

Monthly License Change Requests ^[1]

October 30, 2024 by [Melanie Jones](#) ^[2]

This resource is designed for eComm specialists who are responsible for submitting provisioning and deprovisioning requests for their campus. Learn how to submit requests while being mindful of important deadlines and details that affect the user experience.

No Exceptions Exceptions to the following process and timelines CANNOT be accommodated for any reason.

Checkboxes are not visible in Dashboard Lightning Table widget Checkbox Values are not displayed in the Lightning table widget in Dashboards since the Winter '25 release. While this is a [known issue currently in review](#) ^[3], there is no resolution timeframe. Until then, please use the workaround outlined below in the 'View License Details' section.

Provisioning Requests

eComm specialists submit provisioning requests throughout the month. The System team addresses these requests in a single batch during the first week of each month. New users **MUST** complete [pre-access requirements](#) ^[4] before they will be provisioned, including:

- Relevant SkillSoft courses (confirmed via file uploads to the user's license record), and
- A signed user agreement (both the user and their supervisor must sign the agreement)

How to submit a provisioning request

Review Contact

Before submitting a request, it's important to confirm that you're provisioning the correct person based on their employment with CU. To do so, view the **Contact** record along with the **Related** tab.

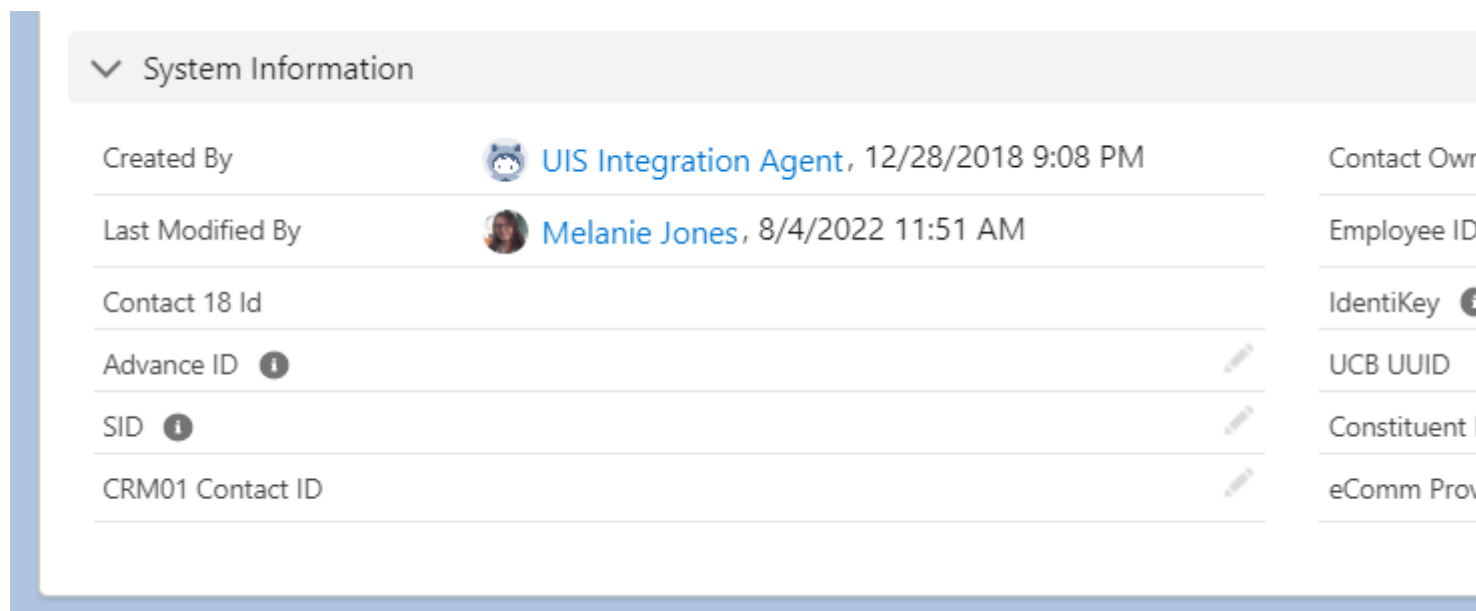
1. Does their university email populate in a university email field? *For example, a CU Boulder employee should have a UCB Email populated.*
2. Do they have an employee ID?
3. Do they have an active CU Employment record?*

