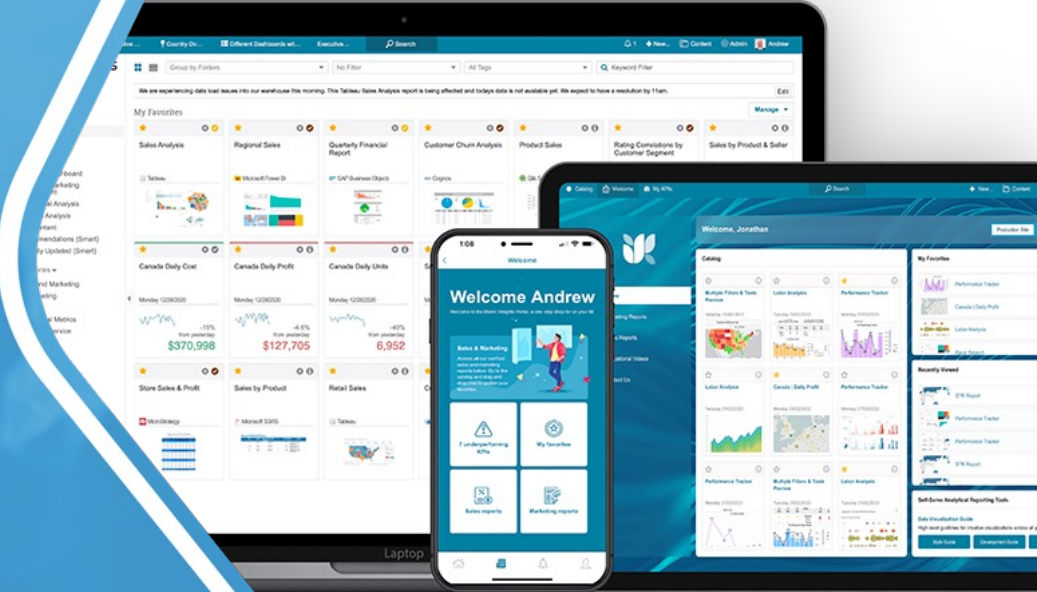


▶ LIVE WEBINAR

# 5 STEPS TO A SUCCESSFUL ANALYTICS CATALOG



# METRIC INSIGHTS

ENTERPRISE BUSINESS INTELLIGENCE PORTAL

# SUCCESS MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE



BI Publishers



BI Consumers



Governance Team



## BI Publishers

- Publish relevant content for users with minimal effort irrespective of tool or source
- Easily associate relevant metadata with content
- Know that security is properly maintained for all report access





## BI Consumers

- Easily find ALL relevant information with a single search
- Distinguish between highly trusted and less trustworthy content
- Discover and request access to reporting where access has not yet been granted
- View analytics in context to understand the data and how it should be used



## Governance Team

- Be certain that all assets are tagged with the correct classification and certification metadata
- Validate that users of sensitive reporting understand usage limitations around the data
- Track usage of analytics across all report types
- Provide an auditable access request process for discoverable content



# 5 STEP PLAN FOR A SUCCESSFUL ANALYTICS CATALOG



## STEP 01

Understand SCOPE OF  
REPORTING



## STEP 02

Plan for SECURITY &  
DISCOVERABILITY



## STEP 03

Establish a  
METADATA strategy



## STEP 04

Develop a PUBLISHING  
strategy



## STEP 05

Enable ACCESS FROM  
EVERYWHERE



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## STEP 05

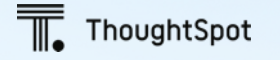
Enable **ACCESS FROM EVERYWHERE**

A large iceberg floats in a clear blue ocean under a bright sky with scattered clouds. The visible tip of the iceberg is a jagged, snow-capped mountain peak. The vast majority of the iceberg is submerged, appearing as a dark, jagged, and textured mass of ice beneath the water's surface. Sunlight rays penetrate the water from the left, creating a bright, shimmering effect. The horizon line is visible in the distance, showing a range of low mountains.

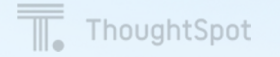
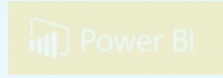
**ANALYST GENERATED  
REPORTING IS THE TIP  
OF THE ICEBERG**



