Bob Middleton, Product Marketing Manager

Data Governance for Self-Service Analytics

"As an IT group we're much more agile with Tableau."

—Doug Rausch, Manager of CRM & BMI
Product Teams, Mercer

▶ *Watch more about IT's perspective on Tableau*

"We make data driven decisions," so says every other CIO.

Is the data used for business decisions both current and accurate?

Does your IT department work closely with business leaders to make effective use of data, and have the ability to deliver positive business outcomes?

Is your data under control?

Does your data security meet legal, compliance and regulatory requirements?

Almost any organization will say they make decisions based on data, or that they want to. Scratch the surface with a few questions about the quality of that data and confidence vanishes. Move on to discuss data security and see how quickly the subject changes. Data is clearly a key element in any business decision process today; this paper explains a few simple steps for finding confidence in data and the distribution infrastructure that makes it available.

As self-service is becoming the norm in data and analytics, more business users are demanding access to data to gain their own insights and drive localized initiatives. The vast majorities of people have smart mobile devices and expect to access data from wherever they are. This any-device-anywhere culture will continue to grow as technology continues to become more powerful, and as data transfer rates improve globally. Let's consider the risk of data in transit—and hatch a plan for it.

Having a data implementation blueprint with executive support is imperative—it also needs to bring data analytics directly to the people who understand what questions to ask with regard to the insights it can provide. Modern data governance requires a true balancing act between enabling self-service analysis, and protecting sensitive business information.

Most countries mandate data protection legislation for information about individual citizens. Additional layers of governance are also applied to public company financial information as well as other protections in healthcare and education. Organizations don't just have to comply with these layers of governance, but proof of compliance is generally required.

Data acquisition continues to build momentum as a key activity for all types of organizations, and with a myriad of data storage methods made available over the years, any longstanding company will likely still have legacy systems in place. Even with newer, on-premise of cloud based solutions implemented, these legacy storage systems just never seem to fade away. Finding a safe

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I spend less than an hour a month maintaining the environment that supports 1400 users. I have no helpdesk calls, the only call I get is I want another license.

