**UBI Access Management Procedure**

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**Responsible or Contact Office/Role:** Institutional Research & Analytics
**Applies To:** University Business Intelligence (UBI), Academic Division

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Background and Purpose

The University of Virginia (UVA) is committed to safeguarding its information upon which the teaching, research, public service, and healthcare functions rely. Additionally, the University is strongly committed to maintaining the security and privacy of confidential personal information and other data it collects or stores (refer to the [Data Protection of University Information](https://uvapolicy.virginia.edu/policy/IRM-003) policy and [Privacy and Confidentiality of University Information](https://uvapolicy.virginia.edu/policy/IRM-012)policy).

Overseen by Institutional Research and Analytics (IRA), [University Business Intelligence (UBI)](https://ira.virginia.edu/ubi) is UVA's enterprise reporting environment, with tools that support the University's needs for transactional reports, managerial reports, and executive dashboards. UBI is based on Qlik software on ITS-managed UVA data center infrastructure. Following the [Data Protection of University Information](https://uvapolicy.virginia.edu/policy/IRM-003)*,* UBI modules and reports provide access to sensitive, internal use, and public data. UBI does not store, use, or provide access to Highly Sensitive Data (HSD). Access to UBI is only provided to UVA faculty and staff. UBI has a designated system administrator (and backup).

This document outlines the process for managing access to information and functionality in UBI modules and reports, which includes sensitive data.

**Procedures**
Access Requests and Provisioning: granting and removing UBI Central Roles

Access requests for initial access to UBI and primary central [UBI roles and responsibilities](https://ubi.virginia.edu/get-started) are managed by the System Access Request process in Workday (refer to [How to Request Access to UVA Systems](https://in.virginia.edu/request-access))**.** Only managers and employees/sponsored accounts can make requests for access to (or removal of access to) UBI. However, it is recommended that employees make requests.

Requests for UBI central roles that provide access to sensitive data must be approved by both the designated data steward (or delegate) and the employee’s manager. Initial access to UBI also requires completion of online training in Workday (either the Intro to UBI or Intro to UBI – SIS course). For roles regarding student data, completion of the online FERPA training in Workday is also required. Requests for removal of access to UBI do not require approval.

Once the user access request is approved as needed and completed, user access is granted by the centralized User Experience and Engagement Access Management team in IT, using the group management application (currently, [MyGroups](https://virginia.service-now.com/its?id=itsweb_kb_article&sys_id=ea1dffc7db3ac744f032f1f51d96193a)).

**Access Removal (Position Changes and Termination)**
The UBI system administrators receive automated notifications when a UBI user has changed positions, changed cost centers, or has terminated from the University of Virginia.

Upon such notification, the UBI system administrator removes the user’s UBI access using the central group management system ([MyGroups](https://virginia.service-now.com/its?id=itsweb_kb_article&sys_id=ea1dffc7db3ac744f032f1f51d96193a)) and, unless the user has terminated, notifies the user to submit new requests via the System Access Request process in Workday for any access roles required for their new position/organization (refer to [How to Request Access to UVA Systems](https://in.virginia.edu/request-access)).

UBI system administrators maintain a file of all user deprovisioning due to position changes, organizational changes, and termination.

**Access provisioning for department/school owned modules (distributed development)**

Departmental/school developed and owned apps that are distributed in the UBI environment require either 1) a central security group issued via System Access Request, or 2) a security group managed directly by the app owner and with user access approvals by the appropriate data stewards.

**Access provisioning for UBI administrative functionality**

Access requests and provisioning for UBI central administration and for distributed development roles are managed directly by the UBI system administrators. Access requests are made to ubi@virginia.edu and the UBI system administrators are responsible for obtaining access approval from the appropriate data steward and user’s manager and for granting and removing access accordingly.

Related Resources

[Data Protection of University Information](https://uvapolicy.virginia.edu/policy/IRM-003)

[Privacy and Confidentiality of University Information](https://uvapolicy.virginia.edu/policy/IRM-012)

[University Business Intelligence (UBI)](https://ira.virginia.edu/data-analytics/ubi)

[How to Request Access to UVA Systems](https://in.virginia.edu/request-access)

[UBI Roles/Responsibilities](https://ira.virginia.edu/data-analytics/request-access-ubi)

Responsibilities
Users are responsible for completing the steps described in this policy, including meeting training requirements, to gain access to UBI and should plan accordingly. IRA is responsible for ensuring all procedural requirements are completed consistent with policy, including modifying user access if their status changes. To address any issues regarding these requirements, users should contact the UBI system administrators at ubi@virginia.edu.

Review and Approval

Institutional Research and Analytics (IRA) will review this procedure annually, revise as needed, and communicate revised procedures to the UBI operational team.

**Next Scheduled Review:** 05/01/2024

**Approved by, Date:** Associate Provost and Director of Institutional Research and Analytics,05/01/2023

**Revision History:** Initial version