ANALYST GENERATED



ANALYST GENERATED



USER GENERATED





**IGNORE USER  
GENERATED CONTENT  
AT YOUR OWN PERIL!**



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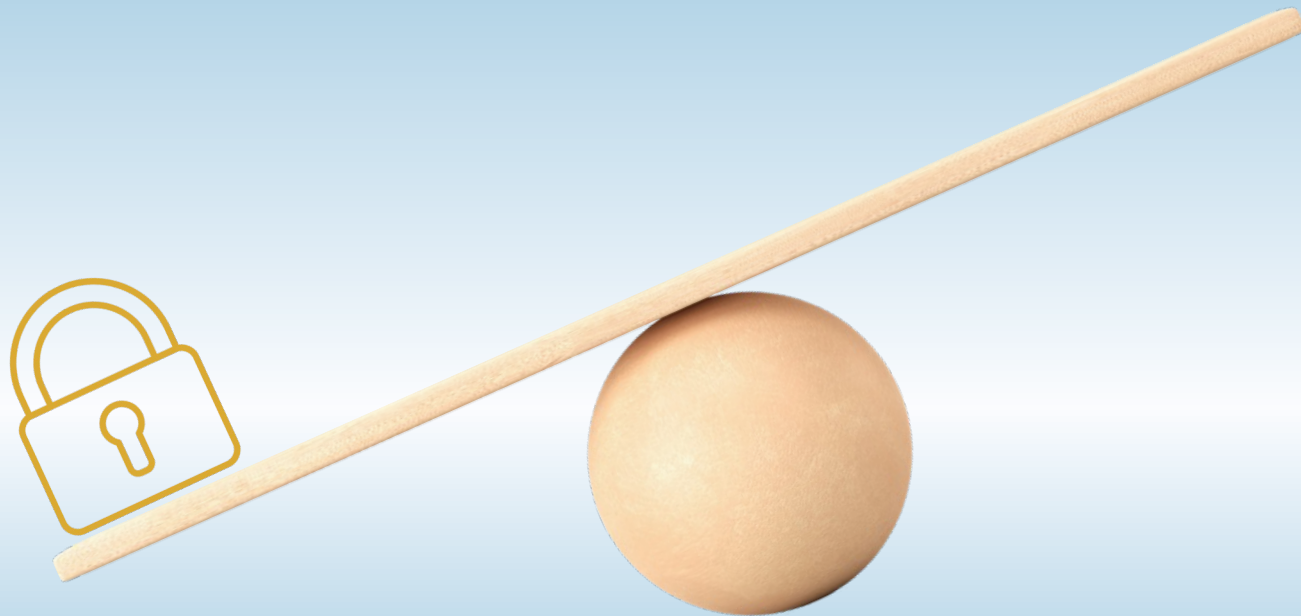
## STEP 05

Enable ACCESS FROM  
EVERYWHERE

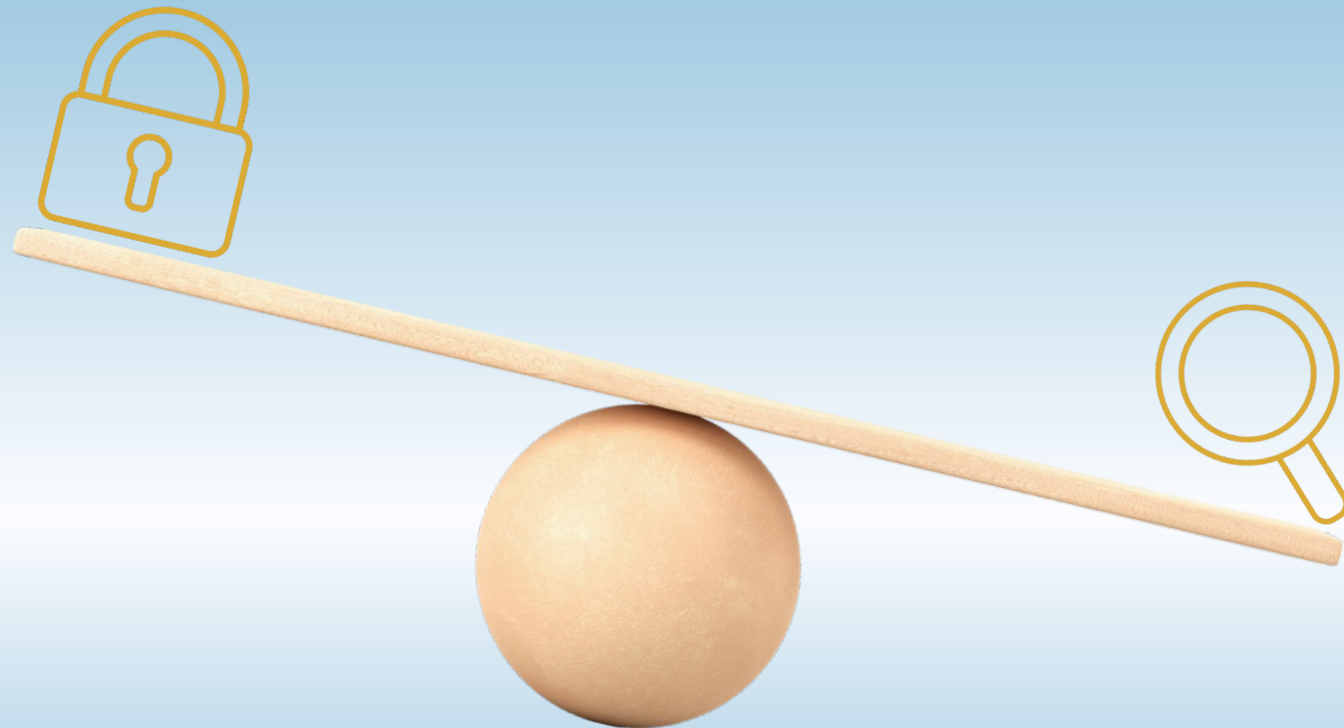
# BALANCE SECURITY & DISCOVERABILITY



SECURE YOUR MOST SENSITIVE CONTENT...

