



# Governance for Tableau:

Ensure True Self-Service  
Analytics at Scale

## Intro

# Governance for the way you do business today

Access to data across the enterprise is a business imperative in today's digital world. The answers to today's most pressing business problems lie in the data.

When data is unique, timely, and trusted, it challenges intuition; provides insights to break free of the status quo; optimizes operations; drives strategic initiatives; and helps organizations quickly respond to rapid changes in business.

That's why organizations are arming people at all levels with data and analytics. When you empower the people in your company who know their respective areas of the business, they can unlock new opportunities and make smarter decisions, faster, with a complete and trusted view of the business.

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 approach that provides trusted content to the right people at the right time, based on business needs. 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**

## JPMORGAN CHASE & CO.

JP Morgan Chase (JPMC) made the switch from a traditional business intelligence, IT-owned model of data analytics, adopting Tableau for a business-owned, self-service analytics model. In the highly regulated and competitive banking industry, the switch positioned them for even greater success by enabling them to keep up with rapid industry changes. Today, over 500 teams across JPMC use Tableau to make strategic decisions balanced with enterprise governance and compliance requirements.

## Part 1: Trusted & Governed Integration

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

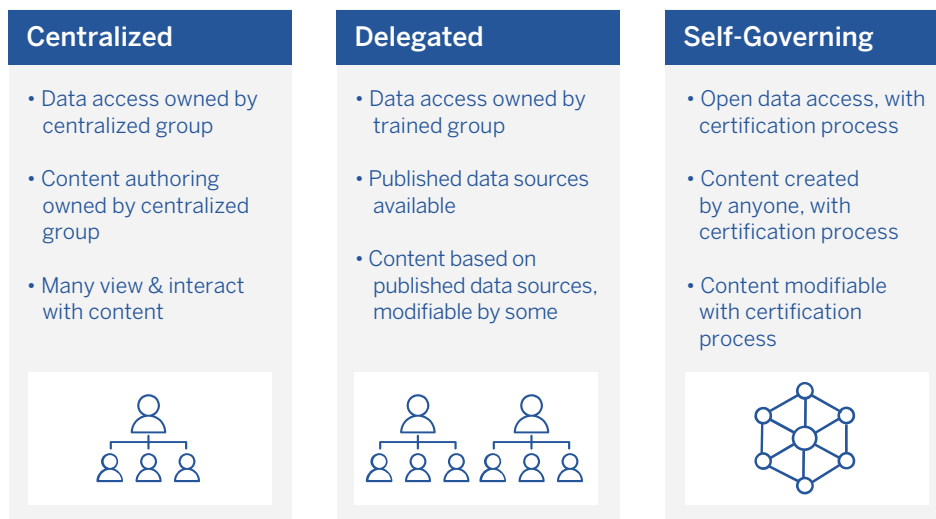
Tableau makes it easy to deploy true self-service in a governed data and analytics environment. It fits your existing technology infrastructure and business model, so you can easily integrate it with your broader enterprise architecture and data ecosystem.

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

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

You can define granular permissions from templates or with fully customized rules by content type, such as restricting downloads for certain workbooks or data sources, while leveraging your existing security and data access policies within Tableau.

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



The data team at the 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 & Governed Integration

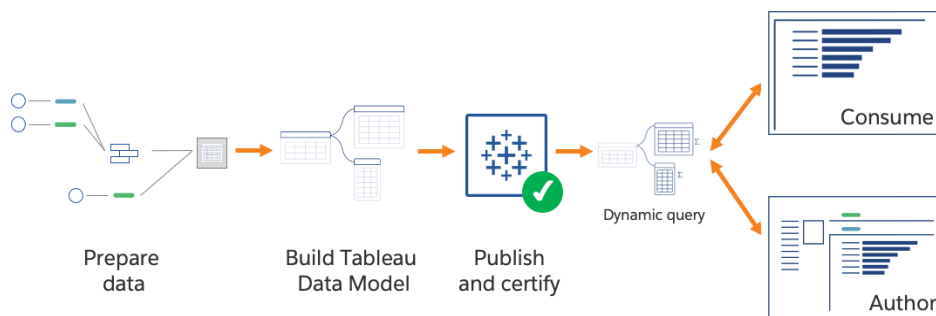
# At a glance: connect, curate, and manage all of your data

With Tableau you can manage the massive amounts of data your organization collects daily, while also gaining 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 trust 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.



