MSB Salesforce Acceptable Use Policy

Purpose
Salesforce.com, to be referred to as Salesforce, is a cloud-based customer relationship management (CRM) system used by Georgetown University’s McDonough School of Business to house contact data pertaining to Georgetown McDonough alumni, current students, vendors, and other constituents. Georgetown McDonough has its own instance of Salesforce, which allows the School to customize applications and features. This system allows Georgetown McDonough to maintain a centralized repository of data that can be used across the School. Access to this system is a privilege and will only be granted to staff, faculty, and other workers who agree to the terms of use as outlined in the appropriate use policies below. These policies help protect School systems from any liability and aim to prevent misuse. By agreeing to the policies as outlined below, you agree to the terms of use. Users in violation of these terms will have their Salesforce access revoked and will potentially be subject to disciplinary action.

Alumni Data Use
The privacy of Georgetown McDonough alumni is very important, and as such, their information must be guarded against wrongful use. The potential for misuse of alumni data could result in damaged external relations and stewardship efforts. As part of the greater University, we must do our part to be good stewards of the data shared by other offices. When using data in Salesforce, err on the side of caution in order to preserve the established relationships cultivated by the Georgetown McDonough Office of Alumni Relations, the Office of Advancement, and other parts of the University. Prior to external outreach to alumni, whether to an individual or en masse, please coordinate with Justine Schaffner, Assistant Dean, Alumni and External Relations, at js3901@georgetown.edu.

Rights and Responsibilities
It is the policy of the Georgetown McDonough School of Business to maintain an environment that promotes ethical and responsible conduct in use of all information systems by staff, students, and faculty. It shall be a violation of this policy for any employee, student, or other individual to engage in any activity that does not conform to the established purpose and general rules and policies of the School. Within this general policy, the McDonough School of Business recognizes its legal and ethical obligation to protect the wellbeing of staff and students in its charge. To this end, the McDonough School of Business retains the following rights and recognizes the following obligations:

1. To remove a user account on the McDonough School of Business’s instance of Salesforce should the user violate the MSB Acceptable Use Policy.
2. To monitor the use of Salesforce activities. This may include real-time monitoring of Salesforce activity and/or maintaining a log of Salesforce activity for later review.
3. To provide internal and external controls as appropriate and feasible. Such controls shall include the right to determine who will have access to McDonough School of Business data and, specifically, to exclude those who do not abide by the McDonough School of Business's Acceptable Use Policy or other policies governing the use of School information.

4. To provide guidelines and make reasonable efforts to train faculty, staff, and students in acceptable use and policies governing Salesforce.

5. To alert a direct supervisor and the McDonough School of Business Technology Center (MSBTC) in a very timely fashion should they become aware of a data breach.

Responsibilities of Supervisors

1. Staff members who supervise students or temporary employees who use Salesforce must make reasonable efforts to monitor the use of Salesforce to assure that it conforms to the mission and goals of the McDonough School of Business and Georgetown University. All student workers and temporary staff using Salesforce must read and agree to the stipulations outlined in the MSB Acceptable Use Policy document.

2. Staff and faculty should make reasonable efforts to become familiar with Salesforce and its use so that effective monitoring, instruction, and assistance may be achieved.

Acceptable Use

1. All use of Salesforce must be in support of educational and research objectives consistent with the mission and objectives of the McDonough School of Business and Georgetown University.

2. Proper codes of conduct in electronic communication must be used. Distributing personal information is inappropriate. When using email through Salesforce, extreme caution must always be taken in revealing any information of a personal nature.

3. Salesforce accounts are to be used only by the authorized owner of the account for the authorized purpose.

4. All communications and information accessible via Salesforce should be assumed to be University property.

5. Exhibit exemplary behavior within the Salesforce environment as a representative of your School and community. Communications within, as a function of, or related to Salesforce must comply with ethical and professional communication standards. And be polite! This includes contributions to contact records, within Salesforce Chatter, mass emails, and any other form of communication facilitated by Salesforce.

