

Insight Direct (UK) Ltd

Salesforce Tableau Platform

- Cloud Software - Digital Marketplace - Lot 2b
- G-Cloud 15



CONTACT INFO

pstenderteam@insight.com

Table of Contents

1. Service Overview	2
2. Service Description - Tableau Server & Tableau Cloud	3
2.1 Product Overview	3
2.2 Service Benefits	6
2.3 Key Features	8
2.3.1 Core Visualization & Analytics	8
2.3.2 Data Connectivity & Preparation	8
2.3.3 AI-Powered Intelligence	8
2.3.4 Collaboration & Governance	8
2.3.5 Deployment Flexibility	8
2.3.6 Developer & Extensibility Features	8
2.3.7 Integration Ecosystem	9
2.4 Key Differentiators	9
2.5 Information Assurance	12
2.5 Data Backup / Restore and Disaster Recovery	16
2.7 On-Boarding	18
2.7.1 Deployment Flexibility	18
2.7.2 Benefit of Flexible Deployment	20
2.7.3 Deployment Guidance	20
2.8 Off-Boarding	21
2.8.1 Termination	21
2.8.2 Data Extraction and removal	22
2.9 Pricing Summary	22
2.10 Service Constraints	24
2.11 Service Management	24
2.12 Customer Responsibilities	25
2.13 Client-side Technical Requirements	25
2.14 Planned Maintenance Windows	26
2.15 Data Centre Locations	29
2.16 Performance	30
3. Service Description - Tableau Next	31
3.1 Product Overview	31
3.2 Service Benefits	31
3.3 Key Features	32
3.4 Platform and Integration Capabilities	32
3.5 Information Assurance	33
3.6 Licencing	34
3.7 Data Centre Locations	34
4. Training	35

1. Service Overview

Tableau: Enterprise Analytics Solutions

Tableau is recognised as a leading data visualisation and analytics platform that transforms complex data into actionable insights. The Tableau portfolio comprises two distinct product families with different architectural foundations and deployment models: Tableau Server / Tableau Cloud and Tableau Next

Tableau Server and Tableau Cloud

These are standalone analytics platforms that operate independently of Salesforce's core CRM infrastructure:

Tableau Server offers flexible deployment options for organisations requiring full control over their analytics environment. It can be self-hosted on on-premise infrastructure or deployed on cloud providers such as AWS, giving clients complete ownership of their data and infrastructure.

Tableau Cloud provides a Software as a Service (SaaS) solution hosted and managed by Salesforce, delivering enterprise-grade analytics without the operational overhead of self-managed infrastructure.

Both platforms support a comprehensive suite of tools including Tableau Desktop for data preparation and visualisation, Tableau Prep Builder for data transformation, Tableau Pulse for automated insights, Tableau Agent for proactive analytics, and Tableau Embedded for integrated analytics experiences.

Tableau Next

Tableau Next represents a fundamentally different approach—it's an end-to-end, agentic analytics experience built natively on the Salesforce Platform. This API-first analytics solution functions as a composable, AI-powered platform that seamlessly integrates with Salesforce CRM data whilst maintaining the flexibility to analyse any data source. By leveraging the Salesforce Platform's infrastructure, Tableau Next delivers contextual insights directly within existing workflows and business processes.

The key distinction is architectural: whilst Tableau Server / Tableau Cloud operate as separate platforms, Tableau Next is deeply integrated into the Salesforce ecosystem, enabling unified data experiences across CRM and analytics workloads.

2. Service Description - Tableau Server & Tableau Cloud

2.1 Product Overview

Tableau Desktop/Web Authoring - Tableau Desktop is the full-features desktop application to create Tableau's visual analytics. It is used by data analysts, data architects and content experts to analyse data and dashboards, reports and other visualisations. It empowers users of any skill set to create rich visualisations and dashboards with an intuitive, drag-and-drop interface. End-users can easily answer their own questions 10-100x faster than traditional BI tools. Tableau's built-in ease-of-use will allow all users to operate with minimal reliance on support from the central IT department. The Customer centrally maintains and enforces data security, ensuring that only those given proper permissions are allowed to access Customer information.

Once the visualisations are developed in Tableau Desktop they are shared to be used by others via Tableau Server or Tableau Cloud. It can be installed on Windows and Mac personal computers (laptops or desktops). A web browser version is only available which does not require an install on a personal computer.

Tableau Prep Builder - Tableau's data preparation tool. Tableau Prep changes the way traditional data prep is performed in an organisation. By providing a visual and direct way to combine, shape and clean data, Tableau Prep makes it easier for analysts and business users to start their analysis faster.

Once the data prep flows are developed in Tableau Prep Builder they are uploaded to Tableau Server or Tableau Cloud and can be scheduled to run automated data flows. Tableau Prep Builder can be installed on Windows and Mac personal computers (laptops or desktops). A web browser version is only available which does not require an install on a personal computer.

Tableau Pulse - is a reimagined data experience that makes data more accessible to everyone regardless of their expertise with data visualisation tools. It streamlines the tracking and analysis of business metrics by leveraging Tableau AI to deliver personalized, contextual, and smart data insights. Tableau Pulse is available for Tableau Cloud users, and leverages the power of [Tableau AI](#) to deliver data in ways that are more personalised, contextual, and smart.

Generative AI enhances each layer of Tableau Pulse, making it easier for all users to discover relevant metrics, create metrics from existing content, understand insights, ask questions, conduct root cause analysis, and tie data to a real-world context.

Tableau Pulse brings the power and flexibility of a Metrics Layer, also known as a *headless BI*—to Tableau's platform, enabling metrics and KPIs to be defined once and then used across the organisation. This not only saves analysts time but ensures teams are aligning to the same trusted numbers thanks to a single source of truth.

Tableau Pulse also provides a Next-Gen Experiences by presenting data using intuitive, [consumer-friendly metrics](#) that are delivered directly to users in their flow of work in Slack, email, Tableau web app, etc., and that can be quickly scaled across the business as users discover, follow, and share relevant metrics much like they would social media content. Generative AI-powered insight summaries help users focus on the data headlines, ensuring that important patterns, trends, outliers, and changes in the data are noticed.

Tableau Agent - is Tableau's AI assistant that helps with data exploration, visualization creation, and analytics across Tableau's various experiences including Tableau Desktop and Tableau Prep. Using generative AI and statistical analysis, Tableau Agent is able to understand the context of your data to create and suggest relevant business questions to help kickstart your analysis. A smart, conversational assistant for Tableau users, Tableau Agent automates data curation—the organisation and integration of data collected from various sources—by generating calculations and metadata descriptions.

Tableau Agent can fill data gaps and enhance analysis by creating synthetic datasets where real data is limited. It helps you anticipate outcomes with predictive analytics that simulate diverse scenarios and uncover hidden correlations. Additionally, generative models can bolster data privacy by producing non-traceable data for analysis.

Fulfilling the promise of generative AI, Tableau Agent presents an efficient, insightful, and ethical approach to data analytics. Think of it as an intelligent assistant integrated into the Tableau suite of products to make everyone successful in their analysis workflow—whether they're an experienced data analyst or a data explorer.

Tableau Server - allows customers to publish dashboards and reports to their end users via a web browser, portal or mobile devices, and to secure and govern the application. It enables users to interactively access a single version of the truth to answer their own questions. With appropriate permission, users can even edit and create new dashboards directly on the web. Tableau Server is a web repository providing IT with centralised security, authentication, data governance, provisioning, policy, and control.

