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Embedding Business Intelligence: OEM with Tableau

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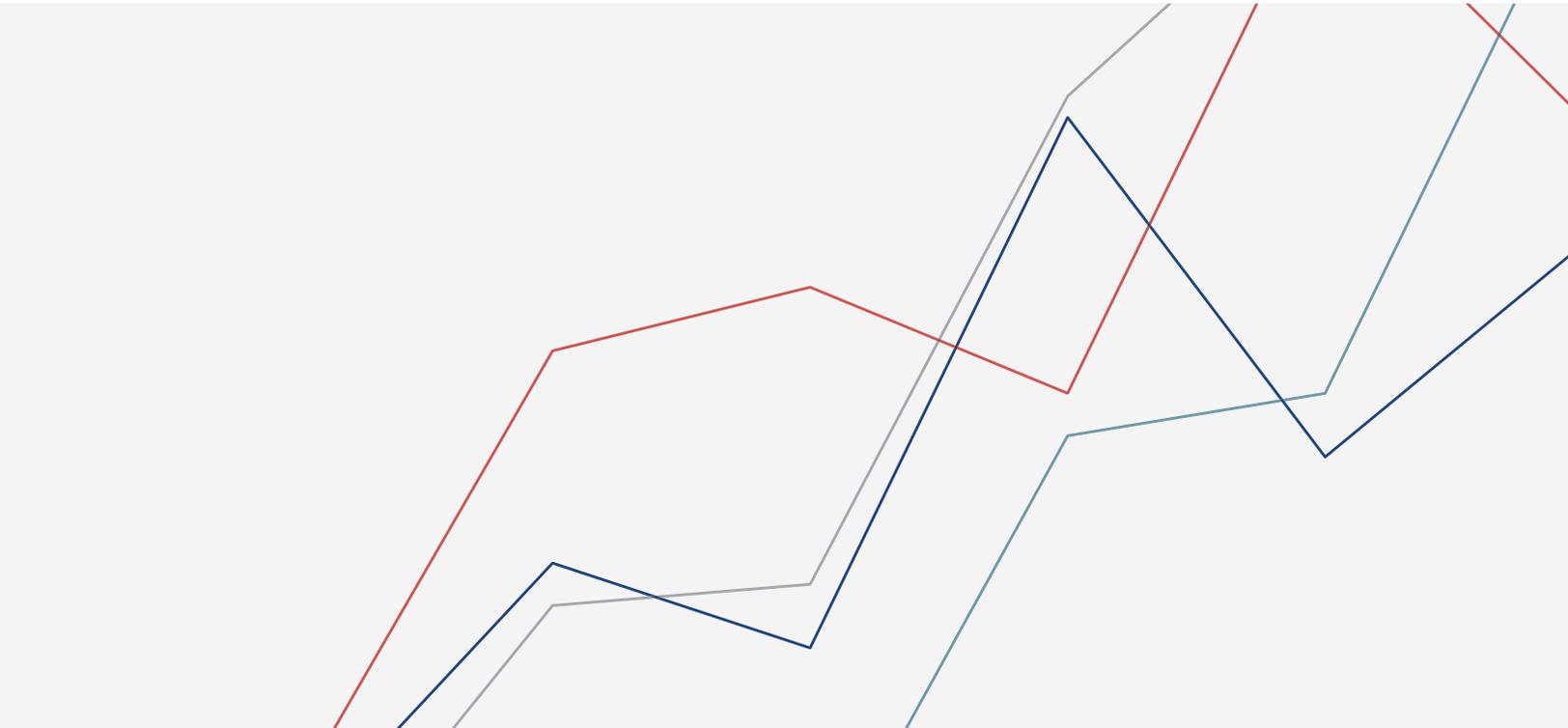
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Leverage the Power of Data

Whether your application provides customer experience management, electronic patient records, RFID asset tracking, recruiting & HR management, or any other application area, you are in the Big Data management business.

Your customers rely on you to help them put this data to work. They expect to access your application's data. Standard reporting has become a minimum requirement—as have general business intelligence capabilities.

If you want to thrive in today's competitive business environment, you need to offer more than the basics. Let your customers view and interact with your data on their mobile devices. Help them to see and understand the data you manage in a visual and intuitive fashion.

Go beyond the basics by providing faster, more beautiful business intelligence solutions. Make great business intelligence one of your competitive differentiators.

