

## University of Oregon IDR Access Form

To request access to the Integrated Data and Reporting data warehouse, fill out the following form, sign, submit to your department head for approval, and then send it to the appropriate Data Owner for a signature before submitting.

### Requestor and General Information

Name: \_\_\_\_\_ UO ID: \_\_\_\_\_ Office Phone: \_\_\_\_\_

Department: \_\_\_\_\_ Job Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Check One: ☐ Faculty ☐ GTF ☐ Staff ☐ Other (please specify) \_\_\_\_\_

Role Description (Check ONE): ☐ Report User ☐ Report Writer

A complete description of the roles can be found at <http://idr.uoregon.edu/roles>

### UO Code of Responsibility for Security and Confidentiality of Records and Files

Security and confidentiality are matters of concern to all University employees and to all other persons who have access to administrative records, education records, reports, or any other confidential or privileged documents or information. The purpose of this code is to clarify responsibilities in these areas. Each individual who has access to confidential or privileged information is expected to adhere to the regulations stated below:

Any person who has access to administrative records, education records, reports, or any other confidential or privileged documents or information, may not:

- ◆ Reveal the content of any record or report to anyone, except in the proper conduct of his or her work assignments and in accordance with University policies and procedures.
- ◆ Make or allow any unauthorized use of information.
- ◆ Knowingly include false, inaccurate or misleading entry in any report or record.
- ◆ Knowingly expunge a data record or a data entry from any record, report or file.
- ◆ Share access codes or passwords with any other person.
- ◆ Seek personal benefit or allow others to personally benefit from the knowledge of any confidential information they have acquired through work assignments.
- ◆ Remove any original or copy of an administrative record, education record, report, or any other confidential or privileged document, from the office where it is maintained, except in the performance of official duties and authorized by law.

Any knowledge of a violation of this code must be reported **immediately** to the violator's supervisor. Violations may lead to disciplinary action, including dismissal. Violations may also lead to criminal and civil liability.

Your signature below indicates that you have read, understand, and will comply with the above Code of Responsibility for Security and Confidentiality of Records and Files. This agreement shall be effective when signed below or in counterpart, photocopy, facsimile, electronic or other copies shall have the same effect for all purposes as an ink-signed original.

\_\_\_\_\_  
(Your signature)

\_\_\_\_\_  
(Printed name)

\_\_\_\_\_  
(Date)

Describe your business reason for requesting this access:

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**Complete page two to request specific data access.**

# University of Oregon IDR Access Form

## Requestor

Name: \_\_\_\_\_ UO ID: \_\_\_\_\_

See page three of this form, or <http://idr.uoregon.edu/getting-access> for definitions of each of the items listed below, and for signature routing information.

Contact Information Requested	Data Owner	Data Owner Signature & Date
<input checked="" type="checkbox"/> <b>Core Contact Information</b> Employee UO address, phone, and email. Vendor address, phone, and email. Last 4 of Student IDs.	<b>Automatically Included with Access</b>	
<input type="checkbox"/> <b>Common Employee &amp; Vendor</b> Core plus Employee mailing and permanent contact info; Vendor mailing contact info.	HR	
<input type="checkbox"/> <b>All Employee &amp; Vendor</b> Core plus all Employee & Vendor contact info.	HR	
<input type="checkbox"/> <b>Student</b> Core plus Student name, full ID, mailing and permanent contact info, and UO email.	Student	

Additional Data Requested	Data Owner	Data Owner Signature & Date
<input checked="" type="checkbox"/> <b>Core Data</b>	<b>Automatically Included with Access</b>	
<input type="checkbox"/> <b>Sensitive Finance Data</b> (bank, collection agency)	Finance	
<input type="checkbox"/> <b>Private Finance Data</b> (SSN, tax ID, bank account)	Finance	
<input type="checkbox"/> <b>Sensitive A/R Data</b> (charges, payments, deposits, disbursements, holds, degree, ethnicity, race, visa, etc.)	Finance	
<input type="checkbox"/> <b>Private A/R Data</b> (tax ID)	Finance	
<input type="checkbox"/> <b>Sensitive HR Data</b> (ethnicity, race, citizenship, visa, veteran status, benefits, deductions, taxes, leaves, etc.)	HR	
<input type="checkbox"/> <b>Private HR Data</b> (tax ID, beneficiary tax ID)	HR	

Business Reason for  
Sensitive or Private: \_\_\_\_\_

## Department Head Approval

I confirm that this employee requires access to the Integrated Data Reporting Warehouse (IDR) to perform the duties of their position. I understand that this access includes the Core data (default) ***unless otherwise requested above.***

\_\_\_\_\_  
Dean/Department Head Approval (**Signature**)

\_\_\_\_\_  
Dean/Department Head Approval (**Printed**)

\_\_\_\_\_  
**Date**

**Department Head: Please route to Data Owners listed above for required signature.**

Return completed form to the Account Administrator, 151 McKenzie Hall, [account@uoregon.edu](mailto:account@uoregon.edu), or Fax: 6-1722

## Information Services Only

Username: \_\_\_\_\_

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_

**Notes:**

# IDR Access Form Description

The results you see on any Cognos report will be filtered by the contact information for which you are approved. For example, if a report contains a Vendor Mailing address (MA) and you are not approved for Vendor Mailing addresses, that information will be blank on your report.

**If you require any of the contact information listed below, please apply for that access.**

## Contact Information

- **Core Contact Information**
  - **Employee UO** and **Vendor VO, VP and VR** address, phone and email
  - VO is Vendor Orders, VP is Vendor Payments and VR is Vendor Remit
- **Common Employee & Vendor**
  - **Core** plus **Employee MA, PR** and **Vendor MA, PR** address, phone and email
  - MA is Mailing and PR is Permanent
- All **Employee** and **Vendor** contact info
  - **Core** plus **Employee & Vendor** contact info
- **Student**
  - **Student unmasked name and ID; MA, PR** address, phone and UO email
  - MA is Mailing and PR is Permanent

## Additional Data

- **Sensitive Finance** includes bank and collection agency data
- **Private Finance** includes SSN, tax ID, bank account
- **Sensitive AR** includes charges, payments, disbursements, deposits, holds, degree, ethnicity, race, veteran, athletics, visa, tax
- **Private AR** includes tax ID
- **Sensitive HR** includes ethnicity, race, citizenship, veteran status, benefits, deductions, visa, taxes, leaves, degrees, employment history, academic outcomes
- **Private HR** includes tax ID, beneficiary tax ID

## Data Owners

For submission purposes, the Data Owner designees are listed below.

- **Finance** – Mark McCulloch, Assistant Director, Business Affairs Office
- **HR** – Sonia Potter, Director, Unclassified Personnel Services
- **Student** – Susan Eveland, University Registrar