Procedure Title:	Fleming Dashboard New User Training
Procedure ID:	Not Applicable
Manual Classification:	Not Applicable
Linked to Policy:	Not Applicable
Approved by:	Chief Business Intelligence Officer
Revision Date(s):	Original: March 14, 2023
Effective Date:	March 14, 2023
Next Review Date:	TDB
Contacts for Procedure Interpretation:	Acting Director, Business Intelligence & Research Services

1.0 – Purpose

Business Intelligence & Research Services is committed to conducting high quality research and providing dissemination channels through the Fleming Dashboard to the Fleming College community so that users from across departments and employee groups can leverage this information to inform their work. Part of its commitment to service delivery includes formalized training on Fleming Dashboard usage.

2.0 – Definitions/Acronyms

BIRS: Business Intelligence and Research Services

CBIO: Chief Business Intelligence Officer

Fleming Dashboard (FD): a Microsoft Teams page that houses a series of Power Bi reports and related files.

IRO Reports Workspace: Power Bi workspace that houses all of the Source Power Bi reports that feed into the Fleming Dashboard.

ITS: Information Technology Services

SAC/FSA: Student Administrative Council/Frost Students Association

SMT: Senior Management Team

3.0 – Procedure

3.1 Approval to Access Fleming Dashboard

a)   Deans, Chairs, Directors, Managers, CBIO or SMT will be the primary requestors for BIRS department to set up access to Power Bi and Fleming Dashboards for designated Fleming Staff (support staff, faculty, administrators).

b)   Fleming Staff (support staff, faculty, administrators) who are looking to access Fleming Dashboard will need to receive permission from their supervisor, manager, director, CBIO or SMT.

3.2 Approval to Access Fleming Dashboard – SAC/FSA and non-Fleming Staff

a) Power Bi access will not be granted to SAC Staff or FSA Staff unless approved specifically by SMT or CBIO. Data must be housed and managed within the BIRS department, and user access to Power Bi must be restricted to a unique Power Bi workspace.
b) Non-Fleming Staff will not be granted access to Fleming Dashboard. A separate Dashboard will be created to house data for non-Fleming Staff. User onboarding and training for SAC and FSA will follow procedures 2.3 and 2.4 listed below.
c) Access to Fleming Dashboard will not be granted to non-Fleming Staff.

3.3 User Onboarding

a) BIRS Director will request ITS to provide a Power Bi License to approved Fleming Staff.
b) BIRS Director will add approved Fleming Staff to the Fleming Dashboard in Microsoft Teams.
c) BIRS Director will add approved Fleming Staff to IRO Reports Workspace in Power Bi.
d) Default access will be set to 'Viewer' unless specified specifically by SMT or CBIO where administrative access is required as part of Fleming Staff job responsibilities.

3.4 Fleming Dashboard Training

a) New users will be provided with formal training on the Fleming Dashboard. Training will be undertaken by BIRS staff members.
b) Fleming Dashboard training sessions will be up to one hour in length and will be delivered virtually or in person.
c) BIRS director will document training status of all new users and will ensure that training is completed within 60 days of access to Power Bi and Fleming Dashboard.

4.0 – History of Amendments & Reviews

Approved by Chief Business Intelligence Officer March 14, 2023