Paul Lilford, Director of EPM and BI, UnitedHealthcare

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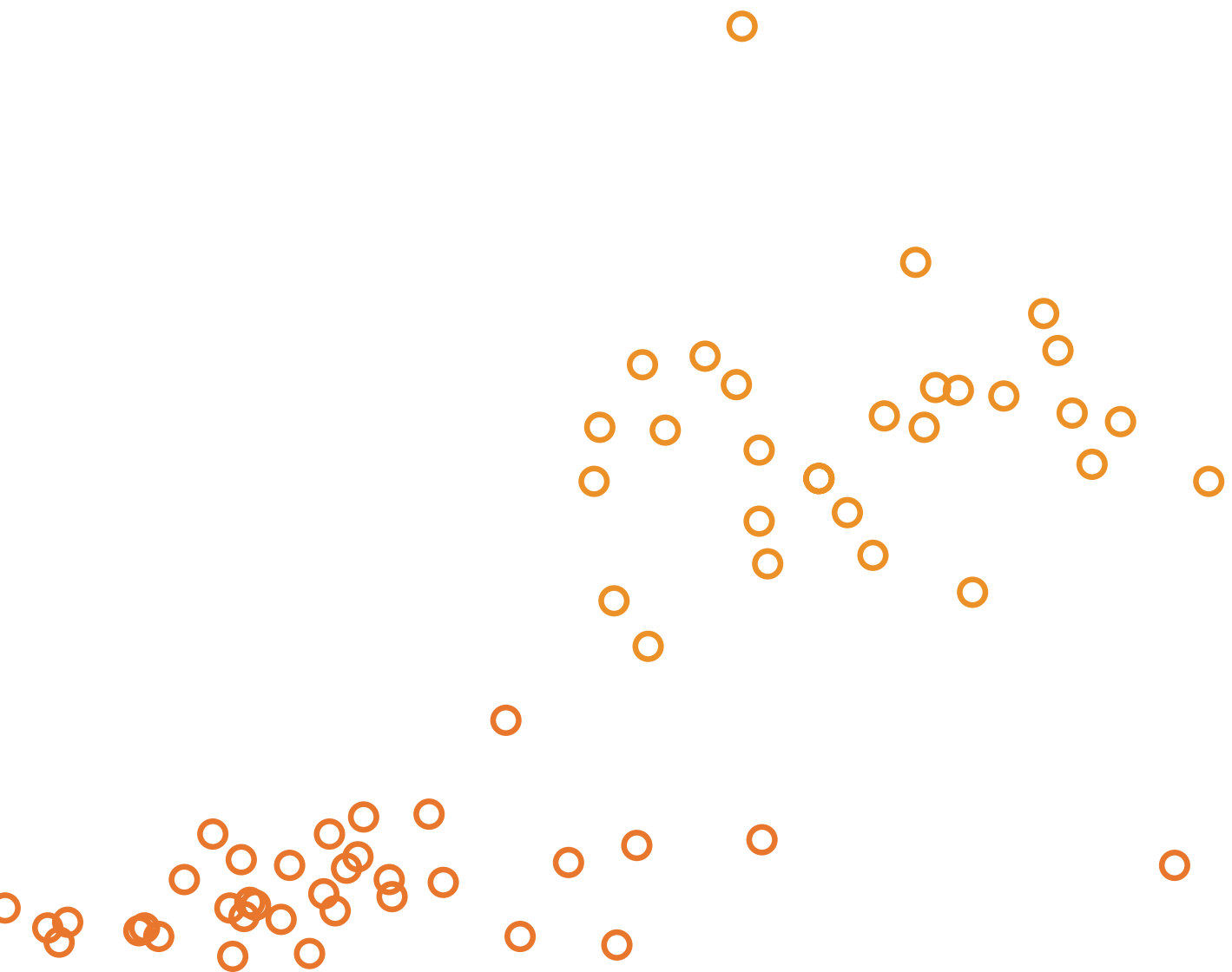
> *"Tableau really is so easy to use. Our analysts pick it up within a couple of hours; our end users pick it up within 10 or 15 minutes."*

—Lloyd Tokerud, Analytics Manager
First Choice Power

▶ *Hear how of Loyd's organization makes data driven decisions using Tableau.*

and effective management system for all the various data sources, including the random spreadsheets, coupled with a way to bring organizations to a higher standard of data quality, is a task that requires a combining of efforts for an IT and business approach.

More precise data insights will show in terms of both increased revenues and reduced costs of operation ultimately driving better business outcomes. Organizations that understand their data can and will make better, more informed and faster decisions.

Four Essential Elements

Consider these four essential elements when building or refining your own data governance strategy.

1. **The Team**

- Start with a small project team to review existing data analytics use, and define a process to formalize and implement a wider self-service data analytics methodology.

- Include IT and business leaders on the team to give a balanced view of data use, governance and self-service needs.

- Involve at least one executive stakeholder to champion the data governance and utilization project.

2. **Data Quality**

- Conduct a data audit to discover all the data sources in use, how current they are, and how many variants and versions of the same data are in existence and in use.

- Build a data infrastructure that allows for consolidation and guides users to shared data that is current and accurate.

- Define a process for onboarding new data sources to make sure they meet quality standards and availability criteria. During this process, business users will usually identify and suggest new valuable sources of data, and IT will manage operationalizing it.

3. **Data Security and Compliance**

- Make sure effective data classifications are in place so that data that requires protection for legal or regulatory reasons meets those requirements in an auditable way.

- Set levels of data access through leveraging your existing network access system, single sign-on through Active Directory, SAML or another solution is much easier to manage than having a separate data access protocol.

- Implement tools that allow for different levels of access based on user privileges; this protects sensitive data while allowing access to higher-level analytics.

