

## How to request an Associate IT account

This guide gives details on how to request or amend an IT account for a University of Exeter Associate.

Associate IT accounts are added, amended, and deleted via the Associate Management System (AMS) which forms part of the University Directory system.

An Associate cannot request an IT account for themselves, with the exception of retiring Staff.

Managing an Associate's IT account is a workflow-based process, where you as a Requestor enter details on behalf of the Associate, and then an Approver approves the request:



If you need any further assistance on any of the topics in this guide, please contact the [SID desk](#).

# 1 Access the University Directory

You can access the Directory at <https://directory.exeter.ac.uk/login.dhtml>

This will give you the login screen as shown below:



UNIVERSITY OF  
**EXETER**

Phone Directory Login

Username

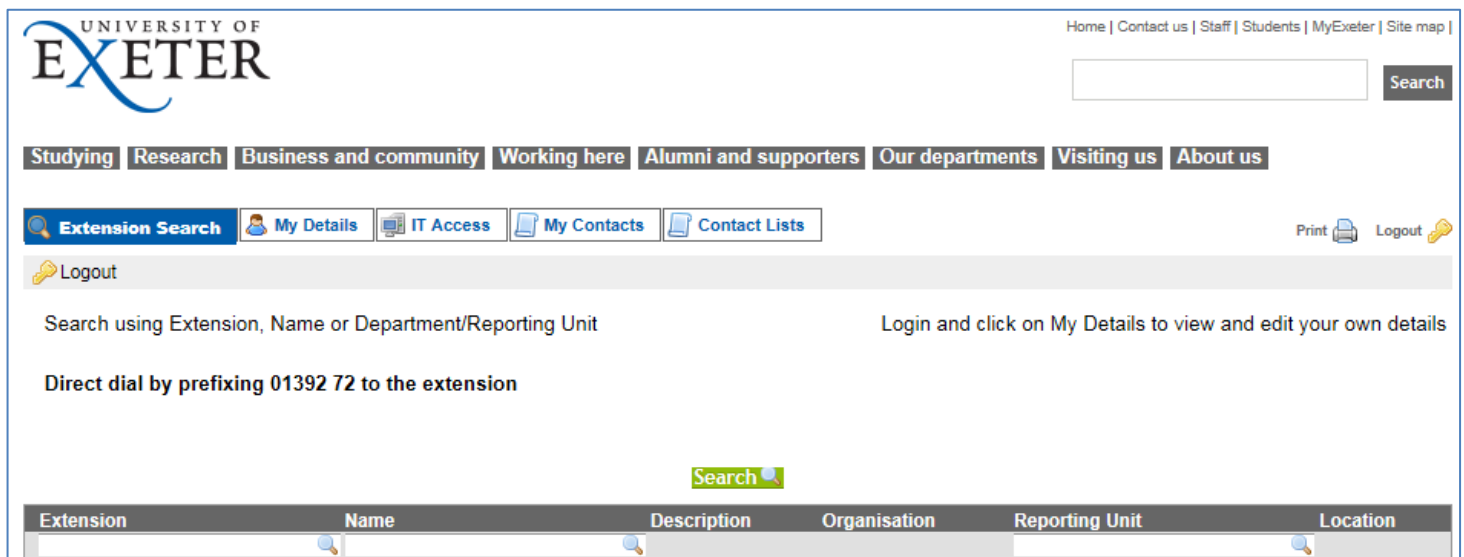
Password

Remember Me

Login

Enter your usual university login details and click **Login**.

This will then show the Directory home page, where you normally look up people's contact details:



UNIVERSITY OF  
**EXETER**

Home | Contact us | Staff | Students | MyExeter | Site map |

Search

Studying | Research | Business and community | Working here | Alumni and supporters | Our departments | Visiting us | About us

