

# Collibra – Tableau Integration

## Overview

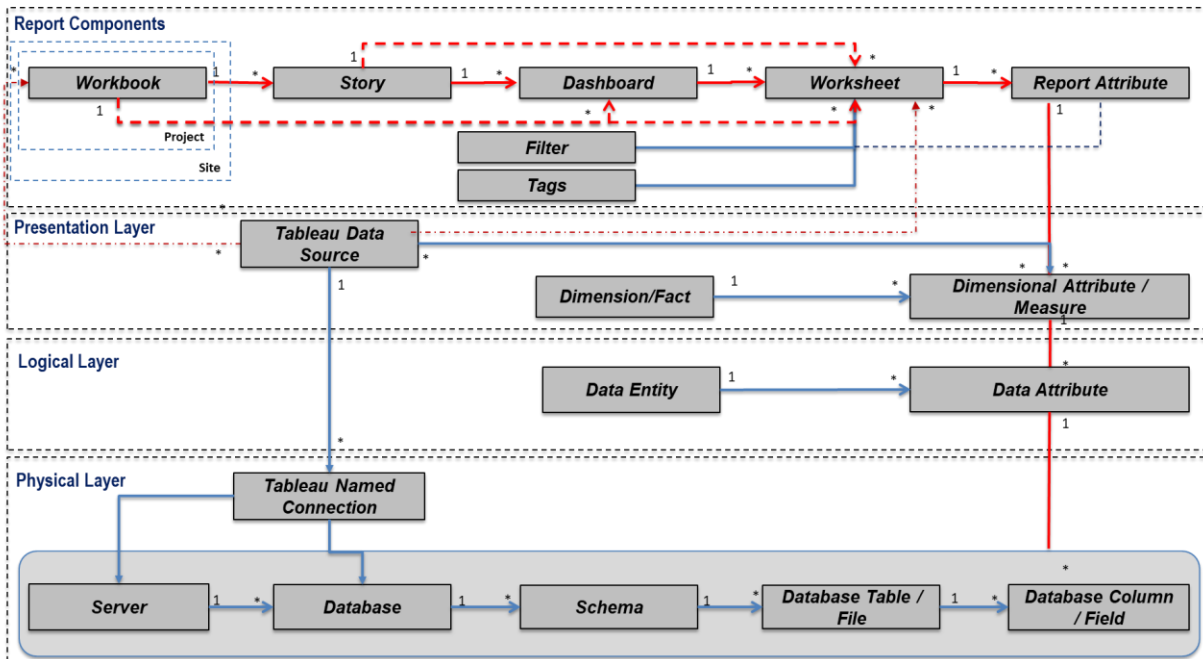
Lucid’s Collibra-Tableau integration ingests the Tableau assets into Collibra DGC.

Some key features:

- Asset extraction can be filtered based on specific Site, Project, or Workbook
- Target community in DGC for loading the assets can be specified
- Source metadata is mapped to DGC asset types as indicated in the diagram below
- Modification and Delete of the source (Tableau objects) are automatically captured and can be used to trigger actions in DGC such as asset status change, asset management workflows, etc.
- Support for full load and incremental load. Incremental loads can load changes since the last successful execution or from a specific date passed as a parameter
- Metadata loads can be scheduled or triggered on-demand

**Tableau Server versions supported:** version 10.5, 2018.x, 2019.x, 2020.x (REST ver 3.9)

Assets and relations that will be loaded into DGC:



Note: The Physical Layer assets (indicated in the shaded area - namely Schema, View /Table/Column, File/Field) will not be loaded by the Tableau template. It must be loaded separately using Collibra Catalog or via Lucid’s Database templates. Lines in red will be shown as part of the Traceability view in DGC.

## Key Use case(s)

- Traceability/Lineage – provide ability to trace the provenance of a report attribute to its source
- Report Certification
- Ability to do impact analysis of changes in the data sources on the downstream Tableau reports that consume data from these sources

## Version

3.0

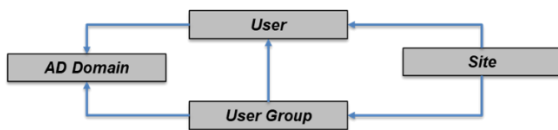
## Release Notes

- The Tableau integration loads the metadata of the following Tableau assets into Collibra DGC:
  - Site, Project, Tableau Workbook, Tableau Dashboard, Tableau Story and Tableau Worksheets along with their relations
  - In additions, the report attributes of the worksheets are loaded along with their relation to the dimensions (dimensional attributes) and measures
  - Relational Data sources (both published and un-unpublished), Excel data sources (only published) are supported i.e. their metadata are loaded into Collibra DGC to provide an end-to-end lineage from the report attribute to its source field/column in the data sources. This metadata is as captured from Tableau. The actual metadata of these physical data sources must be separately loaded using Catalog (ingested using Job server only) or Lucid's database integrations
- Support for mapping to database assets loaded through Collibra Catalog
- Support for aliases of Server and Database which are source for Tableau reports
- Support for loading of thumbnails of workbook/dashboard/worksheet/stories
- Support for handling hidden worksheets
- Support for workbook URL, owner, description and creation date as Workbook attributes
- Support for TDE / Hyper data sources
- Support for parameters and normal filters
- Replacement of unsupported characters in names of file attachments such as ( \ , / , : , \* , ? , " , < , > , | ) with a default character
- Ability to link Tableau assets to the Stored Procedure assets that is used as a data source for the Tableau workbook
- Support for Oracle connections created via native drivers (tnsnames.ora)
- Support for handling renamed Projects and Workbooks (without deprecating the older project/workbook)
- Support for Tableau Tags
- A custom attribute - "Is Partially Load", added to the assets to denote if the ingested assets' mandatory characteristics are available or not
- Ability to integrate with a third-party SQL parser (such as the SQLFlow parser) to provide end-to-end lineage as a custom extension. In case there is no parser integrated, SQL will be attached to the relevant data source connection