Tableau can be self-hosted by clients, on on-premise infrastructure or on cloud providers such as AWS. It is available for Microsoft Windows and Linux operating systems.

Tableau Cloud - like, Tableau Server, allows customers to publish dashboards and reports to their end users via a web browser, portal or mobile devices, and to secure and govern the application. Tableau Cloud is Tableau's Software as a Service (SaaS) option that provides all the power of Tableau's analytics platform without the complexity of managing servers, updates, or infrastructure - making it ideal for organizations wanting to focus on insights rather than IT operations. Hosting locations are available in regions globally, including the UK. The regional pod architecture ensures that both your live data and backup/disaster recovery infrastructure maintain strict geographic boundaries, giving you confidence in meeting data residency requirements. This regional boundary approach enables:

- GDPR Compliance for European customers
- Data Sovereignty requirements for various countries
- Regulatory Compliance with local data protection laws
- Latency Optimization by keeping data close to users

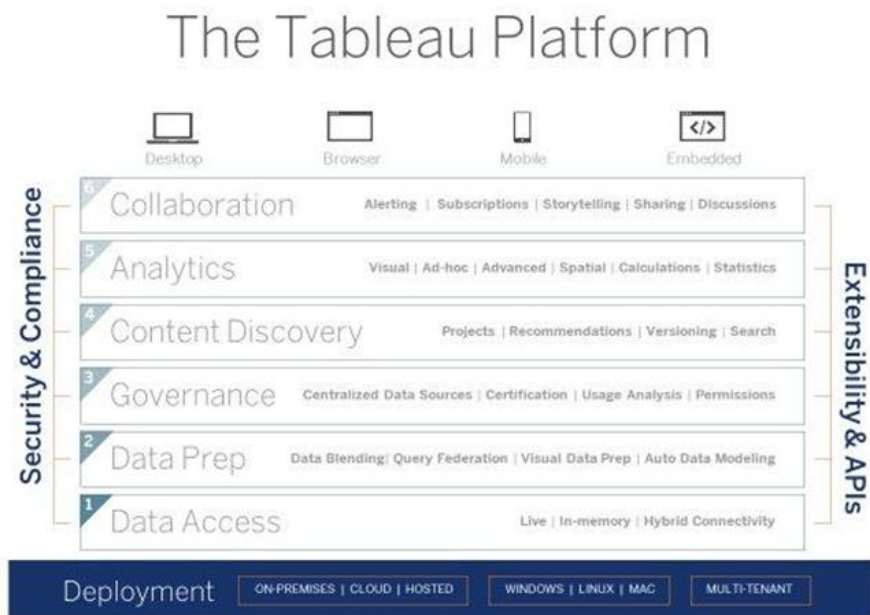
Tableau Embedded - allows customers to embed analytics into your applications, offer analytics as a service as a data product, or embed analytics in web portals or your company intranet—embedding analytics provides the level of access to business intelligence your customers, partners, and employees need.

Embedding Tableau helps you deliver services faster, quickly deploy new analytics content, and fulfil change requests in moments. Use cases for embedded analytics integrations with Tableau, including:

- Simple web pages — Any dashboard published to Tableau Server or Tableau Cloud can be easily embedded in a web page via a simple HTML embed code generated by Tableau. Embed codes are great for sharing data visualisations with large, general audiences. For example, blogs and news sites often use embedded Tableau dashboards.
- Custom web portals — Tableau makes it easy to embed analytics content in custom web portals for in-house employees or externally for customers and partners. Connect to your data and build dashboards in Tableau, then seamlessly deploy the content to your web portal using our JavaScript API. This method gives you full programmatic control of embedded analytics, including preset dashboard filtering, custom interface elements and actions, and endless possibilities with external integrations.
- Third-party applications — Put critical data and interactive analytics where your people are. Embedding visual analytics in the applications your business already uses, like Salesforce or SharePoint, ensures people have the data they need to make informed decisions without needing to learn new software or alter their workflow. Use our Mobile App Bootstrap to bring Tableau analytics to mobile applications, enabling data access and analysis on the go.
- Customer-facing software and data products — An embedded analytics integration with Tableau frees your development team to focus on critical features of your product while ensuring you go to market with the gold standard for intuitive visual analytics. The Tableau platform gives you the flexibility to leverage current security protocols and minimise development costs by

providing solutions for authentication, data access management, and more. And the REST API gives you full programmatic control of backend functionality over HTTP including data source, project, workbook, and user functions.

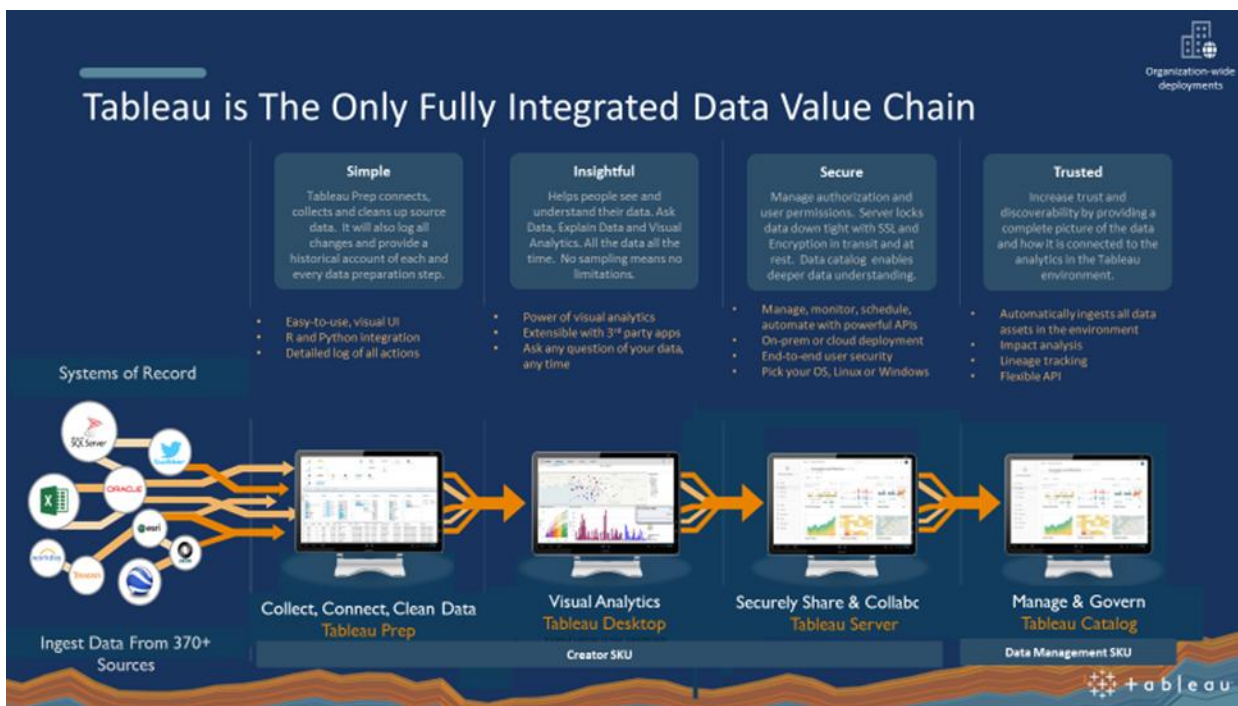
The Tableau platform gives organisations everything they need to empower everyone securely with trusted data – deployment flexibility and choice, extensive data access, powerful data prep capabilities, content and data governance to keep data in the right hands, powerful analytics, collaborative tools to bring data to the centre of every conversation, and even the flexibility to interact with your data in any way you'd like – via the desktop, the browser, a mobile device, or even embedded into other applications.



