Associates System

User Guide – Staff with 'Approver' Role

Information Technology and Communication Services

Author: Lee Spargo

2017

1. Contents

2. Introduction

This guide has been created as a reference for University staff who have the 'Approver' role within the Associates System, and is designed to describe the system and the actions that can be performed within it. The system takes the place of the previous Associates system and introduces a new process of requesting an Associate Account and approving requests from members of staff within your School/Department.

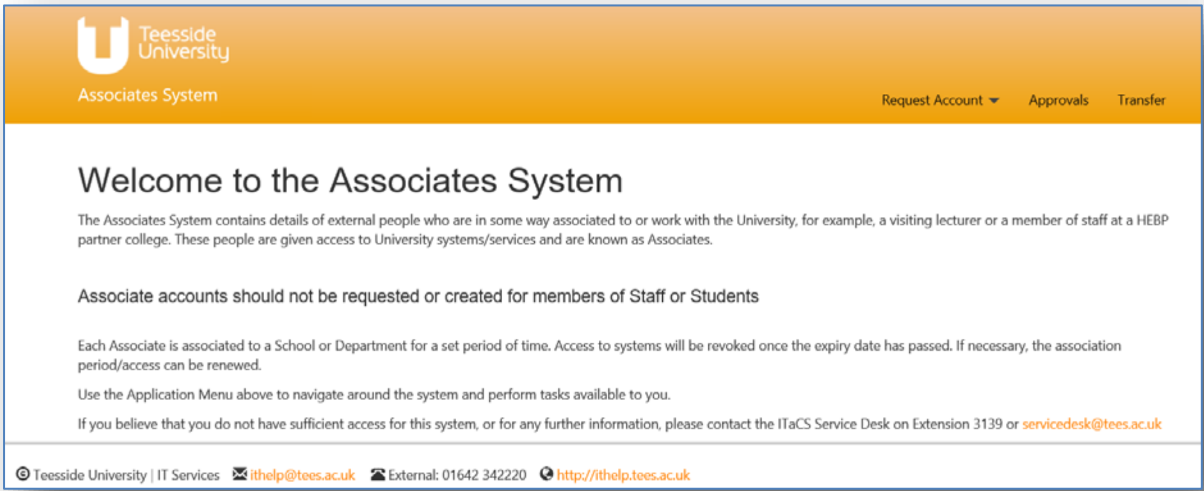
An Associate is an external person who is in some way associated with the University, for example, a visiting lecturer or a member of staff from a HEBP partner college.

An Associate can be given access to University systems/services. Each Associate is associated to a School or Department for a set period of time. Once this period has expired, the Associate's access to systems is revoked. If necessary, the association period/access can be renewed.

If you have any queries, please contact the ITaCS Service Desk on Extension 3139 or ithelp@tees.ac.uk.

3. Accessing the System

The Associates System is available at https://apps.tees.ac.uk/Associates. On visiting this page, the screen below will be shown:



3.1 Home Page

The Home Page contains information regarding Associates, including the important line "Associate accounts should not be requested for members of Staff or Students". Any user who falls into this category will already have system access as per their account.

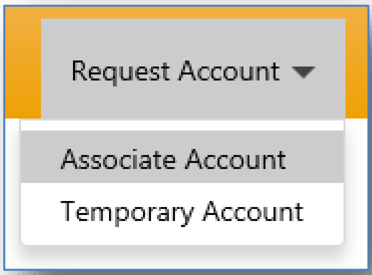
3.2 Application Menu

The Application Menu is shown in the top right hand corner of the screen. Users will see different options dependant on their level of access to the system. Users with the 'Approver' role will see the 'Request Account', 'Approvals' and 'Transfer' options.

