

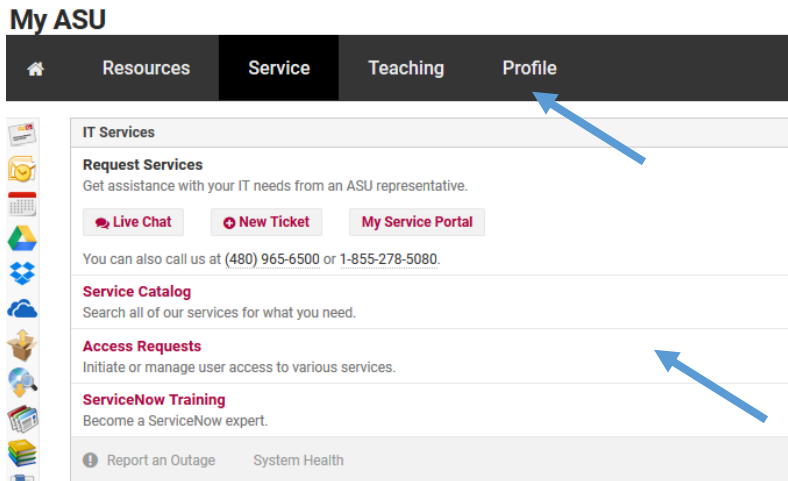
## Introduction

This form is used to walk you through the access you will need to be successful in this job. Additional access may be required depending on your special assignments.

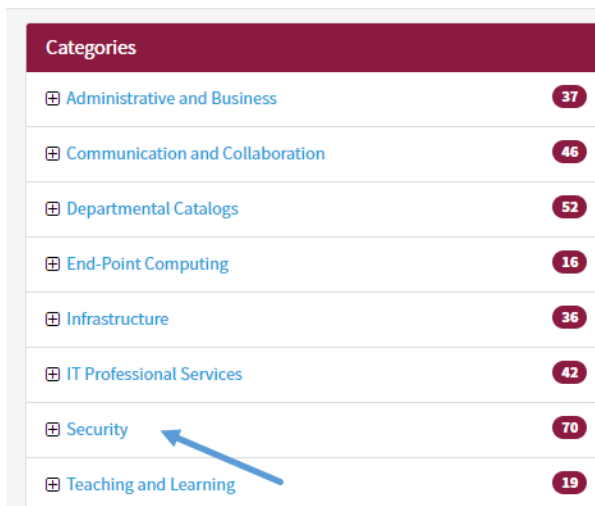
## Process

**How to request access to PeopleSoft:** In order to gain access to PeopleSoft roles, you will need to submit a request online and complete training for each role you've requested. To request access:

1. Log into your my.asu.edu page
2. Click on the 'Service' tab at the top of your my.asu.edu page (see below for icon)
3. Under IT Services, click on Access Requests



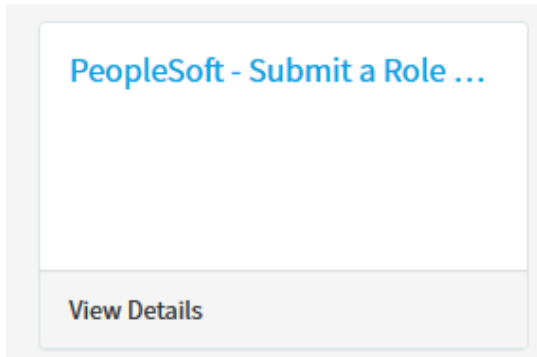
4. Under Categories, click on 'Security'



5. Click 'Identity and Access Management' and select 'PeopleSoft Security'

Categories	
Administrative and Business	37
Communication and Collaboration	46
Departmental Catalogs	52
End-Point Computing	16
Infrastructure	36
IT Professional Services	42
Security	70
Identity and Access Management	39
PeopleSoft Security	18
Secure Computing	25
Security Incident Response and Investigation	2
Security Policy and Compliance	4
Teaching and Learning	19

6. Click on 'PeopleSoft-Submit a Role'



7. Type in the **End-User's UserID** and click on **Continue**.

- End-User ID is the user that needs the access.

