# Cognos Portal Access - Instructions

Access to NMSU's Cognos Reporting Portal is provided via the following procedure. **Please read directions carefully.** All incomplete/incorrect forms will be returned to the employee.

**REQUEST ACCESS:** Employee requesting access must complete Sections A, B and D.

### Section A
By completing this form, employees can be granted access to one or more the following security classes:

    a. **Business, Finance and Human Resources Report Consumer** – provides access to consumers of financial, budgetary and human resources related reports. Authorization by the responsible Dean/Vice President/Director is required.

    b. **Principal Investigator (PIs)**– provides NMSU sponsored research PI access to run and receive select grant and contract - related standard and analytical financial and human resources reports in the Cognos production environment. Access to this security class is authorized by the appropriate Dean/Vice President/Director and by the Director of Sponsored Projects Accounting (SPA).

    c. **Human Resources Interface** – provides NMSU staff a minimal set of human resources data for those staff members with a job requirement of interfacing with and viewing human resource data.

    d. **Research Administrative Support** – provides access to consumers who provide support for sponsored research awards. Access to this security class is authorized by the appropriate Dean / Vice President / Associate Dean for Research and by the Director of Sponsored Projects Accounting (SPA).

### Section B
Access to the **Business, Finance and Human Resources Report Consumer** class is provided to employees fulfilling the following University roles: President, Executive Vice President/Provost, Vice President/Assistant Vice President, Dean/Assistant Dean, Department Head/Assistant Department Head, Director/Assistant Director, Business Manager, Accountant, Central Administrative Offices (Finance, HR, Budget, Student), Administrative Data Management, Institutional Research, Data Warehouse Administrator, and Audit Services.

    Employees who do not fulfill any of the listed roles above require additional Data Custodian approval.

    a. If your position is listed above, please initial next to the statement "I have an approved job title and do not require additional data custodian approval". Continue to Section C.

    b. If your position is NOT listed above, please initial next to the statement "I DO NOT have an approved job title and require additional data custodian approval". Provide a brief explanation/justification for requested security class. Additional data custodian approval will be processed through Administrative Data Management by forwarding authorization request to appropriate Data Custodian. If approved, the Data Custodian will authorize employee access via audited email list.

### Section C
Please provide the name of the employee in Section 1 whose security access should be terminated. The Supervisor must also provide their own name along with signature and date. Once signed, please forward the form to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus), or scan and send by email to security_admin@nmsu.edu.

### Section D
After signing the form, the employee must forward the form to their supervisor for approval/signature. For **Business, Finance, and Human Resources Consumer, Principal Investigator** or **Human Resources Interface** access, the Supervisor will then forward the employee form to Dean/VP/Director approver for signature (refer to **NMSU Policy Manual – 2.35.1.2.3; General NMSU Information and Communication Technologies Policies – 1.2.3**). At the Dean/VP/Director approver level, signatures will only be acceptable from the following job titles: President, Executive Vice President/Provost, Community College President, Vice President, Senior Vice President, Dean, Director or official designee. An official designee is only recognized by ICT if they have provided official documentation indicating they have designated authority to another individual to sign on their behalf for their particular unit.

For **Research Administrative Support** access, the Supervisor will forward to Dean/VP/Assoc Dean for Research. No designee is allowed for this authorization. Once all three signatures have been obtained, please forward the form to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus). ICT will make Cognos security class assignment(s) and notify employee once Cognos access has been granted.

**TERMINATE ACCESS:** Supervisors requesting to terminate employee access must complete Section C only.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____     Employee Title: _____

Aggie ID: _____     E-mail Address: _____     Phone: _____

NMSU Department/Unit: _____     College/Campus: _____     Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

### SECTION A: Request Access

**Security Class:**

☐ Grant Access: Business, Finance and Human Resources Report Consumer

☐ Grant Access: Principal Investigator

☐ Grant Access: Human Resources Interface

☐ Grant Access: Research Administrative Support

**Special instructions:**

_____

_____

### SECTION B: Justification

_____ I have an approved job title and do not require additional data custodian approval.* (Continue to Section 3)

_____ I provide support for sponsored research awards. (Continue to Section 3)

_____ I DO NOT have an approved job title and require additional data custodian approval. (Provide explanation below)

**Please provide a brief justification for requested security access:**

_____

_____

### SECTION C: Terminate Access

☐ Terminate Access     Date Required: _____

## SECTION 3: OFFICIAL APPROVAL

### SECTION D: Authorization

| | | | |
|---|---|---|---|
| _____ | _____ | _____ | _____ |
| Employee Name | Title | Signature | Date |
| _____ | _____ | _____ | _____ |
| Supervisor Name | Title | Signature | Date |

