Purchasing Data Access Guideline

Executive Summary
This Data Access Guideline provides guidance on access to data related to UW purchasing activities. This includes access to data originating from the Purchasing and Accounts Payable system (PAS), eProcurement, and the PurchasePATH workflow application. According to the Open Financial Data policy (DMC Document #1005), users may have access to cross unit financial data for legitimate business purposes. This document clarifies that Purchasing data should be treated in a consistent manner allowing cross unit and central unit access for legitimate business purposes.

Rationale
Three areas of concern have been identified and discussed during review of business needs of access to Purchasing data.

1. Access to information about supplier pricing (One unit receiving favorable or competitive pricing relative to other units)
2. Privacy of individual or unit purchasing activities (Purchases related to sensitive or classified equipment or supplies)
3. Sensitivity of supplier information (Supplier ID numbers that include SSNs for small or individual suppliers)

It was acknowledged that while these may be areas of risk, the risks can be mitigated by providing cross unit access, and applying appropriate data classification and access controls. This improves opportunities for transparency, equitable pricing, enhanced access to supplier information, improved eProcurement PO search capabilities, and proper classification and controls around SSNs in the generally accessible data. Access to purchasing data for individuals should continue to be provided according to properly defined roles administered in the various source systems (i.e. PAS, eProcurement, and PurchasePATH) as well as roles defined to data accessed via the UW Enterprise Data Warehouse or other official reporting repositories. Data classification, roles and access methods are determined by the appropriate Data Custodian(s) for purchasing data. Currently, the Data Custodian responsible for Purchasing data is the Associate Controller for the UW.

Advisory Opinions Sought
Representatives from Data Management Committee, Financial Management, Office of Information Management, and the Pathology Department were involved in developing this guideline and support approval of its adoption.
Concurrence

The undersigned concur with the data access recommendations described in this Data Management Guideline.

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