Access Roles

The following instructions will guide you in obtaining the base-level access we recommend for ASU graduate support staff. You may not need all of these access roles, or you may need more based on your job description and duties. Consult with your supervisor about which ones you may need.

PeopleSoft Roles

Below are some typical PeopleSoft roles related to Graduate Support Staff positions. Some positions require access to all three areas. Input all requests simultaneously, as the requests go to many different places for review and will take longer if you submit one at a time. See the instructions below for how to check the status of the approvals. The FERPA Tutorial for System Access in Workday Learning must be completed before being granted access to student record systems.

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Graduate Advising Staff	**SR Standard Student Pages View** (gives access to view student information in PS like the Student Services page, etc.)
	Acad Unit POS Supervisor (gives access to make changes and approve iPOS)
	Dept Staff GR Admissions Vw (provides access to view graduate applicants in Gportal)
	Supplemental App Acad Unit Vw (provides access to view supplemental applications in PS that are included in the program applications)
	Accelerated App Tracking (provides access to the Accelerated Master's Program accelerated applicant tracking tool--only needed if the position will be advising for an AMP program)
	Accelerated Degree Update (provides access to make updates to the contacts on the Accelerated Master's Program website)
	Acad Unit RA/TA/UGF Entry (if the position requires inputting funding awards for students—i.e., TA/RA, fellowship awards, etc.) The Apprvl Mgr role allows users to approve any entered awards. There is also a View Only role.
	ASU PGA Acceptance View Only (provides access to see the ASU PGA programs offered to a student). The ASU PGA mapping is only for appointed staff who create new pairings for ASU PGA.
	Salesforce Case Management (provides access to manage student communication within Salesforce)
	Salesforce Grad Advisor Portal (provides access to manage cases created in the Graduate Advisor Portal)
	Salesforce Student Profile (provides access to view student information in one place)
Business Operations Staff	**SR Standard Student Pages View** (gives access to view student information in PS like the Student Services page, etc.)
	Acad Unit RA/TA/UGF Entry (if the position requires inputting funding awards for students—i.e. TA/RA, fellowship awards, etc.) The Apprvl Mgr role allows users to approve any entered awards. There is also a View Only role.

	Acad Unit POS View Only (if the position requires the ability only to view the iPOS and NOT make changes).
	SR Standard Student Pages View (gives access to view student information in PS like the Student Services page, etc.)
	Dept Supv GR Admissions Vw (provides access to view and admit/deny graduate applicants in Gportal)
	Supplemental App Acad Unit Gen (provides access to edit supplemental applications in PS that are included in the program applications)
Unit Admissions Staff	**SR Standard Student Pages View** (gives access to view student information in PS like the Student Services page, etc.)
	Dept Supv GR Admissions Vw (provides access to view and process (admit/deny) graduate applicants in Gportal)
	Supplemental App Acad Unit Gen (provides access to edit supplemental applications in PS that are included in the program applications)

PeopleSoft Access

1. Log in to your MyASU and click on Staff View.
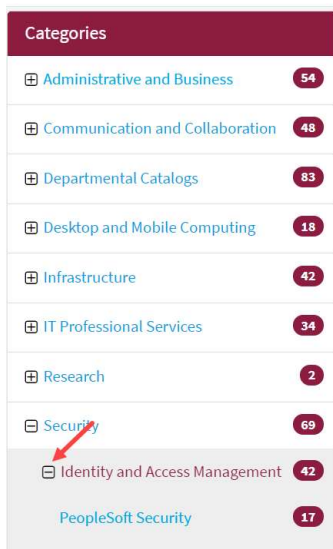

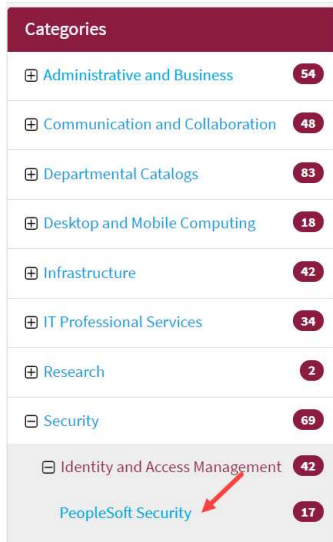2. In the black band, click on **Service**.

