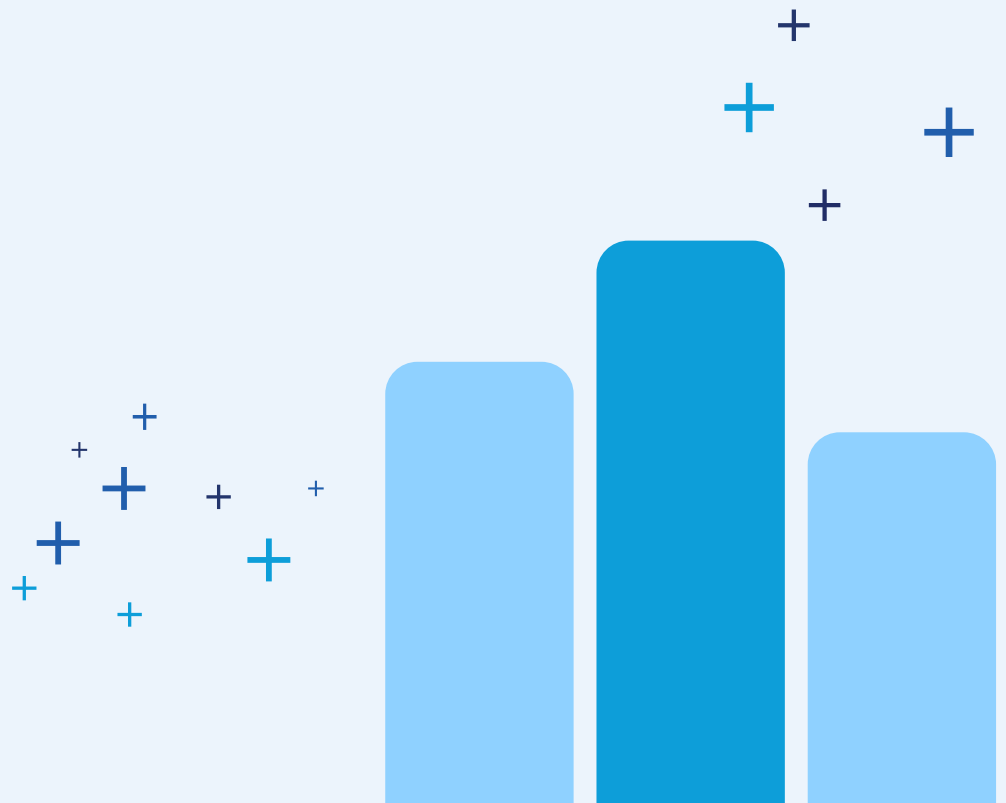


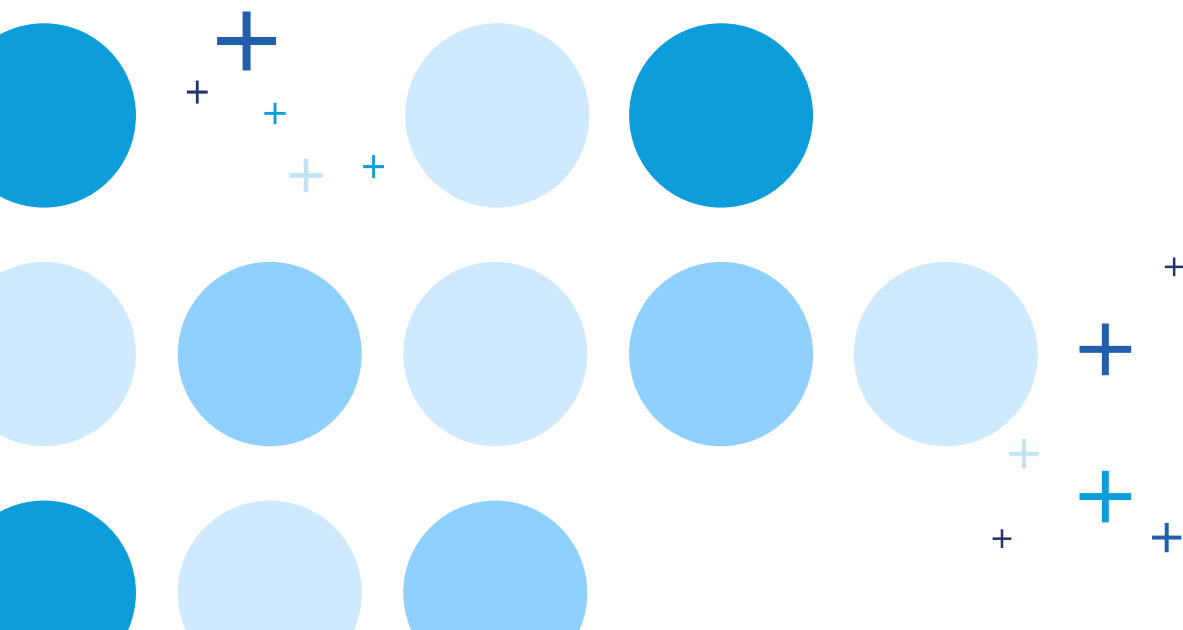


# Your Guide to Moving to Tableau Cloud



# Table of Contents

Why migrate to Tableau Cloud	3
Develop your migration strategy	4
Best practices and risk mitigation	10
Additional resources	12



# Why migrate to Tableau Cloud

For two decades, Tableau has focused on helping people see, understand, and act on their data. As data technology, volume, and complexity have increased, data platform requirements have grown. One of the largest shifts we've seen around the globe in the past few years is a shift to SaaS as the preferred deployment model for organizations of all sizes. For years now, more than 90% of new Tableau customers have chosen to deploy on Tableau Cloud rather than host and manage their own infrastructure with Tableau Server. We are seeing more organizations choose to migrate from existing Tableau Server environments to Tableau Cloud. While the exact reasoning varies from customer to customer, there are four primary drivers for making the jump.

## Innovation

Tableau Cloud is always on the latest version of Tableau, which means you get access to all innovations as soon as they're available. All [Tableau AI](#) features we develop are immediately available to your data community, and some are even exclusive to the cloud. As transformational technologies like LLMs are integrated into [Tableau Pulse](#) and [Tableau Agent](#), your teams can use them to stay up to date on all the essential metrics.

## Increased ROI

By shifting to analytics as a service, customers like [Juniper Networks](#), benefit from increased data access that maximizes productivity for their end users. Access to Tableau Pulse has empowered customers to make data-driven decisions, amplifying the value of data across their organizations. Additionally, letting Salesforce manage your deployment as a service frees up valuable time and resources while eliminating your hosting and hardware costs.

## Security

Tableau Cloud is built on Salesforce's industry-leading [Hyperforce](#) platform, meeting the strictest security requirements with regular security reviews to ensure your data is safe. Every customer benefits from compliance certifications like [Tableau Cloud's HIPAA compliance](#). [Trust](#) is Salesforce's #1 value, and as new technologies emerge, such as agentic AI, you can rest assured that data security will always be our top priority. Migrating to Tableau Cloud means you immediately benefit from Salesforce's industry-leading Trust posture.