Business, Finance, and Human Resources Consumer, Principal Investigator or Human Resources Interface authorization:

| | | | |
|---|---|---|---|
| _____ | _____ | _____ | _____ |
| Dean/VP/Director Approver * | Title | Signature | Date |

Research Administrative Support authorization:

| | | | |
|---|---|---|---|
| _____ | _____ | _____ | _____ |
| Dean/VP/Assoc Dean for Research* | Title | Signature | Date |

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

| | | |
|---|---|---|
| _____ | _____ | _____ |
| Data Custodian Name | Data Custodian Signature | Date |

*Please refer to instructions on first page for more information.*

Reset

# New Mexico State University Non-Disclosure Statement

This Non-Disclosure Agreement is intended to define the responsibilities of those employees who have access to NMSU records that contain sensitive or confidential information about students, employees, donors or other individuals, and to record his or her recognition and acceptance of that responsibility.

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPAA) and the Gramm-Leach-Bliley Act (GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as Social Security Numbers.

FERPA protects student records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

HIPAA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper or orally.

GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver's license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

## EMPLOYEE: Recognizing this responsibility, I agree to the following (please initial each line):

_____ I will access university records only as required to perform my assigned duties.

_____ I will not access student or employee information that is not necessary to carry out my job. This includes the records of my children, spouse, significant other, parents, other relatives, friends and acquaintances.

_____ I will store information under secure conditions and make every effort to ensure individuals' privacy.

_____ I will not divulge, copy, release, sell, loan, review, alter or destroy records except as properly authorized by the appropriate university official within the scope of applicable state or federal laws, record retention schedules and internal policies.

_____ I will forward all requests for information via an open records request to the university's General Counsel for guidance. I will not release information covered by these requests until instructed to by university's General Counsel or my supervisor.

_____ When I release student information, I will divulge only the information regarded as "directory" or public information, specifically the student's name, address, telephone listing, date and place of birth, major field of study, classification, participation in any officially recognized activities and sports, weight or height of members of athletic teams, dates of attendance, degrees and award received and most previous recent educational institution attended.

_____ I will not release any information about a student who has requested total suppression of information, nor will I release any optional directory information on an employee who has requested to have his/her directory information suppressed.

_____ I will not release any information about students, staff or employees that was requested on the basis of non-public information (for example – names of all international students, names of all students with a GPA of less than 2.0, etc.)

_____ I have read the NMSU Non-Disclosure Agreement and agree to comply with its provisions. I understand that failure to comply may result in disciplinary action, including termination of employment.

Employee Name: _____ Employee Signature: _____ Date: _____

New Mexico State University
Information & Communication Technologies

# AR Data Custodian Access

**This page to be completed ONLY by the AR Director.** Employee/Supervisor: If you would like this type of access, please discuss with the AR Director (AR Data Custodian). Please route to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus) when completed.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____     Employee Title: _____

Employee ID#: _____     E-mail Address: _____     Phone: _____

NMSU Department/Unit: _____     College/Campus: _____     Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

☐ **GRANT** Cognos Production (Cognos-P) Access to AR_Custodian user class

☐ **GRANT** Cognos Development (Cognos-U) Access to AR_Custodian user class

☐ **GRANT** Cognos Production (Cognos-P) Access to AR_Collections user class

☐ **GRANT** Cognos Production (Cognos-P) Access to AR_Recv_Clerk user class

☐ **GRANT** Cognos Production (Cognos-P) Access to AR_EXT_Administrator


☐ **TERMINATE** Cognos Production (Cognos-P) Access to AR_Custodian user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to AR_Custodian user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to AR_Collections user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to AR_Recv_Clerk user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to AR_EXT_Administrator

## SECTION 3: OFFICIAL APPROVAL

_____     _____     _____
Employee Name                Employee Signature              Date

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

_____     _____     _____
UAR Director (AR Data Custodian)     Data Custodian Signature          Date

Reset

New Mexico State University
Information & Communication Technologies

# BUD Data Custodian Access

**This page to be completed ONLY by the Budget Director.** Employee/Supervisor: If you would like this type of access, please discuss with the Budget Director (Budget Data Custodian). Please route to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus) when completed.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____ Employee Title: _____