Business Intelligence Options

There are a few options when it comes to providing reporting and analysis within your application. It used to be that the only choice was to hire a team of developers to write custom code that provides a front-end interface and some basic reporting.

Today, rather than building from scratch, it's more common to embed a business intelligence solution. You can do this either by customizing open source software or by working with a business intelligence partner and incorporating their product through an original equipment manufacturer (OEM) agreement.

Each of these choices requires varying degrees of effort on your part. When making the decision about which option is best for you, consider the initial build and the ongoing maintenance.

Building business intelligence capabilities in-house allows you total control over the features you add and how you integrate the analysis into your application—including the branded look and feel. However, it requires staffing a development team with specific technical knowledge and experience in building business intelligence functionality. This method requires ongoing investments—of time, focus, and budget—that add up over time.

“We needed an analytics tool. We looked at all the different Gartner reports and ran across Tableau. We fell in love with them very quickly. We selected Tableau as a Partner because we needed something that was very good and easy to use. We needed a tool that was very easy to use, drag and drop and get the data our customers want.”

— Tom Maxwell, Chief Strategy Officer,
Homecare Homebase

Integrating open source business intelligence into your application is another option. Open source provides some of the pre-built capabilities that you may want. And due to its community-driven development model and “free” licensing, the open source model often appeals due to its seemingly low cost.

Unfortunately, there are many hidden costs to open source. Embedding open source solutions will still require significant resources both during integration and to provide management and customer support. Additionally, when relying on a community-built and –maintained product, you run the risk of unresolved issues or incorrectly answered questions, not to mention no idea when new features and updates will become available.

For these reasons, some companies choose to use an open source provider. These providers are companies who have wrapped additional features and support around the open source product for a fee. However, this solution is still not “plug and play” and you will still face costs in order to integrate the code into your application.

Why You Should Consider an OEM Partner for Business Intelligence

The easiest and most cost-effective way to offer business intelligence in your application is through an OEM partnership. Doing so allows you to go to market quickly with proven technologies that take too long— and cost too much—to develop on your own.

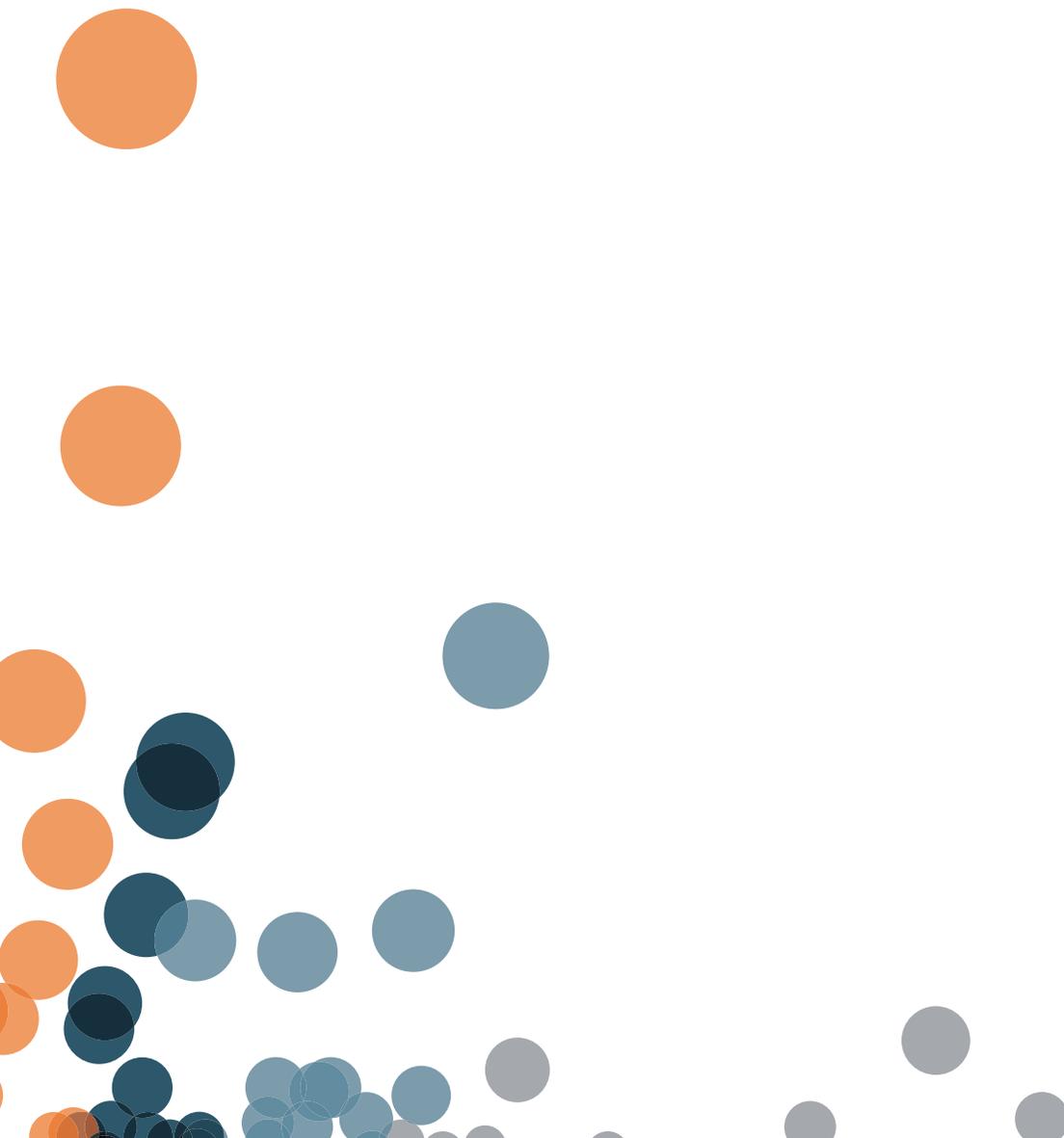
OEM partners that specialize in business intelligence can provide high-quality, rigorously-tested solutions. Your partner’s singular focus on business intelligence will inform its product roadmap, helping you stay ahead of a rapidly-evolving market.