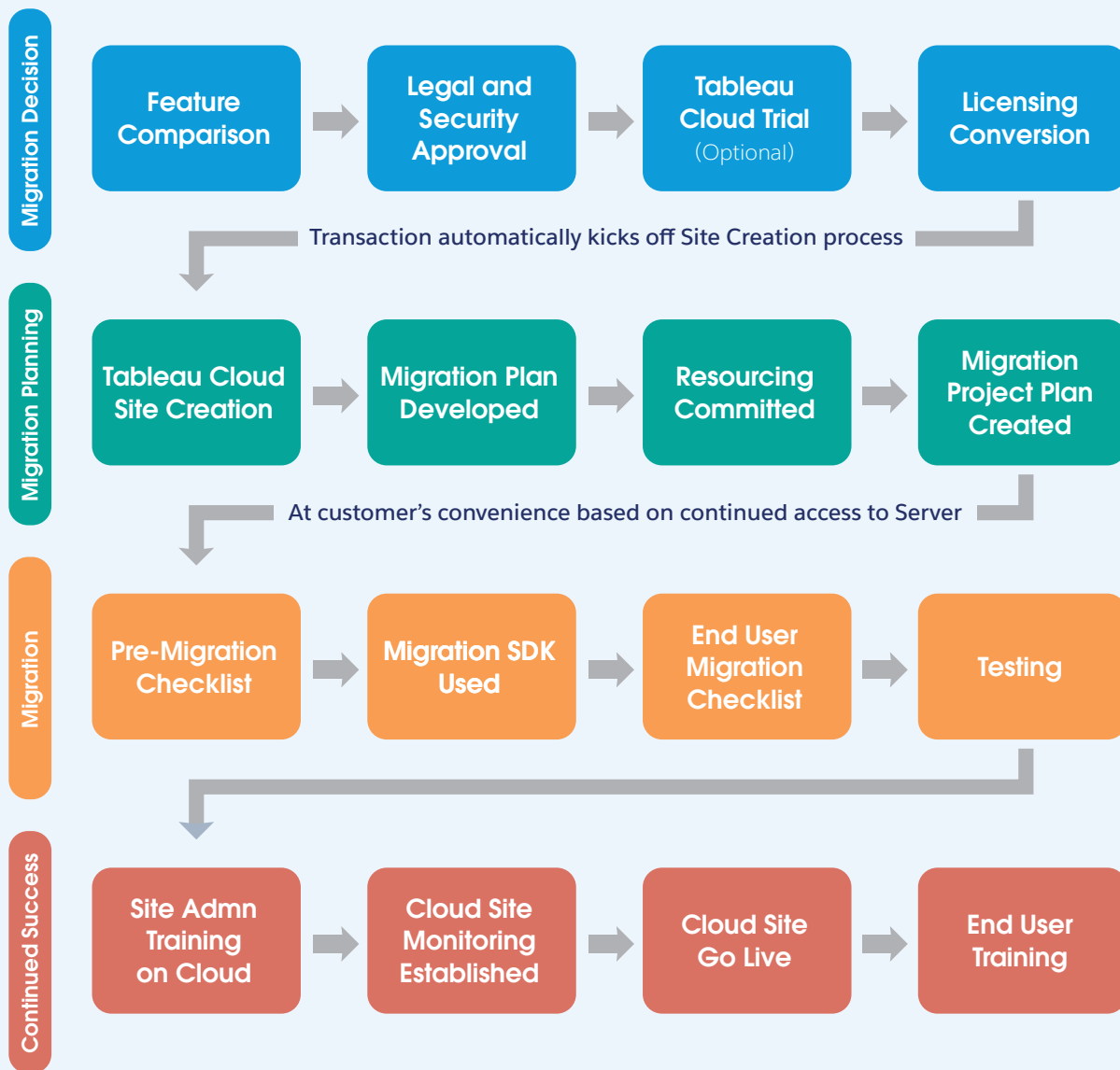
## Scale

Tableau Cloud has pods across the globe to ensure data access, performance, and resiliency for all of your users. Customers like [Jaguar Land Rover](#) securely scaled their global analytics by migrating to Tableau Cloud. Without the need to assess hardware requirements or align on rollout plans, customers can add new users to the platform and have them up and running with the same day. Plus, with [Tableau Cloud Manager](#) offering centralized management capabilities, it's easy to grow across different teams and regions while meeting governance and data residency requirements.

# Develop your migration strategy

Any migration strategy has four primary components:

1. Consideration: Decide that Tableau Cloud is a good fit for your organization
2. Planning: Scope and plan the migration
3. Execution: Conduct the migration
4. Enablement: Establish post-migration enablement for long-term success



