem

Outdated Tableau dashboards clutter the Tableau Server, hindering usability

- Unused dashboards waste server memory, impacting hundreds of daily users across the organization
- Growing server usage puts stress on fixed memory and processing power
- Migration to a new data warehouse requires removal of old content to avoid wasting resources
- The volume of tableau reporting makes manual review impossible

Goal

Develop an automated archiving process, guided by dashboard creators and data governance, to safely remove dashboards unused for over 395 days or averaging fewer than one monthly view in the past year

Intervention Design

Stakeholder Engagement & Policy

- Secure buy-in from analytics teams and content owners
- Coordinate with UCMIT partners
- Establish policy defining stale content and an accountability structure

Tool Development & Validation

- Develop internal tools to automate archiving
- Conduct extensive testing alongside outreach to impacted teams

Measuring Success

- Track frequency of archived content restorations
- Volume of archived dashboards
- Growth in overall dashboard usage

Results and Impact

The automated archival process has been running monthly for the last 10 months of FY 2026

1. Identify stale dashboards
2. Email content owner a report of which workbooks are at risk
3. 2-week review window allows owners to mark a workbooks as still being used
4. Automated system downloads, stores, records, and deletes approved stale content
5. Workbooks are saved in a secure location, available for restoration if necessary
6. In FY26, only 2 requests have been submitted to restore archived content

Dashboards Archived: **1039**

50% Reduction in the Number of Workbooks at the Start of FY26

7 Teams Involved in Reviewing Content Monthly

35 Hours Saved by Automating Process

14% Increase in Tableau Server Utilization*

** Calculated based on the number of workbooks on the Tableau Server with at least 10 views in the last 30 days*

Lessons Learned and Next Steps

Lessons Learned

- Automation delivers strong value: Investing in automation is worthwhile because the development effort is significantly less than the total time saved
- Cross-team collaboration matters: Strong collaboration between analytics teams ensures smooth implementation, better alignment, and more effective utilization of share resources
- Clear policies support transparency: Defining clear policies and guidelines is essential for creating transparency and setting consistent expectations

Next Steps

- Broaden server maintenance scope: Extend maintenance efforts to include activities beyond archiving
- Increase utilization of existing content: Promote and drive active use of the remaining Tableau Server content to maximize its value

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