AUXILIARY USERS DATA ACCESS PROCEDURE

PURPOSE

To accompany the Auxiliary Users Data Access Policy <u>link here</u> and provide detailed information related to procedures and processes users should follow to request access or maintain access to the CADENCE database as a non-Advancement (aka Auxiliary) user.

Non-Advancement user needs access to CADENCE; Submits request via email to assigned Data Access Manager or another Advancement Team member

Approved; Continue Reference Section A Not Approved; Reference Section B



New User is notified via email by assigned Data Access Manager about CADENCE Access & their responsibilities

Confidentiality Statement, CADENCE Training
Reference Section C



New User is granted access and can begin using CADENCE

Must notify assigned Data Access
Manager if role changes or access is no
longer needed

Annually renew Confidentiality Policy and participate in ongoing trainings as needed

SECTION A: CREATE A DAR HELPDESK TICKET

- The Data Access Manager should create a HelpDesk Ticket to formally request CADENCE Access for the New User: https://forever.clemson.edu/help
 - o In the *Onboarding* option, choose "New Auxiliary User-With Revenue" or "New Auxiliary User-Without Revenue".

SECTION B: REASONS FOR AUXILIARY USER REQUEST NOT BEING APPROVED

- The role is not on the pre-approved positions list.
- The scope of their needs is limited and therefore an Advancement team member can provide assistance on an as-needed basis.
- The user has previously had access and not fulfilled their Auxiliary User responsibilities.

SECTION C: WHAT THE DATA ACCESS MANAGER SHOULD PROVIDE TO THE NEWLY APPROVED USER

- Confidentiality Statement Qualtrics Form Link: https://forever.clemson.edu/renew (renewed annually)
- CADENCE Training New User will receive request via Tiger Training
- Note to notify Data Access Manager when statement is signed, and training is completed.
- Note to notify Data Access Manager if role changes and/or access is not needed.
 - If this occurs, the Data Access Manager should communicate the Name, Position, and Username of the individual to Advancement Services for access removal.

TIMELINES

As needed: New User Requests reviewed

Annually: DGC & Data
Access Managers review
& purge full list of Aux
Users

Quarterly: Assigned Data Access Managers Communicate with Aux Users

Annually: Aux Users renew Confidentiality Agreement

QUESTIONS AND SUPPORT

All questions and support requests by CADENCE users outside of the Advancement Division should be sent to the assigned Data Access Manager. The Data Access Manager will respond, involving Advancement Services, as necessary.