

## **New Account**

- When a user is new to the Hobsons Connect CRM (“CRM”), the Director of Admissions must fill out and send a “Hobsons CRM Access Request Form - New Account.docx” form to the CRM security administrator. The Director of Admissions has designated the Assistant Director for Communications in the Office of Admissions in the case of an extended absence by the Director.
  - Forms are not required in the following situations:
    - When requesting the same access for a group of student employees, the Director of Admissions may send an email with the students’ names and online IDs as well as the access requested.
    - When a member of the CRM Management Team requests access for a new student user, the Director of Admissions may approve the access via email.

## **Update Existing Account**

- When a user needs access to additional functionality in the CRM or needs their functionality reduced in the CRM, the Director of Admissions must either send a “Hobsons CRM Access Request Form - Update Account.docx” form OR send an email with the same information to the CRM security administrator.

## **Vetting of New Access Forms**

- The CRM administrator will review the access request forms and clarify any questions with the Director of Admissions and the CRM Management Team as needed.

## **Training**

- Members of the CRM Management Team provide training. They may authorize another experienced user to provide training as needed.
- If a user leaves the University of Kansas, but is rehired -
  - Training for previously held access is available but not required
  - New access may require training

## **Access Termination**

- Faculty and staff
  - Account will be inactivated when the user has not logged on in 12 months
    - An e-mail notification will be sent to the user to inform them of the action.
    - User is responsible for responding within 1 month if the account should be reactivated.
      - Assuming the user is in the same department and position as when they last logged in, this action does not require authorization by the Director of Admissions.
  - Users who appear on Human Resources activity reports will be inactivated -
    - Activity Report information includes:
      - Terminations
      - Departmental Transfers
      - Retirement
      - Other job status changes
    - An e-mail notification will be sent to the user to inform them of the action
    - In the case of Departmental Transfers, re-activating the account will require authorization from the Director of Admissions.
  - Supervisors and EM management may directly request removal of a user’s access
- Students
  - Account will be inactivated when the user has not logged on in 6 months

- An email notification will be sent to the student's supervisor to inform them of the action.
- The supervisor may request re-activation of the account without authorization from the Director of Admissions.
- In addition, all active student accounts are reviewed in May, and supervisors are requested to let SIS know if access is needed over the summer.
  - If the student will be gone for the summer, we inactivate the account for the summer. The supervisor can request re-activation in the fall without authorization from the Director of Admissions.