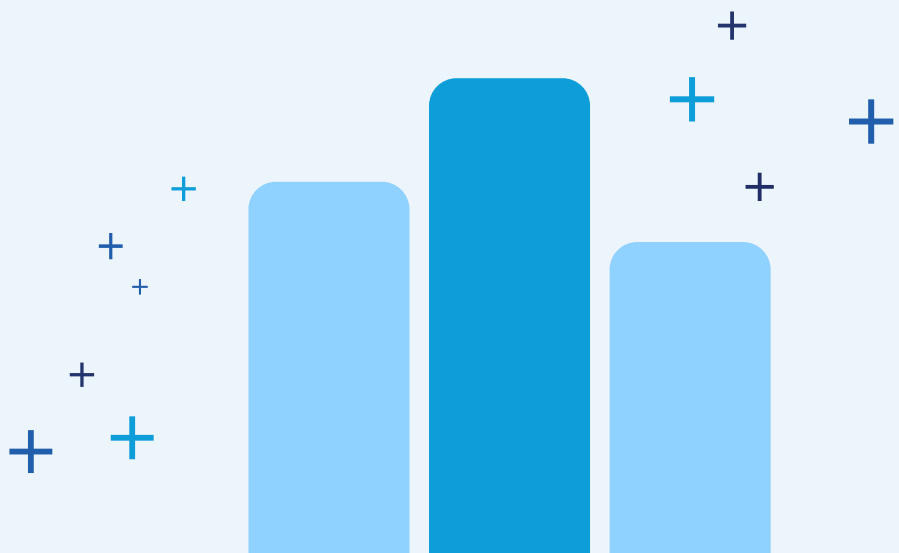
## Considering your migration

The first step to migrating to Tableau Cloud is validating that it fits your organization well. We recommend starting by understanding the differences between Tableau Server and Tableau Cloud. While Tableau Server and Tableau Cloud are remarkably similar, some differences between the two products could impact your decision to migrate. We discuss these differences in greater detail in [this article](#). We've also created a free [Tableau Accelerator](#) on the Tableau Exchange that provides a data-driven approach to understanding your technical readiness for a Tableau Cloud migration.

The next step of the decision is ensuring that legal and security stakeholders are aligned on the decision to migrate to Tableau Cloud. Tableau Cloud meets the strict security requirements and undergoes regular security reviews to ensure your data is safe. Every customer benefits from compliance certifications like [Tableau Cloud's HIPAA compliance](#) just by using the platform. To confirm that Tableau Cloud meets your specific requirements, you can request access to [Salesforce's Compliance Site](#), which provides access to all relevant security documentation, including SOC 2, penetration tests, and the CAS CAIQ.

Before they commit to Tableau Cloud, some customers choose to test it out and compare it with Tableau Server. This can include verifying data connectivity and administrative capabilities. We recommend that customers who service hundreds or even thousands of users with Tableau take the time to confirm that the platform meets their needs with a [trial of Tableau Cloud](#) before they take the jump. This trial will help prepare your teams for the migration process and give your leadership the confidence that any relevant risks have been identified with a mitigation plan before a migration.

Finally, you'll work with your account team to convert your licensing to the Tableau Cloud offering that best meets your organization's needs. This often includes partnering with the Tableau team to develop a business case and corresponding success metrics for a migration that will be essential to showing the long-term value of moving to Tableau Cloud. As a part of this process, you can also work with your account team to understand your options for maintaining your Tableau Server environment while you complete the migration.



## Who shouldn't migrate?

Tableau is built on the idea that no matter your deployment preference, we want you to be able to see and understand your data. That means many would still prefer hosting their own analytics solution with Tableau Server. Before you decide to migrate to Tableau Cloud, make sure you [understand both products](#) and choose the one that makes the most sense for you. You can also verify that Tableau Cloud meets all your security and compliance requirements on the [Salesforce Compliance site](#).

## Compare our Tableau Cloud offerings

### Tableau Cloud

Tableau Cloud offers a powerful suite of products that support your end-to-end analytics workflow and empower users to explore trusted data and discover insights in a secure platform.

### Tableau Cloud Enterprise

Enterprise licenses for Tableau Cloud bundle additional enterprise-grade administrative and data management capabilities, plus a year of Tableau's industry-leading eLearning for each of your Creator and Explorer users.

### Tableau+

[Tableau+](#) is our premium Tableau Cloud offering that provides an enhanced data experience with bundled enterprise management capabilities and support services. This includes Tableau Cloud Manager with up to 50 sites, Tableau Agent, exclusive Tableau Pulse features, Data Cloud for Tableau, additional enterprise-grade administrative and data management capabilities, a tailored Premium Success Plan, Tableau eLearning, and more.

## Planning your migration

Next, it's time to plan your migration. This includes understanding your different analytics use cases and identifying and aligning relevant stakeholders. Then, you can develop a step-by-step plan to migrate to Tableau Cloud.

Many customers will work with Tableau Professional Services or an experienced migration partner to design and implement these plans. If you prefer to undertake the migration yourself, you can also follow the recommended plan available in the [Manual Migration Guide](#) and use the [Cloud Migration App for Small Deployments](#) for smaller, manual migrations, or leverage the [Migration SDK](#) for enterprise migrations.

Before migrating, it's also highly recommended to optimize your Tableau content. While customers often see some performance improvements when moving to the cloud, the greatest enhancements come from data source tuning and efficient workbook design. [Check out these resources](#) to help you optimize your Tableau workbooks before migrating.