4. Requesting an Associate Account

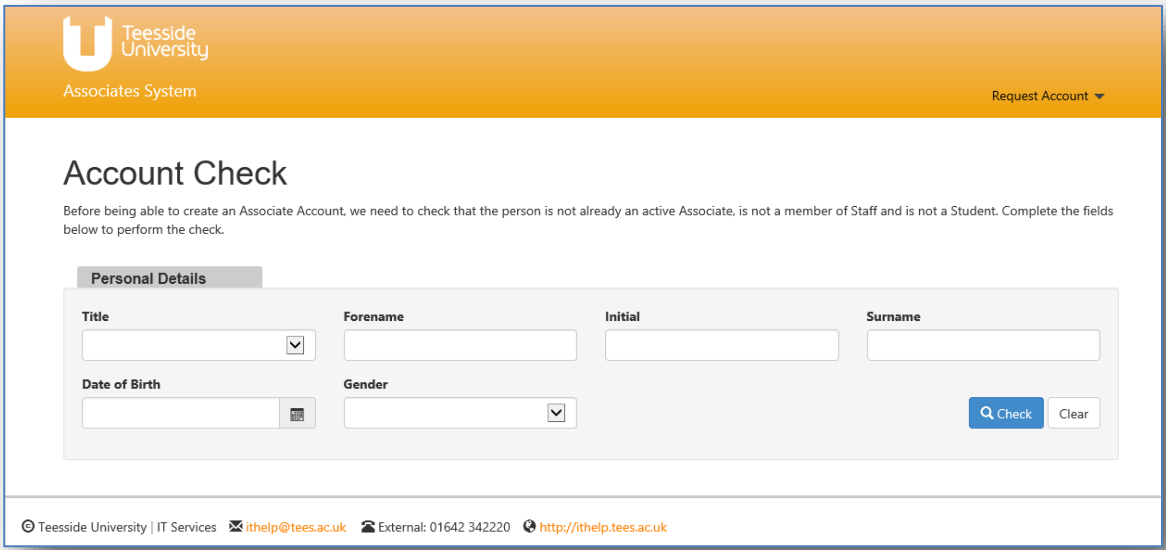
To begin the process of requesting an Associate Account, click the 'Request Account' menu item, and then select 'Associate Account' from the drop down list that appears.

The user will then be taken to the 'Account Check' screen.



4.1 Account Check Screen

To help prevent the creation of duplicate Associate Accounts, before being able to request a new account, the system must be checked to ensure that an account does not already exist for the individual in question.



4.1.1 Personal Details

The 'Personal Details' section contains the following fields which should be completed to check for an existing Associate Account (fields marked with asterisk must be completed):

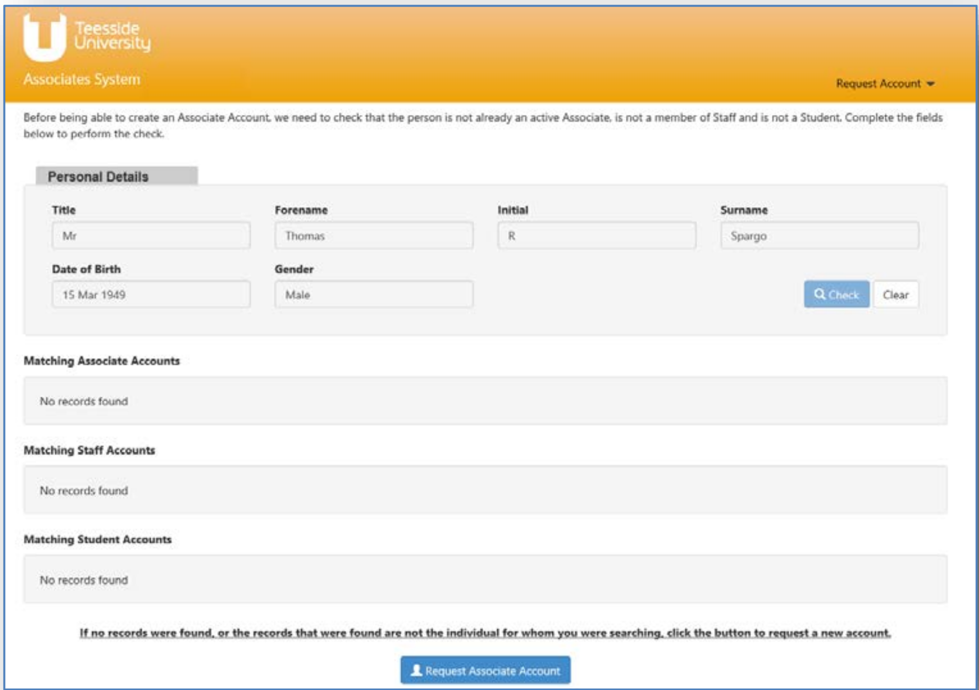
Title – Select the person's title from the drop down list
Forename* – Enter the person's forename, e.g., "Lee"
Initial – Enter the person's middle initial (if they have one), e.g., "T"
Surname* – Enter the person's surname, e.g., "Spargo"
Date of Birth – Select the person's date of birth from the date picker
Gender – Select the person's gender from the drop down list

4.1.2 Checking for existing Accounts

Having entered the details, click the 'Check' button to search for the person within the system. Three tables will be shown on screen, displaying the details of any matching Associates, Staff or Student records.

