

## INSTRUCTIONS

Complete all applicable sections:

- Training is strongly recommended for all Financial Accounting Software and Onbase users.
- Sign and date the form (user and supervisor)
- Email completed form to [foundation@memphis.edu](mailto:foundation@memphis.edu)

## COMPLETED BY REQUESTING USER

Name: \_\_\_\_\_ Username: \_\_\_\_\_ University ID#: \_\_\_\_\_ EMAIL: \_\_\_\_\_@[memphis.edu](mailto:memphis.edu)

TITLE: \_\_\_\_\_ EXT: \_\_\_\_\_ Dept/School: \_\_\_\_\_

Date effective if other than current date: \_\_\_\_\_

By signing below, I agree as an employee of The University of Memphis and having directly related University of Memphis Foundation funds, I am aware the data and materials, to which I may have access, are to be treated in a professional and confidential manner. I agree herein, as a consideration of my access, I will not disclose or cause to be disclosed any such confidential information gained in the course of my duties at any time.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

## COMPLETED BY REQUESTING USER SUPERVISOR

**New** – No current access

**Add** – Additional Access Requested for current Requested-User

**Remove** – Expire account effective \_\_\_\_\_. User will no longer hold this position. Stop here, sign, scan and email to [foundation@memphis.edu](mailto:foundation@memphis.edu).

### Access Requested:

**Financial Accounting Program + Fundriver**- Query access to the following fund(s) – attach additional sheet if necessary

Fund # (s) \_\_\_\_\_

### OnBase – Access restricted by job department and title

Org level access - access to org Fund Agreements, Invoice and Voucher copies. Restricted Business Officer access. (MATRIX-FO-ORG-DEPT)

DOD or Advancement – access to all fund agreements. Restricted advancement employee access (MATRIX-FO-FUND-AGREEMENTS )

Gift Records - access to gift records, donor history, and pledge agreements. Restricted advancement employee access. (MATRIX-FO-GIFTRECORDS )

Gift Records Admin – scanning privileges to gift records, donor history, and pledge agreements. Restricted gift records employee access. (MATRIX-FO-GIFTRECORDSADMIN )

Foundation – Restricted Foundation employee access

User needs the access to perform the following job functions:

### Authorization:

**By signing below, I approve the access requested by the above employee. I UNDERSTAND THE ULTIMATE RESPONSIBILITY FOR ANY ACTION TAKEN BY THE ABOVE INDIVIDUAL IS MINE. If the employee leaves the University or transfers to a different department, I will notify the UM Foundation so the department access is terminated.**

\_\_\_\_\_  
Print Name

Supervisor/Department Head/Dean/Director

\_\_\_\_\_  
Approval Signature

Supervisor/Department Head/Dean/Director

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Ext.