

# Tableau Cloud Migration

## Pre Requisites and Expectations

### Security Resources

Information that may be necessary before any migration takes place.

**A delay in security sign off may have significant impact on timelines.**

- [Tableau Security in the Cloud](#)
- [Salesforce Compliance Certifications and Details](#)

## 1 Migration Workstation/Jumpbox

### • Migration Workstation/Jumpbox

- InterWorks can migrate your content through our internal machines if your Tableau Server is internet facing, or if a VPN can be supplied to get front end access

Alternatively

- If Tableau Server is behind a firewall a jumpbox may be required. This will require access via VPN/RDP or internal accounts for InterWorks

### Important

If jumpbox is required, please confirm sizing with InterWorks consultant

#### Base Specifications:

- Windows Server 2019 or later
- 8/16 Core
- 64GB RAM
- 500GB Drive (This is subject to filestore size)

- Determine and provision access method for InterWorks (RDP/VPN/Citrix)

- Confirm PowerShell can be run on this machine as administrator

- Confirm access to internal Tableau Server

- Confirm outbound access to Tableau Cloud

- Can Tableau Desktop be installed on this machine - Optional

- InterWorks will require a method of transferring files to and from the machine for tool installation and validation. InterWorks uses Box as its cloud storage and content management service. Is use of Box allowed internally? If not – please suggest alternative methods of file transfer

## 2 Immediate Steps (or when capability allows)

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### • Tableau Server

- Provide InterWorks with access to the current Server. Administrator if possible

### • Tableau Cloud

- Confirm Site is provisioned and provide URLs
- Provide InterWorks with Cloud access as Site Administrator
- Data source passwords will be required for Tableau Server versions pre 2024
- If using OAuth, The client id / secret / return url is required on Tableau Cloud

### • Tableau Bridge (if required)

- Confirm OS for Bridge Windows or Linux [https://help.tableau.com/current/online/en-us/to\\_bridge\\_scale.htm](https://help.tableau.com/current/online/en-us/to_bridge_scale.htm)
- Confirmation that all Database username/passwords and connection details are known and will be available during migration (Pre 2024)
- Identify data source drivers required
- A licensed user with a Creator license is required by Bridge to log into Tableau Cloud. Identify this user  
*\*If this user becomes unlicensed, Bridge connection will be lost*

### • User Authentication

- Should already be determined and confirmed as being supported by Tableau Cloud
- **All users must have a valid email address on the Tableau Server.**
  - Users without an email address WILL NOT migrate
- Users are named accounts. No generic accounts without a valid email address
- Confirm internal contact for SAML connection. Multiple files to be transferred between IdP and Tableau Cloud. May require a meeting with IW and internal SAML contact depending on client comfort
- Is SCIM being considered

## 3 Migration Runbook

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- The IW Runbook is a Tableau workbook that connects to the internal Tableau Server Repository. The read-only password for the repository should be available to InterWorks or an internal client contact for connection purposes
- The Runbook provides an opportunity for the client to do an audit on the Tableau Server Content to be migrated
- Identify Published Data Sources that require Bridge
- After any major changes with the Tableau Server content, refreshing the Runbook data to reflect these changes should be done

## 4 Pre – Migration

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- A Pre Flight document and corresponding Workbook will be provided. This will detail the data sources and workbooks considered for migration. Additionally, this will identify RLS and URL actions that may require additional updates to assets that have been migrated to Tableau Cloud.
- Consider your Communication Plan and expected recipients throughout each stage of the migration. InterWorks can assist here
- **Advise a content freeze be put in place.**  
This will require a discussion as size and length of migration phase will determine freeze time period
- Is the project hierarchy being retained or do you wish to change the project structure?  
*InterWorks have a template that can assist this*
- Do you envisage any new or updated user Groups within Tableau Cloud compared against your Tableau Server?  
*InterWorks have a template that can assist this*
- Pre 2024 Source – Usernames and Passwords to all data sources to be provided to IW otherwise these require implemented post asset migration

## 5 During Migration

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### ⚠ Important

As data sources and workbooks are being migrated and tested, This will increase traffic to your internal/cloud databases which may incur additional cost. Please also ensure concurrency is available on these data sources.

- All users will be migrated as unlicensed initially. A number of users may be licensed to review the migration progress and update assets ownership
- **We respectfully request that any Cloud licensed users refrain from publishing or adjusting any content while the main migration is taking place.**  
This allows better validation of migrated content
- In some instances, we will require small updates by Power Users/Admins. This will be communicated from us at the time. We would request a list of these users pre migration

## 6 Post – Migration

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- Bookmarks on a users browser will no longer work, we expect a small window of dual running prior to go live where these can be re referenced
- **Internal client testing is highly advised**
- Agree Go Live date and plan outstanding actions below
- Application of Extract refreshes can be carried out during the migration or post migration. Extract refreshes either exist or are removed. Cloud has not got the ability to disable these tasks
- Subscriptions are the last assets to be migrated. This is the last task pre go live. Subscriptions to be disabled on Tableau Server at go live.
- Update migrated workbooks with updated RLS/URL actions

- A final validation document will be provided by InterWorks post migration that details all migrated content

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For questions or support, please contact your InterWorks consultant