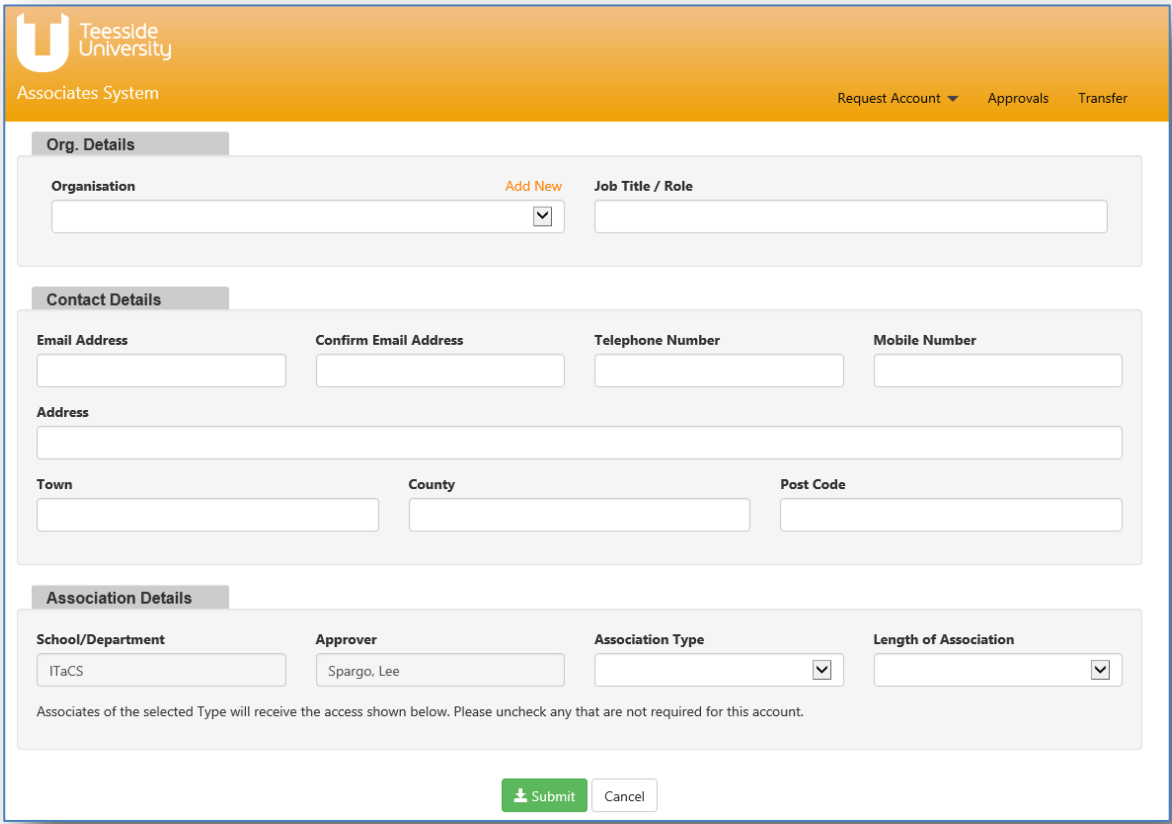
If an Associate Account already exists, the details will be shown, including Expiry Date. If the Expiry Date is in the future, i.e., a date later than today, then the person has an active Associate Account. If the Expiry Date has passed, then the person has an Associate Account, but does not have an active association – in this case, the Approver who is named in the table should be contacted to arrange for a new association to be created. Failing that, contact the ServiceDesk for advice.

If no existing account is found for the person in question, the screen will look as shown below. Click the 'Request Associate Account' button to continue the process.



4.2 Associate Account Request Form

The full ‘Associate Account Request Form’ opens when a user has not found an existing account and has clicked the ‘Request Associate Account’ button. The first section of the form pulls through the ‘Personal Details’ that were entered in the account checking stage so that they do not have to be re-entered.



4.2.1 Organisation Details

The ‘Organisation Details’ section contains the following fields which should be completed:

> Organisation – Select the person’s organisation from the drop down list.
> If the organisation does not already exist, click the ‘Add New’ button and complete the form to add the new organisation.
> Job Title / Role* – Enter the person’s job title, e.g., “Lecturer”

4.2.2 Contact Details

The ‘Contact Details’ section contains the following fields which should be completed:

> Email Address* – Enter the person’s personal email address, e.g., “trspargo@live.co.uk”.
> Note that addresses ending in “tees.ac.uk” will not be accepted.

Confirm Email Address* – Re-enter the person's personal email address, this must match the address in the field above.
Telephone Number* – Enter the person's telephone number, e.g., "01642 774588"
Mobile Number – Enter the person's mobile number, e.g., "07740388566"
Address* – Enter the person's home address, e.g., "5, Shipham Close"
Town* – Enter the person's home town, e.g., "Redcar"
County – Enter the person's home county, e.g., "North Yorkshire"
Post Code* – Enter the person's home post code, e.g., "TS10 2RT"

4.2.3 Association Details

The 'Association Details' section contains the following fields which should be completed:

School/Department – This field is automatically completed with the School/Dept of the logged in user, e.g. "ITaCS".
Approver* – As a logged in 'Approver', this field is automatically completed with your name.
Association Type* – Select an association type from the drop down list, e.g., "HEBP Staff".
Length of Association* – Select an length of association (time period for which the account will be active) from the drop down list, e.g., "One Year".

