

# Migration to Cloud with Tableau

## SCALE YOUR ANALYTICS OPERATIONS WITH EASE TO INCREASE AGILITY

### What is Tableau Cloud Migration (TCM)?

TCM is the process of transferring your data analytics operations from an on-premises or public cloud-based Tableau Server to Tableau Cloud, a fully-hosted, cloud-native SaaS service. This strategic move increases organisation's agility so it can concentrate on data analysis rather than infrastructure management.



### Billigence's Tableau Expertise



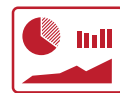
Migration Services



Support Services



Training & Onboarding



Dashboard Consulting



### Benefits of migrating your Tableau operations to cloud:

- Immediate access to the latest data analytics & viz tools, including the latest AI tools
- Major reduction in infrastructure complexity and costs
- Consistent performance regardless of user / data load
- Decreased administrative overhead



## TABLEAU CLOUD MIGRATION PLAN

The Tableau Cloud Migration plan is a structured, multi-step journey designed to seamlessly transition analytics to the cloud. It starts with the '**Discover & Prepare**' step, where the current state is analysed, prerequisites are checked, and key success measures are defined. Next, the '**Content Migration**' step involves setting up cloud and bridge instances and initiating migration. The third step, '**Validate & Test**' step, ensures everything functions correctly through user testing and security validation. The '**Launch**' step marks the official move to Tableau Online, with training for users on new features. Finally, the '**Hypercare**' step provides post-migration support, monitoring server performance to ensure a smooth transition.



- Analyse current state.
- Check prerequisites, establish access and define key success criteria.
- Confirm resourcing and major milestone deliverables.
- Coordinate with IT for user access, database and Tableau Server configuration details.

- Create Tableau Cloud and Bridge instances.
- Commence migration with Dev Server – automatic and manual elements.

- User testing with selected power-users/champions.
- Validate security structures and user access limitations.

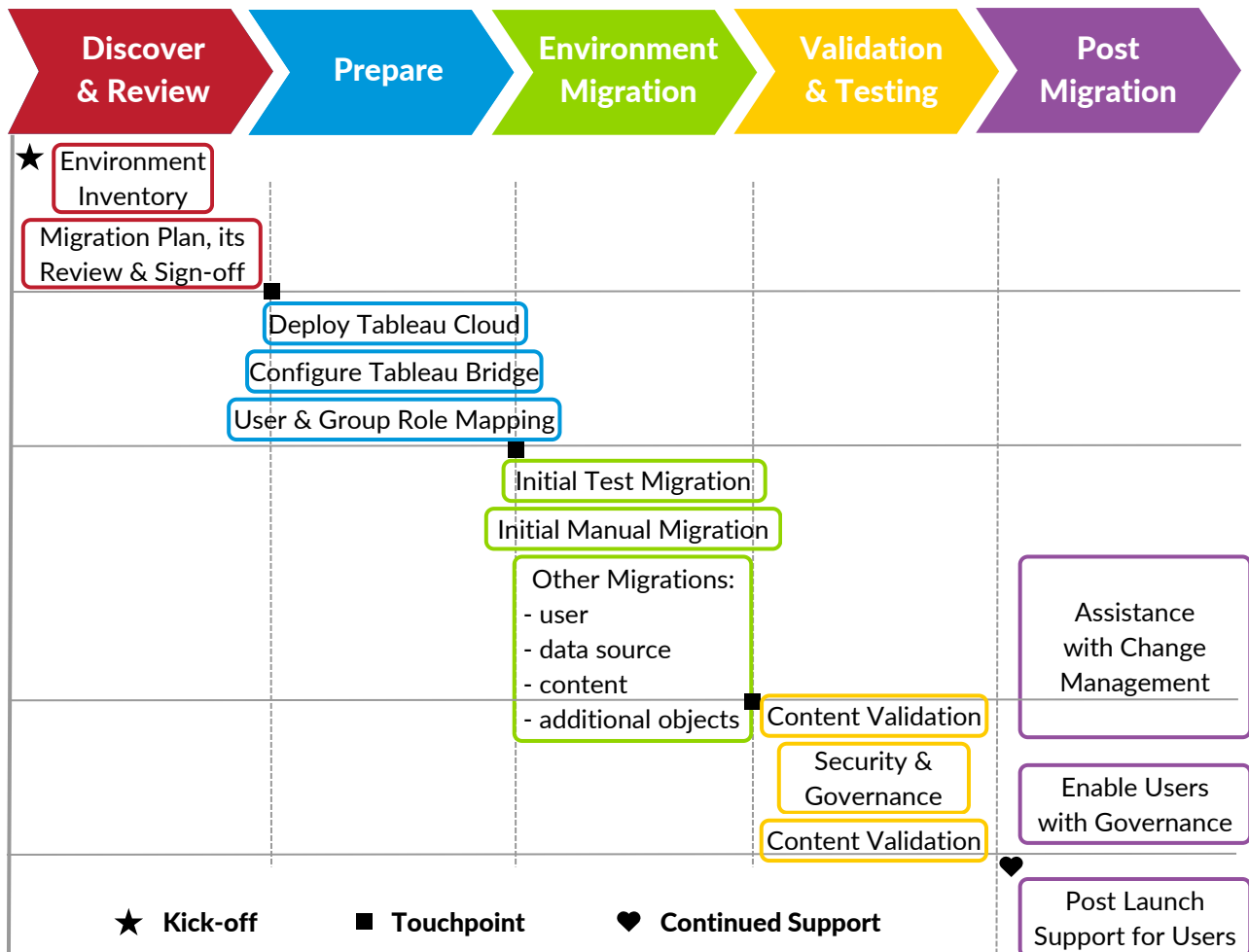
- Transition of Production Server to Tableau Online.
- Upskill Administrators, Creators and Explorers in Tableau Cloud features.

