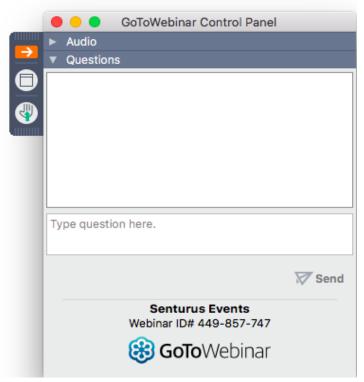
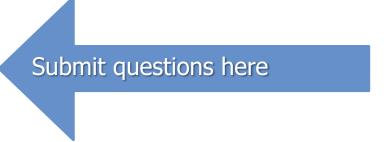




GoToWebinar Control Panel







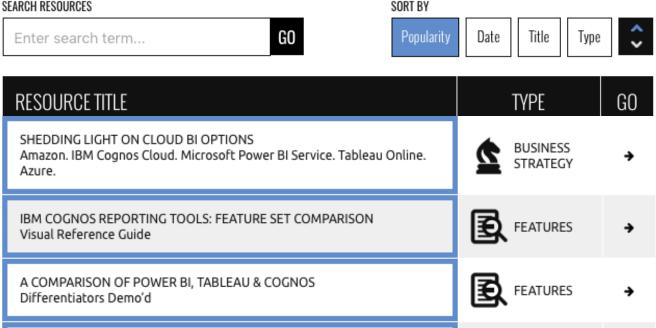


Presentation Slide Deck

www.senturus.com/resources/

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Agenda

- Introductions
- Architecture overview
- Single sign on
- Users & groups
- Permissions & row-level security
- On-premise data access
- Audit logs
- Senturus overview
- Additional resources
- Q&A



Introducing...Today's Presenters



Bob Looney
Sr. Director of Software Engineering
Senturus, Inc.



Michael Weinhauer
Practice Area Director/Solutions Architect
Senturus, Inc.



Poll #1

Which of these platforms do you currently use? (Select all that apply)

- Cognos Analytics
- Power BI
- Tableau
- Other



Poll #2

In what stage is your organization in the deployment of Tableau or Power BI?

- Isolated desktop users, sharing workbook files
- Some departments have adopted & deployed a server/service
- Corporate-wide policy and mature BI processes
- Full migration planned or in process
- No one using/unknown





ARCHITECTURE OVERVIEW

Components

Desktop

- Power Bl Desktop (Windows)
- Tableau Desktop (Windows, Mac)



Vendor hosted service

- Power BI service (app.powerbi.com)
- Tableau Online (online.tableau.com)





Components

On-premise server

- Tableau Server (Windows, Linux)
- N/A
 - Power BI Report Server subset of Power BI service

On-premise data access

- Power BI Gateway (Windows)
- Tableau Bridge (Windows)

Mobile apps

Both offer iOS and Android apps



Example Architecture Diagram

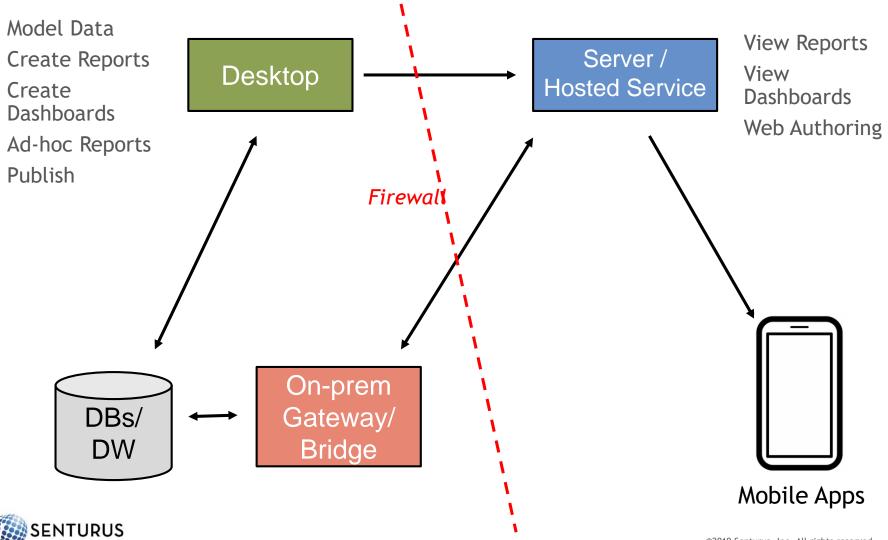


Tableau Server Architecture

- Tableau Server works as a standalone web app □like most other on prem or SaaS applications
- Application is installed on a server or VM





Power BI Service Architecture

Power BI service is designed as a piece of the larger Microsoft Azure cloud architecture...

View Reports View Dashboards Web Authoring





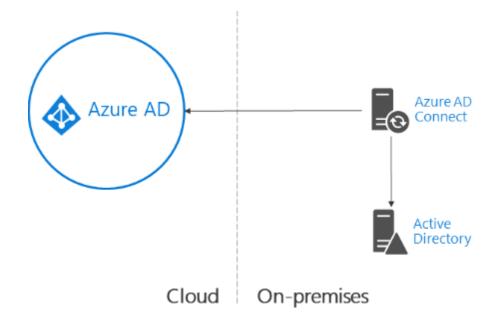


User Management Licensing Audit Logs Distribution Lists SharePoint Embed Azure Active Directory
AD Connect (Domain Sync)
Security Groups
Single Sign On
Multi-Factor Auth (MFA)



Azure AD Connect

- On-premise Active Directory domains need to be synced to Azure Active Directory
- This is done using a Microsoft utility called AD Connect
- If you're using other Office 365 applications (Exchange Online, SharePoint Online) with Active Directory, this step has already been completed by your IT department



Component Overview Summary

Largely the same core components and features

- Tableau has a few unique strengths
 - Mac desktop/Linux server
 - On-premise server



- Power BI is strong when an organization is already implementing Office 365/Azure
 - IT will already be managing users and groups







SINGLE SIGN ON

Single Sign On - Overview

• Enterprises use single sign on to increase security

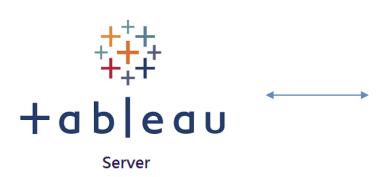


- Multi-factor authentication (MFA) at the SSO level
 - SMS text messages
 - Authentication mobile apps/security tokens or keys



Single Sign On - Tableau Server

- Works like most other SaaS applications
- Default authentication is the user's own username and password database
- Supports SAML and OpenID Connect (Google) for SSO





PingOne®

onelogin





...and more



Single Sign On - Tableau Setup

Similar to other SaaS applications

Authentication types Learn more

√ Tableau

This is the default authentication type for Tableau Sites, and is always enabled.