***People of Interest (POI)** POIs are a temporary type of university employee whose data displays in Salesforce differently compared to a typical employee. **POIs will not have an Employment record in Salesforce, but it's important to confirm 1) that an Employee ID is populated, and 2) that their university email displayed in the respective university email field in Salesforce.** The eComm specialist or POI may need to work with their campus OIT team to get their email address populated in Salesforce. Inactive POIs or those missing a university email in Salesforce CANNOT be provisioned.








Don't have access? eComm specialists must review this following wiki and [pass the quiz](#) [5] for access.

Submit Request

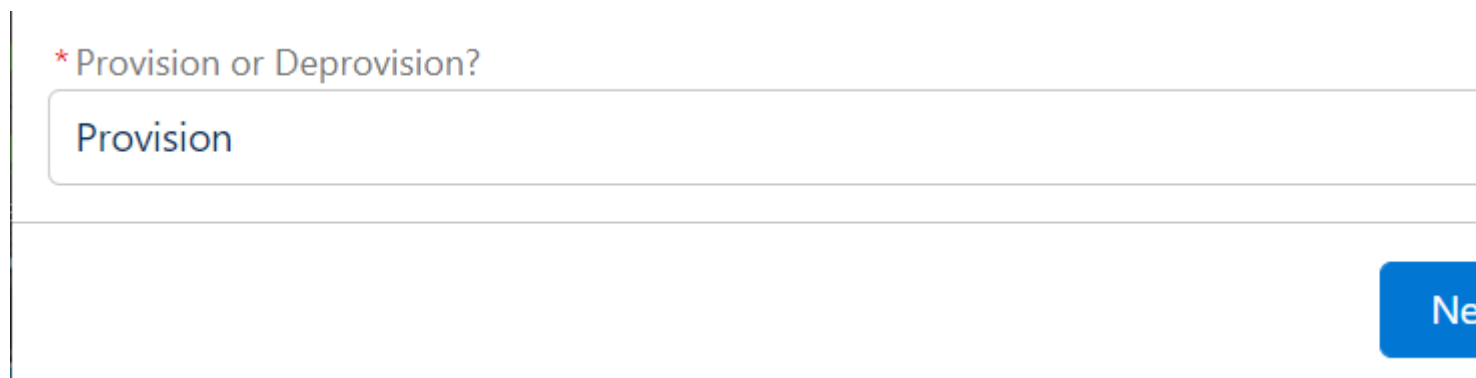
- Scroll to the bottom of the **Contact** to the **Provisioning** field and click on "**Click Here to Provision or Deprovision**"



The screenshot shows the 'System Information' section of a Salesforce record. It contains a table with the following fields:

System Information		
Created By	 UIS Integration Agent , 12/28/2018 9:08 PM	Contact Owner
Last Modified By	 Melanie Jones , 8/4/2022 11:51 AM	Employee ID
Contact 18 Id		IdentiKey
Advance ID 		UCB UUID
SID 		Constituent
CRM01 Contact ID		eComm Prov

- Choose **Provision** and select **Next**



The screenshot shows a dialog box titled '* Provision or Deprovision?'. It has a text input field with the word 'Provision' entered. To the right of the input field is a blue button with the text 'Next'.

- Review details of current access (if relevant) and select **Next**.

This user already has the applications listed below:

Salesforce | Marketing Cloud | |

To add **additional** applications, click "**Next**". To **remove** applications, click "**Previous**".

- Populate eComm specialist information:
 - **Affiliated Campus**
 - **eComm Specialist**
 - **Additional eComm Specialists (if applicable)**

ECOMM SPECIALIST INFORMATION

* Affiliated Campus

Boulder

* eComm Specialist

System Adv

Additional eComm Specialist(s), if applicable

Anschutz

Boulder

Boulder Adv

Denver

System

- Add user information, including:
 - **eComm Role**

- **What do you want this user to have access to?**
 - **Business Unit**
 - **Public Group**
 - **New Public Group (if applicable)**
- Select the **Next** button

USER INFORMATION

* eComm Role

User

What do you want this user to have access to?