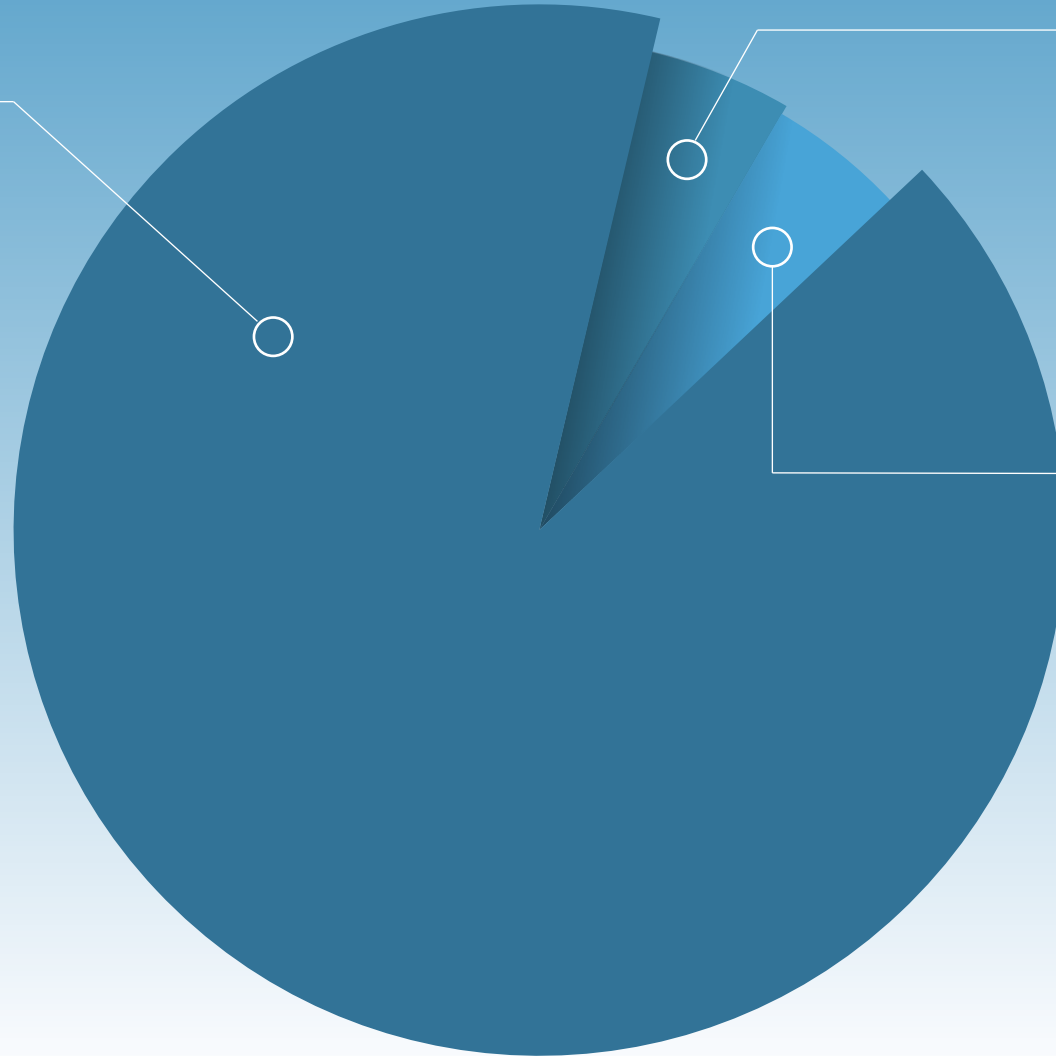


...BUT MOST CONTENT SHOULD BE MADE DISCOVERABLE



90%

Discoverable to  
a limited group  
of users



5%

Discoverable to  
no one

5%

Discoverable to  
everyone



## UNDERSTANDING PORTAL SECURITY

- Identity must be established with corporate identity system
- Portal security controls what reporting users can find and access
- In-report row level security always handled by the reporting tool



# PORTAL SECURITY OPTIONS



Leverage corporate identity & group management systems

- LDAP/AD Groups
- Office365 Groups
- SAML Groups



Set portal content access list from **tool security model**



Set content access directly in the **portal**

- Category level access
- Report Access





# GROUP BASED SECURITY

Only works if the content is in a tool that has group synchronization to a centralized repository

