Governance for Tableau

Enable real-time, self-service analytics at scale
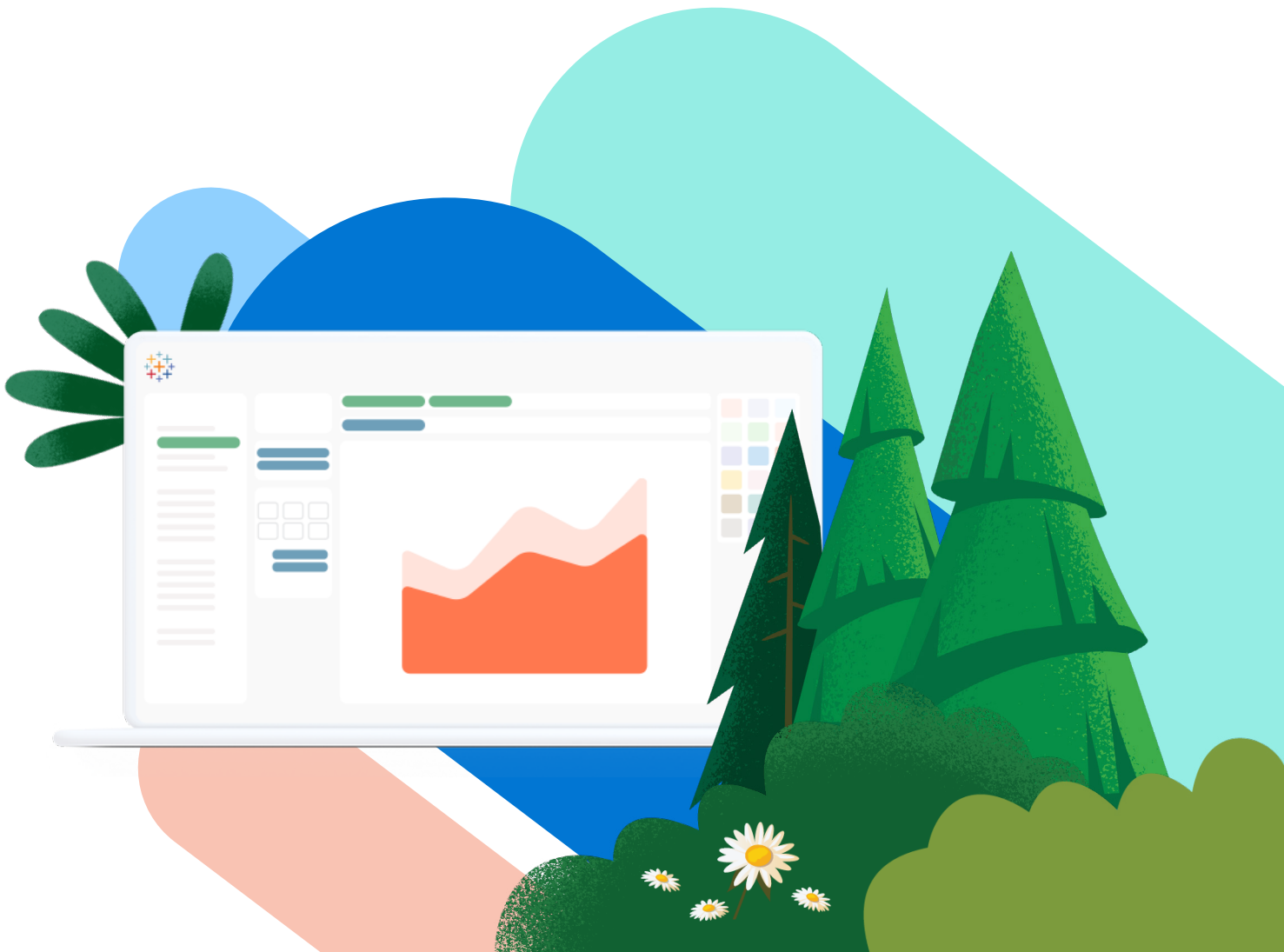
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Introduction

Governance for the way you do business

Access to data–by everyone, everywhere–is a business imperative. The answers to today's most pressing business challenges, like the need to do more with less, lie in the data, just waiting to be uncovered.

When data is unique, timely, and trusted, it challenges intuition; provides actionable insights; optimizes productivity and efficiency; drives strategic initiatives; and helps organizations quickly and intelligently respond to rapid changes and predict what's next.

That's why organizations are arming people at all levels with real-time data and analytics. When you empower teams across the business with actionable insights in real time, they can unlock new opportunities, boost efficiency and productivity while cutting costs, and make smarter, faster decisions with a complete and trusted view of the business.