- Produce final report of migration outcome.
- Continued support for any issues that may arise from the migration.
- Monitor server usage and activity during hyper-care period.



## TABLEAU CLOUD MIGRATION TIMELINE

The migration timeline begins with a strategic kickoff, setting the stage for the entire process. It encompasses a series of touchpoints, which serve as milestones to review progress and make adjustments if necessary. Key activities include setting up the cloud infrastructure, configuring user access, and systematically migrating data and content. Throughout the process, rigorous testing and validation are conducted to ensure data integrity and security. The journey culminates with the official launch and shifts into a support phase to assist users in adapting to the new system and to address any post-migration needs. This approach prioritizes continuity and user engagement, ensuring a seamless integration of Tableau Cloud into the business workflow.





## MIGRATION TIMELINE STEPS IN DETAIL

The 'Discover & Review' starts with assessing and planning, while the 'Prepare' phase sets up the cloud environment and user roles. In 'Content Migration' phase, the data & users get shifted to the cloud, while 'Validation & Testing' ensures all content is migrated correctly with proper governance. The 'Launch' phase introduces the cloud setup to users, and 'Hyper-Care' offers ongoing support post-migration, maintaining system performance.

### Tableau Cloud Migration Timing

\* environment dependent

**Discovery & Preparation Phase** 2-6 weeks\* | **Data Migration Process** 2-12 weeks\*



Conduct of a thorough evaluation of the current Tableau Server setup to inform the migration strategy. Determination of the site consolidation needs, audit security protocols, and creation of a comprehensive migration plan for stakeholder review and sign-off.

Set up of the Tableau Cloud environment, establishment of user groups and roles, installation of Tableau Bridge, and configuration of the authorization settings.

Automation of initial migration of select users and content, then manual transfer of associated elements, followed by comprehensive data and user migration post-validation.

Development of a deployment strategy for current Tableau Server users and their training for effective use of the new cloud environment features.

Creation of a comprehensive final report summarising the migration results. Billigence, alongside Tableau, will provide persistent support for emerging post-migration challenges, such as user access and permissions. We'll monitor the server usage closely during the hyper-care phase to maintain system efficiency and address potential issues promptly.