AI*Engaged

<div align="right">ASTERISK INTELLIGENCE</div>

AI*Engaged Data Warehouse User Access Authorization

This form must be submitted to request a new credit union employee be granted access to work with the Asterisk Intelligence Data Warehouse via the AI*Engaged software platform, or to request changes to or removal of existing employee access.

AI*Engaged User to Add/Change/Remove

Employee name

Credit union   CU#

Choose one   ☐ **ADD** this user   ☐ **REMOVE** this user   ☐ **CHANGE** existing username:

Special instructions

Data Transfer Authority

Must choose ONE of the following:

This is a brand-new AI*Engaged user and:

☐ **No** data transfer authority (either upload or download) should be granted at this time

☐ **New** data transfer authority should be granted
(complete the "Authority Requested" section below)

This is an existing AI*Engaged user and:

☐ Existing data transfer authority should be **removed**

☐ Data transfer authority needs to be **changed**
(complete the "Authority Requested" section below, indicating all authority you want them to have)

Authority Requested

Download authority (pull data from data warehouse table to a local workstation)

☐ Can transfer data from any data warehouse table (in FILExxDW) to a local workstation

☐ Can transfer data ONLY from these specific table(s) *(list as many as needed)*

Upload Authority (push data from a workstation to the data warehouse)

☐ Can transfer data from a local workstation to any data warehouse table (in FILExxDW)

☐ Can transfer data ONLY to these specific table(s) *(list as many as needed)*

Authorization

➔**IMPORTANT NOTE:** This form <u>must</u> be signed by an authorized credit union Security Officer. If a Security Officer is not available, we cannot guarantee that download/upload authority will be granted, even if the form is signed by a credit union CEO. Our policy requires that in order to protect credit union data we will follow up on any "urgent" request for user or permission changes by requiring additional authentication from the credit union.

Security Officer Name

Signature   Date

Instructions

Save and email the completed form to Asterisk Intelligence at ai@cuanswers.com.
User IDs for new employees will be assigned for you and relayed to your Security Officer.

Created: 6/3/2022 1:14:00 PM   By: Dawn Moore
Revised: 6/6/2022 7:22:00 AM   By: Dawn Moore
Form/revisions requested by: Annalyn Hawkes
Path to source document: X:\Administration\Public\Templates\Source files for PDF forms\AIEngaged_EmpAccess.docx