8. Type in the **Purpose for the Access Request**

- The purpose should briefly explain why you need the access you are requesting.

Example: I've assumed a role as a liaison. This requires me to; approve iPOS's, add faculty, approve supplemental apps, assist with RA/TA awards, and use program/plan and term activation to process dismissals and leaves of absence.

9. Enter in your **Supervisor's ASURITE ID**, then click on **Continue**
10. Click on **Add Roles** (See various sections below for access)
11. Find the role(s) that you want and check the box in front of the role(s) (see list of roles below)
12. Scroll to the bottom of the screen and click on **Save and Return**
13. Read the agreement and click on **Save and Submit**.
14. Click on **Return**

### NOTES:

- Many of the pages you will access in PeopleSoft have windows that pop up, it is highly recommended that you allow PeopleSoft to be listed as a trusted site, and that you unblock all pop ups from the PeopleSoft system.
- Request access to GC Grad College Financial Staff, Grad College POS Super User, and Grad College Faculty Approval Setup first, as access to these roles can be approved quickly, then submit a second request for all other PeopleSoft roles once initial request has been approved.
- Gaining access to Salesforce requires two separate steps. It is advised to complete the PeopleSoft access request prior to completing the online access request.
- Any role denoted with an (\*) requires the following training modules to be completed prior to granting access:
  - [FERPA Tutorial](#)
  - [Advising 101](#)
  - [Advising 201](#)
  - [Salesforce Case Management](#)

### PeopleSoft roles

#### *Under the Heading Student Administration (SA) and (GC)*

- GC Grad College Financial Staff – ASU\_SA\_GC Financial Aid Staff
- Grad College POS Super User – ASU\_SA\_GC Grad Coll
- Grad College Faculty Approval Setup – ASU\_SA\_GC Grad College Fac Appr Setup

#### *Under the heading Student Administration (SA) and Admissions (AD)*

- Supplemental App Super User - ASU\_SA\_AD Supp App Super User
- DGS Admissions Supervisor - ASU\_SA\_AD GR Admissions Supv \*

#### *Under the Heading Student Administration (SA) and (SR)*

- SR Program Plan Correct Hist – ASU\_SA\_SR Program Plan Cor Hst \*
- SR Standard Pages View – ASU\_SA\_SR Standard student pages\*
- SR Term Activate Non-Registrar – ASU\_SA\_SR \*

#### *Under the Heading Salesforce (FC)-Salesforce Group (SF)*

- Salesforce Case Management – ASU\_FC\_SF MG Case Management \*

## Various Access Roles for Graduate Support Liaisons

**How to request access to services indicators and checklists:** Once you have access to PeopleSoft you will also need to request special access to other items such as services indicators and checklist items. To get this access, send a request to [urtech@asu.edu](mailto:urtech@asu.edu) and cc your supervisor.

Services Indicators:

- AD4 – Provisional Admit (Code = PROV)
- AD4 – Bachelors/Masters (Code = BSMS)
- AD5 – Graduate Time Limit (Code = GRADT)
- AD5 – Submit Plan of Study (Code = POS50)

Checklist items:

- AD4 – Academic Integrity Module (Code = SRACIN)
  - *This access is only if you are lead for the academic integrity module.*

**How to request access to ApplicationXtender (AppXtender/WebXtender):** To view, print and download documents from applicant and student files, you will need to request access to AppXtender and WebXtender.

1. Go to <http://forms.asu.edu>
2. Enter your ASURITE ID and Password.
3. Click on “ApplicationXtender Access (Document Management Software, also known as WebXtender)
4. Click on “ApplicationXtender Access for Graduate College, including Graduate Admissions and Plan of Study”
5. Complete Purpose for Access and Supervisor’s ASURITE User ID and click submit.