- ✓ Enable an additional authentication method
 - Google
 This allows you to set OpenID as your users' authentication method
 - onelogin.com (SAML)
 This allows you to set up your SAML provider to work with Tableau so your users can sign in to (i.e. Okta, OneLogin, etc.)

 Edit Connection.

 Several options are well documented and supported by Tableau

Site Authentication

Access Sites Directly from Connected Clients

SAML and How it Works

SAML Requirements for Tableau
Online

Enable SAML Single Sign-On for a Site

Configure SAML with Azure Active Directory

Configure SAML with AD FS

Configure SAML with OneLogin

Configure SAML with PingOne

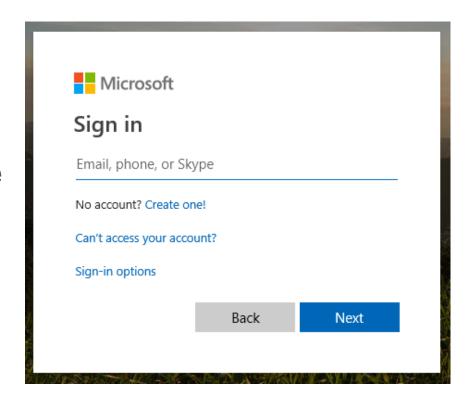
Configure SAML with Okta

Troubleshoot SAMI



Single Sign On - Power BI

- Unlike most other SaaS applications
- Power BI does not maintain a separate database of usernames and passwords
- Power BI uses Azure Active Directory to authenticate users
- Azure AD's default authentication is Microsoft's own identity provider (IdP)





Single Sign On - Power BI

 You can replace Azure's authentication step with another identity provider (IdP)



- Supports WS Federation, WS-Trust and SAML-P protocols
- If your IT group sets this up, it is replaced for <u>all</u> Microsoft authentication calls (Office 365, Azure login, connected apps, etc.)



Single Sign On - Power BI

Using a third party IdP is possible, but...

- Microsoft points you to your IdP if you have questions
- Microsoft doesn't provide any IdP specific setup steps
- Microsoft no longer tests and validates IdPs

If your organization uses a third-party federation solution, you can configure single sign-on for your on-premises Active Directory users with Microsoft Online services, such as Office 365, provided the third-party federation solution is compatible with Azure Active Directory. For questions regarding compatibility, please contact your identity provider. If you would like to see a list of identity providers who have previously been tested for compatibility with Azure AD, by Microsoft, click here.

(!) Note

Microsoft no longer provides validation testing to independent identity providers for compatibility with Azure Active Directory. If you would like to test your product for interoperability please refer to these <u>guidelines</u>.



Single Sign On Summary

Both platforms support single sign on

- Are you already using Office 365?
 - Power BI SSO setup will be faster



Tableau SSO Setup is still possible

- Are you using an organization wide IdP (Okta, onelogin, etc) not tied to Azure?
 - Tableau SSO setup will be faster
 - Power BI SSO setup is still possible







USERS & GROUPS

Tableau Users - Manual

Manual, bulk options are well supported

Add Users to this Site

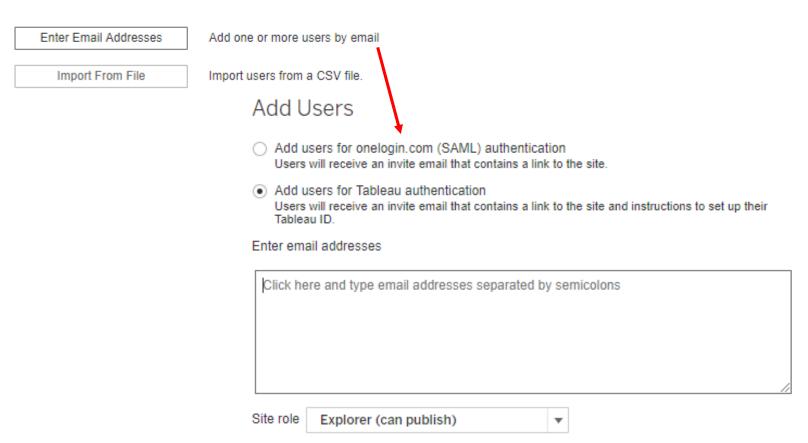




Tableau Groups - Manual

- Adding and assign groups manually
- Users are typically placed in one or more groups
- Best practice: use groups to assign permissions

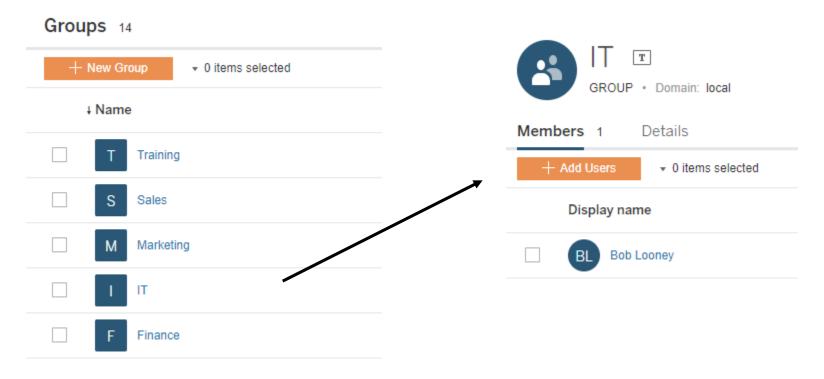




Tableau Users & Groups - API

 Tableau provides REST APIs for managing users and groups programmatically

https://help.tableau.com/curre
nt/api/rest_api/enus/REST/rest_api_ref.htm

Users and Groups	Create Group
	Add User to Group
	Add User to Site
	Get Users in Group
	Get Users on Site
	Query Groups
	Query User On Site
	Update Group
	Update User
	Remove User from Group
	Remove User from Site