4.2.4 Associate Access

When an Associate Type has been selected, checkboxes will be shown at the bottom of the form dependant on the default access for the selected Associate Type.

These are labelled "PC Login", "TUSC Card" and "Wi-Fi Access" (one, two or three of these will be displayed). If any of these levels of access are not required for the person in question, uncheck the relevant checkbox.

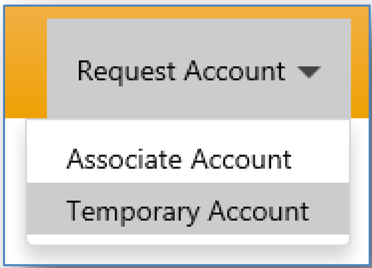
Once the form has been fully completed, click the 'Submit' button to submit the application. A message will be shown on screen to confirm that the form was successfully submitted and the user will be returned to the Home Page.

4.3 Request Approval Process

When a user with general access to the system successfully submits the 'Associate Account Request Form', an automated email is sent to the selected Approver, who must review the request and either approve or decline it (see Section 6 for details on this). However, as a logged in 'Approver', it is assumed that the request has already been approved so this step is not required.

Once submitted by an 'Approver', the request goes straight to the ITaCS Service Desk, where the process of creating the account will be completed. Following this, the Service Desk will inform the Associate of their account.

5. Requesting a Temporary Account



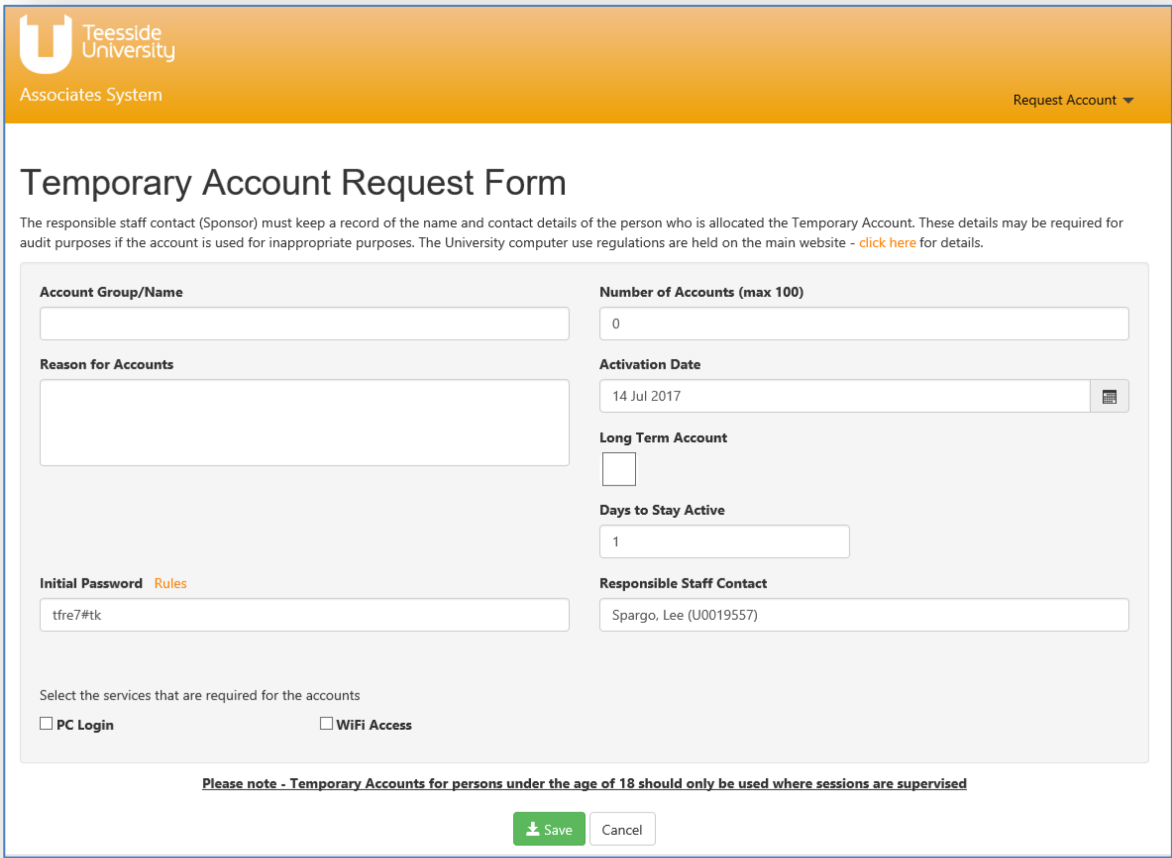
A 'Temporary Account' is a scaled-down verison of an Associate Account which lasts for a shorter time period (usually fewer than 30 days) and also has less access to University systems.

