

# Accessing PEP data in Salesforce

## Overview

In order to access PEP data in Salesforce, several layers of security must be addressed. And once access to Salesforce is obtained, configuration of the Salesforce menu is required. This document identifies the steps required for a user to have access and interact with information in Salesforce. The Appendix provides additional information on the function of the various security elements within Salesforce.

The intended audience for this document are university advisors and PEP central administration

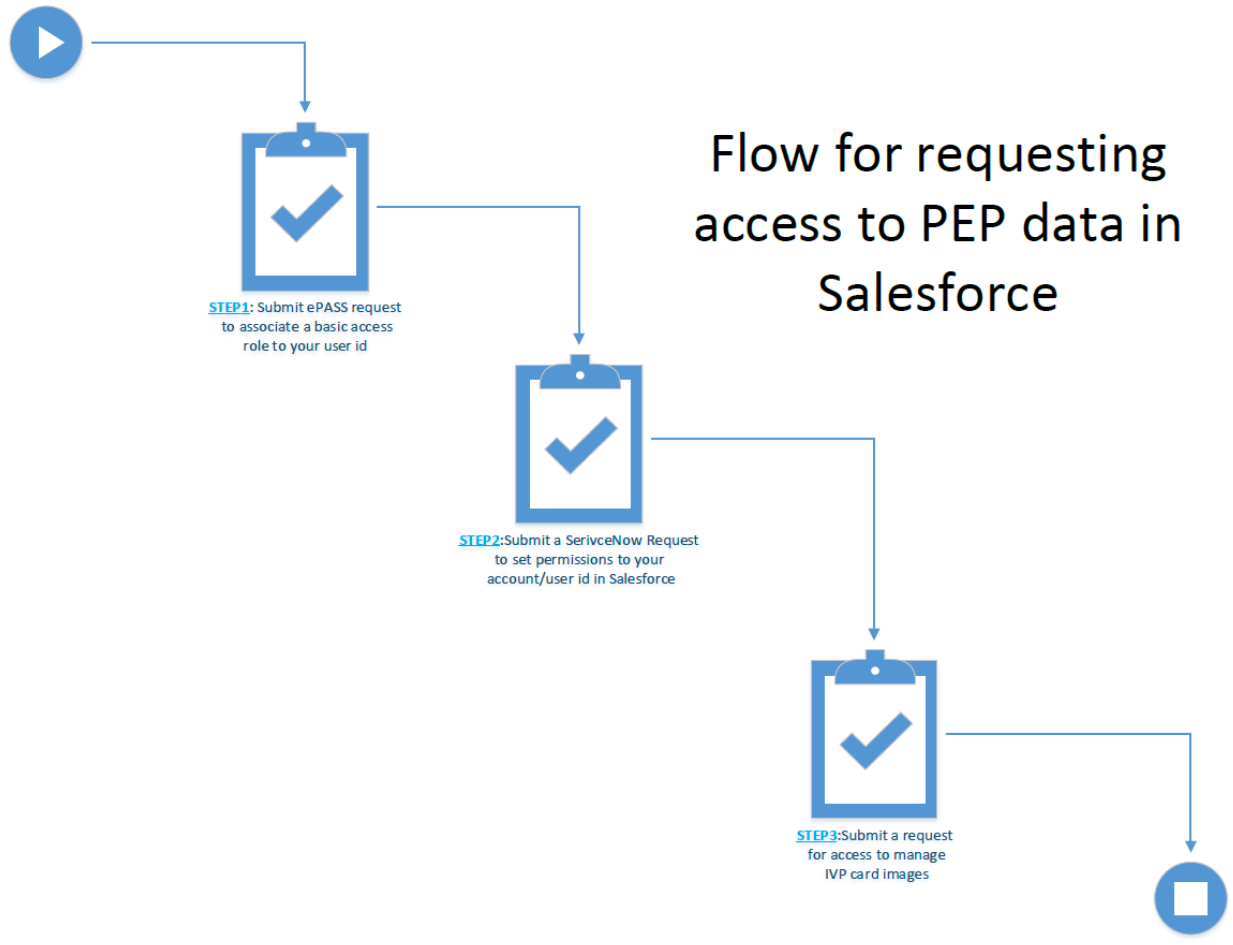
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## Chapter 1: Requesting access to Salesforce

Execute the following steps to obtain the appropriate level of access to Salesforce PEP data.