**NOTE:** To access the images stored in the AppXtender/WebXtender you will need to install Active X control on your computer. This may require that your departmental IT support install the program depending on your level of access to your computer.

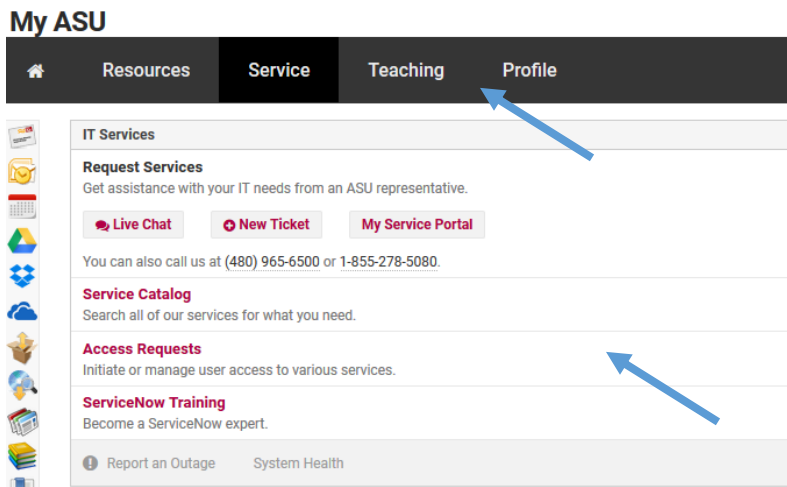
**How to Request Access to Zoom:** Zoom is the tool used to host Graduate Support Staff meetings.

1. Go to: <https://asu.zoom.us/>
2. Enter ASURITE ID and password.

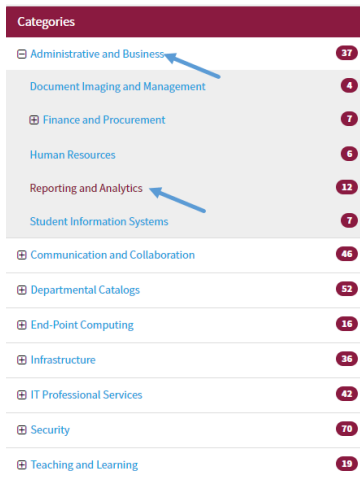
**How to request access to Analytics:** Analytics is a reporting tool to track current students and recently graduated students.

1. Log into your my.asu.edu page
2. Click on the ‘Service’ tab at the top of your my.asu.edu page

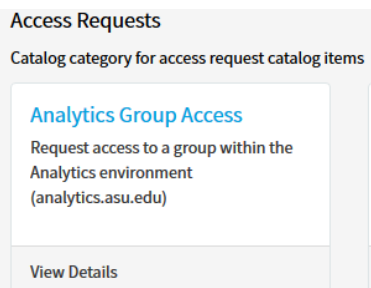
- Under IT Services, click on Access Requests



- Click on 'Administrative and Business', then click on 'Reporting and Analytics'



- Click on 'Analytics Group Access'



- Your name and supervisor should be prefilled, use the drop down arrow to select your proper group name, **Graduate Student Progress**, and provide a justification for your access request.

Use this form to gain access to a specific Analytics group. Once approved, you will be able to view dashboards and reports made for that group in analytics.asu.edu and be on your way to making the data-driven decisions that help us lead the nation in innovation!

Your supervisor and the group trustee will need to approve this request for group access, so make sure the correct supervisor has been auto-populated. This process is automated, so if there is a delay the ticket is most likely waiting on supervisor approval. After both parties approve, access will be granted within 48 hours.

If your desired group is not listed, it is not ready for public access or may have special permissions. Contact the group owner to see about making it available in this form. To be added as a power user with edit/upload permissions or be added to a non-visible group, have the group owner submit a [general Analytics ticket](#).