2.2 Service Benefits

- Singular integrated analytics platform.
- Query language that can translate drag-and-drop actions into database queries, and express the response graphically.
- Data analytics and business intelligence platform that supports Hybrid data connectivity, live and in-memory, with zero coding or scripting required.
- Offers a simple calculation language when custom visualisations are needed.
- Platform to be able to run on Windows or Linux, public cloud (regardless of cloud provider) or on-prem, or as SaaS, so the customer can leverage existing and adapt to future IT investments.
- Consistent user interface and functionality, regardless of the customer's deployment strategy.
- Allows connections to all data regardless of size or complexity, without additional licensing required, with the ability to switch between live and in-memory connections modes with a single click.
- Centralised site roles and permissions to ease the administration process.
- Holistic Data Management offering, including data prep and data catalogue capabilities fully integrated into the platform.

- Data analytics and business intelligence platform that has received Authority-to-Operate (ATOs) approvals to be hosted across all U.S. Federal Government data classification levels and networks, including DoD unclassified (NIPR), secret (SIPR), top secret, and Intelligence Community (ICD-503) networks.



2.3 Key Features

2.3.1 Core Visualization & Analytics

- Drag-and-Drop Interface - Intuitive visual query language for creating charts and dashboards
- Rich Visualization Library - 24+ chart types including maps, treemaps, bullet charts, and custom viz extensions
- Interactive Dashboards - Filtering, drilling, highlighting, and dynamic parameters
- Advanced Analytics - Statistical functions, forecasting, trend lines, and clustering
- Mobile-First Design - Responsive dashboards that work seamlessly across devices

2.3.2 Data Connectivity & Preparation

- 100+ Data Connectors - Native connections to databases, cloud services, files, and web data
- Live & Extract Options - Real-time queries or high-performance in-memory extracts
- Data Preparation - Built-in Tableau Prep for cleaning, shaping, and combining data
- Data Modeling - Relationships, joins, unions, and calculated fields
- Incremental Refresh - Efficient extract updates for large datasets

2.3.3 AI-Powered Intelligence

- Tableau Agent - Conversational AI assistant for natural language queries and insights
- Tableau Pulse - Intelligent metrics monitoring with automated insights and anomaly detection
- Data Guide - AI-powered explanations for data points and outliers using advanced statistical models

2.3.4 Collaboration & Governance

- Secure Publishing & Sharing - Role-based access control and permissions
- Content Management - Organized projects, tags, and metadata
- Row-Level Security - Fine-grained data access controls
- Comments & Annotations - Collaborative discussions on dashboards
- Version Control - Content history and revision management

2.3.5 Deployment Flexibility

- Tableau Cloud - Fully managed SaaS with global pod architecture
- Tableau Server - On-premises or private/public cloud deployment
- Embedded Analytics - White-label embedding in applications
- Developer APIs - REST APIs for automation and integration

2.3.6 Developer & Extensibility Features

- Calculated Fields - Custom business logic and advanced calculations
- Parameters - Dynamic user inputs for interactive experiences
- Extensions API - Third-party integrations and custom visualizations
- Tableau Desktop - Professional authoring environment
- Web Authoring - Browser-based content creation

2.3.7 Integration Ecosystem

- Salesforce Native Integration - Seamless CRM analytics and Einstein Model builder
- Teams and Slack Integration - Dashboard notifications and data alerts
- R and Python Integration - combine Tableau's visualization strengths with the computational power of these programming languages for truly advanced analytics
- Single Sign-On (SSO) - SAML, OAuth, and Active Directory integration
- Third-Party Connectors - Extensive partner ecosystem for specialized data sources

2.4 Key Differentiators

- Tableau empowers individuals.
- Delivers rapid Return on Investment (ROI) for customers.
- Has a low Total Cost of Ownership (TCO).
- Designed to be easy to use for all skill levels.
- Encourages visual exploration at every stage of use, not just dashboards
- Drives far greater chances of insight discovery.
- Is a complete data and analytics platform, without requiring an extensive list of additional software investment.
- Provides tools to ensure that IT can focus on governance of analytics

- Works with existing infrastructure / tools & services, with connectors to 250+ sources and the ability to deploy almost anywhere.
- Offers customers both analytical leadership and partnership, ensuring long term success for users.
- Tableau's only focus is making sense of data, with over 5K employees innovating and serving customers.
- Has the largest analytics community, with more than one million members of the Tableau community.
- Only Tableau offers a visual language (VizQL) which ensures customers can apply visual analysis to the entire scope of their process.

Trial Service

Trials of the Cloud platform can be facilitated; please visit the below link to find details of how to register your interest: <https://www.tableau.com/en-gb/trial/tableau-software>

Accessibility

Tableau's mission is to help people see and understand data. This mission applies to all people, regardless. Tableau understands the importance of making software that is accessible to everyone and is committed to making our products delightful and accessible for all users.

Tableau has developed best practices for content creators to use when creating accessible dashboards and reports, which can be found in the [Tableau documentation](#). Tableau is happy to provide a Voluntary Product Accessibility Template (VPAT) or Agency PAT upon request.

Industry Leadership

Tableau continues to be a leader in the business intelligence software market for over 13 years, as demonstrated in Gartner's 2025 Magic Quadrant for Analytics and Business Intelligence Platforms. In 2025, Tableau introduced Tableau Next, an agentic analytics platform built on an open lakehouse architecture that unifies structured, unstructured, and streaming data. It features an AI semantic layer for interpreting data in a business context and uses agents to suggest and curate semantics.

Gartner views "Completeness of Vision" to include report writer functionality which is typically the basis of many legacy solutions still on the market today. While Tableau does include report formatting capabilities, its strength lies in the ability of everyday users to analyse and understand their data on their own, without the need for advanced "scripting" or programming skills, and minimal dependence on a BI guru.

What sets Tableau apart in 2025 is its evolution beyond traditional BI into agentic analytics. The platform now delivers visualizations embedded in users' workflows, supports conversational analytics through agents, and connects insights to actions via an integrated workflow engine [1]. With Tableau, end-users can perform their own analysis using virtually any data source they have been given permission to access, now enhanced with AI-powered assistance for more intuitive data exploration.



Gartner Magic Quadrant for Analytics and Business Intelligence Platforms

Tableau's Breakthrough Technology

A Visual Query Language for Data: Spun out of Stanford in 2003, Tableau combines advances in computer graphics and database query to change the way you see and understand data. The five core design principles of Tableau's visual analysis products are: Easy User Interfaces, Easy Data Exploration, Expressiveness, Visualization Best Practices **and** Database Independence. All of these principles are embodied in or enabled by Tableau's VizQL™.

VizQL™ -- Making visual analysis real

Tableau's first breakthrough was VizQL, a technology that allows you to visualise data of any size simply by dragging and dropping. The innovation is a patented software language that translates your drags and drops into an optimised database query and then displays the database's response graphically.