**NOTE:** The order of the steps is critical to ensure proper access. Each step **MUST** be completed before starting the next step.



*Figure 1: Flow to obtain access to PEP data in Salesforce*

## STEP 1: Open an ePASS (Electronic PeopleSoft Administrative Security System) request

This action will generate USER record in Salesforce with the requested role

- 1) Navigate to the [Louie](#) self service page
- 2) Select [ePASS Home Page](#) link
- 3) For additional information, please refer to the [NAU Salesforce proxy policy](#)
- 4) From the ePass Home Page, select the [Initiate a Security Request Form](#) link, which will display the request form:

Submit Role Security Form

Step 1 of 3: Add Role Security

**User Info**

User ID: mal643 Laurencell, Marilee Ann  
Email: Marilee.Laurencell@nau.edu NAU Data Access Policy  
Employee ID: 3331000 ePASS Help

**Form Data**

FERPA Completed: 10/02/2017 FERPA Tutorial  
eForm ID: 705752

**JOB**

| Selected                              | Department | Department Description  | Position Number | Position Description     | Supervisor               |
|---------------------------------------|------------|-------------------------|-----------------|--------------------------|--------------------------|
| 1 <input checked="" type="checkbox"/> | 11450      | VPAA: Business Analysts | 00029672        | Part-Time Temp Employees | Hernandez Jr, Steven Roy |

Enter your immediate supervisor:  
\*Supervisor User ID: srh352 Hernandez Jr, Steven Roy

Please explain your specific job duties that require the data access for each role being requested. Explanations such as "per my job duties," "to help students," "same as person in position before me," or copying the role description are NOT sufficient.

Data Access Need

☐ I need to enter and approve time for hourly employees.

**Request Security**

Role Name

1

**Currently Assigned Administrative Security**

Role Name

1 NAU\_CRM Oversight Support  
2 NAU\_CRM SR Basic Data

Next >> Cancel

- a) On the form, update the "Data Access Need" text box with the reason access is required (see green box in screen shot above)
  - b) On the form, update the "Role Names" (see red arrow in screen shot above) with the appropriate Role
    - i) For Academic Advisors, PEP OFE staff (full-time staff), request inclusion in the following profiles:
      - **NAU\_CRM\_OVERSIGHT\_SUPPORT**
    - ii) For GAs supporting OFE, request inclusion in the following profiles:
      - **NAU\_CRM\_ADVANCED\_SUPPORT**
- 5) For additional information on ePass, [click here](#)
  - 6) For additional information on Salesforce proxy roles, [click here](#)

## STEP 2: Open a ServiceNOW request to set permissions in Salesforce for PEP data

- 1) Navigate the [ITS Service Portal](#) site and select [ServiceNow](#)

NORTHERN ARIZONA UNIVERSITY

Home Academics Admissions University Life About NAU Quick Links

DEGREES DIRECTORY ENTIRE SITE Enter search term...

INFORMATION TECHNOLOGY SERVICES

NAU ITS Services Service Now

**SERVICE NOW**

Available To: Faculty, Staff, Students

service*now*

**Service Now** is NAU's service request system.

Use [Service Now](#) to request services, report problems, and contact Information Technology Services with requests for new applications and support.

If you experience difficulty accessing or navigating Service Now, please contact the ITS Solution Center at (928) 523-1511, or the Student Technology Center at (928) 523-9294.

ITS SITE SEARCH

TECHNICAL HELP

[Contact Us](#) For Assistance

ITS HOME

SERVICE NOW

SERVICES

- General IT Services
- Computers, Printing, & Software
- Computer Labs and ResNet
- Enterprise Systems & Reporting
- Email and Calendars
- Passwords, Accounts, & Security
- Student Online Resources
- Telephone Services
- Travel

- 2) Select the “Request ITS Service” option (see screen shots below)

NORTHERN ARIZONA UNIVERSITY

Knowledge Service Catalog System Status Cart

Home > Service Catalog

Search

Items in this category - Get Help

**Request Classroom Support Service**  
Report an issue with technology in a classroom or conference room, or request assistance with classroom technologies. For urgent requests, please call Classroom Support at 928.523.8818.  
View Details

**Request ITS Service**  
Make a request to ITS  
View Details

**Request STC Service**  
Open a new ticket with the Student Technology Center  
View Details

**Request Telecom Help/Services**  
View Details

- 3) A “Request ITS Service” form will be presented (see screen shot below):

## Request ITS Service

Report an issue or request technology service for faculty & staff. For urgent requests please call the ITS Solution Center: 928-523-1511.