Tableau Users & Groups - IDP

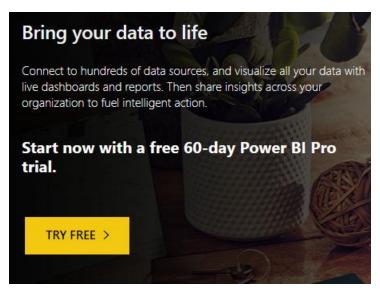
- New feature allows the configured IdP to maintain users
 - Only Okta and OneLogin supported currently

System for Cross-do	main Identity Management (SCIM) Learn more
Allow a third-party id	lentity provider to manage users on this site.
Enable SCIM	
Base URL	https://
Generate New	Secret



Power BI Users

- Anyone can download and install Power BI desktop (no license needed (just machine permissions to install)
- Publishing or using data sources on Power BI service requires a Power BI Pro license

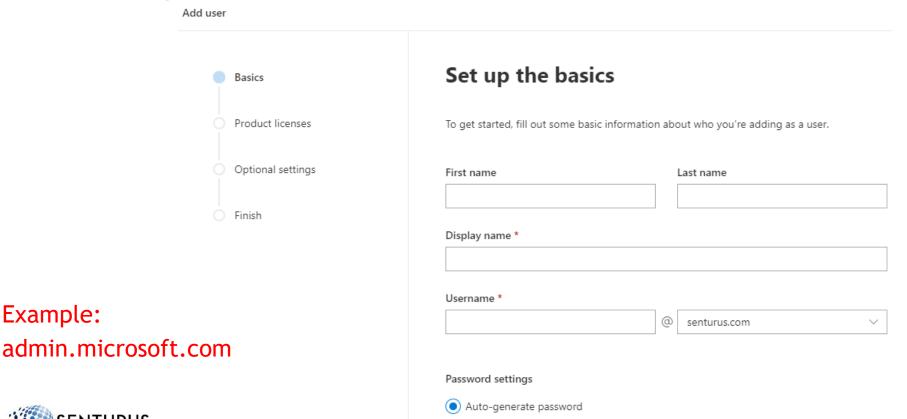


 An end user could install and start using Power BI service without IT involvement until that trial expires



Power BI Users - Manual

- You cannot make a user specifically inside Power BI
- IT typically controls this process
 - On prem AD, Azure AD or Office 365



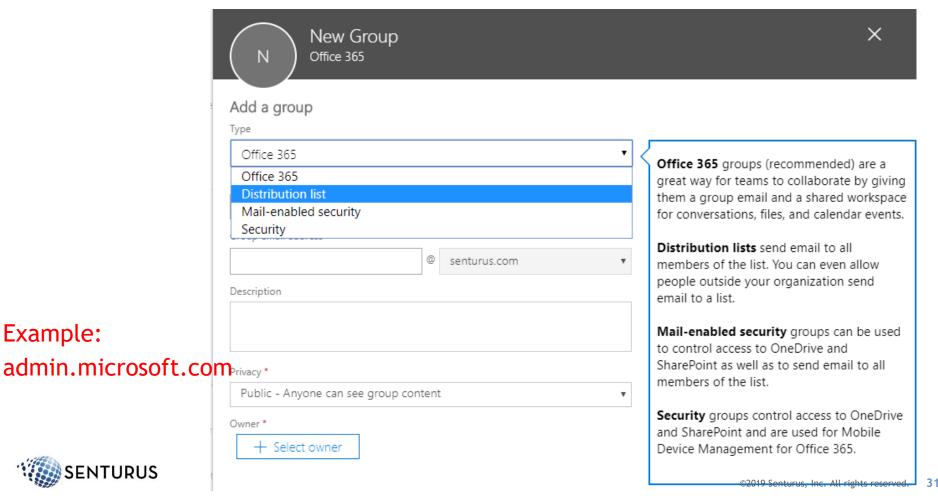
Let me create the password



Example:

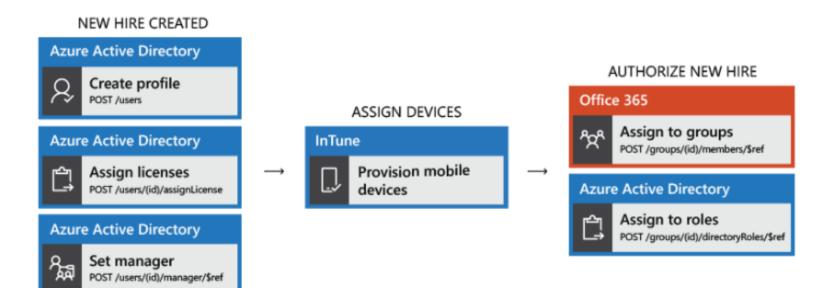
Power BI Groups - Manual

- You cannot make a group specifically inside Power BI
- Again, IT typically controls this process



Power BI Users & Groups - API

- The Microsoft Graph API allows programmatic creation and maintenance of directory objects
- https://developer.microsoft.com/en-us/graph
- Also allows for some fancy employee onboarding workflows





Users & Groups Summary

- Both platforms support users and groups
- Both platforms support automation features

 Power BI will leverage users and groups from Azure AD—AD connect can sync or prem AD to the cloud



 Tableau will need a method/process to create users and groups prior to SSO login—enterprises will likely want to automate this process