- Include mobility and BYOD (bring your own data) into your plans as these are one of the largest sources of data leakage.

4. **Report and Dashboard Governance**

- Provide self-service analytics with clear guidelines on how to access the right data

- Implement a process to review and approve reports and dashboards to production, while providing a "sandbox" for users to develop and test reports.

- Communicate the full process and appoint business and IT data stakeholders as points of contact and advocates.
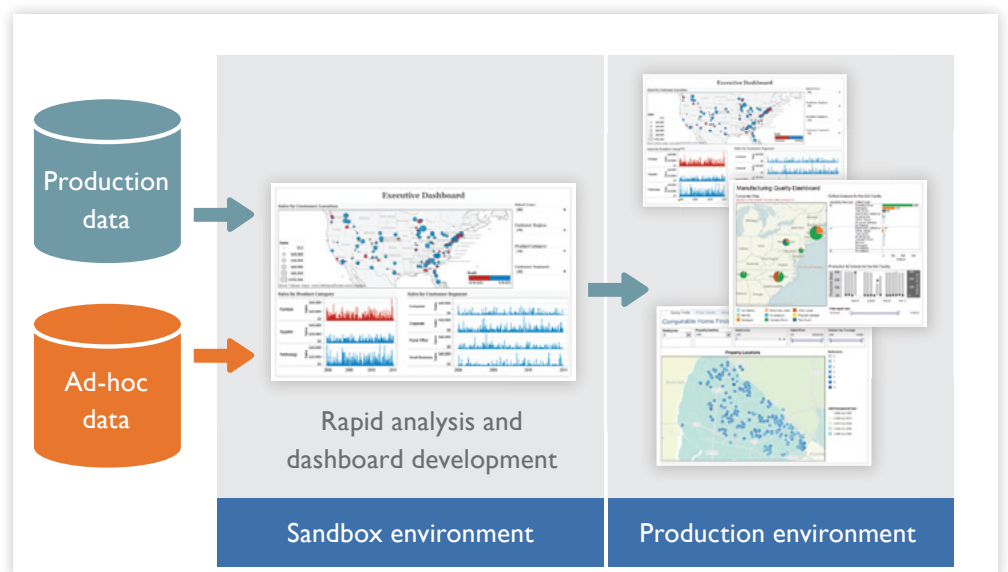
Conclusions

The key to data governance in an age of self-service analytics is to make IT a partner to the business. Data governance is not about locking everything down to a few privileged users, but about enabling broad groups of users with the appropriate controls. Business users get secure access to shared production data sources managed by IT, so they don't have to go fishing for the right data or worry whether data is secure. IT has the opportunity to set security controls and business practices, helping them keep their data accurate and secure. When done right, data governance is about providing the right data to the right people when ever they need it, where ever they need it, so they can answer their own questions.

Tableau's Role in Your Data Governance Strategy

Tableau provides an infrastructure to help people see and understand their data. Tableau Desktop fits into any data governance strategy, providing an easy to use and learn data visualization platform while supporting single sign-on through Active Directory and SAML to control the level of data access users have within workbooks and shared visualizations. Tableau Server and Tableau Online facilitate secure sharing of data and reports on a global basis while maintaining organizational governance policies. Mobile support for Android and iOS allows users to view and interact with their data on the go. All users get to drill down into the data as far as their access rights allow.

"Tableau Software retains its position and builds on its strength as a leader in Agile ADV." The Forrester Wave™: Agile Business Intelligence Platforms, Q3 2014.

About Tableau

Tableau Software helps people see and understand data. Providing rapid-fire business intelligence with a consistent experience from the PC to the iPad, Tableau solutions focus on outstanding usability, enterprise-level security, and deploy-anywhere capability. See how Tableau can help you by downloading the free trial at www.tableausoftware.com/trial.
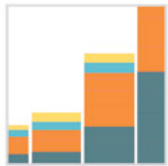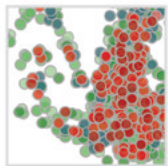
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