And because they sell solutions across multiple customers—often standalone as well as OEM—you will often find the total cost to be lower than both an in-house or even open source solution.



We were able to achieve a truly bundled solution. The key is complete solution.

Shooki Grasiani, Sr. Manager of Global Marketing and Product Development, Abbott Informatics Corporation



How to Evaluate BI Solutions for OEM

Selecting the right OEM partner and business intelligence solution can be a challenge. Many business intelligence vendors offer OEM solutions and your decision should be based not only on the features of the product, but the strength of the partnership as well.

As a baseline, the solution must meet your requirements for functionality, including the ability to provide reports in a format your clients prefer and the ability to perform analysis.

Once you have narrowed the field on these features, it's time to take a deeper dive and consider these factors in your selection:

Ease of use for clients – Is the solution intuitive for the end user or will it require training or developer support? Business intelligence works best when it is accessible and understandable. If the solution is too complex, your clients will question the value. Consider it a red flag if a prospective solution requires support from someone with expensive and hard-to-find development skills. And, unless you want to staff a support center for your clients and become experts in the BI solution itself, it's best to find one that is easy to for your clients to learn and use.

Ease of integration – Once you have made your decision to use an OEM BI solution, you want to be able to go to market quickly. It's important to look into exactly what it will take to integrate the OEM solution into your existing application. Don't assume that integrating it is easy. Inquire with the vendor to see how much development work you'll end up doing. Are you facing hundreds of hours of writing and testing code or can you write a small amount of code to call an API? Is there a hidden "services" cost to integration? Professional Services could—and, arguably should—be available to help accelerate timeliness. But their involvement should not be necessary for a successful implementation.

Platforms supported – Identify the platforms that the vendor's OEM BI solution can run on and ensure these align with your application. Ideally, the solutions will be web-based, giving you and your customers a great deal of flexibility. The platform should also support IOS and Android mobile devices, without the need to recode your applications.

System and Data Security – The topic of data and system security is vast. Learn how the solution supports secure system access, especially if you need to host the integrated solution in a multi-tenant environment. Find out if the solution supports single sign-on (SSO), which relieves the user from having to login multiple times. Lastly, find out how the data itself is secured. Ideally, you should be able to control user access at the row level in the data so that each of your client's users only sees what they should.

Availability of training and support – Every business intelligence solution requires some upfront learning. However, the amount of training needed may range from a simple video to hours of intensive learning. Look for a partner that offers multiple forms assistance, including web-based help, tutorials, and videos. A vibrant user community is another valuable resource. Finally, learn the process for handling technical issues. What is the availability of the vendor's support team? Is support included or will that cost extra?