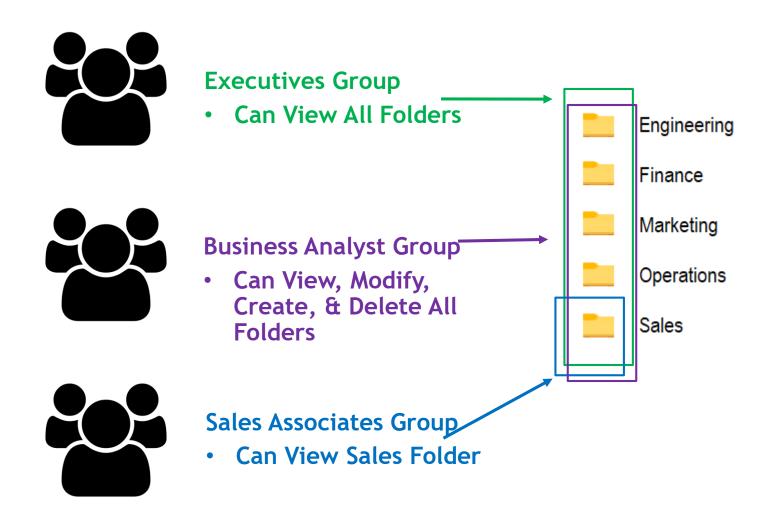
PERMISSIONS & ROW-LEVEL SECURITY DEFINED

Permissions & Row-Level Security

- Permissions enforce which folders, reports and data sources users can access and to what extent (View, Edit, Create, Delete)
 - "Which reports can a user see or edit?"
 - Always enforced at the BI tool level
- Row-Level Security (RLS) is a pattern that restricts access to slices of your data (aka Entitlements)
 - "What data rows can a user see in a report?"
 - Enforced at the DW or BI tool level
- The combination of Permissions and Row-Level Security enforce your company's data governance policies



Permissions - Example





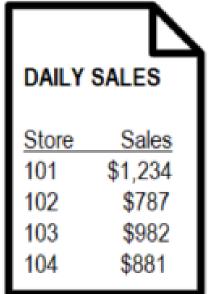
Row-Level Security - Example

Two people in an organization have **permission** to view the same report. When they view the report, they see different slices of the data.

Company Policy:

- A store manager should only have access to their store
- A corporate manager should have access to all stores











PERMISSIONS

Tableau Permissions

- Typical folder ("project") structure where permissions cascade down
- Nested folders are possible
- Assign/restrict a user or group at the project, workbook and data source levels
- Project level view of permissions

Permissions

Edit permissions for the project "Finance".

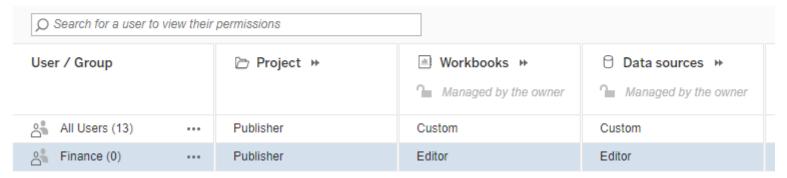




Tableau Workbook Permissions

Workbook level permissions

Permissions

Edit permissions for the workbook "Book1".

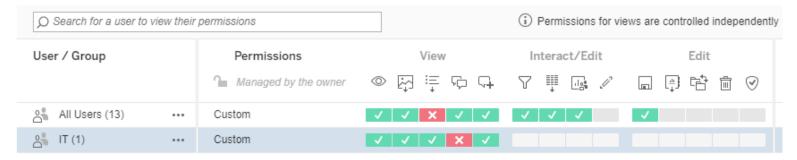






Tableau Data Source Permissions

Data Source permissions

Permissions

Edit permissions for the data source "Training Data Source (Online)".

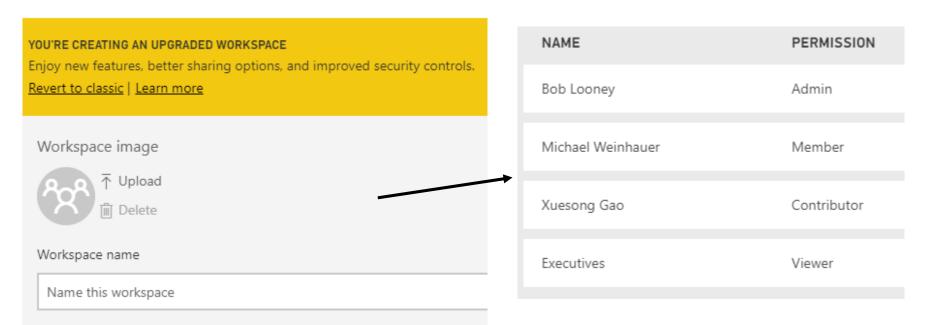
Search for a user to view their permissions							
User / Group		Permissions	Use	Edit			
		Managed by the owner					
All Users (13)	•••	Custom	V V	✓			



Power BI Workspace Permissions

- Power BI calls folders "Workspaces"
- Nested folders are not possible
- Use the new/upgraded workspace experience

Create a workspace

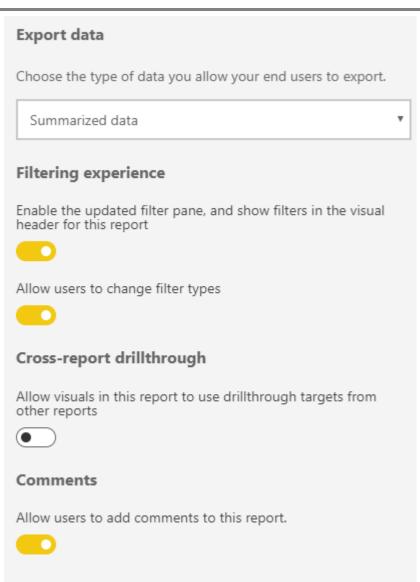




Power BI Report Permissions

 Permissions are assigned at the folder level, not the report level (unlike Tableau)

