

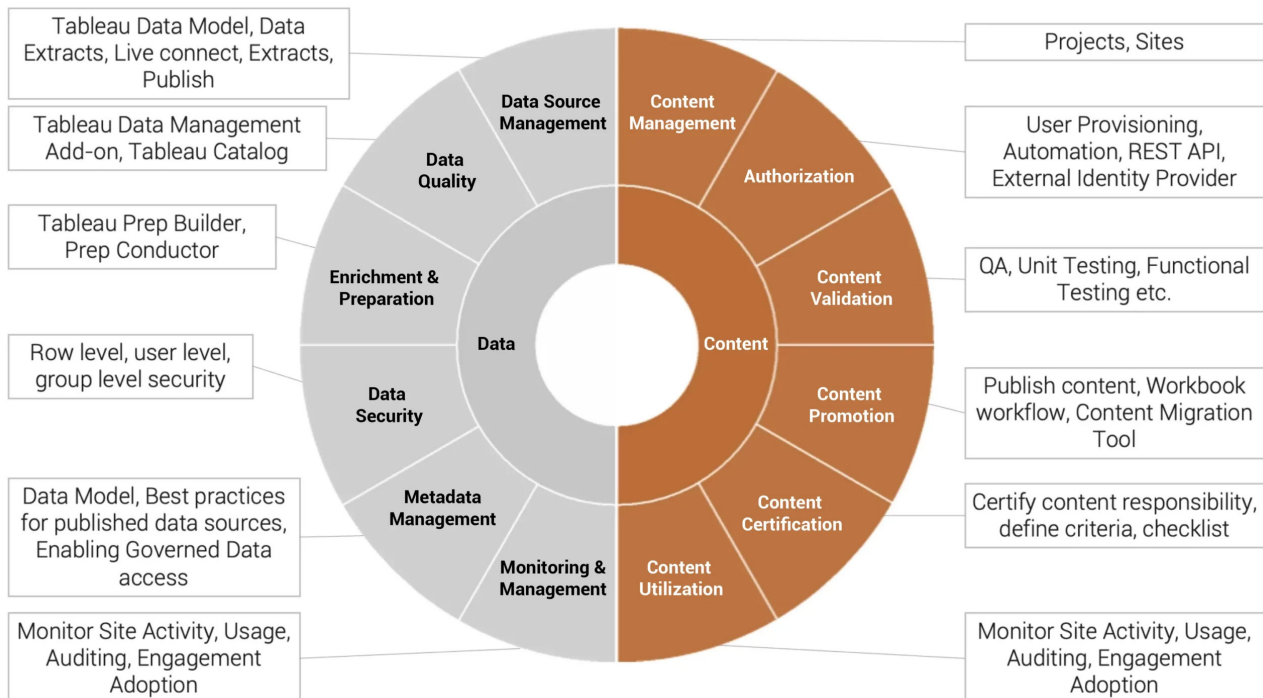
# Tableau Data Governance

## Data & Content Governance

Tableau-enabled governance is a critical component for managing your data and content management needs, as well as for managing risk. Like all Tableau solutions, governance is an important aspect of the overall platform management process. Governance can be defined as the processes and programs designed to ensure the proper operation and maintenance of software systems, with which data are stored or processed. The governance function will assist in ensuring high reliability while ensuring appropriate protection of information security issues.

In Tableau, governance can be split into content and data governance where different team members and members of the organization are responsible to moderate the workflow, so data is available for the right people at the right time.

To better understand how they differ and work together to enable your business, here's a glimpse into how Tableau enables Data & Content Governance – through models, roles and benefits:



## Data Governance Summary

Strike a balance between control and agility by providing an ideal state for governing self-serve data access. The idea is to ensure there is accountability among team members with clearly defined roles.

AREA	IT ADMINISTRATORS / BI PROFESSIONALS	CONTENT AUTHORS
Data Source Management	Provide access to sources of data and comply with organizational data strategy, policies, and procedures.	Define, manage, and update data models used for analysis.
Data Quality	Define the process to validate data and build trust in its accuracy for decision making.	Capture and expose data-cleansing rules applied to published data models.
Enrichment & Preparation	Create ETL processes from multiple sources of data to make data ready for analysis.	Capture and expose enrichment and preparation rules applied to published data models.

AREA	IT ADMINISTRATORS / BI PROFESSIONALS	CONTENT AUTHORS
Data Security	Define security parameters and access controls to published data models.	Comply with enterprise data security policies and external regulations.
Metadata Management	Define organizational policies and processes for metadata management.	Define, update, and expose field-level metadata for users.
Monitoring & Management	Monitor and audit usage to ensure compliance and appropriate use of data assets.	Monitor and track usage metrics of centrally-managed data models.

## Content Governance Summary

Below table describes an ideal state for promoting and governing content across a modern analytics program.

AREA	IT ADMINISTRATORS / BI PROFESSIONALS	CONTENT AUTHORS
Content Management	Create and maintain an environment for storing and organizing published content.	Ensure content is relevant in their site or project.
Security & Permissions	Secure analytic content and grant users the appropriate levels of access based on content type, sensitivity, business need, etc.	Comply with organizational security and permissions policies.
Content Validation	Define process for validating content is correct.	Access platform capabilities to assist with validation and accuracy verification of user-generated analytic content.