Licensing – It's critical to understand how the vendor's licensing program works. Look for partners that offer simple, easily-implemented licensing models that fit your needs. Can you choose between licensing based on users (seats) or servers (cores), based on your need? Is licensing available in both perpetual and subscription models? Be sure your partner's licensing aligns with your own licensing strategy.

Market strength – Customer needs and desires are continually changing when it comes to BI. That means the solution you choose must keep up with the changing demands in the market. If you choose to develop in-house, do you have the means to understand and respond to shifts in user requirements? Or, if you use an OEM partner, has that partner shown that they can respond? One source to check is Gartner's Magic Quadrant for BI.

Financial stability – Lastly, the best product for you means nothing if the OEM partner isn't viable. Do they have the finances to evolve their product and meet market demands? Or, worse case scenario—might the company not exist in a few years? Perform some due diligence to learn about the financial strength of the company and its reputation with existing customers. Find out how long they have been in business and how many paying customers they have.

“We made a decision to just incorporate it in our product and let our customers author and create their own content.”

—Dave Kurak, Director of Product Management, Zilliant



► *Watch Eric Hills and Dave Kurak share with us what a difference Tableau is making for Zilliant's team and its customers.*

Tableau Makes Business Intelligence Fun Again

You've worked hard to create an application that exceeds expectations. The business intelligence features you offer should be just as impressive. There are many business intelligence vendors, including Tableau, offering users the ability to create the basics: tabular reports, pie charts, and dashboards. Unfortunately, even the basics can be difficult for the casual user leaving many to simply dump data into tools they are more familiar with, like Excel.

Fortunately, Tableau makes analytics easy for everyone—even the casual user. There is no need to create complicated reports and write queries. Because Tableau's breakthrough technology, VizQL, lets users query the data through intuitive drag-and-drop actions, your focus stays on the data—not the software.

Tableau's rapid-fire business intelligence lets people get answers 10-100x faster than existing solutions. People can investigate data at the speed of thought—asking and answering questions as they go.

While most business intelligence applications are still relatively static, Tableau is dynamic. While Tableau can easily create the standard visualizations like crosstabs, analysis doesn't stop there. People can also create new reports from scratch, all within their browser. Make a mistake? No problem. Tableau offers unlimited undo and redo.