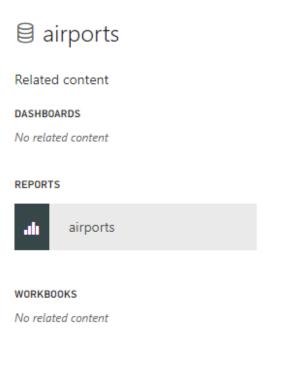
 You <u>can</u> control some "interactions" at the report level, but for all users using Report Settings

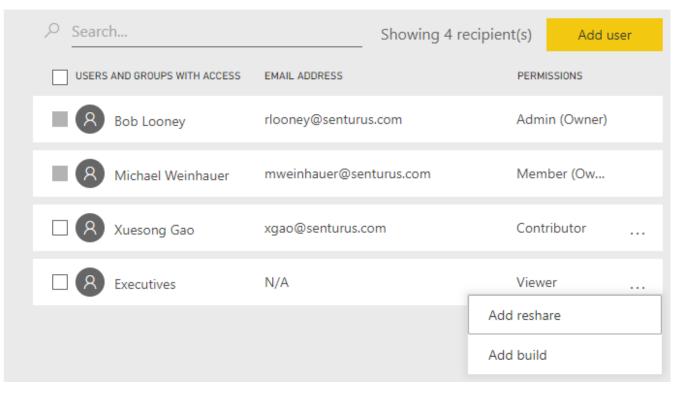




Power BI Dataset Permissions

- Datasets have a specific set of permissions
- Inherited from the workspace, overridden at the dataset level







Permissions Summary

 Both applications cascade permissions from the project/ workspace (folder) down to the reports, dashboards and datasets

 Power BI has broader user permission settings at the folder level



 Tableau offers nested folders and deeper fine tuning of user permissions







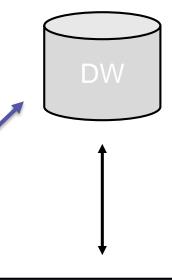
Row-Level Security

Where Do You Implement RLS?

In an enterprise environment, you have a choice of where to implement RLS

• Option 1: Data warehouses can implement RLS at the model layer. Power BI and Tableau can then be configured to pass the logged-on user info to the DW to enforce RLS.

• Option 2: Power BI and Tableau can implement RLS at the server application layer. They use the logged-on user and enforce RLS using logic at the dataset and workbook level.



Server / Hosted Service

Power BI Passing The DW The Logged-on User

Option 1: Implement RLS in the DW (Power BI)

- Works really well with Analysis Services
- Supports a limited set of other DW/DBs using Kerberos delegation

We currently support the following data sources:

- SQL Server (Kerberos)
- SAP HANA (Kerberos and SAML)
- SAP BW (Kerberos)
- Teradata (Kerberos)
- Spark (Kerberos)
- Impala (Kerberos)



Tableau Passing The DW The Logged on user

Option 1: Implement RLS in the DW (Tableau)

- Initial SQL feature can pass logged on user
- Impersonation command executes for each session / query

- Also supports a limited set of DW/DBs via Kerberos delegation
 - Tableau supports Kerberos delegation with the following data sources:
- Specific SAP HANA and SAP BW support as well
- Tableau Online not supported





Denodo

Hortonworks

MSAS



Oracle



PostgreSQL

- Spark
- SQL Server
- Teradata





Implementing Row-Level Security in Power BI

Option 2: Implement RLS in the Application (Power BI) Power BI Desktop:

- Create roles
- Test roles view as roles

Power BI Service:

- Assign users and groups to roles
- Test roles
- Deliver reports to users that enforce RLS



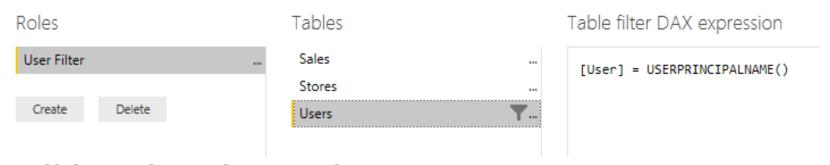
Power BI Desktop - CREATE Roles

Static Role - manage RLS with BI groups

Manage roles



Dynamic Role - manage RLS with a data table



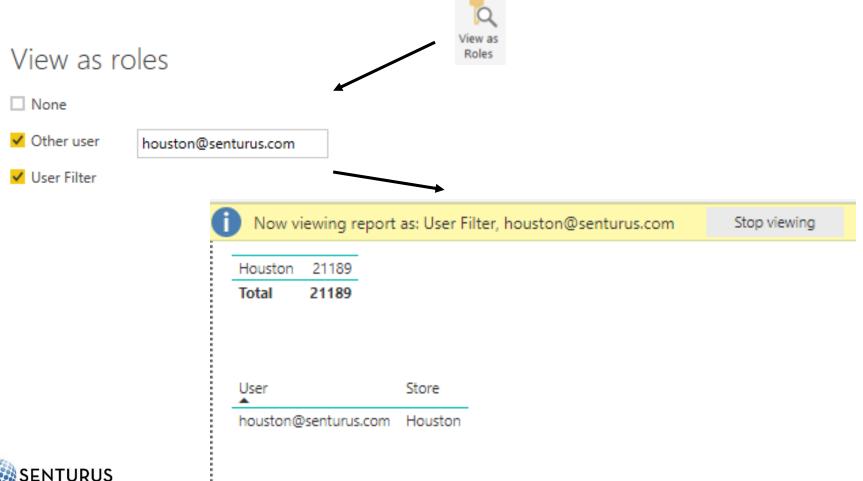
All based on the DAX language

– USERPRINCIPALNAME() = user@company.com



Power BI Desktop - Test Roles DESKTOP

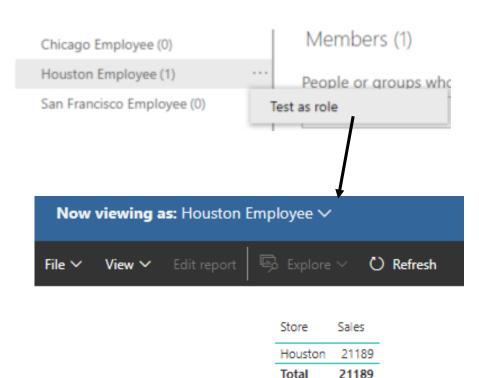
Use View as Roles to test a role as a user in desktop