This creates a fundamentally new way of interacting with databases and spreadsheets. People can now do data visualisation and data analysis as a single action, streamlining the process of human visual analysis. The right presentation of data makes it easy to organise and understand the information. Computational support for visualisation gives the user the ability to iterate on different presentations of data, asking new questions and exploring it interactively.

The Data Engine -- Designed for massive data

The next breakthrough was Tableau's Data Engine, which gives users the ability to perform ad-hoc analysis of massive data in seconds. The Data Engine combines advances in database and computer graphics technology to let you visually query massive data in a truly ad hoc fashion.

With huge data comes huge possibilities. When we built the Data Engine, we focused on data layout and algorithms that allow Tableau to realise speed-of-thought performance. You can work with all your data in memory on a laptop or mobile device and get query responses in seconds or less. For more information on the technology that makes Tableau software so unique, please visit the following: <http://www.tableau.com/products/technology>

2.5 Information Assurance

Tableau helps IT build, manage, and share data centrally through Tableau Server. Specific data sources can be certified by the data experts to ensure users are using the right data for their analysis, and that the organisation is working with accurate and reliable data to drive their decisions. Permissions can be handled at the data source level to ensure only the right people can see the right information. You also get a wealth of information as to who is using what data source for what analysis, so you can continue to shape and improve on what is being offered to the business.

Governance

Centralized data sources

Certification

Permissions

Usage Analysis

Name	Views: All	Work
Carrier Logistics	38,960	28
Case Reports	35,496	20
LAST EXTRACT Today 05:34 AM	3	16
Defects Store	51,201	5
Event Leads	36,497	35
Indicators	34,475	28
Network Status	37,611	28

Tableau's approach to keeping your data safe and secure at scale is to leverage all your existing technology standards so you can use the same security protocols consistently across your landscape. This keeps your data and content safe and also simplifies the management task required from IT. From authentication and

authorization protocols like Active Directory, SAML and Kerberos, to data and network security with SSL and permissioning, we provide the methods to implement security. We also maintain a comprehensive set of IT controls and audits to ensure we are meeting core compliance regulations.

Security & Compliance

Leverage existing technology standards to securely manage the platform

Authentication	LOCAL ACTIVE DIRECTORY SAML/KERBEROS/OPENID TRUSTED TICKETS
Authorization	SITE ROLE DEFAULT & CUSTOM PERMISSIONS INHERITANCE & OVERRIDE
Data Security	DATABASE USER & SERVICE ACCOUNT CONTENT PERMISSIONS TDE BINARY
Network Security	CLIENT-SERVER SSL DATABASE DRIVERS STRINGENT TRUST MODEL
Compliance	SARBANES-OXLEY SOC 2 REPORT EU-US PRIVACY SHIELD

Tableau understands that data is among the most strategic and important assets an organisation has. We put the highest priority on maintaining the security and privacy of our customers' data. Tableau enterprise-level security features manage operational security, user security, application security, network security, and data security.

To learn more, see the following resources on Tableau's website <https://www.tableau.com> and the following whitepaper <http://www.tableau.com/learn/whitepapers/tableau-online-security-cloud>

If you sign into the Tableau Cloud using TableauID credentials, you can use them also to sign in to the Tableau website.

Operational Security

The Tableau Cloud infrastructure is hosted in AWS data centres as part of the Salesforce Hyperforce program. This means that Tableau Cloud benefits from the inherent security that is part of AWS. This includes not only the physical security aspects, but also the resilience of the 3 Availability Zone region model, Infrastructure as Code, immutable infrastructure, zero trust architecture, encryption at rest and in motion and other security attributes.

These are described in more detail in the Tableau Cloud on Hyperforce Security White paper which is available from here:

<https://www.tableau.com/learn/whitepapers/tableau-cloud-on-hyperforce-security>

Your data is your own, even when stored in Tableau Cloud. Only your authorised users have access to data or workbooks stored in Tableau Cloud —Tableau employees and other Tableau customers do not.

Tableau does have access to and may monitor metrics that have to do with system utilisation, account status, and performance.

User Security

The only people who have access to your site and content are the users that your site's administrators have explicitly added to your site. If a user is no longer authorised in your system, simply remove that person's user account to revoke access to Tableau Cloud and your content stored there.

Tableau Cloud enforces an idle session timeout of 2 hours. This means that users will need to re-authenticate after not using Tableau Cloud for a period of 2 hours. The idle session timeout value is a system setting that cannot be modified.

Tableau Account

Your Tableau Account provides secure, unified authentication to Tableau's website and services.

Some of the security features of Tableau Accounts are:

- User sign-in is secured by HTTPS.
- Accounts are locked for a period of time after repeated unsuccessful sign-in attempts.
- Accounts are validated by user email to prove identity.
- Passwords are stored using cryptographic protection. Tableau employees and contractor do not have access to plain-text passwords.
- Tableau supports Multi-Factor Authentication (MFA).

Tableau Cloud site administrators have the option of using your organisation's identity provider for added control and convenience of users. For more information, see [Authentication](#).

Roles and Permissions

Site roles are assigned to a user and determine the maximum capabilities a user has access to (For example, a user with a site role of Viewer will never be able to download a data source even if that capability is explicitly granted to them on a specific data source.) Permissions consist of a set of capabilities that apply to a group of users or a user on a specific piece of content (project, data source, workbook etc.)

Network Security

All communication between users and Tableau Cloud is encrypted using SSL for secure transmission of data. Tableau Cloud supports TLS 1.2 and higher. For more information about TLS support, see the [Tableau Knowledge Base](#). A variety of encryption techniques ensure security from browser to server tier to repository and back. In addition, Tableau has many built-in security mechanisms to help prevent spoofing, hijacking, and SQL injection attacks, and it actively tests and responds to new threats with monthly updates.

Application Security

The Tableau Cloud environment is hosted in a multi-tenant configuration providing separation of users, data, and metadata across customers.

Data Security

Tableau Cloud eliminates the need to implement VPNs or tunnels into your corporate environment. Many data sources can be captured as extracts and then refreshed on a regular basis. To use automatic refreshes, you need to embed credentials in the connection information for the data source. For Google and Salesforce.com data sources, you can embed credentials in the form of OAuth 2.0 access tokens.

Tableau provides a User Filter capability that can enable row-level data security. User filters allow you to set a filter on your data based on the identity of the person viewing the data. For example, the Western Sales Director could see results for sales in the West but not for other regions. Row level security can be managed either at the workbook level or centrally using Data Policies for centralised row-level security. For information on the alternatives you can use to implement row-level security in Tableau, see an [Overview of Row-Level Security Options in Tableau](#).

For more details on security and keeping secure, please refer to the web page: <https://help.tableau.com/current/server/en-us/security.htm>

2.5 Data Backup / Restore and Disaster Recovery

For Tableau Cloud Customers, your site is backed up in the selected region on a regular basis. You can verify your site location by signing in to Tableau Cloud, noting the host name at the beginning of the URL, and then comparing it to the Site Location column in [Tableau Cloud IP addresses for data provider authorization](#). For example, URLs that begin with 10ax, 10ay, 10az, us-west-2b correspond to the US West - Oregon region. Data corresponding to a site in the US-West Oregon region is stored and backed up in Oregon.

