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Getting Salesforce Access [1]

July 19, 2023 by Melanie Jones [2]



PRE-ACCESS REQUIREMENTS

1 | Pre-Access Requirements

Before access to Salesforce, new users must complete the following SkillSoft courses. The following materials are intended to educate CU employees on protecting constituent data in general where training in the Salesforce tools will come in step 2 (below). Step 3 will include a short quiz, initiating your license request to be fulfilled in 3 days.

? Skillsoft Courses | complete every 3 years

Information Security and Privacy Awareness | Course ID: _scorm12_cu_u00063_0001 [3]
This 30-minute course covers how to protect university and private information.

CU: Information Security for IT Service Providers | Course ID: _scorm12_cu_u00064_0001? [4]
This 40-minute course covers your responsibilities for protecting the confidentiality and privacy of information at CU.

CU: FERPA (Family Education Rights and Privacy Act) | Course ID: _scorm12_cu_u00049_0001? [5]
This 45-minute course covers how federal law protects student education records.

2 | New User Training

Review the following wiki resources then complete the quiz (step 3). At the end of the quiz, you will provide details to initiate your request for a license. Access will be granted in 3 business days.

- Intro to the Integrated Online Services Salesforce Org [6]
- Login [7]
- Data Model [8]
- IOS Lead Attributions [9]
- Finding and Cloning Reports [10]

3 | Quiz & Request Access

Please complete the quiz below and provide your employee details to initiate your request for a Salesforce license. Access will be granted in 3 business days.

New User Quiz & Request Access [11]

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