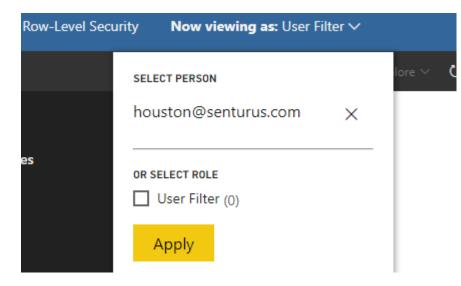
Power BI Service - Test Roles ONLINE

Roles can also be tested online against published reports

Row-Level Security



Static Filters allow you to specify which role to view the report with



Dynamic Filters allow you to specify which user to view the report with



Implementing Row-Level Security in Tableau

Option 2: Implement RLS in the Application (Tableau) Tableau Desktop:

- Create roles
- Assign users and groups to static filters
- Test roles

Tableau Server/Online:

- Assign users to groups
- Deliver reports to users that enforce RLS



Tableau Desktop - Create Roles (Filters)

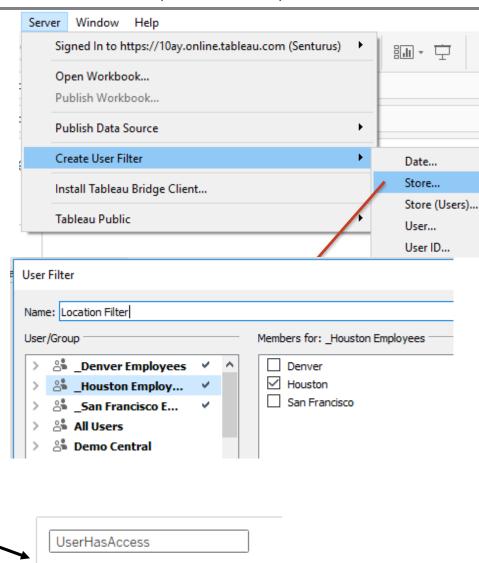
Create a **Static Filter** and Map users and groups

Define all mappings

 Tableau group assigned to a value for the selected field

Dynamic Filters can use built in functions in a calculated field

- USERNAME()
- ISMEMBEROF()
- USERDOMAIN()



[User] = USERNAME()

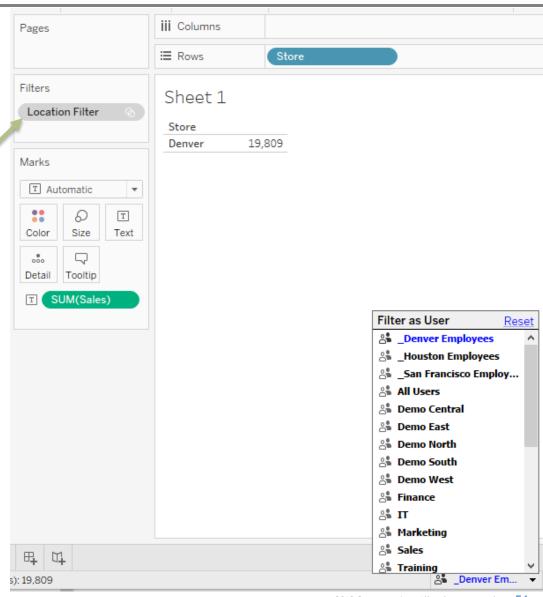


Tableau Desktop - Implement and Test Filters

RLS Filter becomes a set that can be added as a filter on the worksheet

Test RLS with the dropdown of groups and users from Tableau Server

Note: Cannot test RLS on the server, only in desktop





Row-Level Security Summary

- Enterprises with an existing DW with RLS should assess if the BI tool is compatible
 - Tableau supports a wider variety of DWs
- Enterprises without a DW or with incompatible DW technologies can enforce RLS at the BI tool level
 - Static Filters—maintain groups in the BI tool to enforce
 - Dynamic Filters—maintain entitlement data table, leverage BI tool USER functions to enforce









ON-PREMISE DATA ACCESS

On Prem Data Access Overview

- Companies often store data in a data warehouse or databases in an on-premises data center
- Tableau and Power BI can be hosted online
 - Power BI service is only available as a vendor hosted service
 - Tableau Server running in a cloud (AWS, Azure, etc.) or Tableau Online will also need this
- When deployed like this, a gateway or bridge is needed to securely access data

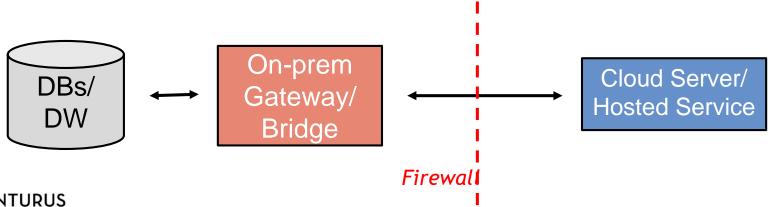


Tableau Bridge

 Tableau Bridge is the Tableau product that provides access to on-premises data

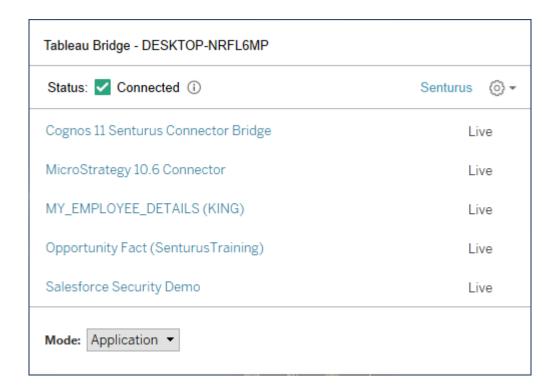




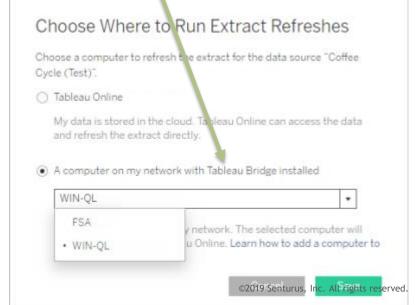
Tableau Bridge

- Provides both live and extract data access
- Can be run as a Windows service (always on)
- Centralized, web-based administration
- No clustering support
- No Kerberos support
- Minimum Specs:

OPERATING SYSTEMS

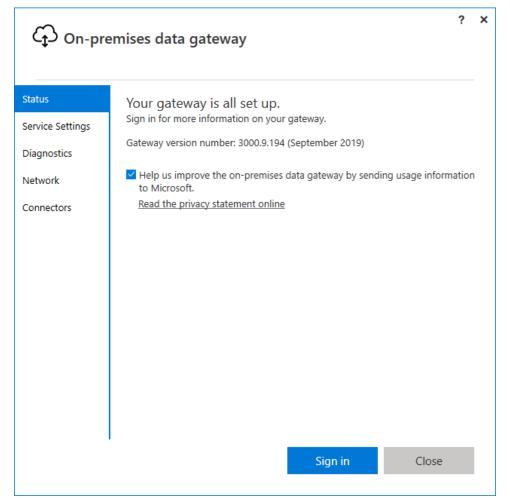
- Microsoft Windows 7 or newer (64-bit)
- · Microsoft Server 2008 R2 or newer
- Intel Pentium 4 or AMD Opteron processor or newer
- 2 GB memory





Power BI Gateway

Power BI Gateway is the Microsoft product that provides access to on-premises data



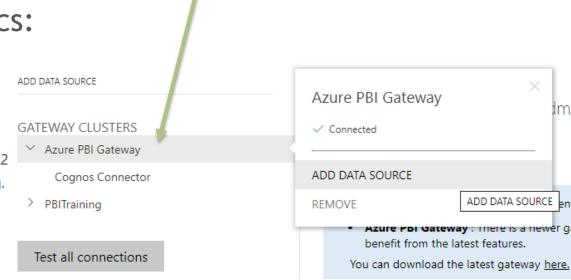


Power BI Gateway

- Provides both DirectQuery and extract data access
- Can be run as a Windows service (always on)
- Centralized, web-based administration
- Clustering support
- Kerberos support
- Recommended Specs:

Recommended

- An 8-core CPU
- 8 GB of memory
- A 64-bit version of Windows Server 2012 R2
- Solid state drive (SSD) storage for spooling.





Best Practices

- Place the bridge/gateway "near" the data sources to reduce latency when possible
 - Same subnet and switch on physical hardware
 - Same virtualized hosts/minimize physical network traffic
- Minimize WAN hops and ensure appropriate bandwidth
- Plenty of RAM, multi-core CPUs and fast disks
- Monitor network and OS for resource bottlenecks





On Prem Data Access Summary

- Both platforms offer similar products to securely access on-premise data
- Gateway/Bridge components only runs on Windows (64 bit)
- Power BI takes a clustering approach which should translate to higher availability and redundancy
- Tableau does not support Kerberos (passing user for RLS) via the Tableau Bridge









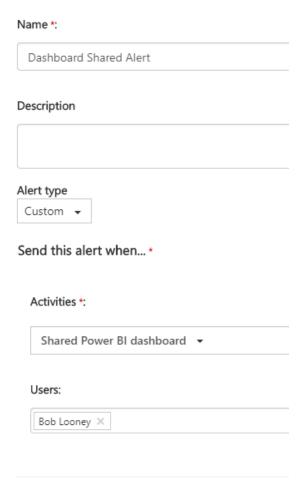
AUDIT LOGS

Power BI Audit Logs

Office 365 Security & Compliance

- Leverages the Office 365
 Security and Compliance portal
 - Combined with Exchange,
 SharePoint and office data
- Search and download audit log activity
- Send alerts based on activity log events

New alert policy





Power BI Admin Portal - Audit Logs

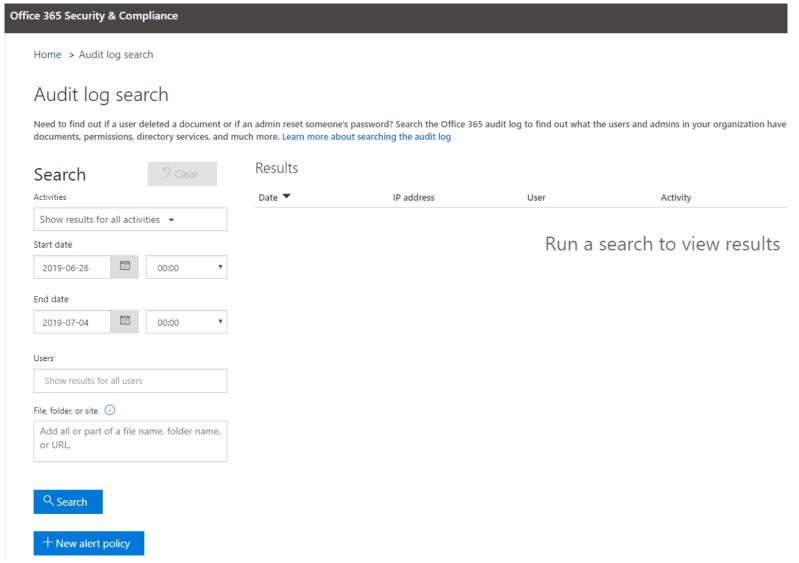




Tableau Audit Logs

- Reports found under the Site Status tab
- Data stored in the Tableau database drives Tableau reports and dashboards
- Use Dashboard Alert feature to build custom notifications on user activity
- Filter and/or download underlying data