To begin the process of requesting a Temporary Account, click the 'Request Account' menu item, and then select 'Temporary Account' from the drop down list that appears.

The 'Temporary Account Request Form' will open on screen.

5.1 Temporary Account Request Form

The 'Temporary Account Request Form' contains a series of fields which should be completed before requesting the account(s).



5.1.1 Temporary Account Details

The form contains the following fields which should be completed (fields marked with an asterisk are mandatory):

Account Group/Name* – Enter the Group Name for all Temporary Accounts that are being requested, e.g., "SCM Summer School".
Number of Accounts* – Enter the number of Temporary Accounts that are required in the Group, e.g., "30".
Reason for Accounts* – Enter a short description as to why the Temporary Accounts are required, e.g., "Access required for 30 children from local school, visiting SCM on Summer School programme".
Activation Date* – From the date picker, select the date that the Temporary Accounts should become active.
Long Term Account – This checkbox should only be checked if the Temporary Account is required for a time period longer than 30 days. It is very rare that this should be checked.
Days to Stay Active* – Enter the number of days for which the Temporary Accounts should be active, e.g., "20". The maximum number that can be entered is 30 days, unless the 'Long Term' checkbox has been checked, in which case the number must be between 31 and 365.
Initial Password* – Automatically generated password that all Temporary Accounts will use to log on to systems. This can be changed if necessary.
Responsible Staff Contact* – Defaulted to the name of the logged in user. Can be changed if necessary.

5.1.2 Services Required for the Accounts

Below the main detail of the form, there are two checkboxes which determine the access of each Temporary Account in the Group.

PC Login – Check this checkbox if the Temporary Account user will need to use a PC on campus.
Wi-fi Access – Check this checkbox if the Temporary Account user will need to connect to the wireless internet whilst on campus.

Once the form has been fully completed, click the 'Save' button to submit the application. A message will be shown on screen to confirm that the form was successfully submitted and the user will be returned to the Home Page.

5.2 Temporary Account Request Approval Process

On successful submission of the 'Temporary Account Request Form', an automated email is sent to the ITaCS Service Desk, who must review the request and either approve or decline it.

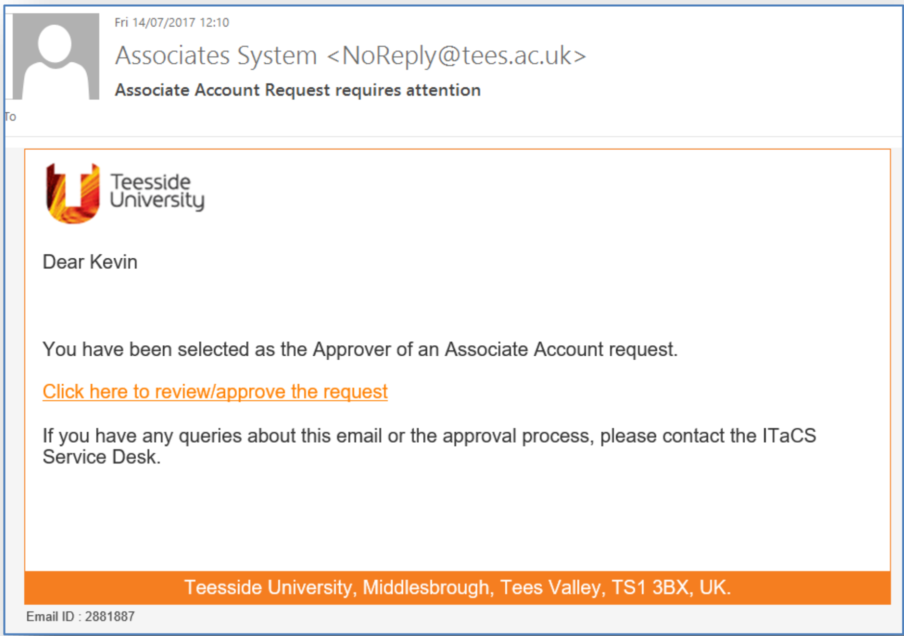
If the request is approved, the process of creating the accounts will be completed. Following this, the Service Desk will inform the Responsible Staff Contact of the accounts. If, however, the request is declined by the Service Desk, the Responsible Staff Contact will receive an email informing of this and the reason for the decision.

