



Securing Finance Visibility for Global Safety & Security Operations with Tableau Next

A global technology company's safety and security team replaced disrupted, low-trust finance reporting with a governed analytics platform that restored visibility into journal entries and procurement activity while protecting access, lineage, and control.

“ Without governance, dashboards become liabilities. We helped a global tech company restore finance visibility and control—so leadership could focus on risk, not reporting. ”

ANNA FOARD, SOLUTION LEADER
Analytic Vizion

THE CHALLENGE

A global enterprise lost trust in its finance dashboards just as operational and financial complexity was increasing. The reporting layer stopped functioning as a control point and became a liability for leaders who needed a clear view of journal entries and procurement activity.

They needed:

- Clarity at speed, even with strict production access policies
- Alignment across finance, IT, and audit partners
- Visibility into procurement and journal entries that matched how finance manages the ledger
- A scalable, sustainable system that didn't compromise security or governance

More than a dashboard, they needed a strategic partner to restore control and confidence.

TOOLS & TECHNOLOGY



OUR APPROACH

Discovery – Start with the Business, Not the Dashboard
Analytic Vizion worked with business operations, finance leaders, and the data team to wireframe a new layout around how leaders actually review safety-related spend, entries, and risk—not just mirror old dashboards.

Design – Build Governance Into the Flow
The GS&S Finance dashboard was rebuilt from the ground up in Tableau Next, with semantic models for case reporting and a new procurement data source with correct accounting line mapping. Bi-weekly "Request Support Use Case" meetings surfaced real questions; design workshops refined answers.

Delivery – Secure, Governed, and Repeatable
SSH key-based access into Snowflake honored strict production policies while enabling modern analytics. A CI/CD pipeline (GitHub + GitHub Actions) handled deployments through dev, QA, and production. Governance tagging and standardized metrics set clear guardrails for how changes moved into production.

THE RESULTS

The Global Safety & Security analytics platform progressed from disrupted legacy reporting to a validated, governed solution ready for production.

Key outcomes included:

- **Reporting Control Restored:** Leadership moved off untrusted dashboards to a production-ready finance and procurement view
- **Governance and Access Secured:** SSH-secured access, semantic models, tagging, and CI/CD now govern sensitive data from source through production
- **Risk Visibility Regained:** Consistent, governed view of journal entries and procurement activity reduces exposure and supports audit conversations
- **Flexibility Without Sprawl:** Users moved from manual Lightning reports into Tableau Next with ad hoc metrics through an analytics agent layered on governed semantic models.