For Clients deploying Tableau onto on premises or cloud infrastructure/s, backing up your server should be part of your regularly scheduled server maintenance. Backups provide peace of mind because they allow you to restore the server configuration and content to a previous state if anything unexpected happens.

During installation and configuration of Tableau Server, you should create backups at several key points to save yourself extra work if something goes wrong. We will point out the places when you should create a backup throughout this guide.

Back up Tableau data

A proper backup of your Tableau Server installation saves all your configuration information, user information, and content.

Even if you're already making backups of your server or software using third-party utilities or snapshots, you still need to follow this procedure. The only way to restore Tableau Server to a previous state is from the files you will generate in the procedure below.

As a matter of safety, you should never keep your backup files on the same computer you are backing up, in this case the computer that is running Tableau Server. Copy them to a separate location so that it is available if something happens to your Tableau Server computer.

For further detail on the back-up of your Tableau Server click link below.

https://help.tableau.com/current/server/en-us/db_restore.htm

2.7 On-Boarding

2.7.1 Deployment Flexibility

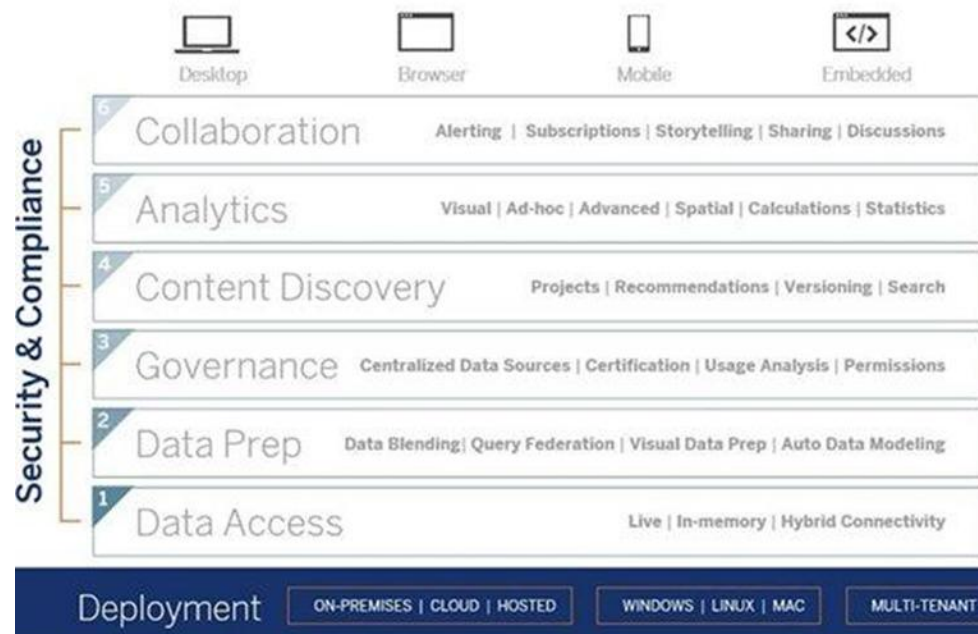


Tableau offers a multitude of ways a customer can deploy our data visualisation software to best fit their needs. Tableau's strength is that it can fit into

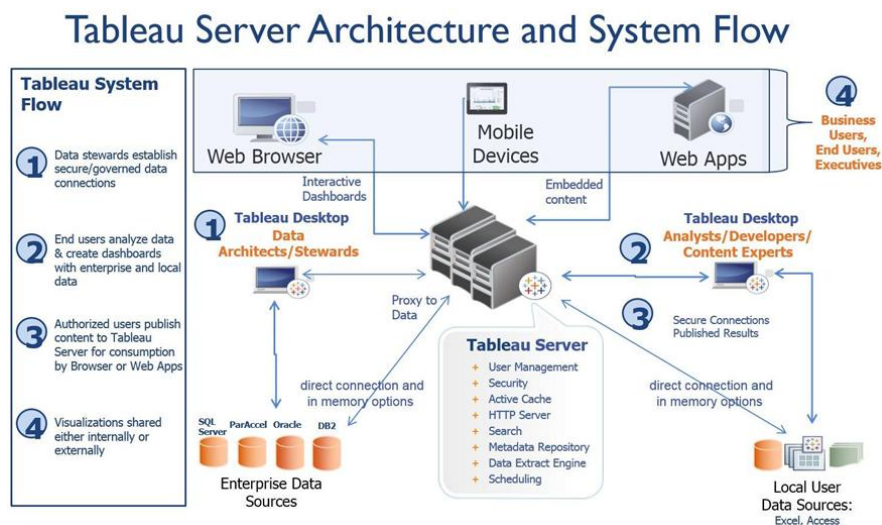
- Data at the Tactical Edge: Tableau Desktop and Tableau Prep Builder can be installed on customers laptops/desktops. This allows users to be able to work on both data visualisations and data cleansing wherever they are: on a plane, at home, or on the back of a Humvee. Users can be connecting live to data or take an extracted copy of the data in order to work with or without an internet connection.
- Tableau Server deployment options
 - o Tableau provides Server Administrators the ultimate flexibility in deployment options. A Tableau server can be installed in an On Premise Data Center, in a Public Cloud Data Center or be hosted with Tableau through Tableau Cloud.
 - o Tableau on a Public Cloud Data Center supports Amazon Web Services EC2 and C2S. Microsoft Azure, Google Compute Engine.
 - One-Click installation is available from both AWS and Microsoft Azure marketplaces
 - Conversely, customers can bring their own licences and install Tableau through a traditional install process.
 - o Tableau on DISA milCloud. Tableau can be installed onto DISA's milCloud 2.0 platform.
 - o Tableau supports Windows, MAC and Linux deployments on 64 bit operating systems. This allows the server administrator to have the flexibility to install on their operating system of choice and not force them to install on non-standard operating systems
 - Tableau Desktop and Tableau Prep Builder can be installed on either a Windows or a MAC operating system
 - o Tableau Server Multi-tenancy: One of the common issues organisations and programs have is finding a place where they can install server software. While public clouds are starting to become accepted within the Federal marketplace, not all organisations have authorization to utilise them. In addition, many data centres are already at maximum capacity and do not have the room to install additional software. Tableau provides the flexibility to allow support for multi-tenancy within a single server installation. This means that multiple organisations can utilise the same server without requiring each organisation/program to buy and install on their own server. With Role Based Access capabilities within Tableau Server, each organisation can be limited in what visualisations and data they can see.
 - o Tableau Server environments: With the purchase of a Tableau Server production licence, users are authorised to install that licence on three environments (1 Production Server, 2 Non-Production Servers). This is a huge cost savings to organisations/programs as most software products require purchasing of any additional non-production servers. Additional environments can be purchased if more than 2 are needed. Each server can be identically sized to the authorised number of users or cores. Non-Production servers can be utilised for Backup/Disaster Recovery (cold-site backup), load testing, REST API development, version upgrade testing, JavaScript SDK development and user syncing.