6. <u>Approvals Process</u>

6.1 Approving/Declining a Request for an Associate Account

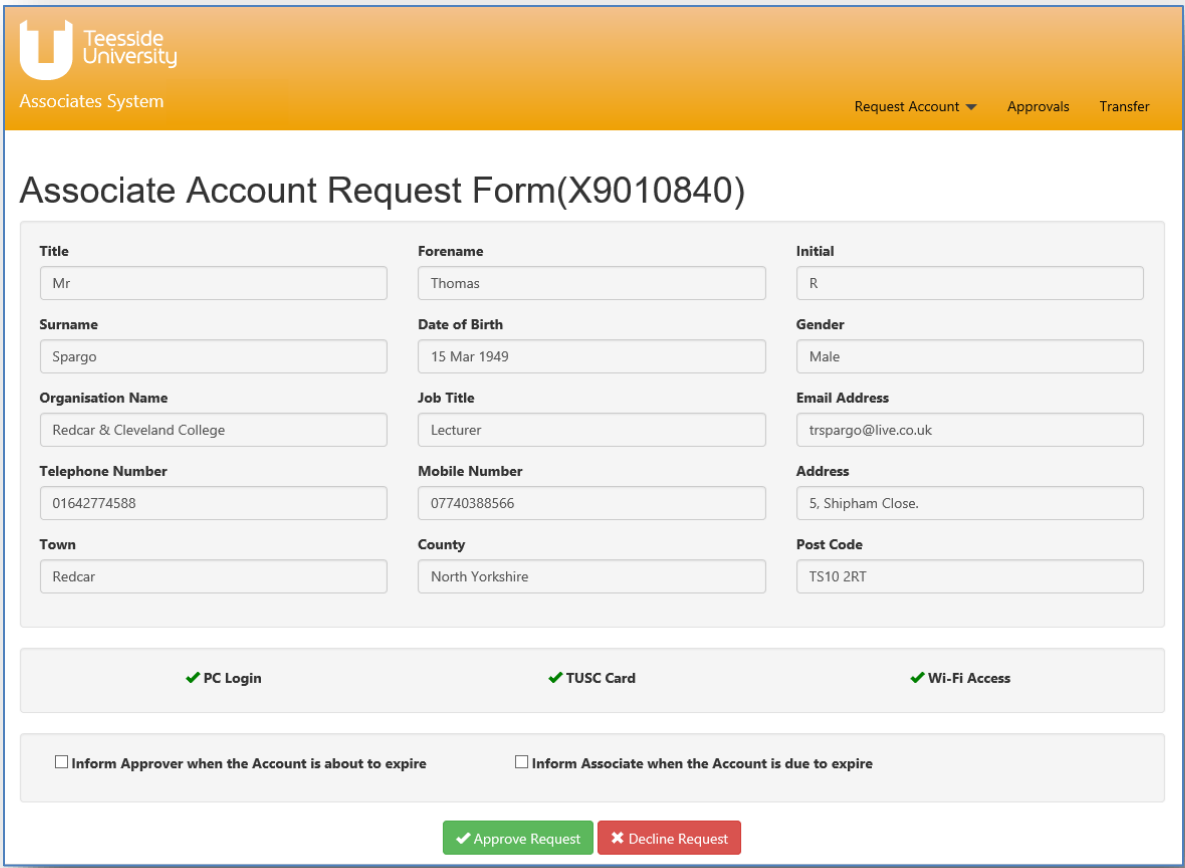
As a named 'Approver' for your School/Department, your name will be shown in the 'Approver' drop down list on the 'Associate Account Request Form', meaning that staff within the same School/Department can select you to approve their request.

When a request has been submitted, you will receive an automated email from the system, as shown below:



6.1.1 Viewing the Request

To view the request, click the link within the email. This will open the request on screen and display all of the information entered by the requester.



There are two checkboxes on the screen which can be checked or left blank. Placing a check in the boxes will ensure that an automated email is sent to the yourself (as the 'Approver') and/or the Associate 28 days before the Association is due to expire. If no action is taken (i.e., the Association is not renewed or extended), an email will then be received 14 days before the expiry, and then again 7 days before expiry.

6.1.2 Approving the Request

To approve the request, simply click the 'Approve Request' button.

Once approved, the request goes to the ITaCS Service Desk, where the process of creating the account will be completed. Following this, the Service Desk will inform the Associate of their account.