Right-sized governance of data and analytics allows both IT and business decision makers to shift away from rigid, restrictive access and to embrace an agile, modern, cost-effective approach that provides trusted insights to the right people at the right time, based on business needs. Successful leaders are implementing data strategies, investing in data management, simplifying operations, and now–with the introduction of Tableau Genie to Customer 360–delivering actionable insights in real time. Such an approach requires the coordination of IT and business decision makers.

This guide will explain how governance in Tableau creates trust and confidence by establishing controls, roles, and repeatable processes across three main areas:

> **Part 1: Integration**
>
> **Part 2: Access**
>
> **Part 3: Oversight**
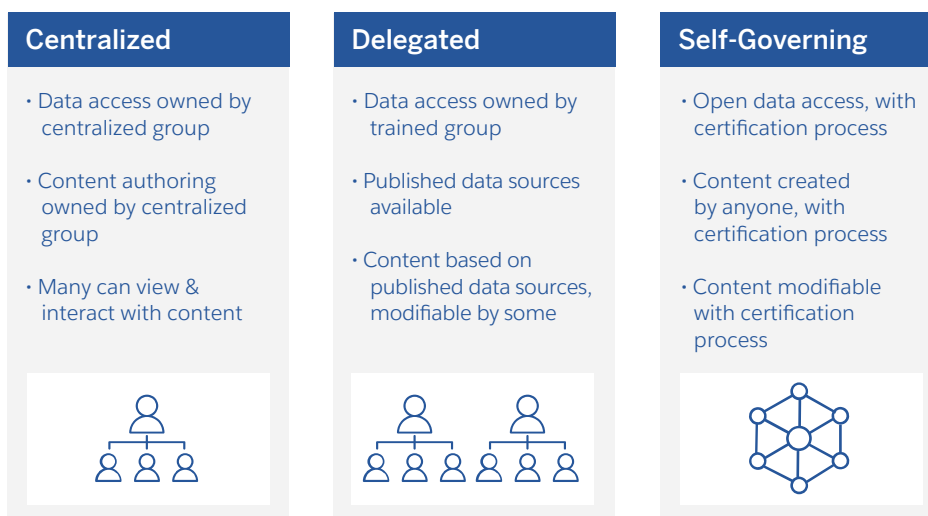
World Food Programme

United Nations World Food Programme (WFP) realized that they needed a formal governance strategy to support and encourage future growth. "We didn't have a very clear outline of the different components of what this structure could look like," shared Prianka Nandy, WFP Chief Data and Analytics Officer. WFP leveraged Tableau Blueprint to guide them through the process of building out capabilities that supported a flourishing, organization-wide Data Culture. "In this moment, we're making data a more powerful asset within the organization, bringing our data to a new level internally."

Part 1: Trusted and Governed Integration

Easy integration helps you manage the responsible use of data and become a more data-driven organization.

Tableau makes it easy to deploy true self-service in a governed data and analytics environment. It fits your existing technology infrastructure and business model, so you can easily integrate it with your broader enterprise architecture and data ecosystem.

With Tableau, you have the choice of fully-hosted SaaS with Tableau Cloud; on-premises or public cloud with Tableau Server; or native in Salesforce using CRM Analytics.

In addition to leveraging your existing technology investments and expertise, Tableau's flexible model also allows you to easily integrate Tableau into your environment with native identity, security, and data access policies in compliance with organizational standards.

Create governance processes using Tableau Blueprint for centralized, delegated, and self-governing scenarios.

| Centralized	Delegated	Self-Governing
• Data access owned by centralized group	• Data access owned by trained group	• Open data access, with certification process
• Content authoring owned by centralized group	• Published data sources available	• Content created by anyone, with certification process
• Many can view & interact with content	• Content based on published data sources, modifiable by some	• Content modifiable with certification process

Part 1 (continued)

At a glance:
Connect, curate, and manage all of your data

With Tableau you can manage the massive amounts of data your organization collects daily, while also maintaining the visibility and control you need to ensure that data is trusted and up to date.

In traditional business intelligence (BI) environments, security (or the perception of it) is often achieved by the limited number of people who have access, the complexity of the system, and the skills needed to use it effectively. Restricting access to data may provide some security, but it's not useful to your business.

Tableau governance ensures you stay in a trusted environment throughout the entire analytics cycle–from preparing data to publishing and consuming it–with mechanisms to ensure proper oversight as roles and needs change.

As analytical skills grow and business needs change, teams naturally ask more complex questions, investigate new trends, and challenge preconceived assumptions. From data exploration to content creation and curation, roles and needs become more fluid, and Tableau works within that environment to adapt and ensure trust while keeping costs low.