3. Click on **Access Requests**.
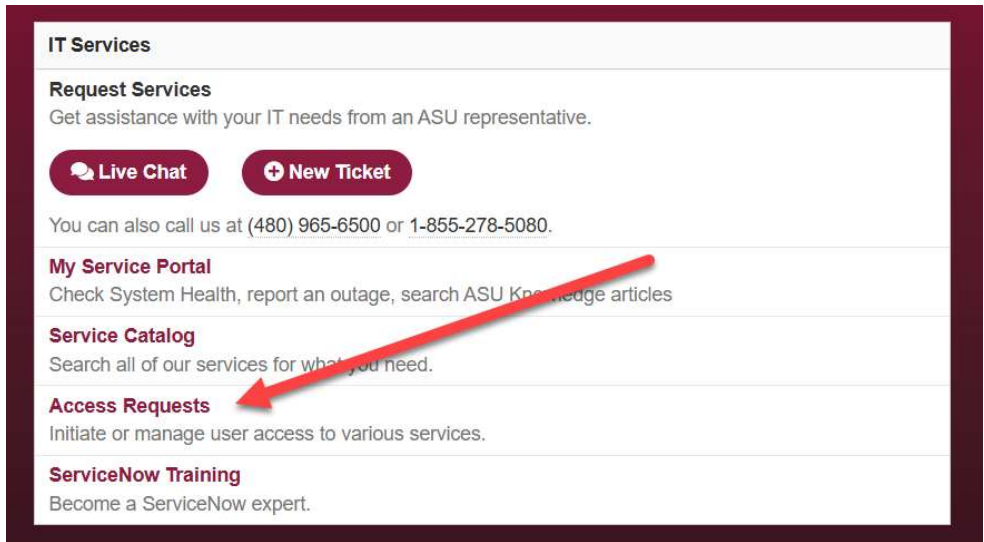
4. On the left, under Categories, click on the **+** to the left of Security if the drop down does not open automatically.
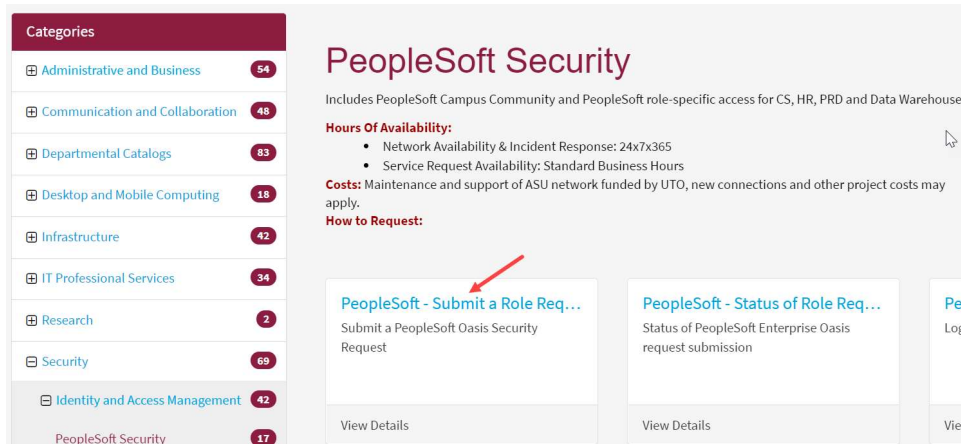
Categories	
⊞ Administrative and Business	54
⊞ Communication and Collaboration	48
⊞ Departmental Catalogs	83
⊞ Desktop and Mobile Computing	18
⊞ Infrastructure	42
⊞ IT Professional Services	34
⊞ Research	2
⊞ Security	69
⊞ Teaching and Learning	18
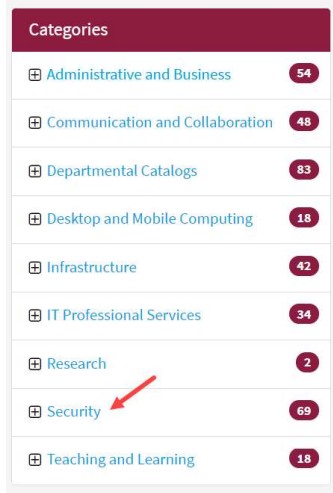
5. Click on the **+** to the left of Identity and Access Management if the drop down does not open automatically.

Categories	
⊞ Administrative and Business	54
⊞ Communication and Collaboration	48
⊞ Departmental Catalogs	83
⊞ Desktop and Mobile Computing	18
⊞ Infrastructure	42
⊞ IT Professional Services	34
⊞ Research	2
⊟ Security	69
⊟ Identity and Access Management	42
PeopleSoft Security	17

6. Click on PeopleSoft Security.

Categories	
⊞ Administrative and Business	54
⊞ Communication and Collaboration	48
⊞ Departmental Catalogs	83
⊞ Desktop and Mobile Computing	18
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7. Click on **PeopleSoft – Submit a Role Request**.

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Note: To check the status of your access request, click on **PeopleSoft – Status of Role Request**.

8. Enter your ASUrite ID (End-User's UserID) and click on **Continue**.

Enter the Purpose for the Access Request. The purpose should briefly explain why you need the access you are requesting (for example, I've assumed a role as an advisor. This requires me to approve iPOS, etc.). Enter your supervisor's ASUrite ID (UserID) and click on **Continue**.

9. Click on **Add Roles**.
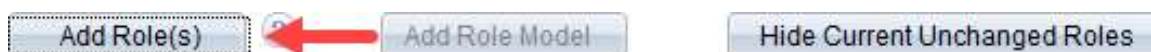
10. The PS security roles are listed in application areas. Search for the roles you need (see Peoplesoft Roles and descriptions above) and check the box to the left of the role. When requesting some roles, you must enter the Academic Plan Codes to which you will need access. Please contact your supervisor if you do not know what those are or where to obtain them.

