Sigma Administration Getting Started — Summary Checklist

Use this checklist to confirm you've addressed each planning area in the How to Get Started - A Guide for Sigma Administrators QuickStart. Not every item will apply to your organization — check off only what's relevant to your use case.

Use Case Plan

- [ ] Identified who this use case is for
- [ ] Defined the workflow or decision it needs to support
- [ ] Confirmed data source ownership and access
- [ ] Set a target go-live date

Security

- [ ] Selected an authentication method (SAML, OAuth, or username/password)
- [ ] Selected a provisioning method (SCIM, JIT, or manual invite)
- [ ] Defined account types for each group of users
- [ ] Organized users into Teams
- [ ] Structured a single Workspace with Team-aligned folders (or additional Workspaces if a group needs exclusive access)
- [ ] Established a license upgrade request process
- [ ] Requested Security Portal and Support Portal access

Cloud Warehouse Connection Strategy

- [ ] Decided on a connection strategy (one connection vs. multiple, sizing, PrivateLink, Python queries)
- [ ] Implemented data security (RLS/CLS, OAuth vs. Service Account vs. Service Account with dynamic roles)
- [ ] Decided how builders access CDW tables (direct vs. data-model-only, and at what granularity)
- [ ] Configured write-back access
- [ ] Set up external storage integration, if needed
- [ ] Set up API connectors for external systems, if needed

Auditing and Cost Monitoring

- [ ] Enabled audit logging
- [ ] Set up an audit logs storage integration for retention beyond 30 days
- [ ] Gave power users access to usage and cost data
- [ ] Set up warehouse cost monitoring
- [ ] Defined a process for deprecating unused content

AI Features and Strategy

- ☐ Configured an AI provider
- ☐ Decided which agents users can access
- ☐ Decided whether to enable MCP integrations (inbound and/or outbound)
- ☐ Considered agent skill configuration for builders
- ☐ Set cost controls (token limits, AI usage table)
- ☐ Aligned on an AI strategy across your tech stack

Branding

- ☐ Built a custom theme (colors, fonts, layout, table style)
- ☐ Set up a custom homepage
- ☐ Set organization timezone and locale
- ☐ Configured organization translation files, if needed

Versioning and Promotion (WDLC)

- ☐ Set up version tagging for Dev/Prod promotion (two tags — avoid a third)
- ☐ Tagged workbooks and their underlying data models in sync
- ☐ Applied Protected tags where promotion needs controlled approval
- ☐ Used Workspaces to control access to Dev/Prod content
- ☐ Noted Version History as an automatic fallback, no setup required
- ☐ Considered managing data models as code via the API

Onboarding Training Plan

- ☐ Decided on a training plan (self-paced, instructor-led, or both)
- ☐ Linked training resources from your custom homepage
- ☐ Considered how to foster a user community