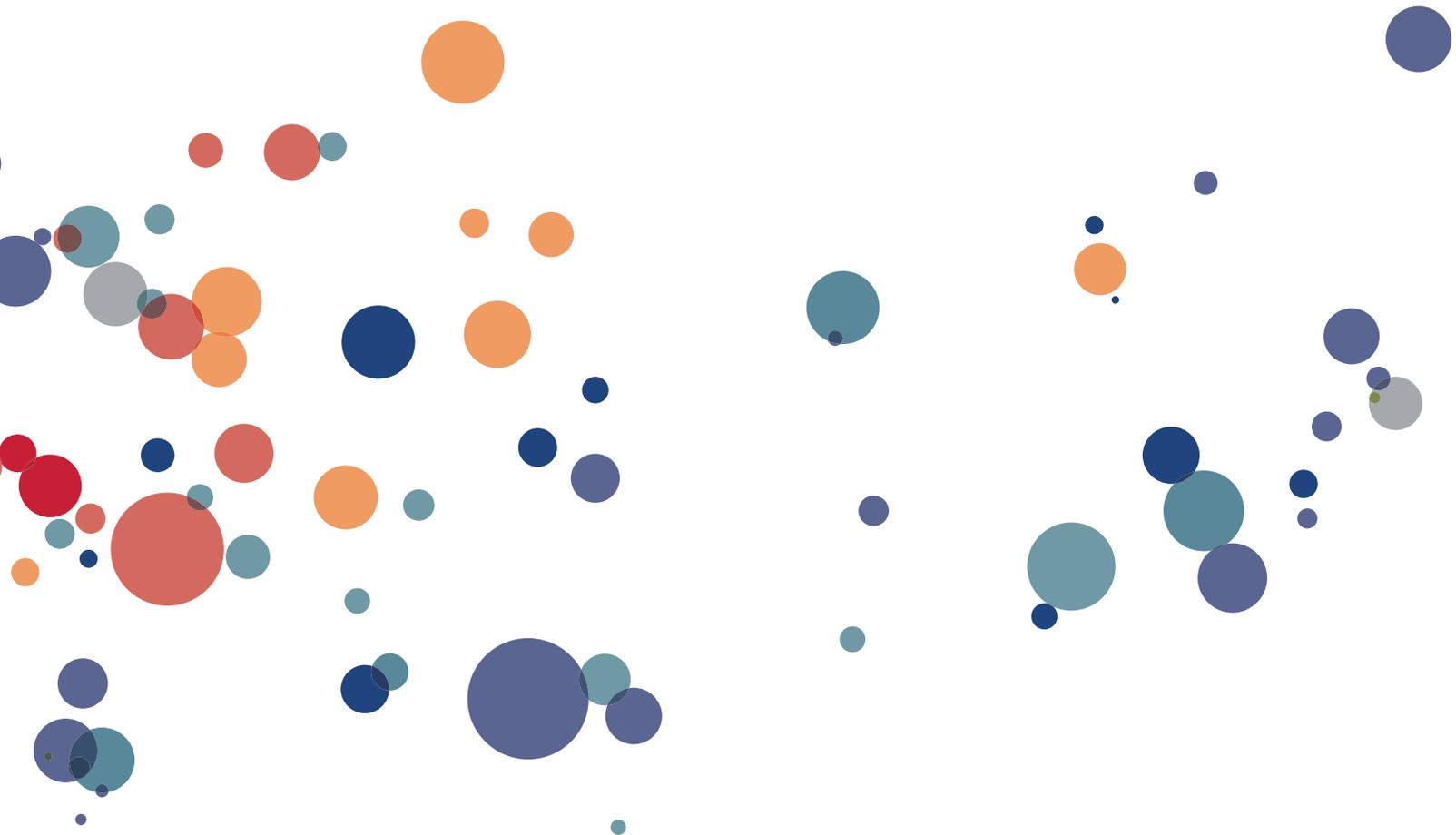
When the results are ready to share, just grab and send a link. If you can share a YouTube video, you can share a Tableau analysis.

Tableau's strength is in its easy-to-use visualization. Data visualization helps people quickly spot trends and correlations in data sets of all kinds—including large, complex data.



Tableau has been a game-changer for us.

Dave Kurak, Director of Product Management, Zilliant



Business Benefit of Tableau OEM Solutions

Some say Tableau is too simple. We believe this is a good thing. Because our advanced features are easy to use, your customers can focus on the data—and the fun of asking questions and getting answers—rather on the software. This leads to success and greater customer satisfaction. Tableau also offers some other benefits to consider when deciding on your OEM solution:

Faster to market. After the Proof of Concept (PoC) is completed, you will have 75% of the integration work done. There is no need for your users to learn wizards or scripts—just connect Tableau to your applications data and you can perform queries without writing a single line of code. It's that easy. And you'll gain the benefit of continual innovation and a robust community—all of which reduce total cost of ownership while potentially opening up new revenue opportunities.

Total control. Your application can take control of Tableau programmatically via multiple APIs. That means you can control Tableau through your program to make it do what you need. You can embed Tableau wherever you want—whether it's in a web page or thick client. You can use your own menus and navigation system. You can brand Tableau within your app by adding headers, changing the system colors, turning off certain features, or using your own sliders and buttons. You can program your app to essentially take control of Tableau.

Bi-directional. Tableau is not just a one-way business intelligence solution that pushes results down. Users can submit results back to your application for further action. Using the listeners provided as part of Tableau's Javascript API, your application gains insight into how your customers are interacting with the embedded Tableau visualization.

Technical Benefit of Tableau OEM Solutions

Integration – Unlike other solutions that require months to set up, you can integrate Tableau almost immediately using iframes or the JavaScript API.

Iframes allow you to drop Tableau right into your application as-is. The JavaScript API lets you customize Tableau to meet your needs. With the API, you can set filter values and control parts of the user experience.

Connecting to your data and setting up the data structure is easy. Using Tableau's shareable semantic data layer you can define your data sources in minutes or hours—instead of days. Your data definitions can then be shared to and used by Tableau Server instead of directly accessing the database itself. The user interface connects to and automatically reads the data source in order to build the structure of dimensions and measures. You don't need a SQL programmer.