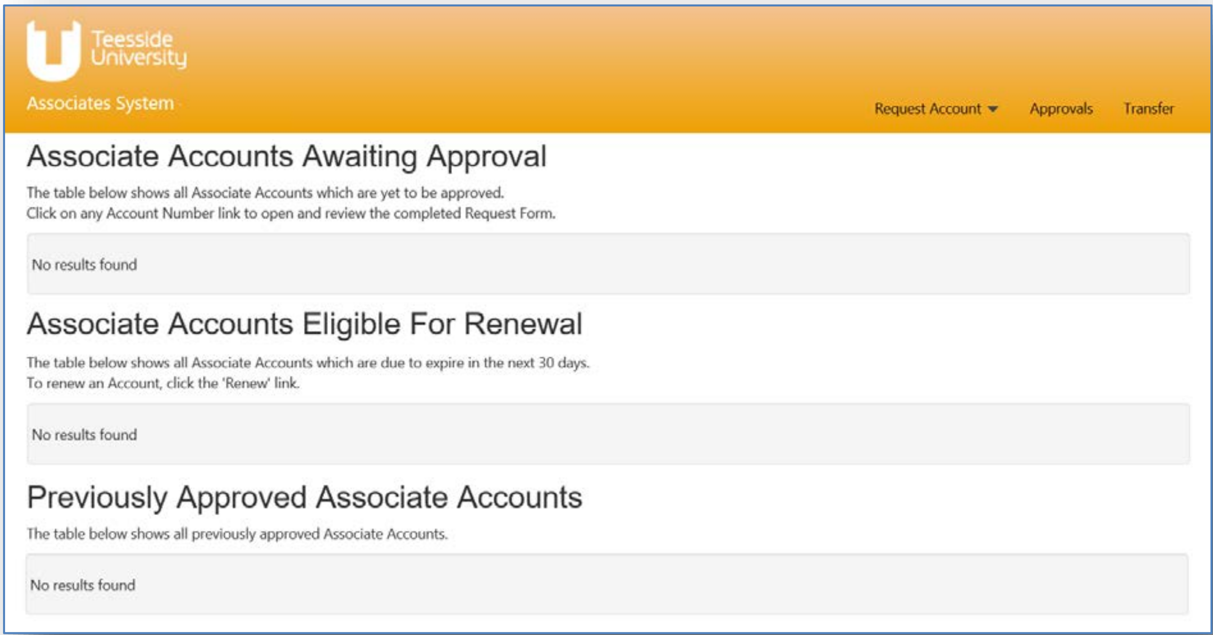
6.1.3 Declining the Request

To decline the request, click the 'Decline Request' button. This will open a pop up window, into which you are required to enter a reason for declining the account request. To submit the reason and close the window, click the 'Decline' button.

Any information entered into this window is sent in an automated email to the member of staff who made the original request.

6.2 Approvals Screen

The 'Approvals' screen can be accessed at any time by clicking the 'Approvals' link on the menu bar. The screen contains three tables detailing all activity relating to the approval of accounts.



6.2.1 Associate Accounts Awaiting Approval

This table shows all Associate Accounts that are awaiting approval. If there are any outstanding account requests, click on the Account Number (e.g., "X9010840") to open the details of the request and proceed with the approval process as described in Section 6.1.

6.2.2 Associate Accounts Eligible For Renewal

This table shows all Associate Accounts with an Association that is due to expire within the next 30 days. If any Accounts are shown in the table that you wish to renew, click on the 'Renew' link. This will open a pop up window containing a drop down list for the new 'Length of Association' (how long the Account will be active for). Select a duration and click the 'Renew' button to complete the action.

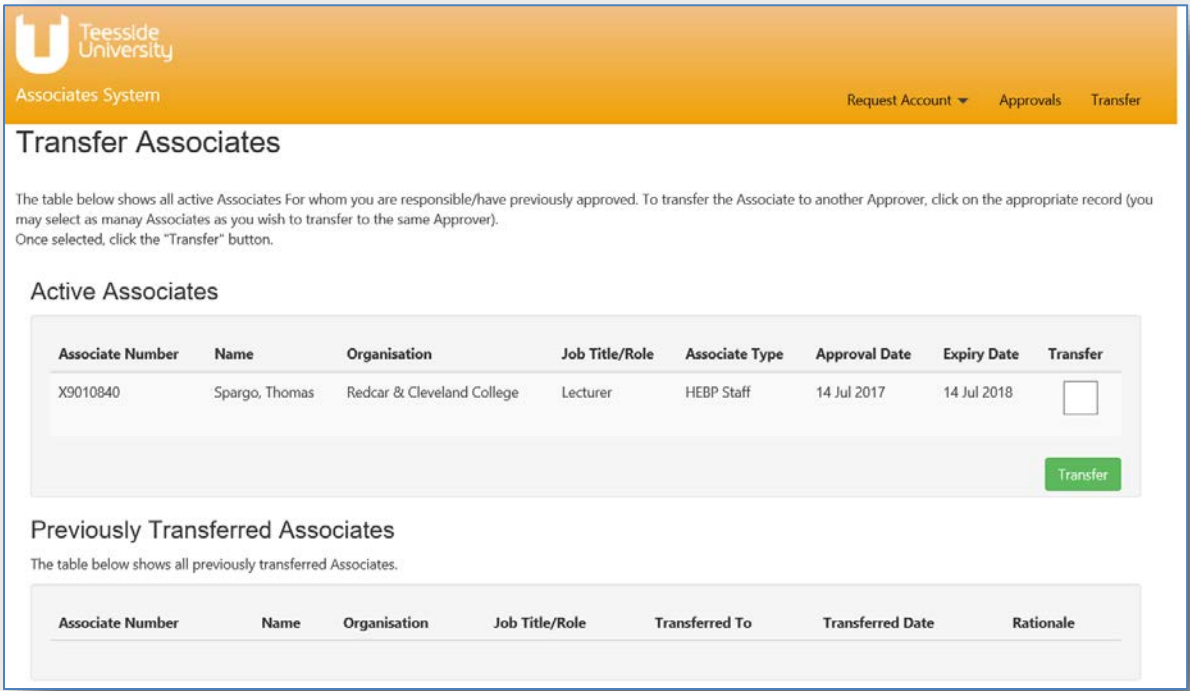
6.2.3 Previously Approved Associate Accounts