- ☒ Salesforce
- ☒ Marketing Cloud
- ☒ Cvent
- ☐ Apsona
- ☐ Geopointe

* Business Unit

CU Adv-Boulder Leeds School of Business

CU Adv-Boulder Music, Arts & Culture

CU Adv-Boulder School of Law

CU Adv-Denver Annual Giving

CU Adv-Denver Development

New Public Group, if applicable

YOUR PROVISIONING REQUEST IS NOT YET COMPLETE.

FINAL STEP: Submit documentation of SkillSoft course completion on the [license record](#).

IMPORTANT: Provisioning requests without documentation of SkillSoft course completion will be rejected. There will be no exceptions. Please plan accordingly.

Provide SkillSoft Course Screenshot

Do not forget to add SkillSoft screenshots to the license record.

- Open the **License** record (link is provided on the final provisioning screen or instructions below)
- Navigate to the **Related** tab
- Use the **Upload Files** button to attach SkillSoft course screenshots



License

License Name
LN-0801

Affiliated Campus
Anschutz

User Email

Salesforce
☐

Mark
☐

Related

Details



License History (1)

Date	Field	User	Original Value
8/23/2022 10:21 AM	Created.	Jason Thomas	
View All			



Files (0)

[Upload Files](#)

Or drop files

Confirm Signed eComm Agreement

Want to confirm a new user signed the eComm agreement as part of pre-access requirements? **View the Contact's Campaign History.**

- **Find a Contact.** You can either:
 - Use Global Search
 - Navigate from the License
- **Search** by name or email address in the top bar. Select the **Contact's name**

The screenshot shows the eComm application interface. At the top, there is a search bar with the text "daniella torres" and a magnifying glass icon. Below the search bar is a navigation menu with items: Home, Chatter, Reports, Campaigns, Dashboards, and Contacts. On the left side, there is a sidebar with a "Search Results" section. Under "Search Results", there is a "Top Results" section with a list of items: Contacts (3), Campaigns (1), Licenses (1), Reports (5), and Email Sends (5+). The main content area shows the search results for "daniella torres". It includes a message: "We searched for 'daniella torres'." and a status bar: "Showing results for 'daniella torres' and spell-corrected terms." Below this, there is a "Contacts" section with the text "3 Results • Sorted by Relevance". A table displays the search results:

Name	Email	Contact
Daniella Torres Solano	daniella.torres@cu.edu	Individ
DANIELA TORRES	dltorres007@yahoo.com	Standar
Dani Torres Rivera		Individ

- Confirm it's the right Contact by **checking the License record** on the **Related** tab (instructions in next section)
- Select the **Content name** from the **License** record



eComm

Home

Chatter

Reports ▾

Campaigns ▾

Dashboards ▾

Contacts ▾

Em



License

Megan

License Name
LN-0615

Affiliated Campus
Denver

User Email

Salesforce
☒

Mar
☒

Related

Details

▼ User Information

User ⓘ

 Megan



Active User ⓘ

Contact ⓘ

Megan



Provisioning St

User Email ⓘ

megar

edu

Type of Request

Affiliated Campus ⓘ

Denver



Requested By

eComm Specialist ⓘ

Denver



Requested On

Additional eComm
Specialist(s)



Salesforce User

eComm Role ⓘ

User



Marketing Clou

Salesforce Profile ⓘ

eComm User

Not a Sender

▼ Licenses

Salesforce ⓘ




Apsona ⓘ

Marketing Cloud ⓘ




Geopointe ⓘ

- Navigate to the **Related** tab of the Contact
- Hover **Campaign History** to find the **eComm User Agreement Campaign** with the date/time signed
- You may need to **View All** to see this Campaign



Search...

 eComm

Home

Chatter


Reports ▾

Campaigns ▾

Dashboards ▾

Contacts ▾

Em

 Contact

Email (5) ▾

Email Opt Out☐

Employee ID

SID

Advance ID

Details


Related


UCB Email Prefs


UCD Email Prefs


Anschutz Email Prefs


More


Related List Quick Links 

 Related Accounts (1)

