Tableau Cloud Migration Checklist

Generated: 08/02/2026, 08:28:48

Client Information

Client Name:	df
Region:	dfv
Tableau Server Version:	fgjkh
Tableau Server URL:	dfc
Primary Client Contact:	df

Security

1. **SecOps are aware of the migration and have signed this off? Confirm**
   ● Completed
   Answered: Feb 8, 2026, 08:28:33 AM

2. **Has data connectivity and access to data sources been confirmed?**
   ● Completed
   Answered: Feb 8, 2026, 08:28:34 AM

3. **Provide detail of the expected connections**
   Not Completed

Communications

1. **Has an internal communication strategy been confirmed?**
   ● Completed
   Answered: Feb 8, 2026, 08:28:37 AM

2. **Communication assistance offered?**
   Not Completed

3. **Have resources been requested and assigned internally?**
   Not Completed

4. **Are your developers aware of a potential change freeze?**
   ● Completed
   Answered: Feb 8, 2026, 08:28:38 AM

Stakeholders

1. **Provide a list of stakeholders and available resources for migration**
   Not Completed

Access & Connectivity

1. **How is Interworks connecting to your Tableau Server?**
   ● dfgvfde
   Answered: Feb 8, 2026, 08:28:42 AM

2. **Has the jumpbox been built to a required specification?**
   - Completed

   Answered: Feb 8, 2026, 08:28:40 AM

3. **Has access been provided to IW Consultants?**

   Not Completed

4. **Has PowerShell been enabled with Admin rights?**

   Not Completed

5. **Confirm file transfer methods**

   Not Completed

6. **Is Tableau Desktop available on the Jumpbox?**

   Not Completed

7. **Tool installed on Jumpbox?**

   Not Completed

8. **Server and Cloud PATS generated and connectivity confirmed?**

   Not Completed

Tableau Server

1. **Are PAT tokens enabled on Tableau Server?**
   - Completed

   Answered: Feb 8, 2026, 08:28:45 AM

2. **Is Tableau Repository readonly access enabled?**

   Not Completed

3. **Has the Runbook been installed and an overview provided?**

   Not Completed

4. **Is there a time delay for client to review Runbook?**

   Not Completed

5. **Expected Date for Runbook review completion**

   Not Completed

6. **Has any housekeeping taken place?**

   Not Completed

7. **Any initial project exclusions to be made aware of initially?**

   Not Completed

8. **Do all users have a valid email address?**

   Not Completed

Pre Flight Checks

1. **Is Row Level Security used extensively in Workbooks?**

   Not Completed

2. **Are you aware of any URL actions that may be present?**
   Not Completed

3. **Are you aware of any fonts that are non web conformant?**
   Not Completed

4. **Pre flight checks will identify the above. Any RLS or URL Actions will need to be updated post migration by power users/developers. Please confirm.**
   Not Completed

5. **Pre flight checks performed and delivered to client**
   Not Completed

6. **Has client reviewed Pre flight checks documentation?**
   Not Completed

7. **Do we expect any delay on starting the migration based on the pre flight checks?**
   Not Completed

Tableau Cloud

1. **Has the Tableau/Salesforce paperwork been signed?**
   Not Completed

2. **Confirm Tableau Cloud SKU type**
   Not Completed

3. **Number of Expected Sites**
   Not Completed

4. **Has Authentication method been confirmed?**
   Not Completed

5. **If SSO - Is app built and applied?**
   ● Yes
   Answered: Feb 6, 2026, 03:23:07 PM

6. **Is any conditional access expected?**
   Not Completed

7. **Is SCIM being implemented?**
   Not Completed

8. **Are the user groups on the authentication app built?**
   Not Completed

9. **Group Remapping required?**
   Not Completed

10. **Any project hierarchy adjustments**
    Not Completed

11. **Have InterWorks engineers been provided access to Tableau Server as Site Admin Creators?**
    Not Completed

12. **Are you expecting to use Custom Domains in Tableau Cloud?**
    Not Completed

13. Additional notes for Tableau Cloud

Not Completed

Tableau Bridge

1. Do you require the use of Tableau Bridge?

● Yes

Answered: Feb 7, 2026, 11:04:39 AM

2. Have the Bridge Servers been requested and built?

Not Completed

3. If No - Expected turnaround/Date

Not Completed

4. Has any testing been done?

Not Completed

5. Is the Bridge client running in service mode?

Not Completed

6. Will the bridge server be accessed via a service account?

Not Completed

7. Will the data sources be using Windows Auth?

Not Completed

8. Flatfiles will require a full UNC filepath when using Bridge. Confirm

Not Completed

Cloud Data Sources

1. Is Private Connect required?

Not Completed

2. Is IP whitelisting required and completed?

Not Completed

3. What authentication is used to Cloud Data Sources

Not Completed