Extension Search | My Details | IT Access | My Contacts | Contact Lists

Print | Logout

Logout

Search using Extension, Name or Department/Reporting Unit

Direct dial by prefixing 01392 72 to the extension

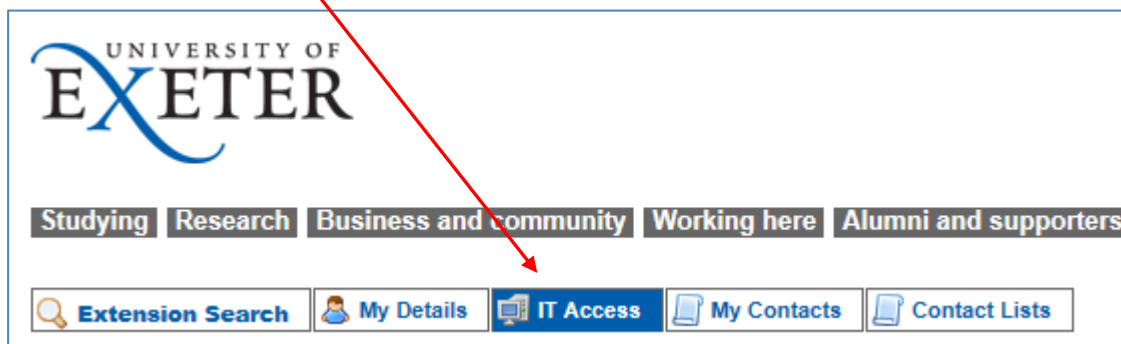
Login and click on My Details to view and edit your own details

Search

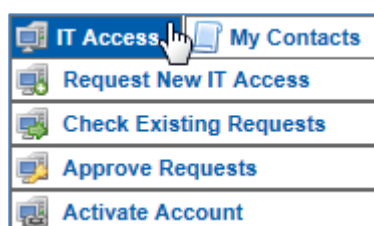
Extension	Name	Description	Organisation	Reporting Unit	Location

## 2 IT Access

Click on the **IT Access** button in the menu bar.



This will show a dropdown list of IT Access functions:



Note that when navigating these links you will need to carefully drag your mouse across the dropdown options.

To create a new Associate's IT account, click on **Request New IT Access**, then go to [section 3](#).

To amend an existing Associate's IT account, click on **Check Existing Requests**, and then go to [section 4](#).

To delete an existing Associate's IT account, click on **Check Existing Requests**, and then go to [section 5](#).

### 3 Create a new Associate's IT account

Clicking on **Request New IT Access** will show a dropdown list of all the categories of University of Exeter Associates. Click on the one relevant to the new Associate.

IT Access	My Contacts	Contact Lists
<b>Request New IT Access</b>		CLES Visitor Cornwall
Check Existing Requests		CLES Visitor Exeter
Approve Requests		Cornwall Associate
Activate Account		eClaims
		Emeritus Professor
		EMPS Visitor
		Exeter Associate
		External Examiners
		Honorary Appointment
		Humanities Occasional Teacher
		Humanities Visiting Scholar
		Innovation Centre
		Medical School Exeter Academic
		Medical School Exeter Research
		Medical School Truro Academic
		Medical School Truro Research
		Staff Retired
		STAFF-Student Community Warden
		Students Guild Staff
		Temporary Staff Bank

This will then show the following screen, using **Exeter Associate** as a typical example:

Extension Search My Details IT Access My Contacts Contact Lists Print Logout

#### IT Access Request - Exeter Associate

IT access for associates working/visiting the Streatham and ST Luke's campuses. Please note, we can not convert a student account to associate status, a new account will be issued. Associates are not allowed to request their own access/extension. Requests can only come from members of staff.

Title	<input type="text" value="-- Please select --"/>
Forename	<input type="text"/>
Surname	<input type="text"/>
Library Access	<input type="text" value="-- Please Select --"/>
University Card Required	<input type="text" value="-- Please Select --"/>
IT Account required	<input type="text" value="-- Please Select --"/>
Trent Reference Number (if known)	<input type="text"/>
Enter IT Account ID to keep an old account - eg abc123	<input type="text"/>
Gender	<input type="text" value="-- Please Select --"/>
Date of Birth	<input type="text" value="dd/mm/yyyy"/>
College/Service	<input type="text" value="-- Please Select --"/>
Discipline	<input type="text" value="-- Please Select --"/>
Photograph	<input type="text" value="Browse..."/> Please upload a photograph if one is available.
Please enter a Contact Address	<input type="text"/>
Start date	<input type="text" value="dd/mm/yyyy"/>
End date	<input type="text" value="dd/mm/yyyy"/> 2 Years
Electronic Library Access	<input type="text" value="-- Please Select --"/>
Notes / Reason for request	<input type="text"/>

**Message** Your request for IT access requires approval. Once it has been approved you will be sent a link containing the account details.