 Affiliations (2)

 Applications (0)

 Campaign History (1)

 **Campaign History**

10+ items • Sorted by Type • Updated a few seconds ago

	Campaign Name	Start Date	Type ↑
1	08_20210215_M	2/15/2021	Cvent Event
2	03_20210928_Fl	9/28/2021	Cvent Event
3	08_20280312_et	3/12/2028	Cvent Event
4	08_20180430_eComm User Agreement	4/30/2018	Cvent Event
5	08_20180430_ε	4/30/2018	Cvent Event
6	01_20160304_2	3/4/2016	Cvent Event
7	03_20190502_C	5/2/2019	Cvent Event
8	08 EMPL 20201		Email
9	08 EMPL 20201		Email
10	03SS SEM CON		Email

View All

View License Details

View Individual License Record

- After opening a **Contact**, navigate to the **Related** tab
- Hover **Licenses** and select the **License Number** to see the full License record

The screenshot shows the eComm system interface. At the top, there is a search bar and a navigation menu with options: Home, Chatter, Reports, Campaigns, Dashboards, and Contacts. The 'Contacts' menu is expanded, showing a 'Contact' sub-menu. Below the navigation bar, there is a 'Contact' header with a contact icon and a 'Contact' title. Below this, there are several tabs: Details, Related, UCB Email Prefs, UCD Email Prefs, Anschutz Email Prefs, and UCCS. The 'Related' tab is selected and highlighted with a green box. Under the 'Related' tab, there is a 'Related List Quick Links' section with several links: Related Accounts (1), Affiliations (0), Applications (0), Campaign History (0), Data Change Requests (0), Education (0), Employment (1), and Enrollments (0). The 'Licenses (1)' link is highlighted with a green box. Below the quick links, there is a 'Licenses' section with a red icon and the title 'Licenses'. It shows '1 item • Updated a few seconds ago'. Below this, there is a table with three columns: License Name, Affiliated Campus, and eComm Specialist. The table has one row with the following data: License Name: LN-0776 (highlighted with a green box), Affiliated Campus: Denver, and eComm Specialist: Denver.

License Name	Affiliated Campus	eComm Specialist
1 LN-0776	Denver	Denver

View Pending Requests

Checkboxes are not visible in Dashboard Lightning Table widget Checkbox Values are not displayed in the Lightning table widget in Dashboards since Winter '25. While this is a known issue currently in review [3], there is no resolution timeframe. Until then, please use the workaround outlined below.

To see checkboxes in a Dashboard table, you can view the same Dashboard in 'Analytics', and then proceed with the following instructions.

- Click the **App Launcher (9 dots)** in the top left.
- Search for ***Analytics*** by typing
- Click **Analytics** in the search options

The screenshot shows the Salesforce App Launcher interface. A green box labeled '1' highlights the App Launcher icon (9 dots) in the top left. A green box labeled '2' highlights the search bar where 'analytics' has been typed. A green box labeled '3' highlights the 'Analytics' option in the search results. The background shows a dashboard titled 'Changes ALL' with a table of license information. A red box highlights the 'Salesforce' column in the table. Large green numbers '11' are overlaid on the bottom left of the screenshot.

Name ↑	License: License Name	Salesforce
on	LN-1065	
Katelyn	LN-1060	
Kira	LN-0952	
Kristina	LN-1061	
Lacey	LN-1063	

Requests submitted before the last day of the month. New Use
View Report (08 System eComm Monthly Prov All)

- If you have recently looked at this Dashboard, it may show in Recents. If so, click the Dashboard named ***08 ECOMM OG Monthly License Changes ALL***



Search...



eComm

Home

Chatter

Reports ▾

Campaigns ▾

Dashboards ▾

Analytics

Home

Browse

Favorites

Collections



● EVC Academic & Stude...