Prepare data — Build Tableau Data Model — Publish and certify — Dynamic query — Consume / Author
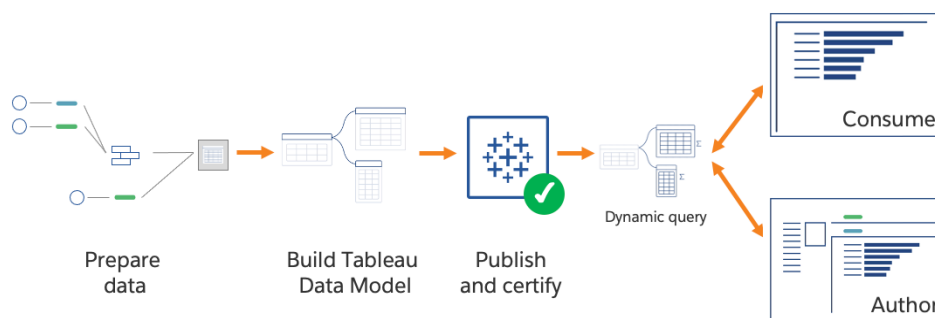
Our unique approach brings self-service to data management by surfacing valuable metadata, lineage, and data quality alerts right in the flow of analysis, while providing the visibility, security, and governance you require.

Comprehensive data management capabilities allow you to:

- Centrally manage your data resources and simply combine and curate data from multiple sources.

- Establish repeatable processes to prepare data, build data models, publish, and certify them.

- Allow users to author and consume content based on trusted, governed data that is up to date, accurate, and relevant.

Part 2: Trusted and Governed Access

Customize access to fit your unique and evolving requirements.

In Tableau, governance goes beyond giving access simply based on who has a license. You define the governance policies and procedures to ensure the right data is available to the right people at the right time. Tableau doesn't rely on a plug-and-play model, because roles and responsibilities are unique to your organization.

And because a governance policy is only as great as the people following it, Tableau makes it easy to adapt and evolve as analytical skills increase among your people.

Creators build analytical content–which can include the design, cleaning, and curation of data sources, and the creation of visualizations and dashboards.

Explorers can access and analyze data published by Creators, as well as create and distribute their own dashboards (governed authoring).

Viewers can view and interact with published visualizations and dashboards– including subscribing to content to get updates and alerts.

Tableau provides customizable governance capabilities to provide responsible use of data at any skill level, at any time, with the following capabilities:

• **Delegate administration:** Assign tasks with scoped administration, from server to site to project, to reduce bottlenecks.

• **Control content through Site Roles:** Customize capabilities independent of license type for groups and users to enable the specific access level for your use case.

• **Provide ongoing feedback:** Content owners can continually refine who needs to access their content to explore and consume trusted content.

• **Match user skills to license type:** Tableau has three license types–Creator, Explorer, and Viewer–allowing you to match user skills and governance needs (for instance, authoring or consumption) to provide the right access at a specific moment.

• **Customize access to fit your data's unique requirements:** Because different types of data have different kinds of governance requirements, Tableau recognizes that governance is a spectrum and allows you to personalize access requirements.
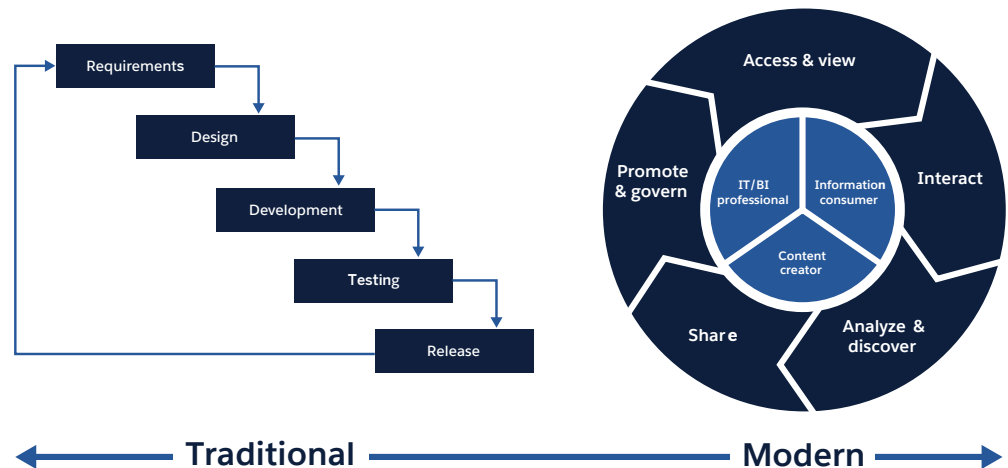
Part 2 (continued)

Designed to work the way you do: Governance for any workflow

Tableau supports–and gives prescriptive guidance through Tableau Blueprint–any workflow type, from modern to traditional, including:

- **Modern workflows** that empower your teams to ask and answer their own questions, with certified, trusted, and real-time data, and then enable them to quickly and easily share their insights with their team and the rest of the organization.

- **Transitional workflows** that incorporate both a traditional, topdown BI approach and phased-in/delegated responsibilities to teams as they increase their analytics skills over time.

