



Find Your Path to
Tableau Cloud

Tableau Cloud Migration Readiness Checklist

Our team has prepped this guide to help you address critical aspects of your Tableau environment as you begin the cloud migration process. Each organization's checklist may vary based on specific requirements, existing infrastructure and deployment plans.

Content Preparation

- Delete or archive content not accessed in more than 6 months
- Check Tableau Server file store size to confirm required site capacity: 1 TB (Standard) or 5 TB (Advanced Management)
- Reduce content size where >15 GB (Standard) or >25 GB (Advanced Management)
- Optimize dashboards and data sources where extract refreshes are >2 hours and viz load requests >300 seconds
- Update .tde to .hyper files
- Convert flat files requiring refresh to published data source extracts
- Reconfigure extensions, webhooks, connected apps, REST API scripts, tabcmd commands or 3rd party data prep tool workflows

Logistics

- Activate Tableau Cloud site(s)
- In site settings, uncheck “Enable site invite emails” prior to authentication configuration to prevent site awareness and access until migration completion
- Schedule dates for migration, including content freeze period
- Communicate migration start date, content freeze period, and go-live to end users

Authentication

- Identify Tableau Cloud-friendly authentication method (if not already in use)
- If authenticating via Entra ID, Okta or OneLogin, consider SCIM
- End users have a valid email, as Cloud uses email as username
- Authenticate at least 1 Site Administrator via Tableau ID w/MFA for backup login

Data Connectivity

- Verify data types(s) are supported by Tableau Cloud
- On-prem or private cloud data to refresh? Tableau Bridge is required
 - Choose Bridge deployment type: Windows or Linux
 - Configure 1-2 pools outside default pool
- Optimize for Cloud
 - Migrate on-prem data to Cloud Data Warehouse
 - Private cloud data? Whitelist Tableau URL specific to your site’s location
 - Move flat files to public cloud spaces

Need help with your Tableau Cloud Migration?

You’re in luck! We specialize in migration planning, implementation and support. Learn more at interworks.com/tableau-cloud-migration

Visit interworks.com/tableau-consulting to learn about all of our Tableau solutions and services. Or reach out to us at interworks.com/contact for help with anything data related.

