

## Financial Data Access

The Financial Data Warehouse has two types of access:

1. Role-based access, e.g., *Financial Campus User*, *Financial Division User*, and *Financial Finance User*, which is used to determine to which *Report Listings* you have access.
2. Row-level access that determines to which rows of data you have access.

Reports based on Grants Accounting data have two types of row-level access, both of which start with the account (Award and PTA):

1. Award-level access used for *Award Installments*.
2. PTA-level access used for the *Costs and Commitments* and *PTA Summaries*.
  - a. *Costs and Commitments* have additional row-level security for compensation-related Expenditure Types.

Reports based on Labor Distribution data have row-level access based on the Assignments for the transactions.

**NOTE:** All requests for access are handled by IMSS Information Security.

## Labor Distributions

A user's Labor Distribution (LD) data access for the data warehouse is same as their LD access within Oracle Labor Distribution. This access is setup by Organization and Person Type and determines to which employee assignments a user has access.

## Costs & Commitments, Summaries, and Award Installments

The account-level security access for was designed to, as much as possible, automate access as new PTAs are created. Users may be granted access to accounts by any combination of the following:

- *By Organization:* Provides access to any PTA with the specified organization as the Project, Task, and/or Award Organization.
  - ✓ Access given to a division (e.g., BBE or Facilities) includes any Award, Project, and PTA that is owned by an organization under the Division within the Oracle HR organizational hierarchy.
  - ✓ As new Awards, Projects, and PTAs are created within the organization, you will automatically gain access to those new accounts.
- *By PI:* Provides access to any Award, Project, and PTA that has the PI named as the active Project, Task, and/or Award Manager.
  - ✓ For these purposes, the PI is defined as the individual that has been assigned the role *Award Manager* of an Oracle Award, *Project Manager* of an Oracle Project, and/or *Task Manager* of an Oracle Project's Task.

- ✓ As new Awards, Projects, and PTAs are created for the PI, you will automatically gain access to those accounts.

**NOTE:** The setup of the Award, Project, and Task Managers are managed by Finance, and only one manager may be named for each for any given date range.

- ✓ If you have access by PI and this access includes a PTA that you do not think should be included, then the Project, Task, and/or Award Manager must be changed by Finance personnel *or* the PTA may be excluded from your access by IMSS Information Security.
- ✓ While IMSS does handle the setup of the data access, IMSS staff *cannot* update data in the Oracle Grants Accounting module, including the setup of the Award, Project, and Task Managers.
- *By Organization/PI Combination:* Provides access to any Award, Project, and PTA that is both “owned” by the Organization **and** has the PI listed as the Manager.
  - ✓ The combination of Organization and PI must be together on the Award or on the Project or on the Task.
  - ✓ For example, if you have access to the Org/PI of CCE/Linus Pauling and the Award of a PTA is CCE/Edwin McMillan and the Project is HSS/Linus Pauling, you will not have access to the PTA.
- *By Award:* Provides access to any PTA with the specified Award.
  - ✓ If additional projects are created and linked to the Award or tasks are added to existing linked projects, then you will automatically gain access to the new projects and PTAs.
- *By Project:* Provides access to any PTA with the specified Project.
  - ✓ If additional awards are created and linked to the Project, then you will automatically gain access to the new PTAs created with the newly-linked awards.
- *By Award-Project:* Provides access to any PTA with the specified Award-Project combination.
  - ✓ This is useful when an Award is linked to more than one Project and the person should only have access to those PTAs with both the Award and Project.
  - ✓ This should *only* be used for these types of cases because it may unexpectedly restrict access
- *By Project-Task:* Provides access to any PTA with the specified Project-Task combination, regardless of the linked Award(s).
- *By PTA:* Provides access to a specific PTA.
  - ✓ This level of access should **only** be used when an individual should have access ONLY to the specific PTA.
  - ✓ If a new Project is being created with a single Task, we do NOT recommend providing access by the specific PTA or Project-Task because any future tasks created will not be automatically added to the individual’s access.

## Compensation vs Non-Compensation Transactions

With each combination above, data access is further defined to include or not include access to compensation-related transactions within the *Costs and Commitments*. The determination of a transaction as compensation or non-compensation is based upon the transaction's expenditure type and the setup of that expenditure type in Oracle Grants Accounting.

**NOTE:** This is in no way related to Labor Distribution (LD) access in either Oracle or the data warehouse.

## Excluding Specific PTAs

In addition to defining those PTAs to which an individual will have access, specific Awards, Projects, and/or PTAs may also be **excluded** from an individual's access. For example, if an individual should have access to all of the PTAs owned by the division *EXCEPT* for the GB award that includes staff salary information, the entire GB award may be excluded from the individual's overall access.

## Tips and Hints

- When determining the overall access of a user, use a narrative approach to describe the access, for example:
  - ✓ Joe Beaver should have compensation-level access to all of Mary A. Engineer's PTAs, but only those owned by EAS.
  - ✓ Joe should also have access to Award NSF.BIGPROJECT (which is owned by BBE) except for salary information.
  - ✓ Joe should *NOT* have any access at all to the project MAE.SPECIAL, even though Mary A. Engineer is the PI and the project is owned by EAS.
- Give users access at the *highest level possible*. For example, if it is expected that an Award will be part of a single PTA, then give access at the Award-level rather Project or PTA.
- If a user already has access at a high level, for example, by Organization or PI, there is no need to request access to individual Awards, Projects, or PTAs that are part of the high-level access.
  - ✓ When creating PTA Setup Requests, only request access for those individuals that would not be receiving access via a higher-level type.