- **Traditional workflows** where IT professionals or a centralized owner gather requirements, analyze data, and prepare reports for information consumers in a waterfall approach.

Support any workflow type

Requirements → Design → Development → Testing → Release

Access & view · Promote & govern · Interact · Share · Analyze & discover

IT/BI professional · Information consumer · Content creator

← **Traditional** ——————— **Modern** →

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"Allowing self-service in one of the most highly regulated spaces–having the standard platform, the right data controls and the right governance in the tool that captures metadata and provides lineage of it in Tableau–users love it because they don't have to wait for IT and IT loves it because they have happy users."

JPMorgan Chase & Co.

Sriram Belur,
Head of Business Intelligence Delivery Center,
JPMorgan Chase

Ensure complete visibility into data governance across the enterprise.

Organizations can design their own governance models–from soft guidelines to firm boundaries–that comply with their internal policies and procedures and overall business needs, and that cover data and content management.

This agile, iterative approach gives you the power to adapt to new business requirements as user adoption and engagement increase across your organization. Because you define the right balance of flexibility and control, you'll have oversight to ensure the right data is reaching the right audience in a secure, governed, and cost-effective model.

Greater visibility into use–what, who, and how often–also helps inform governance guidance. With Tableau's pre-built administrative views, your administrators can monitor and easily understand usage and patterns at the system, data, and content level, and can create custom administrative views to answer questions directly from the Tableau Repository data. Real-time information about how your teams are using data provides forward-thinking guidance about how licenses should be allocated and roles to minimize risk and maximize budget.

PEMCO

PEMCO uses Tableau to track and monitor all ongoing insurance claims. To keep claims on track, PEMCO combines open-source applications, automation, and dashboards to monitor and manage their server ecosystem. The company uses Tableau's permissions to ensure claim-related data is always accessible to only the relevant people. With round-the-clock access to a full range of data and analytics capabilities, PEMCO increased data adoption so that more than 50% of its people now use it at least monthly. PEMCO's team monitors the company's ecosystem with the help of 45 Tableau dashboards that provide a complete overview of all hardware and applications, as well as permissions around auditing and content organization. The team can quickly find any issues, boosting productivity and avoiding downtime.

CUSTOMER SUCCESS

Since deploying Tableau, PEMCO reports significantly improved closure rates on claims, and higher levels of customer satisfaction.

Get started today

In today's data-driven world, an automated, flexible, and intelligent approach to analytics is necessary to stay competitive and do more with less. Transforming how your company makes decisions every day is no easy task, but incorporating real-time data and analytics and self-service insights into your decision-making cycles will help everyone on every team act fast in a changing landscape.

As you re-imagine governance policies to fit your business transformation, Tableau Blueprint provides the definitive methodology for scaling analytics across your organization in a trusted environment. And, as your technical requirements and data environments continue to evolve, Tableau Blueprint shows you how to do so in a trusted, governed environment.

Add to that the power of real-time data with Tableau Genie, the customer data platform for Salesforce Customer 360, which helps you drive customer magic with more personalized experiences and the ability to act on your data from anywhere.

> "Our definition of governance, of how we look at data, has altered in a way. It used to be self-service–get whatever data you want, but we can't guarantee where it came from–to now building standards and consistency around it."

Abercrombie & Fitch

Daniel Trimmer,
Daniel Trimmer,
Senior Manager of
Product Facing Solutions,
Abercrombie

Find out how

TABLEAU BLUEPRINT

Your methodology to becoming a data-driven organization. Take the Tableau Blueprint Assessment to learn how.

Tableau Blueprint Resources

Modern Analytics Workflow

Governance in Tableau

Tableau Governance Models

TABLEAU GENIE

Make decisions at the speed of change and succeed now with actionable, end-to-end analytics.

DELIVER INSIGHTS IN REAL TIME

Get the power of real-time data with Tableau Genie, the customer data platform for Salesforce Customer 360. Help everyone on every team act fast in a changing landscape. Boost your bottom line with trusted analytics and a single view of your customers across any cloud.

Automated analysis for all data

Intelligent predictive analytics

Real-time, collaboration-ready insights

Learn more about

TABLEAU GENIE

About Tableau

Tableau helps people see and understand data. As the world's leading analytics platform, Tableau offers visual analytics with powerful AI, data management and collaboration. From individuals to organizations of all sizes, customers around the world love using Tableau's advanced analytics to fuel impactful, data-driven decisions. For more information, please visit tableau.com.

Tableau also integrates with Salesforce Customer 360—a customer relationship management (CRM) platform that connects the business with a shared view of customer data—giving every department access to the most powerful, comprehensive, and intuitive analytics features embedded directly into workflows. By bringing your customer data to the center of your work, you can grow your relationships with your customers and employees.

+ableau ®
from Salesforce