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Pre-Access Requirements [1]

Once it's determined you're a good candidate for an eComm license, complete the following pre-access requirements.

STEP 1 | Discovery

Meet with your eComm specialist. Review your communication and event goals and learn how eComm can best support your efforts. Complete our questionnaire [2]with your team beforehand.

PREVIOUS [3]

STEP 2 | Pre-Access Requirements

Before access to eComm tools (Salesforce, Marketing Cloud and Cvent) is granted, new users must sign the eComm User Agreement and complete training for data security, confidentiality, FERPA and PCI compliance. This is not training of the Salesforce tools and must be completed BEFORE access to the applications can be granted.

LICENSE SCHEDULE eComm licenses are distributed monthly. Pre-access Requirements and a license request needs to be in by the last day of the month for new users to recieve login credentials around the 5th of the month.

? eComm User Agreement

All users and their supervisors must sign the eComm User Agreement [4]. After you sign the form, the eComm team will send a signature request to your supervisor. This agreement outlines important requirements that you and your supervisor must agree to before you can be provisioned for an eComm license, including confidentiality, data security, fiscal responsibility, CAN-SPAM compliance, training, processes & policies.

? Percipio Courses for all users

All users must complete the following Percipio courses.

Percipio Playlists: Access Marketing Cloud, Salesforce & Cvent [5] | Access Marketing Cloud & Salesforce [6] | Access Cvent ONLY [7]

complete every 2 years

CU: Information Security for IT Service Providers [8]
This 40-minute course covers your responsibilities for protecting the confidentiality and privacy of information at CU.

CU: FERPA for CU-SIS Access [9]
This 45-minute course covers how federal law protects student education records.

CU: Information Security Awareness [10]
This 30-minute course covers how to protect university and private information.

? PCI Compliance for Cvent users

All Cvent users must complete the additional course below annually.

complete annually

CU: Payment Card Security - CU System [11]
This 30-minute course will cover responsibilities for protecting cardholder data.

STEP 3 | Login, Training & Quiz

Assuming you have completed the above Pre-Access requirements, you will receive login instructions with your credentials around the 5th of the month.
NEXT [12]

Groups audience:
eComm

Source URL:https://www.cu.edu/ecomm/access-training/pre-access-requirements

Links
[1] https://www.cu.edu/ecomm/access-training/pre-access-requirements [2] https://www.cu.edu/doc/ecomm-discovery-questionnaire170927docx [3] https://www.cu.edu/ecomm/access-training/discovery [4] https://cvent.me/dKnq44
[5] https://share.percipio.com/cd/HOMGmiYmxk [6] https://share.percipio.com/cd/liTtFWuJi
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