2.7.2 Benefit of Flexible Deployment

- Enable users to ask their own questions of the data without requiring IT assistance
- Connects to all major data sources (databases, Big Data, cubes, text, desktop data, etc.)
- Requires no fixed data model, cube, universe, or meta layer and no modelling exercise
- Easily create simple or complex calculations plus stats integrations (R, SAS, SPSS)
- Flexible architecture supports direct connection or optimised extract queries
- Include built in visualisation best practices
- Drill down into transactional data
- Collaborate with colleagues by sharing modified content or entering commentary
- Allows users to seamlessly blend or integrate data from disparate sources
- Publish dashboards, reports, visualisations to web browsers, mobile devices and web portals
- Editing and creation of worksheets and dashboards over the web
- IT has centralised security, authentication and governance
- Leverage CAC Card, Active Directory, SSO, Kerberos and PKI security methodologies
- Supports multi tenancy so multiple divisions or teams can use a single Tableau Server

2.7.3 Deployment Guidance

The following diagram offers a view of how Tableau is typically deployed:



- **Data Architects/Stewards** – will define and establish the data warehouse and create the data connections to allow Tableau access to the data
- **Analysts/Developers/Content Experts** – will build and maintain required Dashboards... the initial set of dashboards and reports are created using Tableau Desktop; these can be updated and added-to as needed

- **Content is published to Tableau Server** – all security, access controls, scheduling of updates to dashboards, alerts, etc. are established and maintained
- **Dashboards and Reports** – made available as needed via Tableau Server; formatted and displayed as needed by the end-user; can be embedded in websites or viewed and analysed via interactive dashboards using the web-based capabilities of Tableau Server.

2.8 Off-Boarding

Off-boarding from the service is as simple as exporting and downloading your data and metadata if you choose to do so. We provide your data in an industry standard readable format to make it as easy as possible for you to migrate to another service if you wish to do so.

2.8.1 Termination

Details of termination options and implications are contained in our Salesforce Supplier Terms and Order Form Supplement for Tableau Products, see here:

https://www.salesforce.com/content/dam/web/en_us/www/documents/legal/Salesforce_MSA.pdf
https://mkt.tableau.com/legal/Order_Form_Supplement_for_Tableau_Products_March_2022.pdf

The Supplier would never terminate except for buyers' material breach of the Call-Off Contract and the Salesforce Supplier Terms.

2.8.2 Data Extraction and removal

With a commercial model that requires customer trust to be at the core of everything we do, Salesforce also helps ensure that our customers can exit our service with open and transparent processes and clearly defined commercial considerations. Further detail relating to an exit strategy can also be discussed on understanding the nature of any potential solution.

2.9 Pricing Summary

Comprehensive pricing details can be found in our separate pricing document.

Licensing Summary

Subscription Pricing

When customers purchase a Subscription Licence, they receive rights for a specific, limited period of time, during which they are allowed to access and use the licensed Software. At the expiration of the term, the customer must either renew the Subscription licence to use the Software or, alternatively, stop using the Software. Tableau includes Support and Maintenance Services with the sale of all Subscription Licences, and these charges are non-optional. Subscription licensing allows a client to reduce the upfront investment required, allows you to deploy and scale at your own pace, and use OPEX funding.

Licensing Options

Tableau has introduced role-based licensing which will give the customer the most flexibility in licensing different types of users as well as a cost-effective manner to licence those users based on capability needed. For more information on our licensing please visit: https://help.tableau.com/current/server/en-us/license_server_overview.htm

Tableau has identified three types of user **“Roles”**: **Creators**, **Explorers** and **Viewers**.

The Creator

Creators are anyone in your organisation who connects to sources of data and crafts that data into something useful for themselves and others. In your organisation today, they likely create reports and distribute them through email or a share drive. They are performing ad hoc analysis to answer deeper questions of their data. They are your data power users.

The Explorer

Explorers are your modern business users - your mobilising force for change. They may not have analyst in their title, but they're comfortable with data. They're looking to move their businesses forward and need to probe deeper into the data to find answers to their own questions. These answers are often outside the confines of pre-built reports.

The Viewer

Viewers use data to inform and improve the decisions they make. Viewers can be anyone from team members who need data to perform many of their daily tasks, to people managers who need to see how their teams are progressing on important projects, to the CEO, who needs high-level metrics about the health of the business.

The diagram below shows the capabilities of each user role:

Tableau Creator	Tableau Explorer	Tableau Viewer
INCLUDES: Tableau Desktop Tableau Prep A Creator license of Tableau Server or Online	INCLUDES: An Explorer license of Tableau Server or Online	INCLUDES: A Viewer license of Tableau Server or Online
• Connect to new data • Create new data flow (.tfl) with Prep • Create and publish new data source to Server/Online • Full analysis capabilities in Tableau Desktop • Web-based authoring through Server/Online • Everything in Explorer	• Access Tableau via the browser • Connect to published data sources • Create new content, or edit existing content and publish to Server/Online • Download underlying data • Create and share custom views • Collaboration features like discussions, alerts, subscriptions	• Access Tableau via the browser, or directly with embedded content • Interact with existing content published to Server/Online • Download summary data • Download visualizations as images • Limited collaboration features

Customers must upgrade to 2018.1 to take advantage of the new offerings.

Caveat for Core based model

2.10 Service Constraints

Here are some key considerations we wish to highlight; a full list is contained in our Supplier Terms here:

https://www.salesforce.com/content/dam/web/en_us/www/documents/legal/Salesforce_MSA.pdf
https://mkt.tableau.com/legal/Order_Form_Supplement_for_Tableau_Products_March_2022.pdf

Usage Limits

- Services and content are subject to usage limits, including, for example, the quantities specified in order forms.
- A user's password may not be shared with any other individual.

If you exceed a contractual usage limit, we may work with you to seek a reduction in your usage so that it conforms to that limit. If, notwithstanding our efforts, you are unable or unwilling to abide by a contractual usage limit, you will execute an order form for additional quantities of the applicable services or content promptly upon our request.

2.11 Service Management

Tableau offers several support levels to help meet the service needs of all customers. Details can be found here: <https://www.tableau.com/en-gb/support/services>

- Standard Support is included with a subscription purchase, the first year of a perpetual licence or with Annual Maintenance Renewal after the first year of a perpetual licence.

- [Extended Support](#) enables your organisation to avoid or reduce downtime and expedite the value of your investment through accelerated response times and the additional availability of 24 x 7 weekend support for critical P1 issues.
- Premium Support provides complete, proactive account care you can rely on. Premium Support provides a comprehensive set of resources, extended availability and the fastest response time to service issues with 24 x 7 support for P1 and P2 issues. For more information, see [Tableau Server Premium Support Data Sheet and Tableau Cloud Premium Support Data Sheet](#).

2.12 Customer Responsibilities

Customers are responsible for obtaining access to Tableau, and that access may involve third-party fees (such as Internet service provider or airtime charges). In addition, you must provide and are responsible for all equipment necessary to access the Service.

Customers are responsible for ensuring relevant training paths are provided for staff on the relevant Tableau service/s.

2.13 Client-side Technical Requirements

The Tableau Cloud is a Software as a Service (SaaS) delivery model and therefore relevant provision for internet access and personal devices is required.