6. Periodically, Georgetown McDonough will make determinations on whether specific uses of Salesforce are consistent with the acceptable use practice and will adjust/update these policies accordingly.
7. All use of Salesforce data must be in compliance with the Family Educational Rights and Privacy Act (FERPA)\(^1\), a Federal law that protects the privacy of student education records.

Unacceptable Use

1. Using Salesforce to distribute personal information about another person, including home address and phone number, is strictly prohibited.
2. Users shall not intentionally seek information on, obtain physical or digital copies of, or modify files, other data, or passwords belonging to other users or misrepresent others on Salesforce.
3. Any use of Salesforce data for commercial or for-profit purposes is strictly prohibited.
4. Use of Salesforce data for personal business is strictly prohibited.
5. Use of Salesforce to send unofficial communications that can be confused with official communications of Georgetown McDonough, Georgetown University, or its officers is prohibited.
6. Any use of Salesforce data for product advertisement or political lobbying is prohibited.
7. Use of Salesforce to inaccurately imply endorsement, approval, or sponsorship by Georgetown University (or any individual officer of the university) is prohibited.
8. Malicious use of the data to develop programs that harass other users or engage in immoral activity is prohibited.
9. Hate mail, chain letters, harassment, discriminatory remarks, and other antisocial behaviors through the Salesforce platform are prohibited.
10. Use of Salesforce for non-sanctioned mass mailings or spamming is prohibited.
11. Users shall not disseminate or make use of copyrighted material through Salesforce without expressed written consent.
12. The unauthorized installation of any applications for use on the McDonough School of Business’s instance of Salesforce is prohibited.
13. Use of Salesforce to house pornographic material, inappropriate text files (as determined by the system administrator or building administrator), or files dangerous to the integrity of the McDonough School of Business is prohibited.
14. Use of Salesforce for any unlawful purpose or for purposes considered illegal or fraudulent is prohibited.
15. Use of profanity, obscenity, racist terms, or other language that may be offensive to another user is prohibited.
16. Alteration of any computing or network components of Salesforce without authorization or beyond one’s level of authorization is prohibited.

**Mobile Access**
Salesforce Mobile applications are available for use on Android, Apple and Blackberry mobile devices. The applications are sanctioned for use on University owned devices enrolled in in the Mobile Device Management (MDM) service. MDM is a lightweight tool to improve security and provide a more consistent mobile experience for you. Participation is required from all staff members who have a Georgetown-funded mobile device. Personal data (contacts, texts, emails, photos, videos, music, or app data) is not collected from any device. The MDM service is available to all Georgetown University faculty, staff, AAPs, and students, and can be used to locate, lock or wipe a lost device.

**Disclaimer**
1. The McDonough School of Business reserves the right to change its policies and rules at any time.
2. Inappropriate use of Salesforce includes but is not limited to items 1-16 outlined as Unacceptable Use. Other instances of inappropriate use may be determined by the McDonough School of Business Technology Center, the Director of Strategic Planning and Information Management, or the University Information Services office.
3. Termination of employment for any Salesforce license holder, be they staff, faculty, student or temporary employee, will result in the cessation of access to Salesforce and their license will be revoked.

**User Agreement (to be signed by all employee users, student users, and temporary staff users)**

I have read, understand, and will abide by the above MSB Salesforce Acceptable Use Policy when using the McDonough School of Business’s instance of Salesforce. I will not discuss or share with any unauthorized person, group or department, inside or outside of GU, any conclusions that I or others draw from confidential information, if discussing or sharing those conclusions would reveal any confidential information. I further understand that any violation of the terms will result in disciplinary action, up to and including termination of employment, and the McDonough School of Business reserves the right to take legal action should the situation warrant.

User Signature
______________________________ Date ______

User Name (please print)
______________________________ Date ______

Supervisor Signature
______________________________ Date ______

Supervisor Name (please print)
______________________________ Date ______

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What is your reason for requesting a Salesforce license?

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What is your intended use of Salesforce and its data?

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Please describe your data reporting needs.

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Will you require access to current student data such as contact information?

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Resources

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