Please note that we can not convert a Student account to Associate status, a new account will be issued.

Associates are not allowed to request their own access.

Requests can only come from members of staff.

Enter data for the new Associate in all fields, using the dropdown options where applicable.

A yellow dot next to a field means it is a mandatory field and you must enter data in it:

Title	●	-- Please select --
Forename	●	
Surname	●	
Library Access	●	-- Please Select --
University Card Required	●	-- Please Select --
IT Account required	●	-- Please Select --
Trent Reference Number (If known)		
Enter IT Account ID to keep an old account - eg abc123		
Gender	●	-- Please Select --
Date of Birth	●	dd/mm/yyyy
College/Service	●	-- Please Select --
Discipline	●	-- Please Select --
Photograph	●	<input type="text"/> Browse...
Please enter a Contact Address	●	<input type="text"/>
Start date	●	dd/mm/yyyy
End date	●	dd/mm/yyyy <b>2 Years</b>
Electronic Library Access	●	-- Please Select --

Enter the **Start date** for when the Associate starts working at the University. Note that this can be in the past but will normally be in the future,

Ideally, enter the known **End date** for when the Associate will cease working at the University. If for any reason this is not known, then clicking on the **2 Years** button (in this example) will automatically add 2 years to the Start date. This auto End date calculation differs depending on the Associate category you are creating.

Note that if the Associate has previously had a University of Exeter IT account, and this is still valid, then this can be reactivated.

If **Library Access** or **Electronic Library Access** is required, then you must choose **Yes** for **University Card Required**. This is usually required anyway to allow door access in most university buildings.

For the University Card, you will need to upload a passport-type photo of the Associate. This will then appear on the Associate's uni card when printed.

Once all data has been entered click on **Submit Request**. If there are any data entry errors, the screen will be returned with these highlighted.

If all data is present and correct, an automated email will be sent to your Approver. You don't need to know the name or email address of the Approver as they are all set up in AMS for each category of Associate.

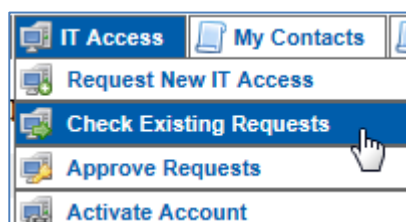
The Approver will then need to click on the link within the email, which will take them to the approval screen in AMS.

Once they approve your request to create the Associate's IT account, you will get an automated email back giving you details on how to activate the account.

Click on the link in the email to display the **Activate Account** screen in AMS. Follow the instructions on the screen and click on **Activate**.

The Associate's IT account will then be created, usually within a couple of hours.

You can then click on **Check Existing Requests** to show the list of your Existing IT Access Requests.



When the Associate's IT account is created, AMS will be updated to show the Associate's university Associate Reference number and Account username in this list, as shown in the example below:



Reference	Account	Expiry Date	Name	Profile
AE102192	js301	31 Aug 2014	Mr John Smith	Exeter Associate
AE102460	js307	27 Jun 2014	Ms Jane Smith	Exeter Associate

The screenshot shows a table titled 'Existing IT Access Requests'. Above the table, there is a 'Show Issue Date' button and a status 'Showing 1 to 2 of 2 results'. The table has five columns: Reference, Account, Expiry Date, Name, and Profile. The first row shows Reference AE102192, Account js301, Expiry Date 31 Aug 2014, Name Mr John Smith, and Profile Exeter Associate. The second row shows Reference AE102460, Account js307, Expiry Date 27 Jun 2014, Name Ms Jane Smith, and Profile Exeter Associate.

You will then receive an automated email with a PDF letter attached. This will contain the Associate's new IT account username and initial password and email address, as well as terms & conditions. Please emphasise to the Associate that they must abide by the University's [IT regulations](#).

Send this letter to the Associate or print it and give it to them.

Once the Associate has logged into their IT account for the first time, please tell them to change their initial password, using the [Self-service password reset](#) function.