## Conducting your migration

The next stage is to conduct the migration itself. There are three ways to migrate to Tableau Cloud. We've summarized the three options below. Once you've identified the approach that makes the most sense for your organization, the details on conducting the migration can be found in the corresponding documents.

Migration path	Cost considerations	Duration	Recommended for
<a href="#">Manual Migration</a> or <a href="#">Cloud Migration App for Small Deployments</a>	Employee time	Scales linearly with content migrated	Customers with 100 users or fewer
<a href="#">Migration Services Provider</a>	Varies by service provider	Varies by service provider	Customers with more than 100 users
<a href="#">Migration SDK</a>	Employee time + developer required	Varies based on available resources and complexity of deployment	Customers with more than 100 users, longer migration timelines, and available developer resources

### Manual Migration Guide

The [Manual Migration Guide](#) is a step-by-step guide explaining how to migrate your Tableau Server deployment to Tableau Cloud manually. In a nutshell, this guide is useful for administrators running a Tableau Server with fewer than 100 users and comfortable with a fully manual, self-service migration process. There are some aspects that a central team can handle and some that will require end-user support to complete the migration. We do not recommend this approach for organizations with more than roughly 100 users because the duration of manual migrations tends to scale linearly with the amount of content requiring migration. It also requires the most end-user support to complete the migration.

### Cloud Migration App for Small Deployments

The [Cloud Migration App for Small Deployments](#) is an open-source tool based on the Tableau Migration SDK, developed to streamline the migration process from Tableau Server to Tableau Cloud for administrators handling smaller deployments. Transfer essential content—such as workbooks, users, groups, permissions, and data sources—with secure local authentication. While the app is well-suited for migrations involving up to around 100 workbooks, larger deployments may benefit from additional or alternative tools.

### Migration services provider

Both [Tableau Professional Services](#) and [experienced migration partners](#) have years of experience in conducting migrations. Each provider has different approaches and strengths to consider. However, we see most migrations with >100 users prefer to leverage a services provider because they have specialized knowledge of migrations that ensures they are completed quickly and efficiently with the least amount of downtime for the business.

### Migration SDK

Tableau's [Migration SDK](#) allows you to build your own migration application to migrate from Tableau Server to Tableau Cloud. The open-sourced tool enables community members to share best practices and relevant samples they've leveraged in their migration. However, this approach requires Python or C# experience to develop an application, which can be costly for organizations without these skill sets readily available. Many partners have developed similar tools, often built on top of the Migration SDK, which provide the same level of automation in their migration service.

## Enabling users post-migration

Finally, once all desired content has been migrated to Tableau Cloud and you begin to onboard your users, it's time to focus on maximizing the value of the Tableau Cloud platform. This looks different for every organization, but often includes training end users on new AI features like Tableau Pulse (and Tableau Agent, if your organization has Tableau+) and ensuring your Administrators are up to speed with all the available tools.

### Optimizing for Tableau AI

#### Tableau Pulse

[Tableau Pulse](#) is an analytics agent that provides a bespoke, metrics-based insights experience that makes data more accessible to everyone. Available for Tableau Cloud users, Tableau Pulse applies the power of generative AI in Tableau to deliver insights in the flow of work that are personalized, contextual, and intelligent. Tableau Pulse enables you and your organization to stay proactively updated on key metrics and explore trends without having to learn a new tool or build comprehensive visualizations—regardless of your expertise with data and analytics.

Refer to the following articles for more information:

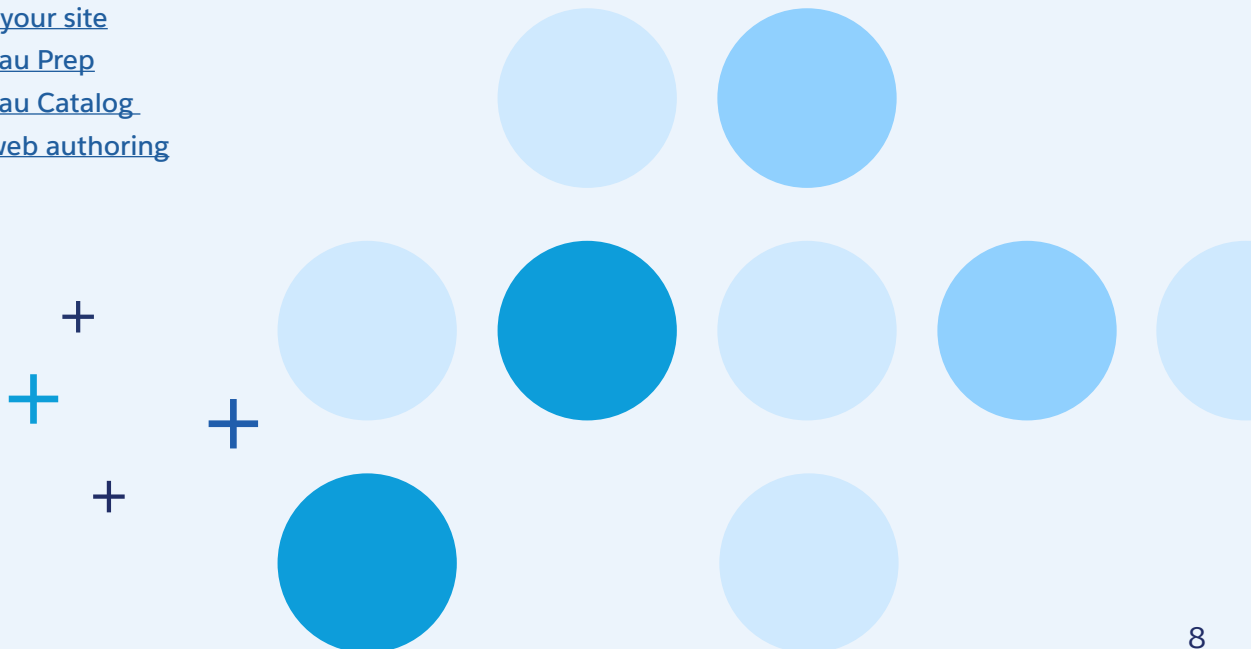
- [Set up your Site for Tableau Pulse](#) – Site configuration, permissions
- [Create Metrics for Tableau Pulse](#) – Published data sources, defining metrics, managing followers

#### Tableau Agent (only with Tableau+)

[Tableau Agent](#) (formerly Einstein Copilot for Tableau) superpowers analysts with a trusted AI assistant that helps accelerate data-driven decision making. Tableau Agent can help analysts create calculations from natural language in data preparation, generate comprehensive descriptions for content in Tableau Catalog, create visualizations from conversational prompts, and provide suggested questions to jumpstart data exploration.

Refer to the following articles for more information:

- [Turn on Tableau AI for your site](#)
- [Tableau Agent in Tableau Prep](#)
- [Tableau Agent in Tableau Catalog](#)
- [Use Tableau Agent in web authoring](#)





## Administrative capabilities

The next area of focus for enablement is for Tableau Server Admins and Tableau Server Site Admins as they transition to Tableau Cloud Admins and Tableau Cloud Site Admins. These individuals may shift their time and effort from availability and recovery tasks to optimizing their Tableau Cloud platform and enabling users.

### Tableau Cloud Manager

[Tableau Cloud Manager](#) helps organizations efficiently grow and manage their Tableau Cloud environment across multiple sites. With Tableau Cloud Manager, you can easily create and manage new, additional sites in the region of your choice (between three and 50 sites depending on which Tableau Cloud offering you have). This makes it easier to expand to new teams or regions while meeting content security and data residency requirements. Tableau Cloud Manager also enables Admins to centrally manage multiple sites and the organization's users and licenses across their sites. Refer to this suite of [Tableau Cloud Manager articles](#) for more information about Admin roles and tasks, authentication and access, and managing sites, licenses, and users.

### Automation

There are many opportunities to automate user workflows and common administrative tasks of Tableau Cloud. While many look similar to Tableau Server, you can find starting points for each below.

- [User Provisioning \(SCIM\)](#)
- [External application authentication \(Connected Apps\)](#)
- [Integration with Slack](#)
- [Monitoring licenses, usage and health of the deployment \(Admin Insights\)](#)
- [Programmatic access to work with content, users and more with the Tableau Rest API](#)

### Tableau Bridge

The biggest change for an admin with the migration to Tableau Cloud is the introduction of [Tableau Bridge](#) to manage connectivity to private data. Below are some helpful resources to get started with Bridge.