This table shows all Associate Accounts that you have personally approved in the past. To view the details of any Account, click on the Account Number.

7. Transfer Screen

The 'Transfer' screen can be accessed at any time by clicking the 'Transfer' link on the menu bar. An Associate can be transferred to another 'Approver' within your School/Department at any time, and in particular should be done if you are about to leave the University.

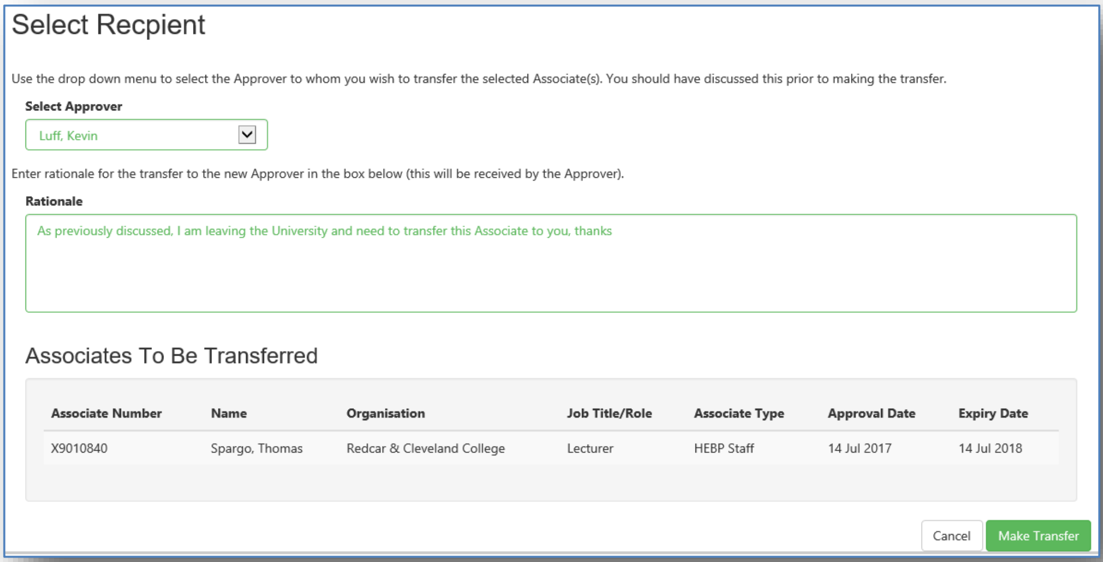
There are two tables on the screen, the first shows all active Associates who you have previously approved (therefore being eligible to be transferred) and the second table shows a history of all previously transferred Associates.



7.1 Transferring an Associate to another Approver

Before begin the process of transferring an Associate to another ‘Approver’ it is a good idea to have discussed this with them beforehand.

To transfer an Associate, click on the checkbox next to the relevant Associate (you can select one or multiple Associates to be transferred to the same ‘Approver’) and then click the ‘Transfer’ button. Having done this, the screen below will appear:



Use the drop down list to select the ‘Approver’ who is to receive the transferred Associate – note, this list will only contain ‘Approver’s from the same School/Department.

In the ‘Rationale’ box, enter the reasoning for transferring the Associate.

Click the ‘Make Transfer’ button to confirm the transfer. The receiving ‘Approver’ will receive an automated email informing them of the transfer and the Associate’s details.