## 4 Amend an existing Associate's IT account

Clicking on **Check Existing Requests** will show a list of all Associate accounts you have requested previously, as shown in this example:

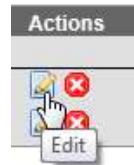


Existing IT Access Requests

Showing 1 to 2 of 2 results

Reference	Account	Expiry Date	Name	Profile	Status	T&C	Actions
AE102192	js301	31 Aug 2014	Mr John Smith	Exeter Associate	Expired		 
AE102460	js307	27 Jun 2014	Ms Jane Smith	Exeter Associate	Expired		 

To edit the Associate's details, click on the **Edit** icon at the right of the line



This will then show the Associate's details on the following screen :

### Edit IT Access Request for Exeter Associate

IT access for associates working/visiting the Streatham and ST Luke's campuses. Please note, we can not convert a student account to associate status, a new account will be issued. Associates are not allowed to request their own access/extension. Requests can only come from members of staff.

Requesting User	Andy Spedding (Exeter Status: Staff)
Title	<input type="radio"/> Ms <input type="button" value="v"/>
Forename	<input type="radio"/> Jane
Surname	<input type="radio"/> Smith
Library Access	<input type="radio"/> Yes <input type="button" value="v"/>
University Card Required	<input type="radio"/> Yes <input type="button" value="v"/>
IT Account required	<input type="radio"/> Yes <input type="button" value="v"/>
Trent Reference Number (If known)	<input type="text"/>
Enter IT Account ID to keep an old account - eg abc123	<input type="text"/>
Gender	<input type="radio"/> Female <input type="button" value="v"/>
Date of Birth	<input type="radio"/> 06/04/1968
College/Service	<input type="radio"/> Academic Services <input type="button" value="v"/>
Discipline	<input type="radio"/> Academic Services <input type="button" value="v"/>
Photograph	<input type="radio"/> <input type="button" value="Browse..."/> Please upload a photograph if one is available
Please enter a Contact Address	<input type="radio"/> 1 Rose Cottage Tiverton Exeter EX16 5AZ
Start date	<input type="radio"/> 03/04/2014
End date	<input type="radio"/> 31/08/2014 <b>2 Years</b>
Electronic Library Access	<input type="radio"/> Yes <input type="button" value="v"/>
Notes / Reason for request	<input type="radio"/> Jane will be working on the <u>KSpa</u> project, reporting into Nathan Burden
Message	Your request for IT access requires approval. Once it has been approved you will be sent a link containing the account details.

You may want to amend any of the Associate's personal details, in which case you need to overtype the data on screen or change dropdown options.

But the main benefit of this function is to allow you to extend the **End date** of an Associate's IT account, as long as you have got confirmation that they have had a role renewal or extension approved by the College or Professional Services team for whom they work.

Once you have amended the data, click **Save**. This will then update the Associate's IT account, usually within a couple of hours.

Note that if the Associate is continuing to work at the University but in a different role or at a different campus, you should instead enter a proper **End date** on this screen and **Save** it, and then create a new Associate account under the correct Associate category (see section 3 above). You can then tie in the Associate's current IT account username to their new Associate record, which will allow them to retain their university email address.

## 5 Delete an existing Associate's IT account

Clicking on **Check Existing Requests** will show a list of all Associate accounts you have requested previously, as shown in this example:

The screenshot shows a web interface for managing IT access requests. At the top, there are navigation tabs: 'Extension Search', 'My Details', 'IT Access', 'My Contacts', and 'Contact Lists'. Below these is a dropdown menu with options: 'Request New IT Access', 'Check Existing Requests', 'Approve Requests', and 'Activate Account'. The 'Check Existing Requests' option is selected. Below the menu, there is a 'Show Issue Date' button and a 'Run Filter' button. The main content is a table with the following data:

Reference	Account	Expiry Date	Name	Profile	Status	T&C	Actions
AE102192	js301	31 Aug 2014	Mr John Smith	Exeter Associate	Expired		[Delete]
AE102460	js307	27 Jun 2014	Ms Jane Smith	Exeter Associate	Expired		[Delete]

To delete an Associate's IT account, click on the **Delete** icon at the right of the line



This will then show a confirmation screen to ensure you don't delete the Associate's IT account by accident :

Are you sure that you want to delete this IT Access request?

I am sure I want to delete this item

**Proceed with delete**

Check the "I am sure..." tickbox and then click on **Proceed with delete** to permanently delete the Associate's IT account.