Active Directory Groups



Group 1



Group 2

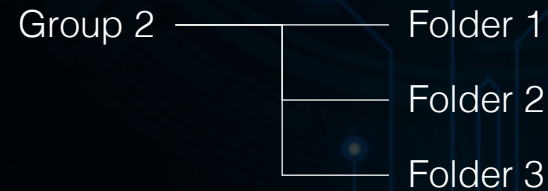


Selected AD groups are mapped to Analytics Catalog & BI Tools User Groups

## Analytics Catalog



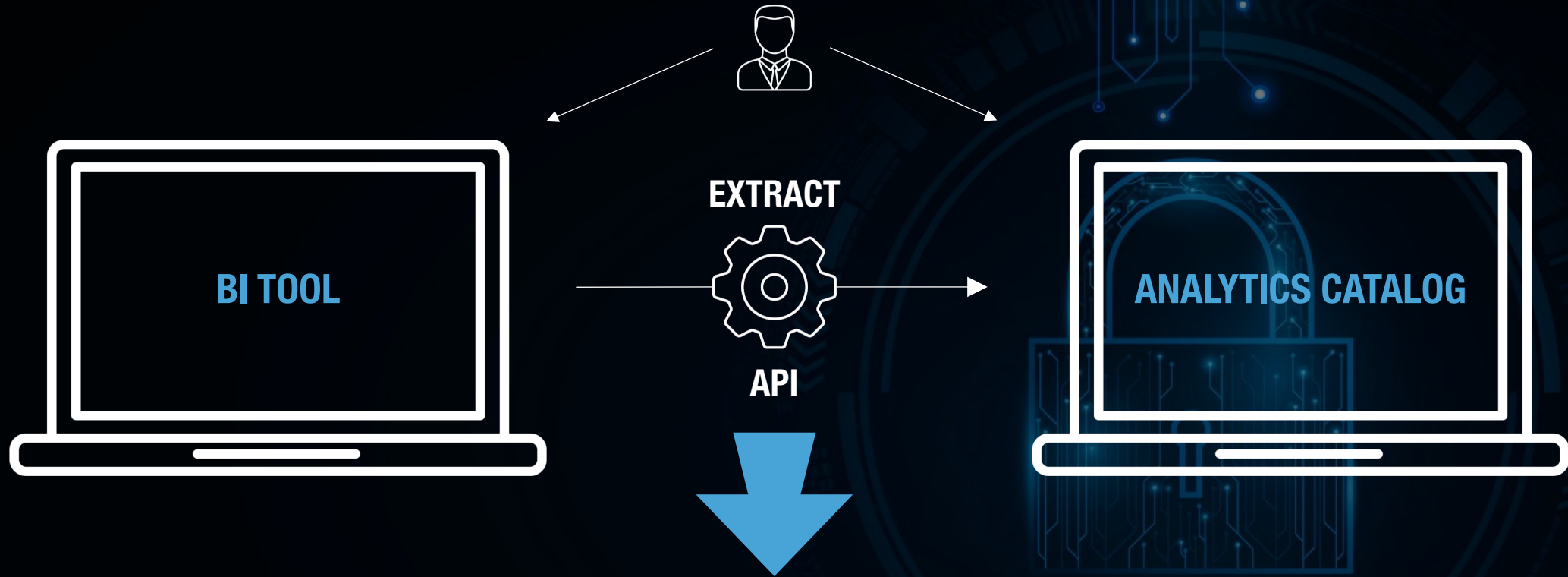
## BI Tool



Catalog categories map to content groupings in BI tools



# TOOL BASED SECURITY – MIRROR SECURITY



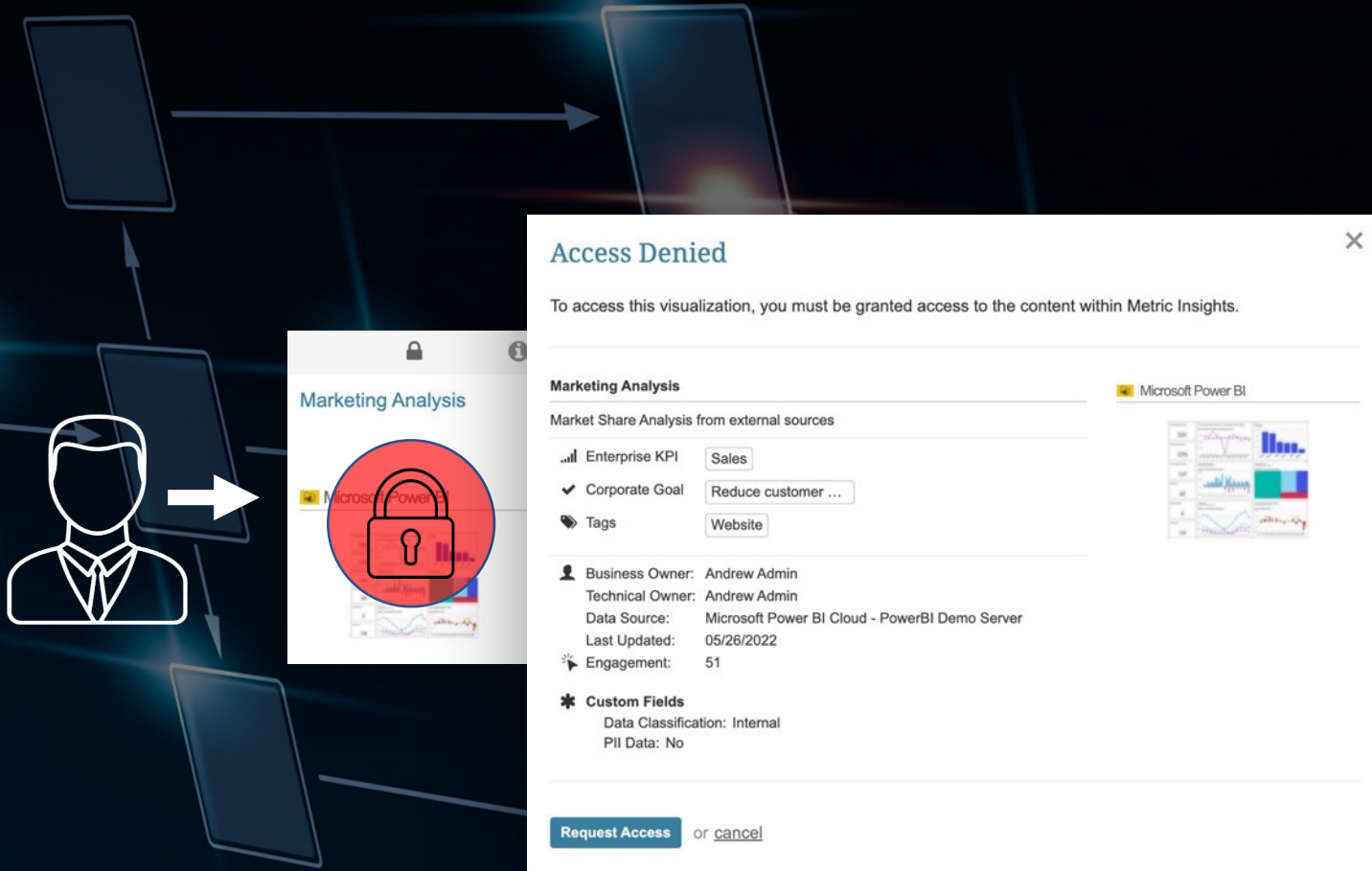
**User Access List**  
User -> Report

**Group Access List**  
Group -> Report

**Group Membership List**  
User -> Group

Used together to set groups and members in the analytics portal

# ACCESS REQUEST WORKFLOW



## SUPPORT TICKET SYSTEM

Assign to appropriate AD groups

## ANALYTICS PORTAL

Assign to appropriate Catalog user groups



# BEST PRACTICES

## DISCOVERABILITY

- Set a High Bar for Globally-Discoverable Content
- Most content discoverable based on business function
- Only the most sensitive content should not be discoverable
- Set appropriate scope for discoverability to avoid oversharing

## SECURITY MODEL

- Publish your portal content into categories that are aligned to group access
- Integrate security with AD/LDAP groups wherever possible to ease long-term maintenance of the security model
- Align access and security planning and portal planning efforts



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EVERYWHERE

# METADATA STRATEGY MUST SERVE 3 AUDIENCES



**BI Publishers**

Is this report a good starting point for the analysis that I want to perform?



**BI Consumers**

Can I use this report to answer my question or do I need to ask for a new one?



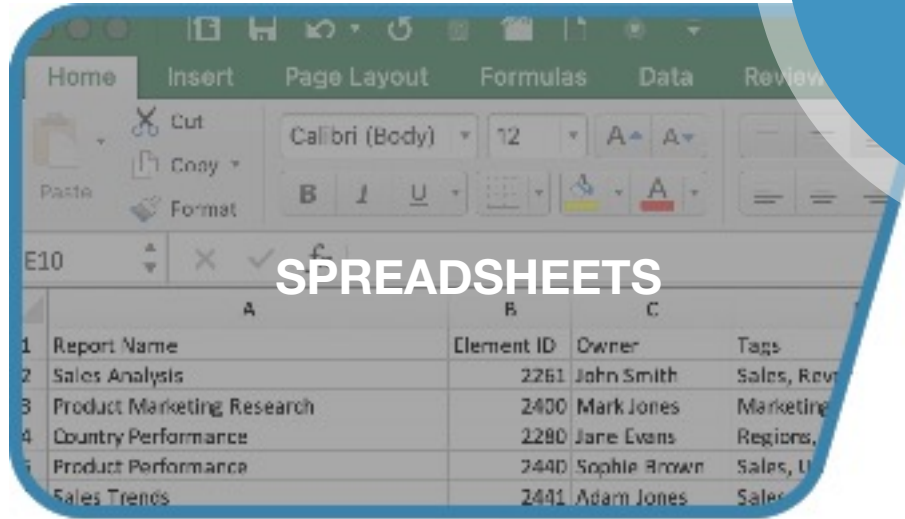
**Governance Team**

How are we ensuring that users are responsibly handling sensitive information in our reports?





