

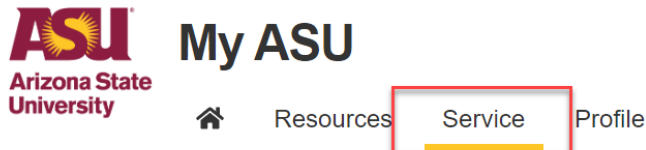
Graduate Advisor Portal

The Graduate Advisor Portal exists in Salesforce but requires a specific PeopleSoft role and training to access. Staff with access to other Salesforce roles (Case Management, Marketing Cloud, etc.) do not automatically gain access to the Grad Advisor Portal. The access is also different from that for the *Undergraduate* Advisor Portal. Only graduate support staff serving in an advising-type role should obtain access to the portal.

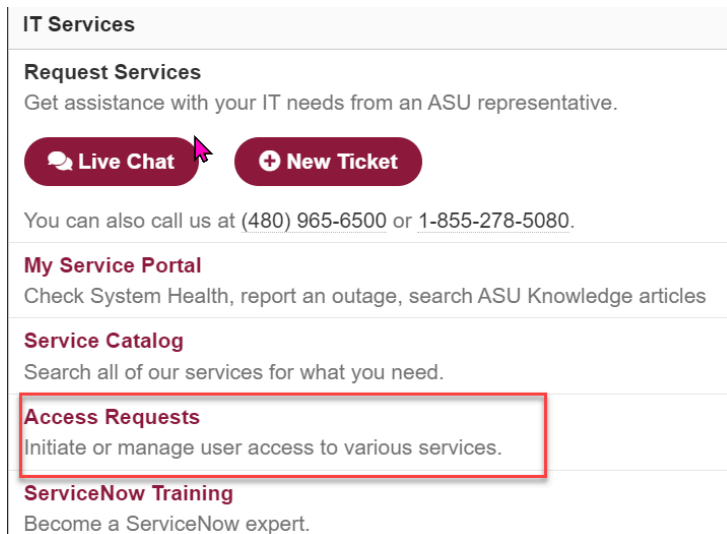
PeopleSoft Role

The first step to gain access is to submit the PS security request: Salesforce Grad Advisor Portal (ASU_FC_SF GP Graduate Portal)

1. Log in to your MyASU and click on **Service** (make sure you are in Staff view).



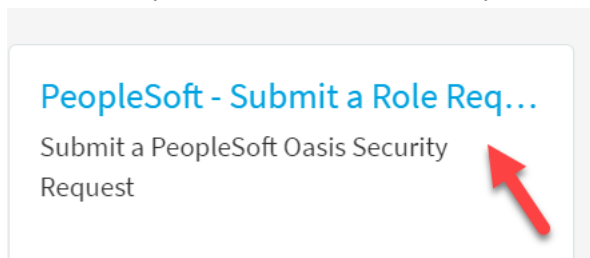
2. Click on **Access Requests**.



3. Scroll down to click on PeopleSoft Security (listed under Identity and Access Management)



4. Click on PeopleSoft – Submit a Role Request



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

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

ASU PeopleSoft Security Request

Requested Security Access ASURITEs and Purpose

- Enter the UserID for which you are requesting a change, then click the Continue>> button. The system will evaluate whether this is a new access request or one which has been started but not yet submitted.
- Note: Fields which have a label preceded by an asterisk (*) are required.

*End-User's UserID:

Continue >>

6. Enter the Purpose for the Access Request. The purpose should briefly explain why you need the access you are requesting (example: I need access to the Graduate Advisor Portal for the graduate advising duties of my position). Enter your supervisor's ASUrite ID (UserID) and click on **Continue**.