Deployments of Tableau Server can be onto Windows and Linux operating Systems, including:

- Microsoft Windows Server 2016, 2019 (x64)
- Microsoft Windows Server 2022 (Tableau Server 2023.3.1+)
- For the latest release of Tableau Server: Alma Linux 8.x and 9.x, Amazon Linux 2023, CentOS Stream 8.x and 9.x, Oracle Linux 8.x and 9.x, Red Hat Enterprise Linux (RHEL) 8.3+ and 9.x, Rocky Linux 8.x and 9.x, Ubuntu 20.04 LTS, 22.04 LTS, and 24.04 LTS, all on x86-64 chipsets only (ARM-based processors are not supported).
- For a table showing Linux distro support across all supported Tableau Server versions, please see our [documentation](#)
- CPUs must support SSE4.2 and POPCNT instruction sets

The minimum configuration recommended for production usage of Tableau Server is based on these hardware specifications:

- 8 physical cores / 16V-CPU (e.g. AWS)
- 128 GB system memory
- 50 GB minimum free disk space

For complete technical specifications, please see <https://www.tableau.com/en-gb/products/techspecs#server>

2.14 Planned Maintenance Windows

Applies to: Tableau Cloud

Tableau Cloud undergoes periodic maintenance to sustain the infrastructure supporting Tableau Cloud services and deliver enhanced features and functionality. As a Tableau Cloud administrator, you don't have to worry about managing updates to your site. But we recommend reviewing the reserved maintenance schedule to plan for scheduled downtime and to avoid service interruptions.

To ensure our products continue to help people use data to solve problems every day, Tableau is constantly innovating. We ship new features and functionality three times a year (Winter, Spring, Summer). For more information about releases, see [Tableau Cloud release cadence](#) below.

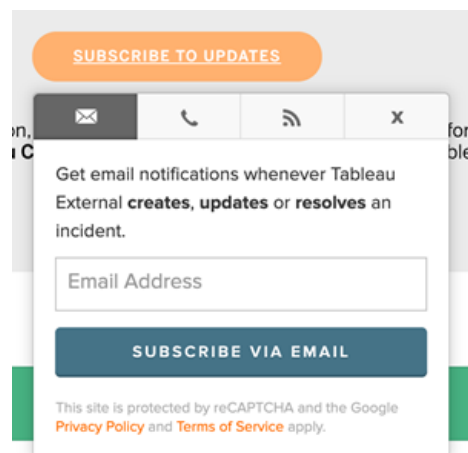
Maintenance communication

Tableau communicates system maintenance through the Tableau Trust page and notification emails to site administrators.

Tableau Trust notifications

Tableau Trust is where all Tableau Cloud status updates are posted. Status updates include system maintenance, as well as reported incidents that may affect the use of Tableau Cloud. You can quickly check the status of your Tableau Cloud instance by visiting the Tableau Trust page, or by subscribing to Trust to stay informed.

To subscribe to Trust, simply go to <https://trust.tableau.com>, and click **Subscribe to updates**. You can receive updates by email, SMS message, or RSS notifications whenever Tableau creates, updates, or resolves an incident.



Site Administrator emails

Tableau Cloud users with the Site Administrator role will automatically receive notification emails about their site. Emails include system maintenance and reported incidents that may affect the use of Tableau Cloud.

Notification emails will include the date and time, name of the Tableau Cloud instance, type of maintenance scheduled, impact to users, and estimated time to completion.

Reserved system maintenance schedule

Tableau has reserved system maintenance windows for sustaining the security, availability, and performance of the infrastructure supporting Tableau Cloud services. The reserved maintenance schedule will help you plan for scheduled downtime and avoid service interruptions to your Cloud site. While there is a predefined window in which maintenance can occur, there may be months when maintenance is not required.

When maintenance is scheduled, we publish the dates and times of the maintenance windows on the Tableau Trust site. For maintenance that impacts an entire Tableau Cloud instance, Trust notifications are sent to subscribers and site administrators via email. Notifications are sent when the maintenance schedule is posted to Trust and 14-days before the maintenance will occur. Trust notifications will also be sent at the start and end of each maintenance and 48 hours prior as a reminder.

In the event that we need to reschedule maintenance, the maintenance record will be updated on the Trust site, and an email will be sent to Trust subscribers.

Note: If priority maintenance is required, Trust subscribers and Tableau Cloud site administrators may be notified less than one week in advance.

Reserved System Maintenance Windows				
Region	Instance	Interval	Local Time	UTC
United States - West	10AY, 10AZ, UW2B, prod-uswest-c	1st monthly weekend 3rd monthly weekend	Saturday, 08:00 - 14:00 PST	Saturday, 16:00 – 22:00
United States - East	prod-useast-a, prod-useast-b, useast-1, prod-useast-c	1st monthly weekend 3rd monthly weekend	Sunday, 11:00 - 17:00 EST	Sunday, 16:00 – 22:00

Europe	DUB01, EW1A, prod-uk-a, prod- ch-a	1st monthly weekend 3rd monthly weekend	Saturday, 02:00 - 08:00 CET	Saturday, 01:00 – 07:00
Canada - Quebec	prod-ca-a	1st monthly weekend 3rd monthly weekend	Sunday, 11:00 - 17:00 EST	Sunday, 16:00 – 22:00
Asia Pacific - Japan	prod- apnortheast-a	1st monthly weekend 3rd monthly weekend	Sunday, 01:00 - 07:00 JST	Saturday, 16:00 – 22:00
Asia Pacific - Australia	prod- apsoutheast-a	1st monthly weekend 3rd monthly weekend	Sunday, 03:00 - 09:00 AEST	Saturday, 16:00 – 22:00
Asia Pacific - Singapore	prod- apsoutheast-b	1st monthly weekend 3rd monthly weekend	Sunday, 00:00 - 06:00 SGT	Saturday, 16:00 – 22:00
Asia Pacific - Indonesia	prod- apsoutheast-c	1st monthly weekend 3rd monthly weekend	Sunday, 23:00 - Monday, 05:00 WIB	Saturday, 16:00 – 22:00

Asia Pacific - India	prod-in-a	1st monthly weekend 3rd monthly weekend	Saturday, 22:00 - Sunday, 04:00 IST	Saturday, 16:00 - 22:00
Asia Pacific - South Korea	prod-kr-a	1st monthly weekend 3rd monthly weekend	Sunday, 01:00 - 07:00 KST	Saturday, 16:00 - 22:00

2.15 Data Centre Locations

Tableau Cloud is hosted on Amazon Web Services (AWS) and is structured so that you can choose the region where your site, and its data, is stored. As a new customer, you can select one of the following regions during the site setup process:

Territory		Region
Asia	Asia Pacific	Australia
	Asia Pacific	India
	Asia Pacific	Indonesia
	Asia Pacific	Japan
	Asia Pacific	Singapore
	Asia Pacific	South Korea
Europe	EU West	Germany

	EU West	Switzerland
	Europe West	UK
North America	Canada	Quebec
	US-East	Virginia
	US-West	Oregon

Please our website for [updated list of locations](#)

2.16 Performance

Full details are contained in our Master Subscription Agreement and Order Form Supplement for Tableau Products, please see here:

https://www.salesforce.com/content/dam/web/en_us/www/documents/legal/Salesforce_MSA.pdf

https://mkt.tableau.com/legal/Order_Form_Supplement_for_Tableau_Products_March_2022.pdf

3. Service Description - Tableau Next

3.1 Product Overview

Tableau Next is defined as an end-to-end, agentic analytics experience and a flexible, API-first analytics platform. It is built on the Salesforce Platform and functions as a composable, AI-analytics platform designed to transform any type of data into actionable insights wherever work happens.