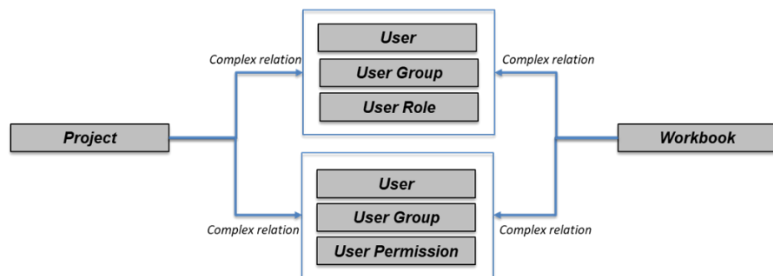
### Add-On (Security metadata)

- Support for load of user and user group mapping with the Tableau Sites
- Support for load of user roles and permissions for Tableau Projects and Workbooks

User, User group mapping and the Tableau Site



User Roles and Permissions mapping to Tableau Project and Workbook



### Unsupported Features:

- Workbooks using local file data sources (i.e. file not published to the Tableau server)
- SQL embedded in data sources and workbooks will not be parsed unless integrated with a 3<sup>rd</sup> party SQL parser as mentioned in the Release Notes section
- Hierarchies and Layouts (chart types, marks and pages)
- Parsing of Sort expressions to identify the used columns
- Filter types - Data source, Context and Action filters
- Workbooks using R and Python scripts (these sections are not captured as part of metadata)
- Handling of workbooks directly created in the server
- Support for CSV/flat file data sources
- Calculated columns using another calculated column as source
- Calculated columns using columns from other data sources as source

### Editions and feature comparison

The Standard edition of the integration is offered on an annual subscription. An **Add-on** provides the load of Tableau security metadata into DGC. A free trial subscription is also available.

Feature	Trial	Standard	Add-on
Licensing	Free	Annual Subscription	Add-On to Standard
Validity Period	14 days	1-year	1-year
Number of deployments allowed	1 Non-Prod	1 Prod + 1 Non- Prod	1 Prod + 1 Non- Prod
Support for all functional features listed in Release Notes	Yes	Yes	Yes (Security metadata only)
Support for Custom Assets	Yes	Yes	Yes
Limit on number of assets loaded	Yes	No	No
Documentation (1) Installation & Configuration Guide	Yes	Yes	Yes

(2) Support Guide			
Training included: 2 hours of virtual sessions for install/config (or) troubleshooting	No	Yes	Yes
Helpdesk/Support	No	Email-based support (Request logged through Support Portal - <a href="https://lucidtechsol.fr/eshdesk.com/support/login">https://lucidtechsol.fr/eshdesk.com/support/login</a> )	Email-based support (Request logged through Support Portal - <a href="https://lucidtechsol.fr/eshdesk.com/support/login">https://lucidtechsol.fr/eshdesk.com/support/login</a> )
Support response SLA	NA	1 business day	1 business day
Custom Extensions	NA	Not supported*	Not supported*
Pricing	NA	Contact Lucid	Contact Lucid

\* No custom extension requests are supported as part of the subscriptions. However, can be separately considered for a one-time fee, with on-going support attached to the subscription.

## Pre-requisites / Compatibility

The following are the pre-requisites required for this integration, with the product versions currently supported:

Prerequisites for this integration with the product versions currently supported:

- Lucid Easy Connections v2 Metadata Integration Platform for Collibra
- Collibra Data Governance Centre v5.7.x , Collibra Cloud

**Note:** The integration has been tested and certified by Lucid to work against specific versions of Collibra and the Metadata source system. As newer versions of Collibra and the metadata source system are released, Lucid will test and certify the integration as part of support. Please note if Collibra or the metadata source system fundamentally change their approach on how metadata is exposed, extracted or ingested, enhancing the integration to support these newer approaches might not always be possible, in which case the current subscription may not automatically support the new version. However, Lucid will make all efforts to provide an upgrade option to support the new versions at the earliest.

## Demo video(s)

- Tableau to Collibra - <https://youtu.be/GVbwYub8ODg>

## To Subscribe / know more / request a demo

- Email us at: [collibrainfo@lucidtechsol.com](mailto:collibrainfo@lucidtechsol.com)