Use this online service to submit routine requests for assistance to Information Technology Services.

**Report all urgent or time-sensitive Issues and requests by calling the ITS Solution Center at 928-523-1511**

**Classroom Technology** issues and requests should be submitted by calling 928-523-8818.

**Phishing Emails** should be reported directly to <https://phishing.nau.edu>

**Student Technology Center** support is available for NAU students by calling 928-523-9294

### \* Description

Please assign to Vice Provost Academic Affairs BA Team. This is a request for security/permission updates to allow access to PEP data in Salesforce

### \* Location:

-- None --

If your location is not in the list, please select "Other (Not Listed)", then include your location in the new field that pops up.

☐ I am not located in Flagstaff

Room:

Property Control Number (PCN)

If your request is related to an NAU owned device, please enter the Property Control Number (PCN) printed on the device.

Due Date

### \* Contact Information

Be sure add your contact information

Enter the phone number or email address you would like us to use to contact you.

**NOTE:** Requests must be routed to the [Vice Provost Academic Affairs BA Team](#). This **MUST** be specifically stated in the description to avoid delays in obtaining access to PEP data in Salesforce.

a) Enter the following information in the description text box:

- i) Requesting inclusion in the permission sets to **access PEP data in Salesforce**. Please route the request to [Vice Provost Academic Affairs BA Team](#) for approval
- ii) The request must include the appropriate permission set for your support role. Include one of following, which best aligns with your support role:
  - (1) PEP Academic Advisors, for use by Academic Advisors
  - (2) PEP Report Manager, for those only needing to review/run reports

- (3) PEP Program Manager, typically for PEP administrative staff and GAs supporting OFE
- (4) PEP OFE Assistant, if supporting Office of Field Experience
- iii) **All PEP requests** must include a request to be added in the Salesforce public group
  - (1) Request inclusion in the PEP PUBLIC GROUP for the user
- iv) To ensure access via Lightning
  - (1) Request “Lightning” to be enabled
  - (2) Request your profile be set to University Advising
    - (a) NOTE: even if you are not a university advisor, be sure to include request to assure access to PEP data.
- b) Requests approved by the [Vice Provost Academic Affairs BA Team](#) will be routed to the appropriate ITS group for further action.

### STEP 3: Submit a request for access to manage IVP card images

IVP or fingerprint cards are managed in two different repositories: Sharedrive and OnBase. The advisors will upload a copy of the IVP to OnBase, while the OFE uses the sharedrive to send the IVP when requesting student teaching placement at a school.

#### Step 3a: Open a request for access to the PEU shared drive

**NORTHERN ARIZONA UNIVERSITY** Knowledge Service Catalog Requests 1

Home > Service Catalog > Submit a request to ITS > Request ITS Service Search

## Request ITS Service

Make a request to ITS

Use this online service to submit routine requests for assistance to Information Technology Services.

**Report all urgent or time-sensitive issues and requests by calling the ITS Solution Center at 928-523-1511**

**Classroom Technology** issues and requests should be submitted by calling 928-523-8818.

**Phishing Emails** should be reported directly to <https://phishing.nau.edu>

**Student Technology Center** support is available for NAU students by calling 928-523-9294

\* Description

Please provide access to the PEP fingerprint folder by adding xxxxxx to the PEU\_FINGERPRINTCARDSONLY\_RW group. This request should be routed to MENSA for action.

\* Location:

-- None --

If your location is not in the list, please select "Not Listed", then include your location in the new field that pops up.

Room:

Property Control Number (PCN)

If your request is related to an NAU owned device, please enter the Property Control Number (PCN) printed on the device.