Under the heading Salesforce (FC) – Salesforce Group (SF)

Salesforce (FC) - Salesforce Group (SF)

☐ Salesforce Acad Advisor Portal	☐ Salesforce Knowledge User
☑ Salesforce Case Management	☐ Salesforce Org Relations
☐ Salesforce Chatter Only	☐ Salesforce Recruit Comm
☐ Salesforce EdPlus Coach Portal	☐ Salesforce Recruiting
☑ Salesforce Export Reports	☑ Salesforce Student Profile
☑ Salesforce Grad Advisor Portal	☐ Salesforce View Only
☐ Salesforce inContact User	☐ UTO Salesforce Admin & Dev

Under the heading Student and Administration (SA) – Graduate Academic Advising (AA)

Student and Administration (SA) - Graduate Academic Advising (AA)

☐ Acad Unit POS Super User	☐ Accelerated Degree Update
☐ Acad Unit POS Supervisor	☐ Accelerated Degree View Only
☐ Acad Unit POS View Only	☑ ASU PGA Acceptance View Only
☑ Accelerated App Tracking	☐ ASU PGA Mapping

Under the heading Student and Administration (SA) - Admissions (AD) (Admissions oversees these roles)

Student and Administration (SA) - Admissions (AD)

☐ Dept Staff GR Admissions Vw	☐ Scholarship Requirements Setup
☐ Dept Supv GR Admissions Vw	☐ Supplemental App Acad Unit Gen
☐ Dept/School Review Role	☐ Supplemental App Acad Unit Vw
☐ DGS Admissions Staff	☐ Supplemental App Grad Coll Vw

Under the heading Student and Administration (SA) – Graduate Financial (GF)

Student and Administration (SA) - Graduate Financial (GF)

☐ Acad Unit RA/TA/UGF Apprvl Mgr	☐ Acad Unit RA/TA/UGF View Only
☐ Acad Unit RA/TA/UGF Entry	

Under the Heading Student and Administration (SA) – Student Records (SR) (Registrar oversees these roles)

Student and Administration (SA) - Student Records (SR)

☐ SR Advisor Action Build	☐ SR Prereq Review Admin
☐ SR Advisor Appointment Rules	☐ SR Prereq Review Athl
☐ SR Advisor Quick Enroll	☐ SR Prereq Review Upd
☐ SR ARC Administrator	☑ SR Prereq Review View

Scroll to the bottom of the screen and click on **Save and Return**. Once the access requests have been submitted, please allow at least a week for processing, as the request requires several levels of approval before access can be granted.
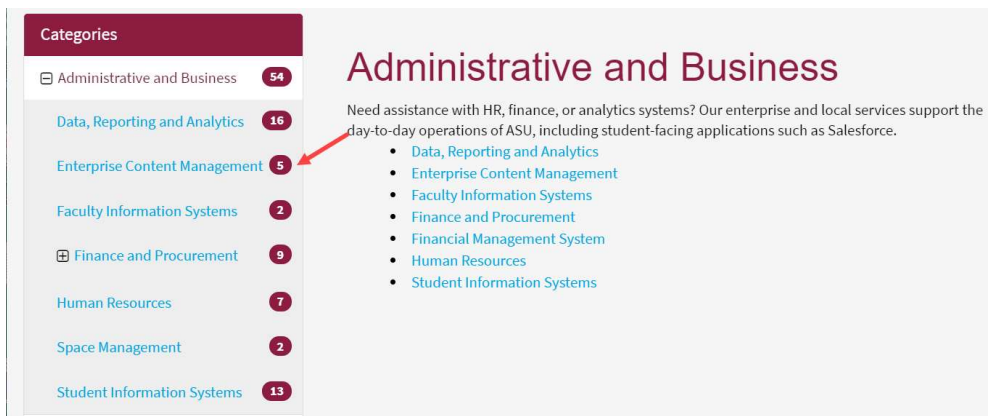
AppXtender Access

Application Xtender (AppXtender/WebXtender) – This tool provides access to view documents from the student's application. To request access:
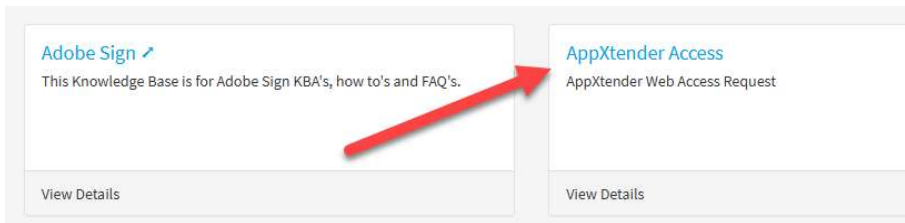
1. Under the Categories menu, click on **Administrative and Business**.

2. Click on **Enterprise Content Management**.

3. Scroll down and click on **AppXtender Access.**

4. Complete all necessary fields on the AppXtender Access request form. The Reason for Access should include the need to review applications, test scores, transcripts, letters of recommendation, etc. Check the box to acknowledge the FERPA policy and click **Order Now**.

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Analytics Access

Analytics **-** This tool is used to run reports and track current student progress. To request access:

1. Click on this URL: [Analytics Access.](#)

2. Enter the information as shown below.

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