\* Requested for

\* Group name

Click the magnifying glass and select a group name from the list. If you do not see a group listed, that means it is not yet ready for public access.

\* Reason for access request

\* Supervisor (approver)

 Add attachments

Required information: Requested for Group name Reason for access request Supervisor (approver)

- Click 'Submit' on the bottom of the page.
- Once Analytics access has been granted, use this [link](#) to access the Graduate Student Progress home page.

**How to request access to Salesforce:** In order to gain access to SF, you will request access through PeopleSoft but also request access through an [Online form](#). You can find directions if the link changes through Knowledgebase in MyASU.

- Complete the required information and choose "Case Management"

Your full name \*

Your supervisor's full name \*

Your supervisor's ASURITE \*

What college or department do you work in? \*

What type of Salesforce access are you requesting? \*

If the access type is not listed here, visit [https://asu.service-now.com/ess/kb\\_view\\_customer.do?sysparm\\_article=KB0012611](https://asu.service-now.com/ess/kb_view_customer.do?sysparm_article=KB0012611) for instructions on submitting a PeopleSoft security request.

Case Management - Access to the Service Cloud to manage cases and includes access to Chatter.

Exporting Reports - Limited add-on access for existing users to have the ability to export reports.

Knowledge - Access to create and approve articles for their team. Includes access to Chatter.

Marketing Cloud - Indicates user is a member of the Marketing Cloud and includes access to Chatter.

Recruitment & Case Management - Access for undergraduate and graduate recruitment and support. Includes access to manage cases, contacts, opportunities, and campaigns related to communication and events. Includes access to Chatter.

Recruitment Marketing & Communication Support (no Case Management) - Access to view campaigns related to communication and events. View access to cases, contacts, and opportunities. Includes access to Chatter.

View Only - General Salesforce access to be able to look up student data contained in Salesforce and includes access to Chatter.

Quick Text Manager - Access to create and publish quick text.

**Special Assignment Access:** Marketing Cloud, only request if this is a special assignment.

## How to set up email signature:

1. Click on the following link, <https://print.asu.edu/EmailSig/> to create your signature online
2. You can populate your signature by entering your asurite

## Email signature generator

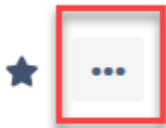
Generate an Enterprise Marketing Hub-approved on-brand email signature. If you need email print@asu.edu.

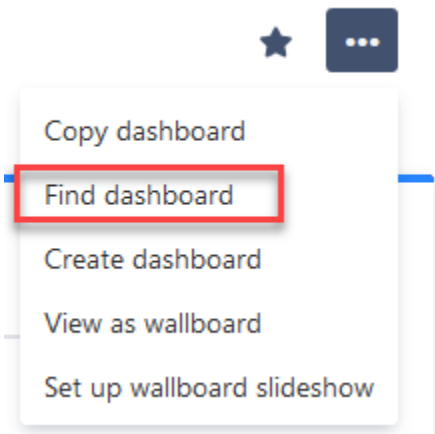
3. Enter and review all contact information entered
4. Be sure to add social media links for Twitter, Facebook and Instagram on your signature
5. Choose your bottom and select box titled '#1 in innovation'
6. Click on 'Generate' on the bottom of page
7. Review contact information for accuracy

**How to setup Jira access-**Jira access is to be requested by manager/supervisor via email. Once Jira access has been granted, the additional setup listed below is required to establish Jira home page for the Graduate Support Coordinator role.

