



# Institutional Research

Collect. Analyze. Report. Inform.

## Query Request Policy

### Overview

The Office of Institutional Research (IR) provides centralized query development services to support faculty, staff, and administrators requiring access to institutional data. This service ensures that all queries adhere to established Query Development Life Cycle (QDLC) standards, maintain system performance, and uphold data integrity and security. Requests for new queries or modifications to existing queries must be submitted through the designated [request form](#).

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### I. Service Scope and Eligibility

IR develops and maintains Public Queries for use in Query Viewer. Services are intended for users who do not have query authoring access but require reliable data extracts for operational, reporting, or planning purposes.

To be eligible for query services from IR, the requestor must already have access granted to run queries. If a requestor does not have access to run a query in SOAR, then the requestor will need to obtain that through their direct supervisor.

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### II. Compliance and Data Governance

All requests are reviewed to ensure compliance with institutional policies and applicable regulations:

- **FERPA Compliance:** Data will be limited to the minimum necessary. Sensitive data may be suppressed, aggregated, or excluded to protect student privacy.
- **Data Domain Restrictions:** Queries will not combine data across system pillars (e.g., Campus Solutions and Human Resources) unless explicitly authorized.
- **Data Stewardship:** Requestors are responsible for appropriate use and redistribution of data.

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### III. Standard Timelines

- **Standard Requests:** Minimum 3 weeks
- **Complex Requests** (multiple joins, unions, or advanced logic): Timeline determined during intake

Expedited requests may be considered but are not guaranteed.

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### IV. Submission Requirements

All requests must include:

- **Purpose:** Intended use of data, including external reporting if applicable
- **Key Questions:** Specific business or research questions
- **Data Elements:** Required fields (e.g., enrollment, GPA, demographics)

- **Population Definition:** Clear inclusion/exclusion criteria
- **Timeframe:** Term(s) or date range
- **Constraints:** Filters or limitations
- **Output Requirements:** Preferred format, column naming, sorting
- **Frequency:** One-time or recurring request

Incomplete submissions may delay processing.

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## V. Development Standards

All queries will adhere to QDLC standards, including:

- Standard naming conventions
- Performance optimization
- Validation and testing procedures
- Use of secure prompts for row-level security

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## VI. Delivery and Maintenance

- **Deployment:** Queries will be published as Public Queries in SOAR
- **Access:** Requestors will receive query name and execution instructions
- **Version Control:** IR maintains ownership of query logic and versioning
- **Modifications:** Changes require a new request and full review cycle
- **Retention:** Queries may be deprecated if no longer maintained or used

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## Acknowledgment

By proceeding to the request form, you acknowledge and agree to the policies, timelines, and data governance standards outlined above.