

Tableau Server to Cloud Migration

Guided Questionnaire & Checklist

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A companion to the **Don't Migrate Your Mess: Cloud Migration Round Table**
presented at Tableau Conference 2026

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Guided Questionnaire & Checklist

How to use this guide: Work through each phase in order. Each section contains guided questions followed by steps to reference when building your migration strategy. Items marked with a note (*italics*) call out common gotchas.

While the guide is in order of the phases of a migration, we recommend doing an initial read through of the entire checklist to ensure no critical dependencies are overlooked during planning.

Note on evolving technology: We are in a rapidly shifting AI era. While this guide currently prioritizes the [Tableau SDK](#), [Cloud Migration App](#) (aimed for smaller migrations built upon the Tableau SDK), and [Content Migration Tool \(CMT\)](#), please remain agile. Automation capabilities and best practices may shift as new AI integrations emerge.

PHASE 1

Auditing Content: What to Look for

PRE-AUDIT QUESTIONS

- How well do you know the content that's living in your Tableau environment currently or would audit results surprise you?
- What do you think your biggest source of your "mess" is? Is it duplicate workbooks/data sources, former employee content, etc.?
- What audit tools or reports do you use today?
- What do you think the hardest content will be to make a decision on?

ENVIRONMENT AUDIT

- Document current Tableau Server version
- Export usage and view statistics from Server Admin. Flag stale content
- Inventory all sites, projects, and workbooks on Server
 - Use [Tableau MCP](#) to gather Tableau data into AI tools by leveraging VizQL Data Service, Metadata API, and other Tableau APIs in one spot
- Document all data source connections and connection types (live vs. extract)
 - Consider published data sources if planning to use automation
- Identify all service accounts, guest, and licensed users
 - Service accounts and guest users are commonly forgotten - these will not migrate automatically
- Document all embedded credentials, scheduled jobs, and their owners

PHASE 1 – Continued

POST-AUDIT QUESTIONS

- Based on your audit results, what criteria would your org use to decide what content makes the cut for migration?
- How do you plan to define “stale” content? Is it 90 days of no views or is it based on the last refresh date?
- Do you plan to use automation tools like the CMT or manually migrate your content?
- Who will physically execute the migration?

OTHER CONSIDERATIONS

- Align with IT/network security team on Tableau Cloud IP whitelisting requirements
- Assess need for Tableau Bridge for on-premises or private cloud data sources
 - *Bridge replaces the Server gateway - plan its deployment and maintenance before migration day*
- Confirm Tableau Cloud license count, site name, and admin credentials
- Define roles: who owns migration, who owns content governance post-migration
- Determine if using automation or manual migration approach
 - *If planning to use the CMT, please use [Getting Started with Tableau Content Migration Tool](#) to check if the CMT version is compatible with your Tableau Server version*

PHASE 2

Triage Framework (Migrate • Optimize • Sunset)

PRE-TRIAGE QUESTIONS

- Are you confident that the reports your organization leverages the most are the most up to date? Or are there multiple versions published?
- Who decides what's valuable and what is not - is that the right group/person to be making that call?
- How will you determine content priority for the migration?

MIGRATE — CRITICAL CONTENT THAT MUST MOVE

- Identify workbooks with consistent high view counts over the last 30/60/90 days
- Confirm there is a clear business owner/purpose for each critical workbook
- Flag workbooks tied to scheduled reports or executive distribution
- Ensure critical workbooks are connecting to healthy/maintained data sources
- Ensure workbook meets internal governance standards

OPTIMIZE — VALUABLE, BUT NEEDS WORK BEFORE MIGRATING

- Identify workbooks with meaningful views but no edits in 6+ months
- Flag workbooks with 3+ versions - consolidate to a single certified version
 - *Version sprawl is a top reason users can't find the 'official' dashboard. Resolve before migrating.*
- Flag workbooks with performance issues, slow load times, or bloated data sources
 - *Moving to Cloud does not fix technical debt - lag present on Server will follow you*
- Assign an optimization owner for each flagged workbook

PHASE 2 – *Continued*

SUNSET — RETIRE AND DO NOT MIGRATE

- Identify workbooks with zero or near-zero views in the last 90+ days
- Flag workbooks whose owner has left the organization
- Flag workbooks with broken or disconnected data sources
- Flag workbooks built for one-time or ad hoc analysis with no ongoing value
- Communicate the sunset plan to stakeholders and set a formal retirement date

POST-TRIAGE QUESTIONS

- Looking at what landed in each bucket – does the distribution feel right, or did external forces influence where things ultimately ended up?
- What's your plan for unclaimed ownership of content during triage?
- Did this process surface any previously unknown gaps in your content?
- How will you track migration progress? The order in which content is migrated?

PHASE 3

Migration Execution

PRE-MIGRATION QUESTIONS

- What criteria would your org use to decide what content makes the cut for migration?
- What is your plan for siloed information that may not exist outside someone's local machine?
- How will you flag and assess shared content across sites/projects?
- How will you bring your end users along on a change this big without losing their trust?