Analytics

Search reports, dashboards, and more, then press Enter

For You

Recently Updated

New or changed in the last 7 days



08 ECOMM OG Monthly License Chan...

Modified yesterday

4



08 System eComm Users ALL

Modified on 10/24/2024



01 ALUM 240410 Tier4 SUB Programs

Modified on 10/28/2024

My Analytics

Recents

Favorites

Title

Today



08 ECOMM OG Monthly License Changes ALL

4

If not recently viewed:

- Search for the Dashboard name
- Select the Dashboard in the dropdown list named **08 ECOMM OG Monthly License Changes ALL**

The screenshot shows the eComm dashboard interface. At the top, there is a search bar with the text "Search...". Below the search bar, the navigation menu includes "Home", "Chatter", "Reports", "Campaigns", and "Dashboards". The left sidebar contains "Analytics" (with sub-items "Home", "Browse", "Favorites") and "Collections" (with a sub-item "EVC Academic & Stude..."). The main content area displays the "Analytics" section with a search bar containing "monthly license changes" and a green "4" next to it. Below the search bar, the "SEARCH RESULTS" section lists three dashboards:

- 08 ECOMM OG Monthly License Changes ALL**
Lightning Dashboard in 08 Provisioning
- 08 ECOMM OG Monthly License Changes**
Lightning Dashboard in System Audits
- 08 ECOMM OG Monthly License Changes DANIELLA**
Lightning Dashboard in 08 Provisioning

Below the search results, there is a section for "Modified yesterday" and a section for "01 ALUM 240410 Tier4 SUB Programs" with a modification date of "10/28/2024".

- Pending provisioning requests can be viewed on the **first row of the license dashboard**

- The **second row of the Dashboard** indicates those without completed pre-access requirements who will be held until the following month.
 - *View details on the license or contact for which requirements are out-of-date.*

eComm
Home
Chatter
Reports
Campaigns
Dashboards
Contacts
Em

Dashboard

08 ECOMM OG Monthly License Changes ALL

As of Aug 25, 2022 11:22 AM Viewing as Melanie Jones

Campus Support | eComm Specialist
Billing Campus

equals Anschutz | Jason Thomas

All

Provisioning Requests ...

2

[View Report \(08 System eComm M...](#)

Provisioning Requests in Queue

Contact Name ↑	License: License Name	Salesforce	Request Salesforce
Eleanor Shields	LN-0801	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thomas Forlenza	LN-0802	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Requests submitted before the last day of the month will be addressed on the 1st business day of the following month.
[View Report \(08 System eComm Monthly Prov All\)](#)

SkillSoft NOT submitted ...

2

[View Report \(08 System eComm M...](#)

SkillSoft NOT Submitted or Expired

Contact Name ↑	License: License Name	Requested On
Eleanor Shields	LN-0801	8/23/2022 10:2
Thomas Forlenza	LN-0802	8/24/2022 4:1

Users will NOT receive login credentials until they complete Pre-Access Requirements. For more information, see the Pre-Access Requirements page.
[View Report \(08 System eComm Monthly Prov Skill ALL\)](#)

View Existing Users

- To view a list of your active users, **view the license Dashboard** ^[6], **scroll to the last row**
- **View active licenses** and **select the license number** to see full details

[Home](#)
[Chatter](#)
[Reports](#)
[Campaigns](#)
[Dashboards](#)
[Contacts](#)

Luan Nguyen

LN-0768

6/28/2022 12:34 PM

☒

[View Report \(08 System eComm U...](#)

[View Report \(08 System eComm Users Rec Prov Succ ALL\)](#)

Number of Users

78

[View Report \(08 System eComm U...](#)

Salesforce Users

75

[View Report \(08 System eComm U...](#)

Marketing Cloud Users

55

[View Report \(08 System eComm U...](#)

Cvent Users

35

[View Report \(08 System eComm U...](#)