Security – We take data security very seriously. We know you and your clients need to secure sensitive data and meet certain compliance and regulatory requirements. This is particularly relevant in a multi-tenant environment that uses a shared database for all of your clients. Tableau's robust, built-in security features are easy to manage and shareable across clients, saving time and money on development and maintenance.

Multi-Tenant – Tableau's OEM architecture supports multi-tenancy—out of the box. Each of your customers can share the same resources; Tableau's multi-tenancy function partitions the server so that they can only access the data and visualizations they are allowed to see.

Single Sign On – Tableau supports single sign-on through Trusted Authentication, SAML, or Active Directory

Trusted authentication involves defining a simple trust relationship between Tableau Server and one or more of your application servers. When Tableau Server receives a request from these trusted resources, it defers to the authentication mechanism of your solution.

SAML, an OASIS standard, allows secure web domains to exchange user authentication and authorization information. With SAML—just as with trusted authentication—all user authentication is done outside of Tableau, so you can provide a single sign-on experience.

If your web server uses SSPI (Security Support Provider Interface), you do not need to set up trusted authentication. You can embed views directly into your application. Your users will have secure access to them as long as they are licensed Tableau Server users and members of your Active Directory.

Regardless of the authentication method, Tableau will always continue to manage data security restricting users to only the data they are allowed to see.

Data Access – Tableau can employ security at the row level. Row-level security restricts users from seeing certain rows based on their security profile. Row-level security is also known as data permission security or fine-grained access control. Users may still have access to a table without having access to all rows on that table.

Row-level security saves development and maintenance cost by allowing you to create one report for your application that serves all of your clients. Each client will only see the data in that report that they have been given permission to see.

Training – At Tableau, we take pride in the fact that our software is easy to use, whether by experienced data scientists doing advanced statistical analysis or by a person building their first data analysis.

It has been our experience that our OEM customers learn most everything they need during the proof of concept (PoC). Even so, we have a special section on our Partner Portal just for you. It provides additional training to OEM customers by way of helpful videos from 15-60 minutes long on a variety of OEM-centric topics.

Support – Technical support is included within the OEM licensing fees. We support our partners through standard integration and implementation, and, although our partners offer support for their own end users, we are available to help with escalated issues.

OEMs may also purchase Elite Support from Tableau Software. In addition to all of the benefits of our Technical Support Service, OEMs that choose Elite Support enjoy the services of a dedicated Technical Account Manager who help to route, prioritize, and manage support cases. All members of the Elite Support team offer strong Tableau product expertise.

We also have an active user community. Tableau's user community is the best in the data discovery space. Community members have deep technical knowledge of the product and are very responsive and willing to help resolve issues that users post to the community.



► *Hear more from an OEM partner in this video*

Tableau's Market and Financial Strength

Tableau was founded in 2003. Our goal was—and still is—quite simple: Help people see and understand data.

Our software products put the power of data into the hands of everyday people, allowing just about anyone to engage with their data, ask questions, solve problems and create value.

Our products are used by people of diverse skill levels across all kinds of organizations, including Fortune 500 corporations, small and medium-sized businesses, government agencies, universities, research institutions and non-profits. Currently, we have more than 21,000 customers.

People use Tableau for a broad range of applications: increasing sales, streamlining operations, improving customer service, managing investments, assessing quality and safety, studying diseases, completing academic research, addressing environmental problems, improving education—and many more.

Tableau Software is traded on NYSE under the ticker symbol DATA.

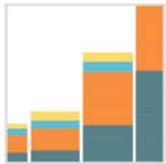
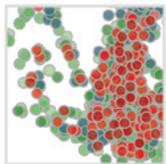
Conclusion

At Tableau, we are passionate about what we do. We know that when business intelligence is easy—and, yes, even fun—people will spend more time exploring their data and finding answers. We encourage you to [download a free trial](#) of Tableau and try it for yourself.

Then, you can begin your journey by visiting our OEM Partner page and filling out an [inquiry form](#).

About Tableau

Tableau Software helps people see and understand data. Tableau helps anyone quickly analyze, visualize and share information. More than 21,000 customer accounts get rapid results with Tableau in the office and on-the-go. And tens of thousands of people use Tableau Public to share data in their blogs and websites. See how Tableau can help you by downloading the free trial at www.tableausoftware.com/trial.



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