CMT PREPARATION

- Download and configure the Content Migration Tool (CMT)
- Run a pilot migration with a small non-critical project first
- Verify data sources for critical workbooks are accessible from Cloud or via Bridge
- Document any CMT watchouts or unsupported features in your environment
 - Use [CMT Migration Limitations](#) for full list of unsupported content

PHASE 3 – Continued

MIGRATION EXECUTION

- Confirm extract refresh schedules are active in Cloud
- Confirm all data source connections are live and scheduled jobs have migrated correctly
- Re-create prep flows in cloud environment
 - *CMT does not support migrating Tableau Prep*
- Migrate critical workbooks first – flagged in the Migrate tier
- Verify all workbooks open and render correctly in Tableau Cloud post-migration
- Test user subscriptions and alerts for migrated content

USER ACCESS

- Communicate the new Tableau Cloud URL and login method to all users
- Confirm Users can login to Tableau Cloud and are set with MFA
- Audit user roles – Cloud uses a different permissions model than Server
- Confirm guest, licensed users, and service accounts have been re-provisioned

POST-MIGRATION QUESTIONS

- What will your documentation process look like moving forward?
- If your Tableau Server was turned off now, would you feel confident with the content available in your cloud environment today?

PHASE 3.2

Optimization QA

PRE-OPTIMIZATION QUESTIONS

- How much of your current environment was built for the moment vs built to last?
- How do you plan to treat one off or ad hoc dashboards before pushing toward migration?
- Will content marked migrate be moved first, or will you set up parallel workstreams?

CONTENT CLEANUP

- Rebuild or consolidate workbooks flagged in the Optimize tier
- Remove redundant versions - publish a single certified workbook with a clear name
- Replace slow live connections with optimized extracts where appropriate
- Verify cleaned workbooks perform acceptably in Tableau Cloud

TECHNICAL DEBT

- Review migrated workbooks for legacy calculated fields or deprecated functions
- Address any performance lag that existed on Server - it does not auto-resolve in Cloud
 - *Moving to Cloud will not fix technical debt. Any lag you had on Server will follow*

POST-OPTIMIZATION QUESTIONS

- Do any of your workbook reference Server-only features incompatible with cloud?
- Do you have any optimization strategies in place for future state reporting?

PHASE 3.3

Sunset Execution

PRE-SUNSET QUESTIONS

- How do you plan to communicate workbooks identified for deprecation to the broader organization?
- Do you anticipate pushbacks on the reports identified for sunsetting?

RETIREMENT PROCESS

- Notify any remaining content subscribers or users before content goes offline
- Archive sunset-tier workbooks before deletion – do not hard-delete without archiving
- Remove broken/unused data source connections
- Document what was retired and why, for future audit trail

POST-SUNSET QUESTIONS

- How do you plan to organize your audit trail?
- Is this audit trail easily accessible amongst teams?

PHASE 4

Post-Migration Validation

PRE-VALIDATION QUESTIONS

- Are your content owners prepared to sit down and verify the validity of their content? If not them, then who?
- What does “Close Enough” look like for your organization? Are you prepared to standardize this threshold across the organization?

FUNCTIONAL VALIDATION

- Confirm all scheduled extracts have run successfully at least once in Cloud
- Run a side-by-side comparison of key dashboards between Server and Cloud
- Walk through the top 10 most-viewed workbooks with business owners to confirm accuracy
- Validate Tableau Bridge connectivity for all on-premises data sources

NETWORK & SECURITY

- Confirm Tableau Cloud IP addresses are whitelisted in firewall/proxy
- Verify SSO and IdP authentication is working for all user groups
- Test access from VPN, off-network, and mobile to confirm consistent connectivity

PHASE 4 – *Continued*

USER ACCEPTANCE

- Gather feedback from pilot users within first 2 weeks
- Work with the help desk/technical support to address potential and known issues
- Set an official sunset date for the Server environment – do not run both environments indefinitely

POST-VALIDATION QUESTIONS

- How does your organization determine success?
- What should they see within the first 90 days post migration to feel confident in the migration?
- Have you broadly communicated the Server sunset date?
- How confident are you that the users who didn't participate in validation won't surface a new problem the week after Server goes offline?

PHASE 5

Ongoing Governance

PRE-GOVERNANCE QUESTIONS

- How do you plan to identify and surface certified workbooks?
- Is everyone seeing what they are supposed to? What does security look like to your organization?
- Do you expect content owners to change over time? What does your content transition plan look like moving forward?

CONTENT GOVERNANCE

- Create certified collections and workspaces for easy access
- Define a recurring audit schedule (e.g., quarterly) to prevent future sprawl
- Assign a Cloud Site Admin responsible for content governance
- Set a policy for publishing content – who can certify reports, who can publish to production

ACCESS GOVERNANCE

- Document the permissions model for new Admins and Analysts
- Establish an offboarding process
- Schedule periodic review of service accounts and scheduled jobs

POST-GOVERNANCE QUESTIONS

- What does the offboarding process look like to ensure content is reassigned, not abandoned?
- What are some potential pitfalls of your governance framework that would cause processes to be ignored?
- How do you plan to enforce this governance framework so that it sticks?

Move from Server to Cloud with Confidence

Use this guide to assess your current Tableau Server environment and define a clear path to Tableau Cloud without carrying forward unnecessary complexity.

Concord helps teams apply this checklist in real environments, from content audit and triage through migration planning, execution support, and post-migration governance.

THIS INCLUDES:

- Optimizing and securing the environment as part of ongoing governance and performance improvement
- Identifying and sunseting stale or unused content to reduce risk and improve maintainability
- Managing communication pathways and setting clear expectations across the organization, including CoE support where needed
- Helping deprecate legacy Server environments while building stakeholder alignment and buy-in around the transition

If you have questions about your migration path, sign up for a free BI workshop to review your approach with our team.

→ [Connect with Concord to review your migration plan](#)

Contact Us

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