Active eComm Users

See table end for totals per application

License: License Na...	Contact Name	eComm Public Group ↑
LN-0700	Kara	02 Alumni Relations
LN-0787	Julia	02 Alumni Relations; 09 Adv Anschutz I
LN-0786	Matt	02 Alumni Relations; 09 Adv Anschutz I
LN-0622	Kate	02 Campus Student Services
LN-0386	Mele	02 Center for Bioethics and Humanities
LN-0627	Jodi	02 Center on Aging
LN-0618	Wen	02 Clinical and Translational Sciences
LN-0510	Crist	02 Clinical and Translational Sciences; C
LN-0032	Dana	02 College of Nursing
LN-0781	Robe	02 College of Nursing
LN-0472	Mich	02 CU Alzheimer's and Cognition Cente
LN-0530	Layn	02 Facilities Management
LN-0600	Jesse	02 Facilities Management
LN-0788	Jessi	02 Facilities Management
LN-0789	Kade	02 Facilities Management
LN-0767	Jane	02 Gates Center
LN-0691	Kath	02 Health & Wellness Center
LN-0605	Kara	02 Human Resources

[View Report \(08 System eComm Users ALL\)](#)

Important Timing

Provisioning

Last Day of the Month

- Provisioning requests, along with completed pre-access requirements, **MUST** be provided by the last business day of the month in order to be addressed during the first week of the following month.

Around the 5th of the Month

- New users can anticipate credentials around the 5th of the month.
- eComm specialists will receive a monthly announcement in Chatter announcing an exact date to share with new users.

Deprovisioning

60 days after getting provisioned

- New users who fail to complete training and the quiz after 60 days will be deprovisioned (per the user agreement).

Six months after not logging in

- Users who do not log in for six months will be deprovisioned (per the user agreement).

New User Experience



STEPS 1 & 2 | Discovery & Pre-Access Requirements

- eComm specialists should submit a provisioning request after meeting with a potential user for discovery ^[8], an important step to ensure eComm is the right fit. Pre-access requirements ^[4] must be completed by the last business day of the month in order for provisioning to occur during the first week of the following month.

STEP 3 | Login Details, Training & Quiz

- The System team will notify new users when their credentials are ready (**around the 5th of the month**) with the eComm specialist CC-d. New users will also receive relevant training courses and a **short post-training quiz, to be completed within the first month**.
- Once new users **complete the post-training quiz**, they will be **granted access to send Marketing Cloud emails and/or have Cvent events approved**. They will be notified via email (with their specialist CC-d) and provided with continued training resources.

Users who do not complete the post-training quiz will be reminded to do so. If the quiz is not completed after 60 days of obtaining access, they will be deprovisioned.








[View Emails New Users Receive](#) ^[9]

Deprovisioning Requests

Don't have access? eComm specialists must review this following wiki and [pass the quiz](#) ^[5] for access.

Submit Deprovisioning Requests

System Information

Created By	 UIS Integration Agent , 12/28/2018 9:08 PM	Contact Own
Last Modified By	 Melanie Jones , 8/4/2022 11:51 AM	Employee ID
Contact 18 Id		IdentiKey
Advance ID 		UCB UUID
SID 		Constituent
CRM01 Contact ID		eComm Prov

- Change the dropdown option to **Deprovision**

* Provision or Deprovision?

Deprovision

- Verify the tools in which the user is currently licensed so you know what to remove.
- **Check the applications** to remove and select **Next**

This user has the applications listed below:

Salesforce | Marketing Cloud | Cvent | |

What do you want to remove?

- ☒ Salesforce
- ☒ Marketing Cloud
- ☒ Cvent
- ☐ Apsona
- ☐ Geopointe

Previous

Next

View Pending Deprovisioning Requests

- Scroll to the **3rd row on the license dashboard** ^[10] to view deprovisioning requests that will be addressed during the first week of the following month.

[Home](#)
[Chatter](#)
[Reports](#)
[Campaigns](#)
[Dashboards](#)
[Contacts](#)

[View Report \(08 System eComm M...](#)

Preston Bruce	LN-0791	7/26/2022 11:2
Thomas Forlenza	LN-0802	8/24/2022 4:1
Tracy Berger	LN-0023	8/4/2022 9:2

Users will NOT receive login credentials until they complete Pre-Access Requirements. Fi

[View Report \(08 System eComm Monthly Prov Skill ALL\)](#)

Deprovisioning Reques...