Full data Summary Showing first 14 rows. Download all rows as a text file Show all columns Action comment Created At created_at_local Item Name (Hist Name (Hist Name (Hist Name (Hist Site Use Flows) Views) Workbooks) Name Datasources) Login Null 10/1/2019 10/1/2019 Null Null Null Null Senturus rlooney@ 6:49:29 PM 11:49:29 AM Null 10/1/2019 10/1/2019 Null Null Null Null Login Senturus rlooney@ 6:49:28 PM 11:49:28 AM Null 10/1/2019 10/1/2019 Null Null Null Null Login rloonev@ 6:49:37 PM 11:49:37 AM Redeem Refresh Null 10/1/2019 10/1/2019 Null Null Null Null Senturus rloonev@ Token 6:49:37 PM 11:49:37 AM



Tableau - Audit Logs

▼ C nected Dat... Actions by All Users Actions by Specific User Actions by Recent Users Background Tasks for Extracts Bridge Tasks for Extracts Background Tasks for Extracts

What Actions Have Users Taken on this Site Recently? (Click to filter)

User Status	
(AII)	▼

Active Recently Active

1
1

1. Who Was Most Recently Active?

User Name	Site Name	Last Activity Time	=	
rlooney@senturus.com	Senturus	10/1/2019 11:56:36 AM		Active
rlooney@senturus.com	Senturus	10/1/2019 11:49:37 AM		Recently Active
rlooney@senturus.com	Senturus	10/1/2019 11:49:40 AM		Recently Active
rlooney@senturus.com	Senturus	10/1/2019 11:49:29 AM		Recently Active

2. What Actions Were Recently Performed?

User Name	Item Name	Site	Action				
rlooney@senturus.com	-	Senturus	Login	•			
rlooney@senturus.com	-	Senturus	Redeem Refresh Token				
rlooney@senturus.com	-	Senturus	Logout	•			
					11:51 AM	11:53 AM	11:55 AM



Audit Log Summary

- Both platforms offer similar audit capabilities
- Both platforms offer alerts based on user activity









RECAP

Recap

Reviewed

- Architecture overview
- Single sign on
- Users & groups
- Permissions & row level security
- On-premise data access
- Audit dogs

Your organization's unique systems and business requirements will drive your platform choice.



Detailed Platform Comparison: 150+ Attributes

Summary Feature/Function Inventory

Database / Data warehouse

ETL Tools

Metadata Modeling Tools

Query Tools

Caliber & Reporting Tools

Completeness of Dashboarding Tools

BI/Analytics

Tools

Product

Company

Investment

Improvements &

Data Exploration Tools

Data Mining Predictive Tools Data Governance Capabilities

Audit Tools

Infrastructure Connectivity & Security

Overall

Full Stack

Front-end Tool(s)

Partner Enablement

Reporting Tools

Dashboarding Tools

Data Exploration Tools

Data Mining / Predictive Tools

Infrastructure Connectivity & Security

Overall

On-Premise (e.g ERP) Cloud / SAAS systems



	Immediate Data Preview
	3 rd party custom visualization & features marketplace
	Developer Access to create custom visuals or extend features
Visualization	Prebuilt workbooks for popular operational systems
	RAVE/D3 Support
	Filtering
	Advanced Filtering
	Slicers
	Create Calculations
	Create Complex Calculations
	Copy Report to Clipboard
	Drill through Definitions
	Drill up/drill downs
	Variable Support
	Parameterized Reporting
Report	Dynamic Layout Based on Parameters
Functionality	Complex nesting and row selection
	Tuples/Intersections
	Layout Control

Full Tool Comparison

- Our consultants walk you through the 150+ ratings in our interactive comparison grid
 - Explain our rationale and context for the ratings
 - Provide guidance and focus on capabilities most important to your company priorities
- \$4999
 - Entire cost credited against any future services or training

www.senturus.com info@senturus.com 888 601 6010





WHO WE ARE

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Bridging the Gap between Data & Decision Making







Full Spectrum of Services for BI

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- Data preparation and modern data warehousing
- Hybrid BI environments (migrations, security, etc.)
- BI support retainer (expertise on demand)
- Software to enable bimodal BI and platform migrations
- Training and mentoring









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WHAT'S NEW IN COGNOS ANALYTICS 11.1.4

SNEAK PEEK

Thursday, October 31, 2019 - 11am PT (2pm ET) - 60 minutes DETAILS



NORTHERN CALIFORNIA COGNOS USERS GROUP MEETING

NOVEMBER 5 IN SAN FRANCISCO

Tuesday, November 5, 2019 - 9:30am - 2:30pm -



BIMODAL SUPERHERO: SENTURUS ANALYTICS CONNECTOR

HOLY SUPER POWER! COGNOS WITH TABLEAU & POWER BI

Thursday, November 7 - 11am PT (2pm ET) - 60 minutes



OUR FAVORITE NEW FEATURES IN TABLEAU 2019.3

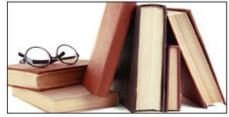
DATA AND SERVER MANAGEMENT GET A BIG BOOST Thursday, November 21 - 11am PT (2pm ET) - 60 minutes



Free Resources

www.senturus.com/senturus-resources/







UPCOMING EVENTS

RESOURCE LIBRARY

BLOG

Webinar recording

Comparison of Power BI, Tableau & Cognos



Training for Power BI, Tableau and Cognos

https://senturus.com/training/



CORPORATE TRAINING



MENTORING



SELF-PACED LEARNING



INSTRUCTOR-LED, ONLINE COURSES

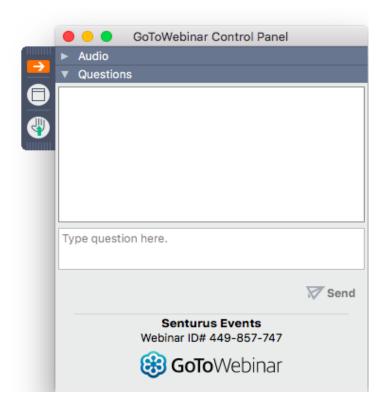


Q&A

If your question or issue is broader than what can be answered today, contact us at

info@senturus.com

and we will set up a free consultation.





Thank You!

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