Tableau Next is the expansion and next evolution of the Tableau portfolio, ushering in the agentic analytics era. It achieves its functionality through deep integration with:

Agentforce: The world's first digital labor platform, which Tableau Next enriches with pre-built analytics skills. The analytical engine that powers accurate, reliable answers and makes conversational analytics possible is Tableau Next.

Data Cloud (Data 360): Serving as the unified data layer. Tableau Next relies on data in Data Cloud for ingestion and queries.

Tableau Semantics: Salesforce's AI-infused semantic layer, which provides the trusted semantic layer and unified business logic for context-aware AI.

Tableau Next is structured around workspaces, which serve as collaborative environments for analysts to create and organize analytic assets such as data objects, semantic models, metrics, visualizations, and dashboards.

Please see following line for Tableau NEXT documentation

<https://help.salesforce.com/s/articleView?id=analytics.tua.htm>

3.2 Service Benefits

Tableau Next delivers actionable insights to your entire organization and is designed to empower every user to make data-driven decisions.

Key benefits include:

- **Enriching Agents and Augmenting Humans:** Tableau Next augments human users and enriches AI agents across workflows using pre-built analytics skills.
- **Delivering Trusted, Accurate Insights:** It sets a trusted foundation for accurate AI with its semantic layer. By leveraging curated Semantic Models, insights and visualizations are accurate, trusted, and aligned with the organization's business definitions.
- **Accelerating Time to Insight:** The service accelerates data analysis by offering self-serve analytics empowered by AI-powered features, such as relationship suggestions. It replaces traditional BI challenges like inaccurate responses and information overload with features that deliver visualized insights, clarify intent, recommend next steps, and understand business context.

- **Unified and Governed Data:** It centralizes data and metrics in a single, governed layer for easier analysis and increased efficiency.
- **Seamless Integration and Reusability:** Tableau Next provides unified analytics that deliver a seamless experience in the flow of work across CRM, mobile, and Slack. It enables users to create, share, and reuse analytics assets seamlessly on an open, API-first platform.

3.3 Key Features

The underlying architecture of Tableau Next consists of several fundamental layers built on the Salesforce Platform: the Data Layer (Data Cloud), Tableau Semantics (Semantic Layer), Visualization Layer, and Action Layer.

Pre-built Analytics Skills (Agentforce for Analytics)

Tableau Next provides pre-built analytics skills—packaged as Agentforce topics and actions—to empower every user and enrich every agent. These skills are available within the "Agentforce for Analytics" template

Concierge - Business Users: Enables trusted Q&A and conversational analytics. It allows users to ask questions in natural language and receive trusted, contextual, and visual answers, identify root causes, and suggest next-best actions.

Data Pro - Analysts: Accelerates data preparation and semantic modeling. It assists in defining data relationships through suggestions and creating new metrics using Calculated Field Creation in natural language.

Inspector - Business Users: Delivers proactive insights and alerts. It provides automated alerts about important changes to metrics

3.4 Platform and Integration Capabilities

Tableau Semantics: Provides the framework for defining, governing, and querying business metrics. It enables the creation of Semantic Models, which contain the data model, relationships, and semantic definitions.

Workspaces: The organizational unit where analytical assets are created, connected to data (either from Data Cloud DMOs/CIOs or CSV files), and managed collaboratively.

Marketplace: Includes a Private component for sharing, reusing, and extending internal assets, and a Public component for distributing and monetizing solutions.

Visualization and Dashboards: Users can build insightful visualizations and dashboards with rich features, filters, calculations, and actions, often based directly on semantic model data, eliminating the need for data modeling within Tableau visualization tools.

In the Flow Actions/Integration: Includes features like Embeddable Dashboards & Metrics in Salesforce Lightning Pages, Take Actions with Salesforce Flow, and Slack Integration for sharing, collaborating, and analysing data.

3.5 Information Assurance

Tableau Next is built on Salesforce for enterprise-grade performance, security, and scalability.

Information assurance aspects are supported by features including:

- **Trusted Data Foundation:** The integration with Tableau Semantics ensures data consistency, reliability, and governance by providing a single source of truth for business terms and metrics across consumption layers.
- **Security and Compliance:**
 - Tableau Next and Data Cloud require a Salesforce org as their foundation, supporting Enterprise, Performance, and Unlimited editions.
 - The platform leverages Salesforce's Hyperforce cloud infrastructure, which provides the foundation for enterprise-grade security, compliance, scalability, and governance.
 - Private Connect allows highly secure connections to AWS data via the AWS Private Link to prevent exposure to the public internet.
- **AI Trust:** The conversational analytics components utilize trusted AI, and when referencing the underlying AI services like Generative AI, they rely on the Einstein Trust Layer.
- **Audit Logging:** Additional Activity Log Events related to Private Connect, Recycle Bin, and Prep Endpoint control features are available to help administrators monitor the platform for security and governance purposes.

As an internal component of Tableau Next, Tableau Semantics acts as the foundation of trust, ensuring accurate responses from conversational analytics by serving as a semantic safety net in a world of non-deterministic Large Language Models (LLMs)

3.6 Licencing

The licensing model for Tableau Next is a hybrid approach, combining user-based subscriptions with consumption-based credits.

1. Subscription (User-Based) Licensing:

- Tableau Next is sold on a per-User basis for Creators, Viewers.
- Every customer purchasing Tableau Next receives a Salesforce org, which is required as the foundation for Tableau Next and Data Cloud. Tableau Next is specifically available in the Enterprise, Performance, and Unlimited editions of Salesforce.
- Tableau Semantics, the semantic layer used by Tableau Next, is included for Data Cloud customers with all Data Cloud editions, but Tableau+ customers require the TableauEinsteinPlatform license to use it.

2. Consumption-Based Licensing (Credits):

- In addition to user seats, usage of Tableau Next features consumes pre-purchased credits pooled across the deployment.
- Data Cloud Credits: Used for data ingestion and data queries (generating visuals, dashboards, and metric interactions).
- Einstein (AI) Request Credits: Used for Generative AI capabilities, such as the Data Pro semantic assistant and Metric Summaries. These are pooled monthly based on role.
- Flex Credits: Required for conversational analytics skills, specifically Concierge and Inspector. Using Agentforce for Analytics requires the customer to use Agentforce on Flex Credits.

3.7 Data Centre Locations

Tableau Next and Data Cloud are available globally, leveraging Salesforce's Hyperforce cloud infrastructure to provide in-country data residency and compliance.

The ability to host these products, including Data Cloud and Agentforce, via Hyperforce Geo Expansion, supports data residency in numerous locations.

Tableau Next is deeply integrated with Data Cloud and Agentforce. Consequently, its availability and data storage residency align with Data Cloud's regions.

Data Cloud and the related products (Agentforce, Data Cloud, and UMA) are currently available in the following regions/countries for Hyperforce Geo Expansion for Data Residency:

- North America
- Europe
- APAC (Asia-Pacific)
- Southeast Asia
- Australia
- Brazil
- Canada
- Germany
- India
- Japan
- Singapore
- United Kingdom
- United States

- Switzerland

4. Training

We provide webinar-based and instructor led training for the majority of our services. Details can be found in our GCloud15 Lot 3 - Tableau Training - Service Definition.

Further information can also be found here: <https://www.tableau.com/learn>

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