Employee ID#: _____ E-mail Address: _____ Phone: _____

NMSU Department/Unit: _____ College/Campus: _____ Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

☐ **GRANT** Cognos Production (Cognos-P) Access to BUD_Custodian user class

☐ **GRANT** Cognos Development (Cognos-U) Access to BUD_Custodian user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to BUD_Custodian user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to BUD_Custodian user class

## SECTION 3: OFFICIAL APPROVAL

_____     _____     _____
Employee Name                           Employee Signature                           Date

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

_____     _____     _____
Budget Director (Budget Data Custodian)      Data Custodian Signature                      Date

Reset

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# Finance Data Custodian Access

**This page to be completed ONLY by the Controller.** Employee/Supervisor: If you would like this type of access, please discuss with the Controller (Finance Data Custodian). Please route to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus) when completed.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____ Employee Title: _____

Employee ID#: _____ E-mail Address: _____ Phone: _____

NMSU Department/Unit: _____ College/Campus: _____ Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

☐ **GRANT** Cognos Production (Cognos-P) Access to FIN_Custodian user class

☐ **GRANT** Cognos Development (Cognos-U) Access to FIN_Custodian user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to FIN_Custodian user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to FIN_Custodian user class

## SECTION 3: OFFICIAL APPROVAL

_____     _____     _____
Employee Name            Employee Signature            Date

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

_____     _____     _____
Controller (Finance Data Custodian)       Data Custodian Signature       Date

Reset

# HR Custodian Access

**This page to be completed ONLY by the Asst VP for Human Resource Services (HR Data Custodian).** Employee/ Supervisor: If you would like this type of access, please discuss with the Asst VP for Human Resource Services (HR Data Custodian). Please route to ICT-UCC, MSC 3AT; or fax to 8 646-2699 (fax must be dialed as 8 646-2699 even if on campus) when completed.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____  Employee Title: _____

Employee ID#: _____  E-mail Address: _____  Phone: _____

NMSU Department/Unit: _____  College/Campus: _____  Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

☐ **GRANT** Cognos Production (Cognos-P) Access to HR_Custodian user class

☐ **GRANT** Cognos Development (Cognos-U) Access to HR_Custodian user class

☐ **GRANT** Cognos Production (Cognos-P) Access to HR_Internal user class

☐ **GRANT** Cognos Production (Cognos-P) Access to HR_Internal_EMS user class

☐ **GRANT** Cognos Development (Cognos-U) Access to HR_Internal user class


☐ **TERMINATE** Cognos Production (Cognos-P) Access to HR_Custodian user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to HR_Custodian user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to HR_Internal user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to HR_Internal_EMS user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to HR_Internal user class

## SECTION 3: OFFICIAL APPROVAL

_____  _____  _____
Employee Name  Employee Signature  Date

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

_____  _____  _____
Asst VP for HRS (HR Data Custodian)  Data Custodian Signature  Date

Reset

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# RA Custodian Access

**This page to be completed ONLY by the Dir, Post Award Admin (RA Data Custodian).** Employee/Supervisor: If you would like this type of access, please discuss with the Dir, Post Award Admin (RA Data Custodian). Please route to ICT-UCC, MSC 3AT; or fax to 8 646-269 (fax must be dialed as 8 646-2699 even if on campus). when completed.

## SECTION 1: REQUESTOR INFORMATION

Employee Name: _____ Employee Title: _____

Employee ID#: _____ E-mail Address: _____ Phone: _____

NMSU Department/Unit: _____ College/Campus: _____ Employee MyNMSU Username: _____

## SECTION 2: REQUEST DETAILS

☐ **GRANT** Cognos Production (Cognos-P) Access to RA_Custodian user class

☐ **GRANT** Cognos Development (Cognos-U) Access to RA_Custodian user class

☐ **GRANT** Cognos Production (Cognos-P) Access to RA_Internal user class

☐ **GRANT** Cognos Development (Cognos-U) Access to RA_Internal user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to RA_Custodian user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to RA_Custodian user class

☐ **TERMINATE** Cognos Production (Cognos-P) Access to RA_Internal user class

☐ **TERMINATE** Cognos Development (Cognos-U) Access to RA_Internal user class

## SECTION 3: OFFICIAL APPROVAL

_____          _____          _____
Employee Name                    Employee Signature               Date

## SECTION 4: INTERNAL DEPARTMENT USE ONLY (Data Custodian Authorization)

_____          _____          _____
Dir, Post Award Admin (RA Data Custodian)    Data Custodian Signature        Date

Reset