Due Date

\* Contact Information

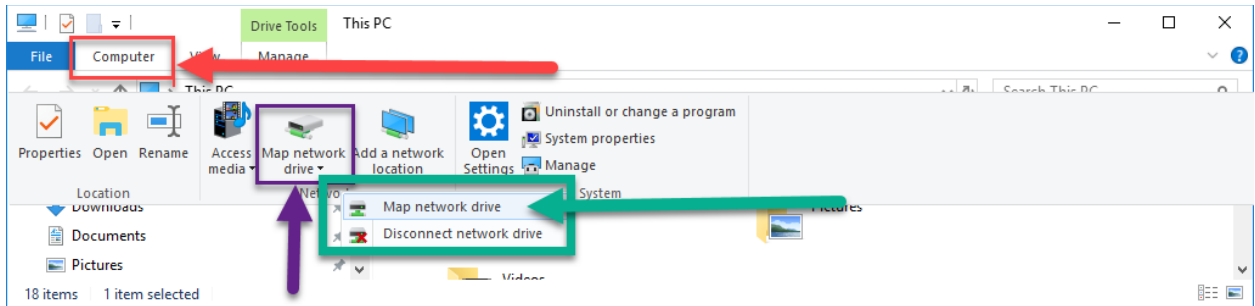
Enter the phone number or email address you would like us to use to contact you.

a) Enter the following information in the description text box:

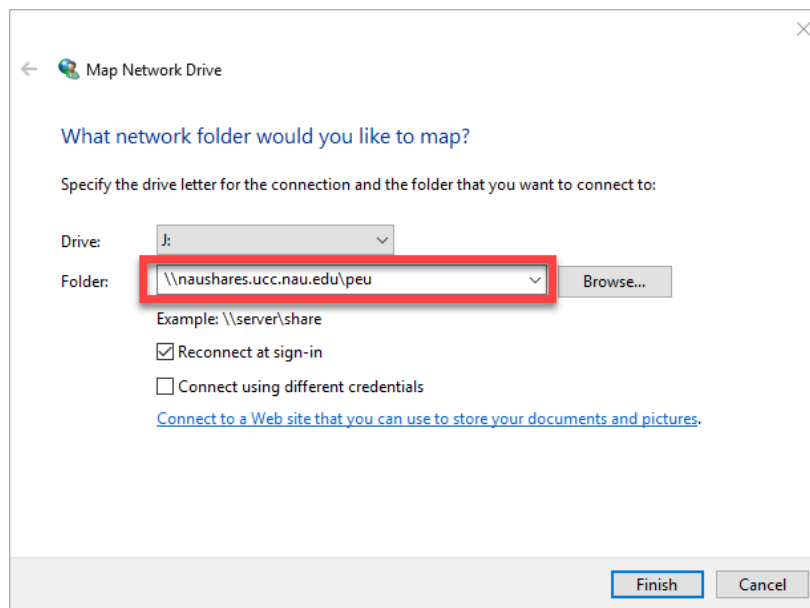
Please provide access to the PEP fingerprint folder by adding *your name and NAU Id* to the PEU\_FINGERPRINTCARDSONLY\_RW group. This request should be routed to MENSA for action.

NOTE: xxxxxx should be replaced by your name and NAU id

- b) Once added to the PEU group, access to the fingerprint folder will be allowed. To access the fingerprint folder, you must “map” to the share drive
  - i) In Windows Explorer, select the drop down menu for “Computer”. From the Computer menu, select Map Network Drive. From the Map Network Drive menu, select Map network drive.



- ii) Define the shared drive that will be mapped by selecting a “drive” from the drop down (any unused selection is valid) and entering the folder information: \\naushares\ucc.nau.edu\peu



- iii) Select the “finish” button to link to the shared drive.

Step 3b: Open a request for access to OnBASE

- 1) From the [NAU OnBase Enterprise](#) page, select the link for the [Enterprise Security Request Form](#)  
**NOTE:** The form will be presented in sections. You must select “submit” or input information before the next section of the form will be visible
- 2) Populate the form as follows:
  - a) Submitter Information Section



**Enterprise Security Request Form**

**NORTHERN ARIZONA UNIVERSITY**

**Submitter Information**

Submitter User ID: [nauf40] Submitter Email ID: [E31000] Submitter Name: [BARLEE LAURENCELL] Submitter Email: [BARLEE.LAURENCELL@NAU.EDU]

What type of employee is this request for?