# 4 SOURCES OF METATDATA



# ALIGN YOUR METADATA STRATEGY TO YOUR CONTENT

**Name**

**Link**

**Description**

**Certified?**

**Data Classification**

**Contains PII?**

**LOB**













**Technical Owner**

**Business Owner**

























**Data Source**

**Lineage**




































# ALIGN YOUR METADATA STRATEGY TO YOUR CONTENT

|                            |  Power BI |
|----------------------------|--|
| <b>Name</b>                |           |
| <b>Link</b>                |           |
| <b>Description</b>         |           |
| <b>Certified?</b>          |           |
| <b>Data Classification</b> |           |
| <b>Contains PII?</b>       |           |
| <b>LOB</b>                 |          |
| <b>Technical Owner</b>     |         |
| <b>Business Owner</b>      |         |
| <b>Data Source</b>         |         |
| <b>Lineage</b>             |         |















































# ALIGN YOUR METADATA STRATEGY TO YOUR CONTENT

|                            |  Power BI |  + a b   e a u |
|----------------------------|--|---|
| <b>Name</b>                |           |                |
| <b>Link</b>                |           |                |
| <b>Description</b>         |           |                |
| <b>Certified?</b>          |           |                |
| <b>Data Classification</b> |           |                |
| <b>Contains PII?</b>       |           |                |
| <b>LOB</b>                 |          |               |
| <b>Technical Owner</b>     |         |              |
| <b>Business Owner</b>      |         |              |
| <b>Data Source</b>         |         |              |
| <b>Lineage</b>             |         |              |

