



Instructions and Application for **salesforce.com Access**

Budget Charges Apply – See Step 1 Below

05/29/08

Step	Action				
1	<p><b>ACCOUNTHOLDER or MANAGER</b> prints a copy of these instructions. The procedure and form can be accessed by pointing a browser to <a href="http://www.infoservices.neu.edu">www.infoservices.neu.edu</a>, and downloading the salesforce.com application package.</p> <p><b>ACCOUNTHOLDER</b> completes and signs part 1. <b>The accountholder myNEU user ID must be clearly shown.</b> The <b>MANAGER</b> completes and signs part 2A.</p> <div data-bbox="834 596 919 680" style="text-align: center;"> </div> <p><b>Charges apply to salesforce.com access. Budget information MUST be shown in the areas noted on the account application cover sheet.</b></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><b>Please direct all budget-related questions to primary contact Stephanie Trowbridge at x4581, or secondary contact Sue Scannell at x2751.</b></p>				
2	<p><b>MANAGER</b> faxes pages 2 and 3 to a member of the salesforce.com <b>CONSULTATIVE</b> team:</p> <p><b>Consultative contacts:</b></p> <table border="1" data-bbox="300 1129 1357 1325"> <thead> <tr> <th data-bbox="300 1129 828 1161">Primary</th> <th data-bbox="828 1129 1357 1161">Secondary</th> </tr> </thead> <tbody> <tr> <td data-bbox="300 1161 828 1325"> <b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b> </td> <td data-bbox="828 1161 1357 1325"> <b>Cheryl Cronin, 501 Richards, Phone 5259 Fax 3215 <a href="mailto:ch.cronin@neu.edu">ch.cronin@neu.edu</a></b> </td> </tr> </tbody> </table>	Primary	Secondary	<b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b>	<b>Cheryl Cronin, 501 Richards, Phone 5259 Fax 3215 <a href="mailto:ch.cronin@neu.edu">ch.cronin@neu.edu</a></b>
Primary	Secondary				
<b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b>	<b>Cheryl Cronin, 501 Richards, Phone 5259 Fax 3215 <a href="mailto:ch.cronin@neu.edu">ch.cronin@neu.edu</a></b>				
3	<p><b>CONSULTATIVE</b> team determines and records appropriate profile on provisioning sheet, obtains any required countersignatures, then faxes cover and provisioning sheet to salesforce.com <b>ADMINISTRATIVE TEAM:</b></p> <p><b>Administrative contacts:</b></p> <table border="1" data-bbox="300 1549 1357 1745"> <thead> <tr> <th data-bbox="300 1549 828 1581">Primary</th> <th data-bbox="828 1549 1357 1581">Secondary</th> </tr> </thead> <tbody> <tr> <td data-bbox="300 1581 828 1745"> <b>Hung Nguyen, 320 RP phone 2113 Fax 7498 <a href="mailto:h.nguyen@neu.edu">h.nguyen@neu.edu</a></b> </td> <td data-bbox="828 1581 1357 1745"> <b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b> </td> </tr> </tbody> </table>	Primary	Secondary	<b>Hung Nguyen, 320 RP phone 2113 Fax 7498 <a href="mailto:h.nguyen@neu.edu">h.nguyen@neu.edu</a></b>	<b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b>
Primary	Secondary				
<b>Hung Nguyen, 320 RP phone 2113 Fax 7498 <a href="mailto:h.nguyen@neu.edu">h.nguyen@neu.edu</a></b>	<b>Karen Stevens, 402 Columbus Place, phone 4829 Fax 3215 <a href="mailto:k.stevens@neu.edu">k.stevens@neu.edu</a></b>				
3	<p><b>ADMINISTRATIVE</b> team faxes cover and provisioning sheets to <b>INFORMATION SECURITY AND IDENTITY SERVICES</b> at Fax #4354.</p>				
4	<p><b>INFORMATION SECURITY AND IDENTITY SERVICES</b> verifies personal information, activates access, and notifies accountholder by email. If the accountholder does not have NU email service, the authorizing manager is notified.</p>				



**salesforce.com ACCOUNT APPLICATION COVER SHEET**  
05/29/08

Date
------

**Part 1: Accountholder Information:**

Accountholder Name	Position Title	Department
Campus Address	Email Address	Telephone

BUDGET INFORMATION, MYNEU ID AND NUID # MUST BE SHOWN BELOW – LEAVE NO BLANK SPACES

Budget#	Object Code	Budget Contact Name	Budget contact phone	Budget contact email
---------	-------------	---------------------	----------------------	----------------------

Accountholder myNEU user ID (do not write the myNEU password)	Accountholder NUID Number:
	0 0

Roles-> Check one->	Employee, staff or faculty	Student (work study, Coop, Teaching/Grad Assistant)	Part time staff or faculty	Consultant End date MUST be shown, & cannot exceed 1 year from date of request	Consultant End date MUST be shown, & cannot exceed 1 year from date of request
Write end date----->	[ ]	[ ]	[ ]	[ ]	[ ]
	----- 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](http://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 NU Information Security, 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](http://www.infoservices.neu.edu)). Under these terms, I request access to SALESFORCE.COM to be established according to the specifications in page 4 of this form.

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

**Part 2A: Manager Approval and Agreement**

Manager 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.

**Manager Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

THIS SHEET MUST BE ACCOMPANIED BY SALESFORCE.COM APPLICATION COVER SHEET

**S: SALESFORCE.COM ACCESS (052908)**

Print the accountholder name ->

<b>Access request type</b> Mark one box →	<b>NEW access</b>	<b>DELETE access</b>	<b>MODIFY access</b>	
<b>Reason for request</b> Mark one box →	<b>New hire</b>	<b>Termination</b>	<b>Transfer</b>	<b>New Responsibilities</b>

**AREA BELOW THIS LINE FOR CONSULTATIVE TEAM USE ONLY**

PROFILES	Actions (mark an "X" in the appropriate column)	
	SET PROFILE (MARK <u>ONE</u> SPACE ONLY)	DELETE PROFILE (MARK <u>ONE</u> SPACE ONLY)
<b>System Administrator</b>		
<b>SYSTEM ADMINSTRATOR ACCESS REQUIRES A COUNTERSIGNATURE FROM ONE OF THREE AUTHORIZERS -----&gt;</b>	Primary: Vanessa Ritz Secondary: Tom Hopkins, Rick Mickool	
<b>NU System Administrator</b>		
<b>NU DIS Staff</b>		
<b>NU DIS Staff + Reporting</b>		
<b>NU Basic User</b>		
<b>NU General User</b>		
<b>NU General Super User</b>		
<b>NU Development User</b>		
<b>NU Development Super User</b>		
<b>NU Events and Mass Communications</b>		
<b>NU Research User</b>		

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

Team	Action	Initial	Date
<b>Consultative</b>	Determine and record access		
	Fax pages 2 and 3 to administrative team, fax 7498		
<b>Administrative</b>	Set access		
	Fax pages 2 and 3 to security, fax 4354		
<b>Information Security</b>	Verify identity data Set flag Notify user that account is set up Store account application in provisioning book		