☐ NAU Employee ☐ NAU Affiliate

Submit

- Submitter fields will be automatically populated, but update as needed
  - Select the appropriate radio button for “What type of employee is this request for?” (see red arrow in screen shot above)
  - Click the “submit” button
    - The “Submit” button will not be active until the type of employee is identified
- b) Employee Information Section

**Employee Information**

Show Help

I am requesting access for myself

User ID (Enter ID and press tab): [nauf40] First Name: [Barlee] Employee Email: [BARLEE.LAURENCELL@NAU.EDU]

Employee ID: [E31000] Last Name: [Laurencell] Department: [VPA - BUSINESS ANALYSTS]

Title: [Part-Time Temp Employees]

- If the request is for yourself, select the “I am requesting access for myself” button (see red arrow in screen shot above); otherwise, fill in the employee information
- c) Application Security Request Section

**Application Security Request**

Show Help

System Request: [SECURITY: ADD ACCESS] Request Date: [12/16/2017]

☒ OnBase ☐ WordPress

- For “System Request”, select “ADD ACCESS” from the dropdown list (see red arrow in screen shot above)
  - Select the “OnBase” checkbox (see green arrow in the screen shot above)
- d) OnBase Section

**OnBase**

Show Help

Organizational Unit: [VICE PROVOST-ACADEMIC AFFAIRS] OnBase User Group: [VICE PROVOST-ACADEMIC AFFAIRS-ONBASE-SALESFORCE-STUDENTSUPPORT]

Add Group List

Business Need: [ ]

Clear All

- For Organizational Unit, select “Vice Provost – Academic Affairs” from the dropdown list (see purple arrow in screen shot above)
  - For OnBase user Group, select “Vice Provost – Academic Affairs - ONBASE - SALESFORCE – STUDENTSUPPORT” from the dropdown list (see green arrows in the screen shot above)
    - Select the “Add>>” button once the OnBase User Group has been selected. This will automatically populate the “Add Group List”
  - Provide the “Business Need” for the access in the text box provided (see red arrow in screen shot above)
- e) Supervisor Information
- Supervisor Information will be automatically populated, but update as needed
- f) Click the “submit” button (see red arrow on screen shot below):

**Enterprise Security Request Form**

**NORTHERN ARIZONA UNIVERSITY**

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**Submitter Information**

Submitter Email:  Submitter Email ID:  Submitter Name:  Submitter Title:  Submitter Department:

What type of employee is this request for?  
☐ Full Employee ☐ Part-Time Employee ☐ Temporary Employee

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**Employee Information**

Employee Email:  Employee Email ID:  Employee Name:  Employee Title:  Employee Department:

What type of employee is this request for?  
☐ Full Employee ☐ Part-Time Employee ☐ Temporary Employee

---

**Application Security Request**

System Request:  Request Date:  Request Reason:

☐ Outbreak ☐ WordPress

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**Outbreak**

Organizational Unit:  Outbreak User Group:  Add Group List:

Business Need:

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**Supervisor Information**

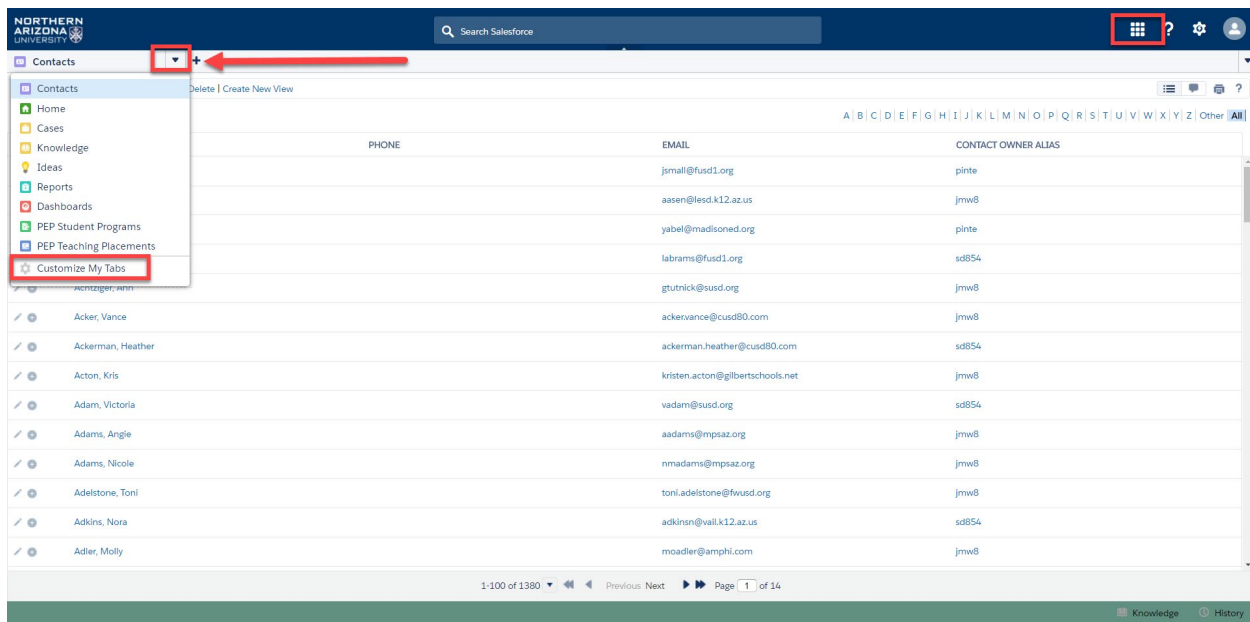
Supervisor Email:  Supervisor Email ID:  Supervisor Name:  Supervisor Title:  Supervisor Department:

## Chapter 2: Configuring the Salesforce Console for PEP

Once access to Salesforce has been obtained, it will be necessary to configure the Salesforce menus for ease of access to PEP information. The following steps detail one method for configuring the access. Please note that access to PEP data is based on the Salesforce role and permission sets. Not all users will have access to all areas of PEP (for example, general access to PEP financials is not allowed).

### Step 1: Accessing Salesforce NAU Console

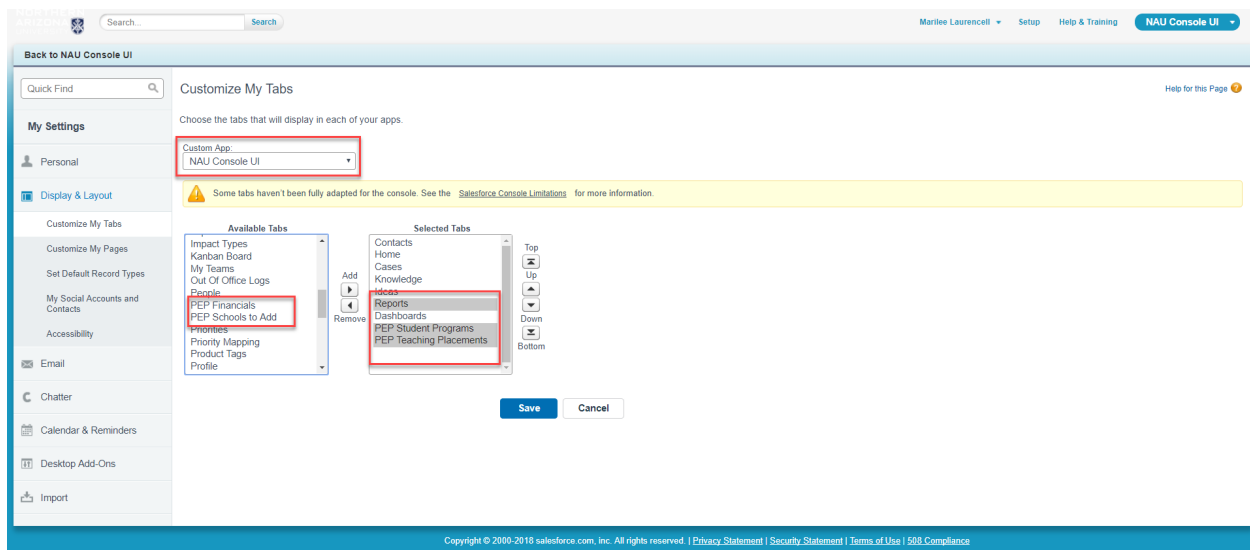
Upon initial access to Salesforce, the user will be presented with the default console (see screen shot below).



- 1) The grid highlighted in the upper right corner provides a drop down list of the available views
- 2) The drop down on the left side of the menu (see red arrow in screen shot above) provides a list of Salesforce “areas”.
- 3) Select the “Customize My Tabs” option at the bottom of the drop down list

## Step 2: Customizing the tabs

Upon selection of the Customize My Tabs option, the user can select the “tabs” to be displayed on their console (see screen shot below).