AREA	IT ADMINISTRATORS / BI PROFESSIONALS	CONTENT AUTHORS
Content Promotion	Define process for promoting content.	Promote validated analytic content to centralized-trusted environment as determined by governance process.
Content Certification	Define process for certifying content.	Certify content as trusted and delineate from untrusted content in the same environment.
Content Utilization	Measure broad usage patterns across organizational business units.	Measure and audit usage of published content and track usage of untrusted content.




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## Tableau Governance Roles

In the Tableau environment, there are three types of admin roles for server and content management:

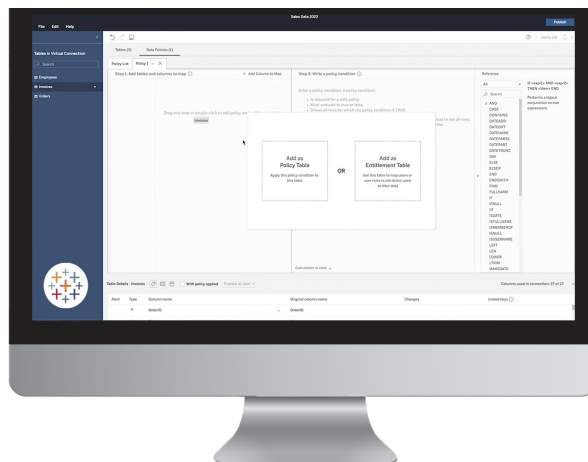
Server Administrator	Site Administrator	Project Leader
<ul style="list-style-type: none"> <li>• Manage Tableau server</li> <li>• Configure settings, users and groups</li> <li>• This role is applicable to Tableau server only (not applicable to Tableau online)</li> </ul>	<ul style="list-style-type: none"> <li>• Manages individual sites within Tableau server</li> <li>• Configure site access</li> <li>• Create projects</li> <li>• Set up permissions within the site</li> <li>• Add new users to the site</li> <li>• Get data to Tableau Online</li> <li>• Tableau Prep Builder</li> <li>• Monitor site usage and performance</li> <li>• All other activities that Project leader can also perform.</li> </ul>	<ul style="list-style-type: none"> <li>• Manages individual projects within the sites</li> <li>• Create and delete nested projects</li> <li>• Change ownership of the projects</li> <li>• Set up permissions at project level including data sources, workbooks and child projects</li> <li>• Move content from one project to another where they have access</li> <li>• Run, add or remove extract schedules</li> <li>• Monitor site usage and performance.</li> </ul>

Organizations may opt to use different governance models for managing their data and content:

 <b>Centralized</b>	 <b>Delegated</b>	 <b>Self-Governing</b>
<ul style="list-style-type: none"> <li>• IT or other authority owns and responsible for               <ul style="list-style-type: none"> <li>• Data access.</li> <li>• Data Sources</li> <li>• Creation and distribution of dashboards</li> </ul> </li> <li>• Needed to maintain tight control of highly sensitive data.</li> <li>• Highly recommended for teams with limited technical skills.</li> <li>• As available trusted data sources and content grows, users will be able to explore and answer wide range of questions.</li> </ul>	<ul style="list-style-type: none"> <li>• New roles are identified by IT or other responsible authority.</li> <li>• Data stewards are identified and provided access to various sources of data.</li> <li>• Content authors are provided access to certified published data sources</li> <li>• Content consumers are provided with web authoring capabilities.</li> <li>• Validation, Promotion and certifying are still controlled by IT or owners.</li> <li>• Increased collaboration between IT and Business users.</li> </ul>	<ul style="list-style-type: none"> <li>• New roles are identified by IT or other responsible authority.</li> <li>• Strong collaboration between IT and business users.</li> <li>• Data Stewards are provided access to various certified sources.</li> <li>• Capability to explore ad-hoc content by creators and explorers.</li> <li>• Viewers have a higher knowledge of data, technology, and content.</li> <li>• Roles are more fluid as users switch from consuming to creating based on permissions.</li> </ul>

**The slow rate of adoption for self-service analytics is a lack-of-data-governance problem. Tableau offers 3 simple steps to accelerate adoption by 12x through implementing strong data governance principles:**

1. Build trust with data governance to help standardize data ingestion
2. Eliminate data silos with a federated environment
3. Empower users with self-service analytics at scale



### **Tableau Governance Benefits**

The right balance of flexibility and control can help organizations realize the benefits of self-service data and governance:

- Driving business value by building trust and confidence through transparent and accessible processes.
- Building a strong foundation for data-driven decision making.
- Working in a secure, governing environment, you can assure the correct level of data access to the right users.
- Developing dedicated workflows to ensure the stability and integrity of the platform, while reducing duplication.

That's why Tableau's model of Data and Content Governance is the key to establishing a successful Tableau implementation for your organization. When fully realized, your model can revolutionize the way your business uses dashboards and analytics to view your data and gain insights to develop new strategies while preventing problems before they develop.

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