Privacy settings in business intelligence tools

As a business intelligence professional, you won't just create dashboards and visualizations. You will also share these tools with stakeholders so that they can access the data to get up-to-date information and make informed decisions. You empower stakeholders with the ability to answer their own questions—but you also want to ensure that only the people who are supposed to access that information can do so. This has to do with data privacy and security. In this reading, you will learn about some of the privacy restrictions that are already included with Tableau as well as other common BI tools.

Privacy settings in Tableau

Incorporating privacy settings in your dashboard helps ensure that the data remains secure, even when people from across your organization need to access it for different purposes. Throughout this program, you will be using Tableau to practice key concepts and get familiar with sharing BI insights. Luckily, Tableau already has a variety of privacy and security settings built in that you can take advantage of.

Setting permissions

Tableau gives you the power to set permissions to control how users are interacting with your dashboards and data sources; you can even use permissions to determine which users can access which parts of a workbook. Tableau organizes permissions into projects and groups. Basically, this means you can determine permissions depending on project needs, or by groups of users instead of person-by-person.

You can also use permission settings to choose what metrics users can interact with, show or hide different sheet tabs, or even add explanations of the data that can be seen by different users depending on their specific needs.

To learn more about permissions and how to set them yourself in Tableau, you can check out the Tableau Online Help article about permissions.

Managing user visibility

In addition to allowing you to determine what permissions users have as they interact with your Tableau dashboards, you can also manage how users are able to interact with each other. Usually, all users can view other users' aliases, project ownership, and comments by other users by default. But in cases where you have created a tool that's being used by multiple clients, teams, or users who don't need to interact, you can actually determine how much visibility users have of each other.

To learn more about user visibility settings and how to set them yourself in Tableau, you can check out the Tableau Online Help article about managing user visibility.

Row-level restrictions and filtering

Finally, Tableau allows you to filter the actual rows of data so users can access the data relevant to their role without having to create an entirely separate view for them. This is especially useful when working with live data sources or extracts that use multiple tables.

To learn more about user visibility settings and how to set them yourself in Tableau, you can check out the Tableau Online Help article about user filters and row-level restrictions.

Privacy settings in other tools

Other tools that you might encounter as a professional also use privacy settings that allow you to determine what data different users can access and view. Here are some resources you can use to learn more about those tools:

Data Studio: Sharing, access permissions, and data credentials

Looker: Access control and permission management

MicroStrategy: Restricting access to data: security filters

PowerBI: Power BI Desktop privacy levels