1. Log on to your Jira home page.
2. In Jira click on the following icon three dot icon the far right side.

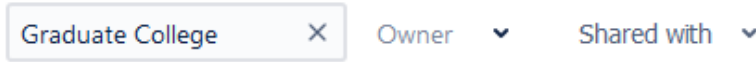


3. A drop down list will appear, click on Find Dashboard.

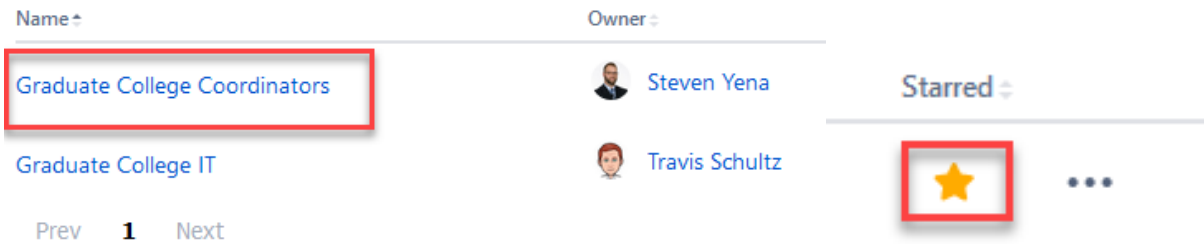


- In the search bar type in Graduate College.

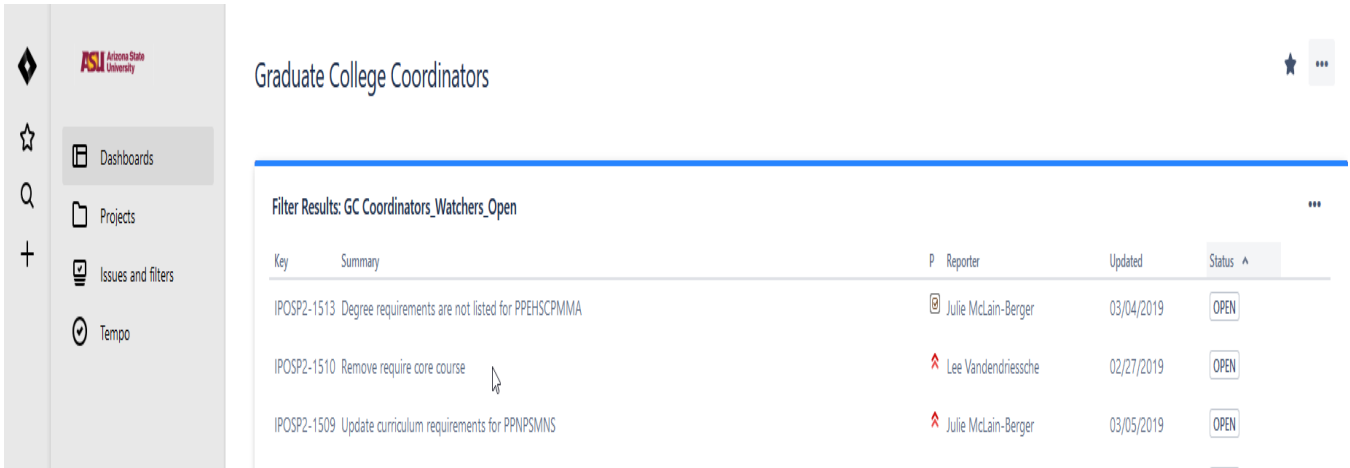
## Dashboards



- Then hover over the Graduate College Coordinator bar and hit the star icon on the far right to save as a favorite.



- The home screen will appear as such will all open and closed Jira tickets by the Graduate Support Coordinators.



### How to setup access to PeopleSoft test environments

- PeopleSoft test environment access is to be requested by manager/supervisor via email.

### How to setup voicemail to email

- Access this [page](#) for instructions for voicemail to email setup.



## How to setup VPN router

- Access this [page](#) for instructions for VPN setup.

## How to setup Duo authentication

- Access help document for Duo can be found [here](#).

## How to setup Skype for Business

- Skype for Business is preinstalled on university computers. When logging in, enter ASU email address as ASURITE@asurite.asu.edu.