- 1) Selected the desired tabs from the “Available Tabs” list on the left side and click “add”
  - a) For accessing PEP data, the following should be selected:
    - i) PEP Student Programs

- ii) PEP Teaching Placements
  - iii) Reports
  - b) Select the “Save” button to capture the selections and return to the previous screen
- 2) Selection of the tab drop down button (see red arrow below) will now show the selected tabs

The screenshot shows the Northern Arizona University Salesforce interface. The left sidebar contains a list of tabs: Contacts, Home, Cases, Knowledge, Ideas, Reports, Dashboards, PEP Student Programs, PEP Teaching Placements, and Customize My Tabs. A red arrow points to the tab drop-down button. The main content area displays a list of contacts with columns for PHONE, EMAIL, and CONTACT OWNER ALIAS. The 'Reports' and 'PEP Teaching Placements' tabs are highlighted in the sidebar.

| PHONE             | EMAIL                            | CONTACT OWNER ALIAS |
|-------------------|----------------------------------|---------------------|
|                   | jsmall@fusd1.org                 | plnte               |
|                   | aasen@lesd.k12.az.us             | jmw8                |
|                   | yabel@madisoned.org              | plnte               |
|                   | labrams@fusd1.org                | sd854               |
|                   | gtutrick@susd.org                | jmw8                |
| Acker, Vance      | ackevance@cusd80.com             | jmw8                |
| Ackerman, Heather | ackerman.heather@cusd80.com      | sd854               |
| Acton, Kris       | kristen.acton@gilbertschools.net | jmw8                |
| Adam, Victoria    | vadam@susd.org                   | sd854               |
| Adams, Angie      | aadams@mpsaz.org                 | jmw8                |
| Adams, Nicole     | nmadams@mpsaz.org                | jmw8                |
| Adelstone, Toni   | toni.adelstone@fwusd.org         | jmw8                |
| Adkins, Nora      | adkinsn@vall.k12.az.us           | sd854               |
| Adler, Molly      | moadier@amphi.com                | jmw8                |

## APPENDIX

### Security Attributes in Salesforce

#### Roles

Roles determine user access to objects, regardless of who owns those records. Users at any role level can view, edit, and report on all data that's owned by or shared with users below them in the role hierarchy.

- For example, you can set the contact access so that users in a role can edit all contacts associated with accounts that they own, regardless of who owns the contacts. And you can set the opportunity access so that users in a role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities.

#### Profiles

Profiles define how users access objects and data, and what they can do within the application. When you create users, you assign a profile to each one. Profiles are used to assign the minimum permissions and access settings for a specific group of users.

Every profile belongs to exactly one user license type.

#### Permissions

Every user is assigned only one profile, but can have multiple permission sets. Create permission sets to grant access among logical groupings of users, regardless of their primary job function.

- For example, let's say you have several users with a profile called Sales User. This profile allows assignees to read, create, and edit leads. Some, but not all, of these users also need to delete and transfer leads. Instead of creating another profile, create a permission set.

##### *User Permissions*

Specify what tasks users can perform and what features users can access.

##### *Object Permissions*

Specify the base-level access users have to create, read, edit, and delete records for each object.

##### *Custom Permissions*

Allows definition of access checks that can be assigned to users via permission sets or profiles, similar to how you assign user permissions and other access settings.

- For example, one can define access checks in Apex that make a button on a Visualforce page available only if a user has the appropriate custom permission.

#### Public / Personal Groups

A group consists of a set of users, which can contain individual users, other groups, or the users in a particular role. Everyone in the organization can use public groups.

- For example, an administrator can create a group for an employee carpool program. All employees can then use this group to share records about the program.

## Change Log

| Version | Date     | Author             | Description  |
|---------|----------|--------------------|--|
| V1.0    |          | Marilee Laurencell | Initial release  |
| V1.1    | 5/22/18  | Marilee Laurencell | Added sharedrive access for IVP card; added change Log |
| V2.0    | 9/10/18  | Marilee Laurencell | Added specific permissions for GAs supporting OFE      |
| V2.1    | 10/17/18 | Marilee Laurencell | Added additional roles for the ePass request           |
| V2.2    | 1/8/2019 | Marilee Laurencell | Added details for SF Lightning                         |