- [Planning a Bridge deployment](#)
- [Installing Tableau Bridge](#)
- [Configuring and managing a Bridge client pool](#)
- [Troubleshooting Tableau Bridge](#)

### Data Connect

[Data Connect](#) provides a new choice for those who prefer not to manage Tableau Bridge themselves. With Data Connect, Tableau takes on the responsibility of remotely operating, monitoring, and maintaining the software client, while the organization's team provides and manages the physical or virtual hardware.

## Keeping users informed

Enabling the end users of Tableau Cloud is primarily an exercise that teaches them about the new features that will now be available post-migration. We recommend developing a plan to communicate the changes before and after a migration to inform end users about any changes or planned downtime. Below are a few resources that highlight the new features your users can access.

- [Tableau Pulse](#)
- [Tableau Agent](#) (formerly Einstein Copilot for Tableau, only with Tableau+)
- [New features in recent releases](#) (especially helpful for customers who jump versions in the migration)
- [Connecting to private data with Tableau Bridge](#) (Creators only)

# Best practices and risk migration

## Best practices

Migration best practices can be cataloged into three primary areas: migration strategy, communication, and optimization for Tableau Cloud.

### Migration strategy

We have provided comprehensive best practices for developing a migration strategy [here](#). It's most important that you establish goals for your migration that you can use to manage trade-offs and timelines during the migration process.

### Communication

As with just about anything, clear communication about the migration plan, its goals, and its impact will go a long way in a migration. The primary points to identify are “Who should be included in the communication?” and “What events require communication?” For a smooth migration experience, it is essential to have the right stakeholders involved and to share relevant information with enough time for people to react to your strategy. When creating a communication plan, these are some key aspects to include: the migration decision, a finalized plan, when Tableau Cloud is ready for onboarding with a message to Tableau users of the upcoming change, and results after completing the migration.

### Optimization

We have cataloged many best practices for migration optimization [here](#). These help you create the most value for your end users, including opportunities to validate that content was migrated successfully.

## Risk migration

The three most common risks associated with migration are a lack of documented success criteria, scope creep, and ensuring content is working post-migration. Below are tools and tactics to help you de-risk your migration project.

### Documented success criteria

To keep your migration focused, we recommend that you establish concrete goals for your migration. If your goals aren't established before the migration, you can't know if it is a success. We've outlined a few [example goals for reference](#), but expect that your team will be responsible for establishing success criteria best suited to your organization.

### Managing scope creep

The best way to manage scope creep is to have clear, documented goals and a migration plan to follow. You can find a template to manage both in our [migration documentation](#).

### Ensuring content is functional after the migration

To assist with post-migration validation, we've laid out recommended processes for the [five most common areas of content validation](#) in a migration plan.



## Additional resources

Want to dive a little deeper? A number of on-demand sessions from Tableau Conference 2024 are available on Salesforce+ that cover Tableau Cloud and migration topics in greater detail:

[Hyper Secure and Scalable: Tableau Cloud on Hyperforce](#)

[Take Charge in the Cloud with Tableau Cloud Manager](#)

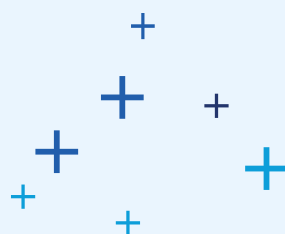
[Drive Impact: Embrace Trustworthy AI with Tableau Cloud](#)

[Accessing Your On-Premises and VPC Data with Tableau Cloud](#)

[Unlock Seamless Cloud Migration: Mastering the Migration SDK](#)

## Try Tableau today

Before you decide to migrate, [try a free trial of Tableau Cloud](#) to experience all it has to offer—including Tableau Cloud Manager and Tableau Pulse.



## About Tableau from Salesforce

Tableau is the world's leading AI-powered analytics platform. Intuitive data experiences, backed by generative and predictive AI capabilities, elevate insights where you work most. Offering a suite of analytics and business intelligence tools, Tableau turns trusted data into actionable insights so you can make better decisions every time. Tableau offers the most choice and flexibility for your architecture as your technology and AI strategy evolve. With security, data governance, and compliance in mind, your organization can maintain agility as new demands on data arise.

Tableau is committed to supporting the unique needs of organizations around the world with the largest partner and success ecosystem, including the passionate Tableau Community that can teach, support, challenge, and celebrate you at every stage of your AI journey. The future is limitless when you start with data and move forward with Tableau. For more information, visit [www.tableau.com](http://www.tableau.com).

