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’

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)-Saleforce Group (SF)
- Salesforce Case Management – ASU_FC_SF MG Case Management *
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 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
3. Under IT Services, click on Access Requests

4. Click on ‘Administrative and Business’, then click on ‘Reporting and Analytics’

5. Click on ‘Analytics Group Access’
6. 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.

7. Click ‘Submit’ on the bottom of the page.

8. 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”
Various Access Roles for Graduate Support Liaisons

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.

   Auto-populate using your asurite

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.
4. In the search bar type in Graduate College.

**Dashboards**

[Image of dashboards]

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate College Coordinators</td>
<td>Steven Yena</td>
</tr>
<tr>
<td>Graduate College IT</td>
<td>Travis Schultz</td>
</tr>
</tbody>
</table>

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

[Image of Jira tickets]

**How to setup access to PeopleSoft test environments**

1. 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.
Various Access Roles for Graduate Support Liaisons

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.