# ALIGN YOUR METADATA STRATEGY TO YOUR CONTENT

|                            |  Power BI |  + a b   e a u |  SharePoint |
|----------------------------|--|---|--|
| <b>Name</b>                |           |                |             |
| <b>Link</b>                |           |                |             |
| <b>Description</b>         |           |                |             |
| <b>Certified?</b>          |           |                |             |
| <b>Data Classification</b> |           |                |             |
| <b>Contains PII?</b>       |           |                |             |
| <b>LOB</b>                 |          |               |            |
| <b>Technical Owner</b>     |         |              |           |
| <b>Business Owner</b>      |         |              |           |
| <b>Data Source</b>         |         |              |           |
| <b>Lineage</b>             |         |              | N/A  |

# ALIGN YOUR METADATA STRATEGY TO YOUR CONTENT

|                     |  Power BI |  + a b   e a u |  SharePoint |  Network Drive |
|---------------------|--|---|--|---|
| Name                |           |                |             |                |
| Link                |           |                |             |                |
| Description         |           |                |             |                |
| Certified?          |           |                |             |                |
| Data Classification |           |                |             |                |
| Contains PII?       |           |                |             |                |
| LOB                 |          |               |            |               |
| Technical Owner     |         |              |           |              |
| Business Owner      |         |              |           |              |
| Data Source         |         |              |           |              |
| Lineage             |         |              | N/A  | N/A   |

The image shows a screenshot of a dashboard interface. At the top, there is a navigation bar with several icons: a bookmark, a dropdown menu, a group of people, a star, a refresh icon, a download icon, an envelope, and a gear. Below the navigation bar, the user 'Andrew Admin' is logged in, with the date '10/13/2022'. The dashboard features several filterable sections: 'Enterprise KPI' with buttons for 'Sales', 'Units', 'Cost', and 'Profit'; 'Tags' with buttons for 'Country' and 'Channel'; 'Business Owner' with a link to 'Sam Sales'; 'Data Steward' with a link to 'Gary Governor'; 'Technical Owner' with a link to 'Andrew Admin'; and 'Element ID' with the value '2261'. A descriptive paragraph follows: 'Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.' Below this, there are several data points: 'Image Last Taken' (Feb 17, 2023 3:05), 'Last Refreshed' (Feb 17, 2023 3:05), 'Engagement' (855), and a user profile for 'Andrew Admin' (Wednesday 05/12/2021) with a description: 'This dashboard contains our key sales metrics and is available to all regions. Set bookmarks to subscribe to specific views on the data for your region.' The dashboard is organized into sections: 'Alation' (Alation Data Classification: Internal), 'Collibra' (Collibra Status: Accepted, View In Collibra: Sales Analysis), and 'Custom Fields' (PII Data: No). A large, semi-transparent watermark reading 'BEST PRACTICES' is overlaid on the left side of the dashboard.

## REPORTING METADATA

- Start with governance requirements
- Include other metadata only when it has clear ownership and business value
- Don't try to boil the ocean!



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# CONTENT PUBLISHING STRATEGY

