


Instructions and Application for **salesforce.com Access – CBA**
Budget Charges Apply – See Step 1 Below
03/06/08

Step	Action				
1	<p>ACCOUNTHOLDER (i.e. Advisor) or SUPERVISOR prints a copy of these instructions. The procedure and form can be accessed by pointing a browser to www.infoservices.neu.edu, and downloading the salesforce.com application package.</p> <p>ACCOUNTHOLDER completes and signs part 1. The accountholder myNEU user ID must be clearly shown. The SUPERVISOR completes and signs part 2A.</p> <div align="center" data-bbox="831 630 919 714">  </div> <p>Charges apply to salesforce.com access. Budget information MUST be shown in the areas noted on the account application cover sheet.</p> <p>New users are charged a prorated amount (\$50 per month) until annual license renewal in July. On July 1, all users are charged \$600.00 for an annual license. If a user is removed during the course of a year, a refund is credited to the applicable budget.</p> <p>Please direct all budget-related questions to primary contact Stephanie Trowbridge (x4581) or secondary contact Sue Scannell (x2751).</p>				
2	<p>SUPERVISOR faxes pages 2 and 3 to a member of the FACT salesforce.com CONSULTATIVE team:</p> <p>Consultative contacts:</p> <table border="1" data-bbox="300 1192 1356 1325"> <thead> <tr> <th>Primary</th> <th>Secondary</th> </tr> </thead> <tbody> <tr> <td> David Abdow, 474 Dodge Hall phone x7194 d.abdow@neu.edu </td> <td></td> </tr> </tbody> </table>	Primary	Secondary	David Abdow, 474 Dodge Hall phone x7194 d.abdow@neu.edu	
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David Abdow, 474 Dodge Hall phone x7194 d.abdow@neu.edu					
3	<p>CONSULTATIVE team determines and records appropriate profile on provisioning sheet, then faxes cover and provisioning sheet to salesforce.com ADMINISTRATIVE TEAM:</p> <p>Administrative contacts:</p> <table border="1" data-bbox="300 1518 1356 1680"> <thead> <tr> <th>Primary</th> <th>Secondary</th> </tr> </thead> <tbody> <tr> <td> Vanessa Ritz, 448 CP phone 7418 Fax 4354 v.ritz@neu.edu </td> <td></td> </tr> </tbody> </table>	Primary	Secondary	Vanessa Ritz, 448 CP phone 7418 Fax 4354 v.ritz@neu.edu	
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3	<p>ADMINISTRATIVE team faxes cover and provisioning sheets to INFORMATION SECURITY AND IDENTITY SERVICES at Fax #4354.</p>				
4	<p>INFORMATION SECURITY AND IDENTITY SERVICES verifies personal information, activates access, and notifies accountholder by email. If the accountholder does not have NU email service, the authorizing Supervisor is notified.</p>				



CBA: salesforce.com ACCOUNT APPLICATION COVER SHEET

03/06/08

Date

Part 1: Accountholder Information:

Accountholder Name	Position Title	Department
Campus Address	Email Address	Telephone

BUDGET INFORMATION MUST BE SHOWN BELOW – LEAVE NO BLANK SPACES

Budget# Object Code	Budget Contact Name	Budget contact phone	Budget contact email
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Accountholder myNEU user ID (do not write the myNEU password !) NOTE: Please do not write the 9-digit NUID number. *->	NON-EMPLOYEE ROLES End date MUST be shown, and cannot exceed one year from date of request. <-*
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Roles-> Check one->	Employee, staff or faculty	Student (work study, Coop, Teaching/Grad Assistant)	Part time staff or faculty	Consultant	Temporary
	[]	[]	[]	[]	[]
Write end date-----> (if known)	----- end date MMDDYY	----- end date MMDDYY	----- end date MMDDYY	----- end date MMDDYY	----- end date MMDDYY

Accountholder Agreement: Northeastern University systems are to be used according to the terms of the Appropriate Use Policy (www.infoservices.neu.edu). I further agree to: access, distribute and share data, including test data, only as needed to conduct University business as specified in my position/engagement description, respect the confidentiality and privacy of individuals whose records or data I access, observing all ethical and legal restrictions that may apply, protect and be personally accountable for all work performed under my user id(s) and password(s), logout when leaving my workstation, report knowledge of security breaches to the University Data Administrator, and comply with all department and University security policies and procedures.

NOTICE: This application is not an employment contract in any form, although adherence to these standards is a condition of employment or continued role. Access granted pursuant to this application does not give rights of any kind, and may be changed by Northeastern University without notice at any time.

I have read and will abide by the above agreement and the Appropriate Use Policy (www.infoservices.neu.edu). Under these terms, I request access to SALESFORCE.COM to be established according to the specifications in page 3 of this form.

Accountholder Signature: _____ **Date:** _____

Part 2A: Supervisor Approval and Agreement

Supervisor Name	Position Title	Department
Campus Address	Email Address	Telephone

I approve this request for data access in accordance with University Policy. For the accountholder named above, I approve the grant or continuance of the profiles listed on the attached sheet. I certify these profiles are required to allow the named accountholder to perform assigned work-related duties.

Supervisor Signature	Date
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THIS SHEET MUST BE ACCOMPANIED BY SALESFORCE.COM APPLICATION COVER SHEET

U: SALESFORCE.COM ACCESS (030608)

Print the accountholder name ->

Access request type Mark one box →	NEW access	DELETE access		
Reason for request Mark one box →	New hire	Termination	Transfer	New Responsibilities

AREA BELOW THIS LINE FOR CONSULTATIVE TEAM USE ONLY

PROFILES	Actions (mark an "X" in the appropriate column)			
	NEW PROFILE		DELETE PROFILE	
CBA – External Relations				

***** THIS SECTION FOR ADMINISTRATIVE USE ONLY *****

Team	Action	Comment	Initial	Date
Consultative	Validate user access			
	Fax pages 2 & 3 to administrative team			
Administrative	Set access			
	Fax pages 2 & 3 to security, fax 4354			
Information Security	Verify identity data Set flag Notify user that account is set up Store account application in provisioning book			