ASU PeopleSoft Security Request

Requested Security Access ASURITEs and Purpose

*End-User's UserID:

[View Employee Data](#)

*Purpose for Access Request (maximum of 2 lines)

254 characters remaining

*Supervisor's UserID:

Continue >>

Cancel/Reset

7. Click on **Add Roles**.



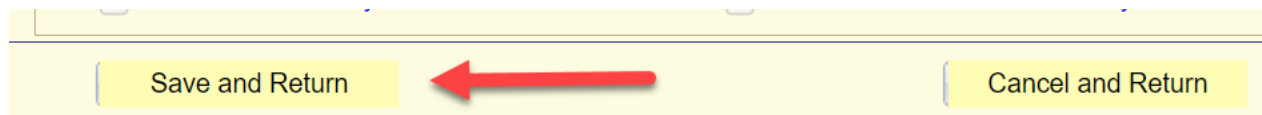
8. Scroll down to find the role you need and check the box to the left of the role.

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



Salesforce (FC) - Salesforce Group (SF)	
☐	Salesforce Acad Advisor Portal
☒	Salesforce Case Management
☐	Salesforce Chatter Only
☐	Salesforce EdPlus Coach Portal
☒	Salesforce Export Reports
☒	Salesforce Grad Advisor Portal
☐	Salesforce inContact User

9. Scroll to the bottom of the screen and click on **Save and Return**.

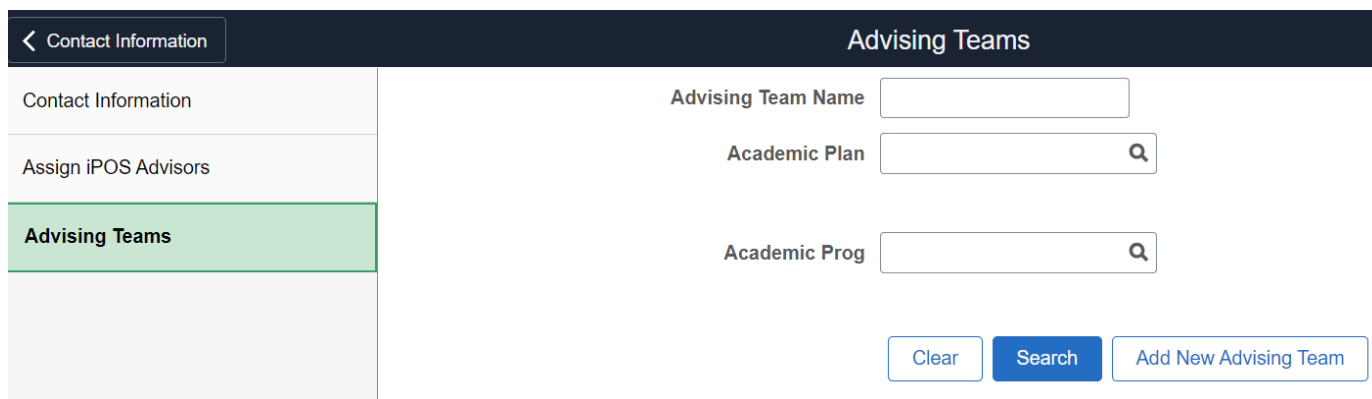


Once the access request has been submitted, please allow at least a week for processing, as it requires several levels of approval before access can be granted.

Next Steps

Before the Graduate College tech team can approve the PS security role, staff must complete the Graduate Advisor Portal training course in Workday (unless it has already been completed). Staff must also gain access to Salesforce Case Management and be listed in PeopleSoft under Academic Plan Extensions for their plan codes.

1. Complete the [Graduate Advisor Portal](#) course in WorkDay.
2. Confirm that you have been added to the Contacts tab in [Academic Plan Extensions](#) for your programs.



Advising Teams	
Contact Information	Advising Team Name
Assign iPOS Advisors	Academic Plan 
Advising Teams	Academic Prog 
Clear Search Add New Advising Team	

3. After submitting your access request, your supervisor will receive an email to approve the PS security request.
4. You will then receive an email requiring you to acknowledge the PeopleSoft security request.
5. Once acknowledged, the SF Administrators set up the graduate advisor permissions in Salesforce and then will send you a SF Chatter message once you have access to the Graduate Advisor Portal.