



---

## RAISER'S EDGE ACCESS REQUEST

### Raiser's Edge

Raiser's Edge (RE) is a customer relationship management (CRM) database used to store information about:

- The University of Queensland's alumni, donors and other individuals and organisations, collectively known as constituents; and
- the ongoing relationships University staff have with these constituents.

Access to RE is restricted to university staff who are required to use information about constituents regularly in the course of their work. Other University staff can request reports from the Advancement Office. Staff who are granted access to RE must know and understand their responsibilities for storing, accessing, using and maintaining the privacy of personal constituent information.

### User Training

The Advancement Office coordinates user training for all RE users. Basic user training must be completed before database access will be granted. Advanced user training must be completed within six months of receiving database access and will include training for staff in specialist roles including event coordination, prospect research, system administration and key data entry roles.

### RE Access

To gain access to RE:

1. Read the following University policies:
  - University Policy 1.60.2 [Privacy Management Policy](#); and
  - University Policy 1.60.1 [Freedom of Information Management Policy](#).
2. Review all sections of The University of Queensland's [Freedom of Information website](#).
3. Read the [Advancement Office Constituent Information and Privacy Guidelines](#).
4. Seek further clarification from your Supervisor, Advancement Manager or the Advancement Office if you do not understand your roles and responsibilities regarding storing, accessing, using and maintaining the privacy of personal constituent information.
5. Print pages 2 and 3 of this document and complete Part 1 of the form. Ensure your Faculty Advancement Manager (or your Supervisor if you do not have a Faculty Advancement Manager) completes Part 2. Please contact the Advancement Office if assistance is required.
6. Mail the completed Access Request (pages 2 and 3) to the Advancement Office. You will be contacted to arrange a time to attend basic user training. Once you have completed basic training you will receive an email with your logon, password and installation instructions and be registered for intermediate and advanced user training.

### Further information or assistance

Please contact the Advancement Office Advancement Services team if further information or assistance is required.



## RAISER'S EDGE ACCESS REQUEST

### PART 1: USER TO COMPLETE (ALL SECTIONS MANDATORY)

First Name: \_\_\_\_\_ Surname: \_\_\_\_\_  
 Staff ID (Aurion) Number: \_\_\_\_\_ UQ Logon: \_\_\_\_\_  
 Division/Institute/Faculty: \_\_\_\_\_  
 Office/Centre/School: \_\_\_\_\_  
 Role/Position Title: \_\_\_\_\_  
 Date Appointed: \_\_\_\_\_ Tenure End Date: \_\_\_\_\_  
 Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

1. I have read and understand University Policy 1.60.2 [Privacy Management Policy](#) last amended: \_\_\_\_\_ (date)
2. I have read and understand University Policy 1.60.1 [Freedom of Information Management Policy](#) last amended: \_\_\_\_\_ (date)
3. I have reviewed The University of Queensland's [Freedom of Information website](#) last updated: \_\_\_\_\_ (date)
4. I have read and understand the [Advancement Office Constituent Information and Privacy Guidelines](#) last updated: \_\_\_\_\_ (date)
5. I will abide by all University policies and guidelines, as well as Commonwealth and State legislation concerning security, privacy and correct use of the Raiser's Edge system and resources and agree:
  - 5.1 to use Raiser's Edge only when and as authorised, and then for only bona fide University purposes which I am authorised to conduct;
  - 5.2 never to reveal my logon and password to anyone;
  - 5.3 not to provide anyone else with access to or use of the Raiser's Edge system;
  - 5.4 to promptly report any suspected security violations to the Advancement Office; and
  - 5.5 to terminate my access by notifying the Advancement Office as soon as access is no longer needed.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### PART 2: SUPERVISOR/FACULTY ADVANCEMENT MANAGER TO COMPLETE

This staff member will be employed in the following advancement role(s):

- |   |  |
|---|--|
| <input type="checkbox"/> Alumni and Community Relations               | <input type="checkbox"/> Donor Relations and Stewardship                     |
| <input type="checkbox"/> Fundraising Campaigns and Appeals            | <input type="checkbox"/> Gift Processing (Advancement Services Only)         |
| <input type="checkbox"/> Major and Principal Gift Prospect Management | <input type="checkbox"/> Prospect Research (Advancement Services Only)       |
| <input type="checkbox"/> Events Management/Coordination               | <input type="checkbox"/> Database Administration (Advancement Services Only) |
| <input type="checkbox"/> Other (please specify): _____                |  |

**Supervisor's/AM's Signature:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

| <b>Internal Use Only:</b>   |                          |   |       |       |       |       |
|---|--------------------------|---|-------|-------|-------|-------|
| <b>Access Approval</b><br>(Advancement Services Manager)                            | <input type="checkbox"/> | Alumni and Community Relations                      |       |       |       |       |
|   | <input type="checkbox"/> | Donor Relations                                     |       |       |       |       |
|   | <input type="checkbox"/> | Fundraising   |       |       |       |       |
|   | <input type="checkbox"/> | Prospect Management                                 |       |       |       |       |
|   | <input type="checkbox"/> | Events  |       |       |       |       |
|   | <input type="checkbox"/> | Gift Processing (Advancement Services Only)         |       |       |       |       |
|   | <input type="checkbox"/> | Prospect Research (Advancement Services Only)       |       |       |       |       |
|   | <input type="checkbox"/> | Database Administration (Advancement Services Only) |       |       |       |       |
|   | <input type="checkbox"/> | Other (Specify):                                    |       |       |       |       |
|   |                          | Initials:   |       | Name: |       | Date: |
| <b>User Record Created</b><br>(Database Systems Officer)                            | Initials:                |   | Name: |       | Date: |       |
| <b>Basic User Training Completed</b><br>(Database Systems Officer)                  | Initials:                |   | Name: |       | Date: |       |
| <b>New User Brief Sent to User and Saved to Drive</b><br>(Database Systems Officer) | Initials:                |   | Name: |       | Date: |       |
| <b>New User Added to Email List</b><br>(Advancement Services Officer)               | Initials:                |   | Name: |       | Date: |       |
| <b>New User Added to Shared Drive</b><br>(Advancement Services Officer)             | Initials:                |   | Name: |       | Date: |       |
| <b>New User Registered for Training</b><br>(Advancement Services Officer)           | Initials:                |   | Name: |       | Date: |       |
| File completed form in RE Access Requests Folder (Advancement Services Officer).    |                          |   |       |       |       |       |