# Right Data, Right Care. Enhancing Client Care with Power BI's Row-Level Security:

Do your team members have access to *just* the right amount of data they need to do their jobs efficiently and securely?

This was the challenge for our client, a leading social care charity. Managing sensitive schedules for clients and carers was a manual process that was inefficient and risked exposing data. When they came to us, they needed a digital solution that could deliver secure, customised information to each user.

## PowerBI/Charity Sector

Previously, schedules were created manually on paper, listing the carer's name, shift times, and a photo.

This process was time-consuming inflexible, and lacked data security - everyone saw the same information, regardless of role.

Our client needed a Power BI report for tablets that displayed different information based on the viewer:

**Clients or Family Members:** View carer's name, photo, and shift times.

**Carers:** View client's name and shift times.

**Administrators:** Access the full report data.

## The benefits of using Quorum for data insights included:

**1** Strong data security and privacy.

**2** Improved operational efficiency.

**3** Enhanced user experience.

**4** Scalable and flexible reporting.

One common approach would have been to create a dedicated report for each group or individual, including administrators, carers, clients and family members. Each with access to the specific sets of data they required.

However, this approach presents challenges. When requirements or data changed each report must be updated individually to keep everything consistent, leading to significantly more maintenance work and more room for error.

## Our Solution

We created a single report where all data was stored in a central location, allowing any changes to shift or details to be automatically updated once the data source was refreshed. The data source contains all details for carers, family members, administrators and shift information.

We implemented a data structure to support Row-Level Security (RLS) in Power BI. RLS enabled us to determine, based on the user's account (User Principal Name), what data they could see within the single report.

The steps included:

**1**
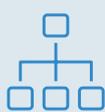
**DATA STRUCTURE CONSOLIDATION**

Built to support RLS, enabling specific data visibility based on user roles.

**2**

**DYNAMIC DATA DISPLAY**

Ensured that clients and family members could only see the relevant carers and shifts, while carers could only see the clients they were assigned to.

**3**

**CENTRALISED DATA SOURCE**

Held all carer and shift details, allowing for automatic updates and reflection of any changes.

**4**

**USER MANAGEMENT**

Allowed easy addition and removal of users from the data source, facilitating minimal ongoing maintenance.

When a user opens the report, RLS automatically filters the data to show only their specific information. The system uses the user's email address (User Principal Name) to determine their access level, seamlessly filtering the data they can view and interact with through the Power BI service. This streamlined approach delivers all functionality through a single report.

Administrator accounts have been specially configured to provide complete data visibility, enabling supervisors and managers to maintain comprehensive oversight whilst using the same unified report.

## Benefits

Using Row-Level Security (RLS) in Power BI, we delivered a secure and dynamic reporting solution that:

- Ensures data security by limiting access to authorised information only.
- Eliminates the need for multiple reports and manual updates.
- Provides real-time updates across all user views.
- Reduces administrative overhead and maintenance costs.
- Offers customised access levels for different user groups.
- Simplifies system management through centralised control.

## Conclusion

Managing data access in your organisation shouldn't be complicated or time-consuming. This case study shows how a single, secure Power BI solution can simplify reporting by replacing multiple reports while maintaining precise control over data access.

Many organisations need reporting solutions that are easy to maintain, secure, and adaptable to changing requirements. Quorum's tailored Power BI solutions are designed with these needs in mind, helping teams move away from complex, time-consuming reporting systems toward streamlined, efficient setups that saves you time and reduces administrative burdens.

# Contact us today to discover how we can transform your reporting capabilities with Power BI.

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