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.

“Our Tableau deployment went viral. In less than two years, we had 20,000 users. The reason for this success is because we’ve been able to strike the right balance between empowering the business, enabling better visibility, and instilling trust and governance in the data.”

## Honeywell

**Sherri Benzelock,**  
VP of Business Analytics  
Transformation at Honeywell

## Part 2: Trusted & 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.

**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.

**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.

## Part 2: Trusted & Governed Access

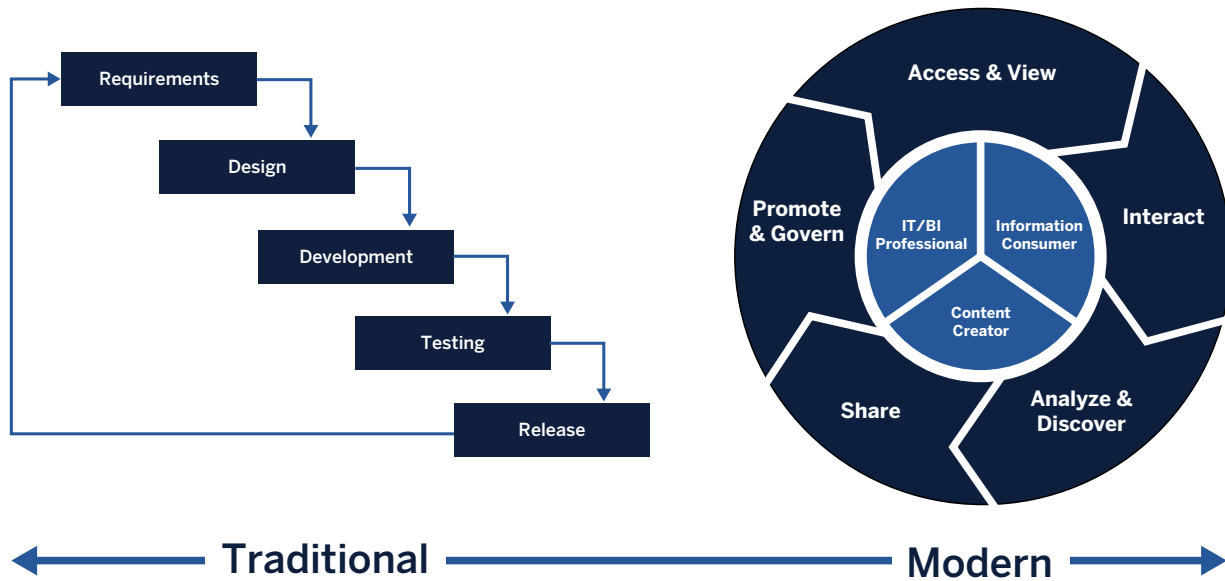
# Designed to work the way you do: Governance for workflows from traditional to modern

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 and trusted data, and then enable them to easily share their insights with their team and the rest of the organization.
- **Transitional workflows** that incorporate both a traditional, top-down 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



## Part 3: Trusted & Governed Oversight

# 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 operational 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 assigned.

“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



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.

“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 accessible, flexible approach to data analytics is simply a must to stay competitive. Transforming how your company makes decisions every day is no easy task, but incorporating self-service data and analytics into decision-making cycles is how you will see the most transformative impact on your organization.

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.

## Find out how

Learn more with Tableau Blueprint

## Additional Tableau Blueprint Resources

- [Modern Analytics Workflow](#)
- [Governance in Tableau](#)
- [Tableau Governance Models](#)

## About Tableau

Tableau is a complete, integrated, and enterprise-ready visual analytics platform that helps people and organizations become more data driven. Whether on-premises or in the cloud, on Windows or Linux, Tableau leverages your existing technology investments and scales with you as your data environment shifts and grows. Unleash the power of your most valuable assets: your data and your people.

“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,**  
Senior Manager of  
Product Facing Solutions,  
Abercrombie