[View Report \(08 System eComm M...](#)

De-Provisioning Requests in the Queue

Contact Name ↑	License: License Name	Salesforce	Remo
Alisha Meyer	LN-0624	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Betty Kilsdonk	LN-0130	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mike Hellman	LN-0670	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sandra Romero	LN-0223	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sarah Mensch	LN-0181	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[View Report \(08 System eComm Monthly DEProv ALL\)](#)

Cvent Only Licenses

Chatter Free Users

Many users have a license in Cvent ONLY - and thus only pay for Cvent. If you are looking at a user's license record and notice both Salesforce and Cvent are checked, also look under the 'Permissions' section to see if the 'Salesforce Profile' is 'Chatter Free User'. This means they are not paying for Salesforce access and instead have a 'Chatter Free User' in Salesforce which is free. This grants them access to the [Collaborative Community](#) ^[11] in Salesforce devoted to Cvent. See the example below.

If a user wishes to see Dashboards in Salesforce (or anything more than participate in the Collaborative Community), they require a full Salesforce license.



License Casey

eComm Specialist ⓘ Anschutz



Requeste

Additional
eComm
Specialist(s)



Salesforc
Usernam

eComm Specialist ⓘ ecomm@cuanschutz.edu
Email 1

Marketin
Usernam

eComm Specialist ⓘ
Email 2

▼ Permissions

eComm Role ⓘ User

Super Us
CV Appr

Salesforce Profile ⓘ Chatter Free User

Super Us
CV Appr

Not a Sender ⓘ ☐

Super Us
Audience
Creation

▼ Licenses

Salesforce ⓘ ☒

Apsona

Marketing Cloud ⓘ ☐

Geopoin

Cvent ⓘ ☒

Related Content

- [How do I view a contact?](#) [12]
- [What is the difference between a Standard Contact and an Individual Contact?](#) [13]
- [How do I modify information on a contact \(such as the email address\)?](#) [14]
- [How do I add a contact to a Salesforce campaign?](#) [15]
- [What are individual email results \(IERs\) and how can I use them?](#) [16]
- [How do I add contacts to Salesforce?](#) [17]
- [How can I match new contacts against existing contacts to avoid creating duplicates?](#) [18]
- [How will I know if a contact received my email?](#) [16]
- [How does a Salesforce contact relate to a Marketing Cloud Subscriber?](#) [19]
- [Is Salesforce GDPR compliant?](#) [20]

Display Title:

Monthly License Change Requests

Send email when Published:

No

Source URL: <https://www.cu.edu/blog/ecommm-wiki/monthly-license-change-requests>

Links

- [1] <https://www.cu.edu/blog/ecommm-wiki/monthly-license-change-requests> [2] <https://www.cu.edu/blog/ecommm-wiki/author/39>
- [3] <https://issues.salesforce.com/issue/a028c00000zgsx1AAA/winter-25-checkboxes-are-not-visible-in-dashboard-lightning-table-widget> [4] <https://www.cu.edu/ecommm/access-training/pre-access-requirements>
- [5] <https://forms.gle/gCXxzLW2iTvXiSUZ9>
- [6] <https://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>
- [7] <https://www.cu.edu/ecommm/training> [8] <https://www.cu.edu/ecommm/access-training/discovery>
- [9] <https://www.cu.edu/blog/ecommm-wiki/new-user-onboarding-journey>
- [10] <http://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>
- [11] <https://www.cu.edu/blog/ecommm-wiki/collaborative-communities>
- [12] https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be
- [13] <https://www.cu.edu/blog/ecommm-wiki/standard-contacts-vs-individual-contacts>
- [14] <https://www.cu.edu/blog/ecommm-wiki/updating-contact-information-salesforce>
- [15] <https://www.cu.edu/blog/ecommm-wiki/create-salesforce-campaign-and-add-campaign-members>
- [16] <https://www.cu.edu/blog/ecommm-wiki/salesforce-individual-email-results-iers>
- [17] <https://www.cu.edu/blog/ecommm-wiki/adding-and-matching-contacts-apsona>
- [18] <https://www.cu.edu/blog/ecommm-wiki/using-salesforce-apsona> [19] <https://www.cu.edu/blog/ecommm-wiki/salesforce-contacts-marketing-cloud-subscribers> [20] <https://www.cu.edu/blog/ecommm-wiki/understanding-gdpr>