## 4 Techniques to follow



**ANALYST PUBLISHING**



**PUBLISHING WORKFLOW**



**CONTENT AUTO-SYNC**



**USER PUBLISHING**



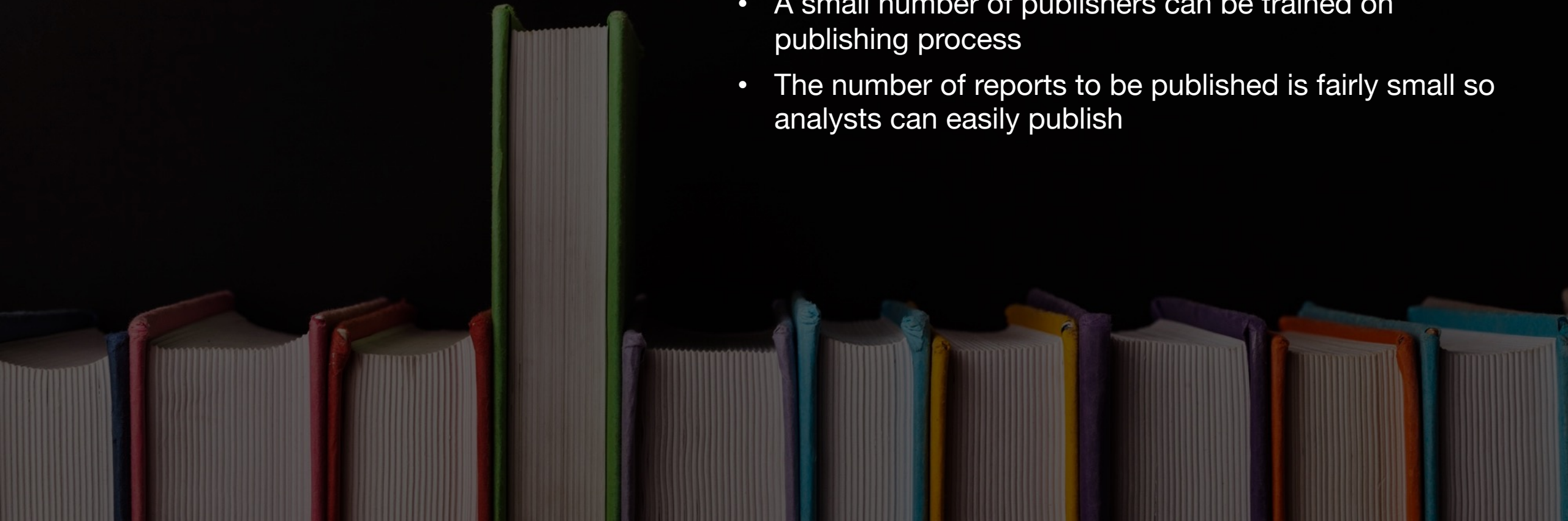


## ANALYST PUBLISHING

Analysts select the reports that should be published and specify extended metadata as part of the publishing process

### Most suitable for:

- Reports that do not need coordination among multiple parties to publish
- A small number of publishers can be trained on publishing process
- The number of reports to be published is fairly small so analysts can easily publish



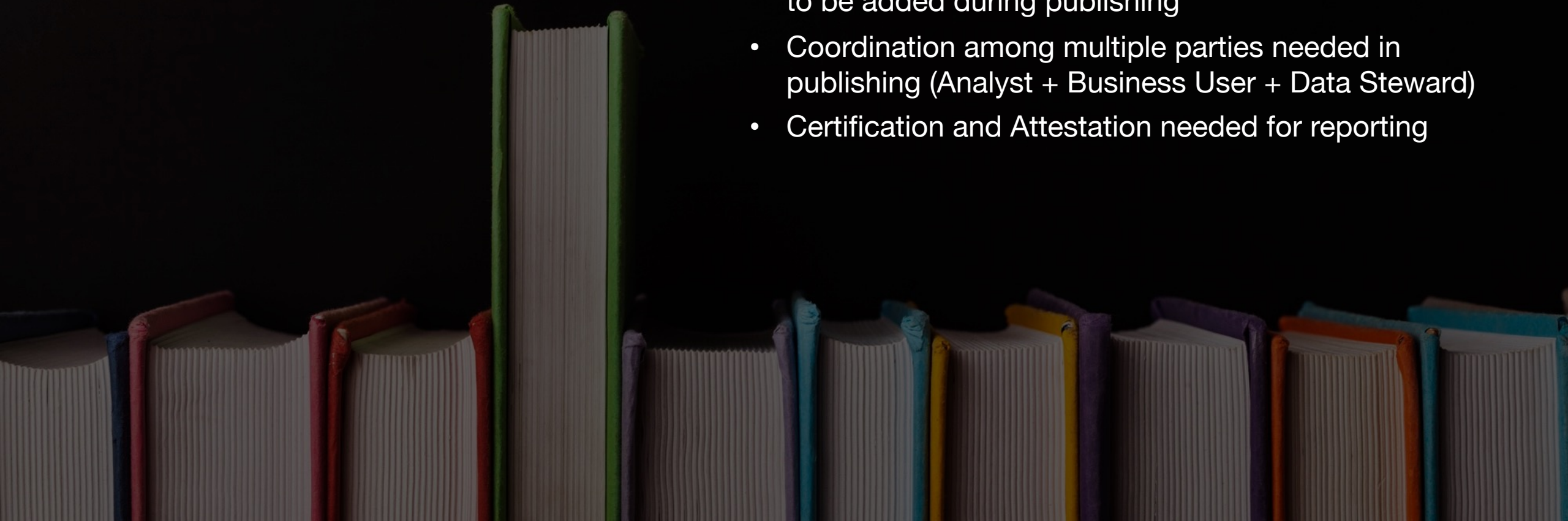


## PUBLISHING WORKFLOW

Structured process to move content through a publishing pipeline to add needed metadata before publishing

### Most suitable for:

- Highest Impact Analyst Generated Reporting
- Reports that require a significant amount of metadata to be added during publishing
- Coordination among multiple parties needed in publishing (Analyst + Business User + Data Steward)
- Certification and Attestation needed for reporting





## USER PUBLISHED

Users select specific user-generated reports that should be made available in the portal

### Most suitable for:

- Curation is required as not all user-published in a given location (folder, SharePoint site, etc..) is useful
- Extended metadata is required for user-generated reporting (e.g. data classification)
- Amount of content to publish (per publisher) is fairly small so manual publishing effort will not require more than 1-2 hours per month per content publisher.

