Session 5 Handout: Share Safely and Present

FAST-11 AI-Assisted Analytics and Business Intelligence · 7formations · Instructor: Wadood Chaudhary · All examples fictional

Why this session matters

A correct dashboard shared with the wrong people is a data incident. AI features make this sharper: Copilot can answer questions from anything a user can access. Sharing well means the right audience, least privilege, row-level filtering where needed, labels that travel with exports, and knowing when the data was last refreshed.

Key concepts

1. Permissions vs. labels (Power BI)

Control	What it does
Workspace roles, app audiences, sharing	Decide **who can see** content in the service
Row-level security (RLS)	Filters **which rows** each viewer sees, by role
Sensitivity labels (Microsoft Purview)	**Classify** content; label and encryption **travel with supported exports** (Excel, PowerPoint, PDF, .pbix)

In the service, a label does not by itself block access; permissions do. **RLS applies to Viewers.** Workspace Admins, Members, and Contributors see all rows, so give most readers Viewer access or an app. Test with "View as."

Tableau: use project and site permissions and row-level data policies or user filters; Pulse metrics follow the data source's permissions.

2. Refresh

AI answers come from the data **as of the last refresh**. Show the last refresh time on the page; check it before quoting a number.

3. Sharing checklist (W5)

1. Classify: personal or confidential data? Label.
2. Audience: who, to do what?
3. Access: Viewer or app; no edit for readers.
4. Rows: RLS needed? Tested?
5. Exports: label applies; export settings appropriate.
6. Refresh: scheduled; last refresh visible.
7. Public links: none.

4. Presenting the capstone (5 minutes)

Question → answer with one number → how you verified it → dashboard → data story → sharing setup → decision needed.

Worked example (fictional)

Pioneer Valley Mutual's renewal report: Confidential label; six agents get Viewer access through an app with an RLS role by agent (tested as two agents); the principal is workspace Admin; the marketing contractor gets no copy, only an aggregated table with no names if the principal approves; no "publish to web"; refresh nightly with the time shown.

Do and don't

Do	Don't
Share with the smallest audience that needs it	Add everyone as Members
Test RLS and Copilot as a viewer	Assume filters protect data
Give aggregates to outsiders	Send a .pbix with names
Show last refresh	Quote stale numbers