

Contract Consultant and External User Roles, Responsibilities and Security Requirements – ODOT’s ProjectWise Network (For Consultant Firms and Their Staff)

A. OBTAINING THIRD PARTY ACCESS BY CONSULTANT

- 1. Establish User Accounts:** Each employee of consultant that will need access to ODOT’s ProjectWise Network must submit a completed [External User Access Agreement – ODOT’s ProjectWise Network](#) per the instructions on the form. Following a verification and approval process by ODOT, the user account will be established.
- 2. Gaining Access to ODOT’s ProjectWise Network:** Each employee of consultant will receive email instructions on setting up a MOVEit account to access the instructions for establishing a password and configuring their ProjectWise application for access through ODOT’s Partner’s Domain.
- 3. Access to Specific Project Folders:** Each employee of consultant will be restricted to the folder(s) specific to the project they have been contracted to work on.

B. THIRD PARTY RESPONSIBILITIES FOR CONSULTANT STAFF

- 1. Handling of confidential information:** Confidential information is information which concerns or relates to the processes, operations, styles of works, or to the production, sales, shipments, purchases, transfers, identification of customers, inventories or amount or source of any income, profits, losses, or expenditures of any person, firm, partnership, corporation or other organization or other information where the disclosure of which is likely to have the effect of either impairing one’s ability to obtain such information as is necessary to perform its statutory functions, or causing substantial harm to the competitive position of the person, firm, partnership, corporation or other organization from which the information was obtained. Client firm and their staff shall not disclose, retain, or negligently handle confidential information, which could cause damage to the reputation of ODOT, impede operations and may violate state or federal law. Client firm and their staff shall promptly destroy or return all confidential information upon request of ODOT.
- 2. ODOT information assets:** ODOT information assets are required to be identified and classified by an assigned information asset owner. Information assets are both electronic and paper. Client firm and their staff shall follow the Information Classification Level Guidelines:
 - a. Level 1 – Published: is done so people know it can be publicly released. For example, DMV brochures and maps.
 - b. Level 2 – Limited: if no label is present on an information asset, the default is ‘Level 2’ as the vast majority of ODOT information assets are level 2.
 - c. Level 3 – Restricted: is sensitive information including Personally Identifiable Information (PII), HR and financial. Release to external parties requires a non-disclosure agreement.
 - d. Level 4 – Critical: is extremely sensitive and intended for use by named individual(s) only. This is information that must be secured and may affect safety or legal compliance as release could cause physical, legal or financial harm. At this time, level 4 files are not kept in ProjectWise at ODOT.
- 3. Assigned duties & confidential information:** Client firm shall not read, copy, modify, delete confidential information unless required to do so to complete assigned duties.

- 4. Distribution of confidential information:** Client shall not distribute or otherwise access confidential information unless required to do so to complete assigned duties.
- 5. Disclosure of confidential information:** Client firm shall not discuss confidential information processed, stored or managed by ODOT with anyone outside of ODOT.
- 6. Sharing of confidential information:** Client firm shall not share confidential information with anyone else at ODOT unless required to do so to complete assigned duties and the person providing the information is authorized to view it.
- 7. Notice of termination of employment:** Client firm shall immediately notify ODOT in the event an employee with ProjectWise access is terminated by client firm. Client firm and/or employee of Consultant shall inform ODOT if termination is planned for a future date. In the event there is no notice, ODOT must be immediately notified of termination.
- 8. Use of ProjectWise Network:** Client firm and their representatives shall use due diligence to ensure the integrity and operation of the ProjectWise application by following professional standards of use and security when accessing and using ODOT's ProjectWise application.
- 9. ODOT Authority:** ODOT retains sole unlimited authority to terminate client firm usage and/or account(s) at any time.
- 10. Data Management:** Client firm shall use file and folder structures as defined by ODOT to store all plans, files, documents and related project design and project materials. These documented structures may be revised from time to time by ODOT and are available at <http://www.oregon.gov/ODOT/Business/Pages/ProjectWise.aspx>.
- 11. Work in Progress:** Client firms and designated representatives shall use ODOT ProjectWise to store and retain all work in progress, including but not limited to all plans, files, documents and related project design and project materials.
- 12. Collaborative System:** ODOT ProjectWise is intended to provide a collaborative work environment for ODOT design projects. As such it is expected that all work by parties, both ODOT and Consultant, will place and maintain all designated project work and deliverables in the ProjectWise application.