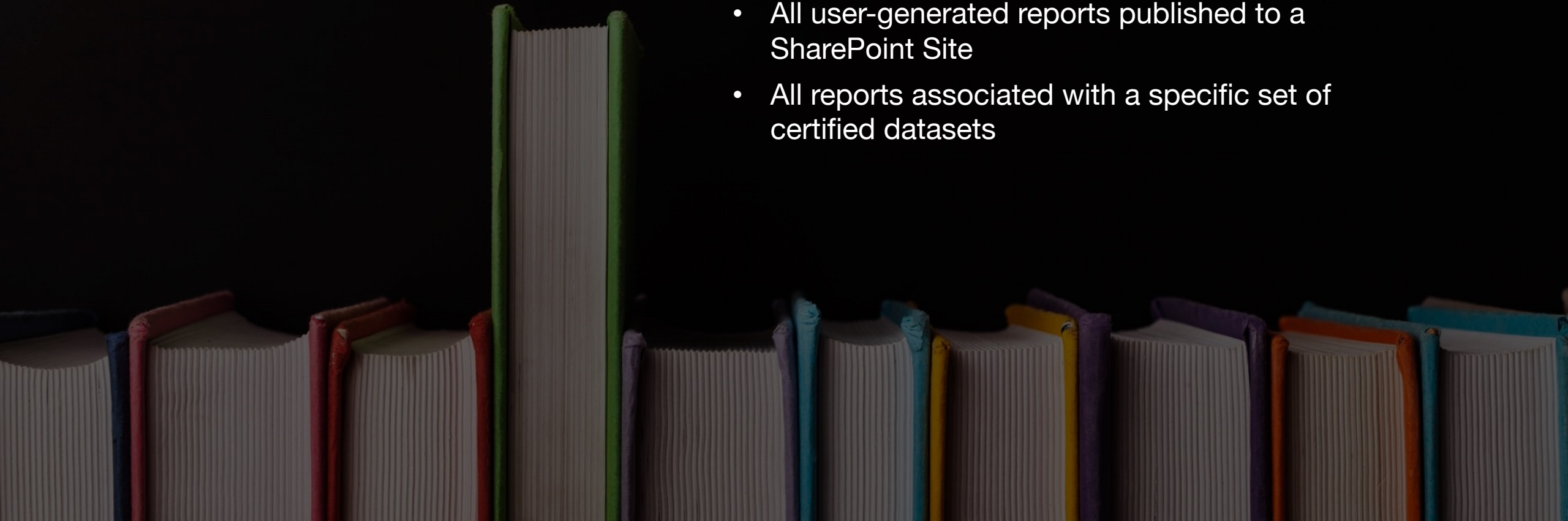


## AUTO PUBLISHED

System automatically publishes content based on a set of rules

### Examples:

- All Analyst Published Reports in a specific Project or Workspace
- All user-generated reports published to a SharePoint Site
- All reports associated with a specific set of certified datasets



1-Party Review & Certifi...

2-Party Review & Ce...

All Categories

Assignee

All Assignees

Developer Review



Business Review

Quarterly Financial Analysis

SAP Business Objects

Erik Insights

MTD Sales Analysis

Cognos

Sam Sales

# BEST PRACTICES

Daily Units

Erik Insights

Daily Sales

Sam Sales

## PUBLISHING

- Understand scope of reporting before developing a strategy
- Leverage Automation wherever possible
- Plan for reporting obsolescence



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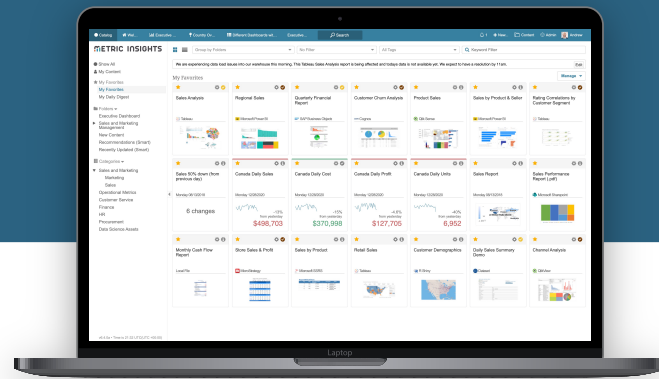


## STEP 05

Enable ACCESS FROM  
EVERYWHERE

# CATALOG MUST BE ACCESSIBLE FROM EVERYWHERE

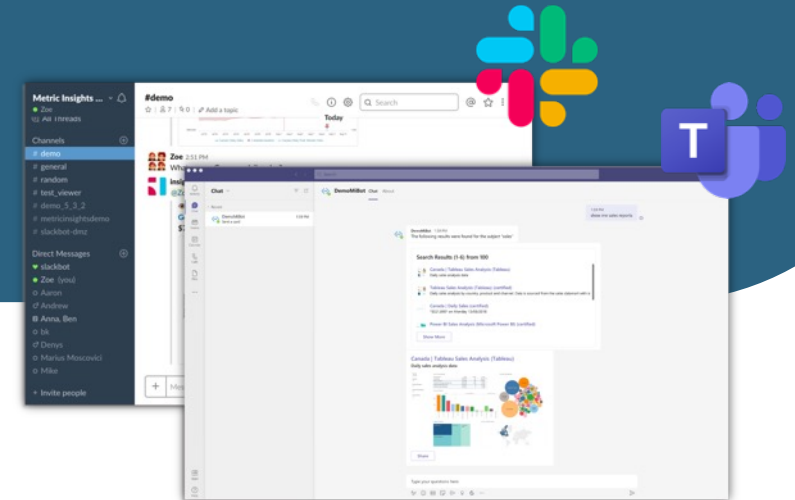
BROWSER



MOBILE



COLLABORATION TOOLS





# EMBEDED INTO EVERY USERS WORKFLOW





# BEST PRACTICES

## Deployment

- Develop a staged roll-out plan
- Make sure ALL relevant content has been published
- Make sure security and discoverability are working properly
- Get Management buy-in up-front!



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