



Associates System

User Guide – Staff with ‘Service Desk’ Role

Information Technology and Communication Services

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A large, abstract graphic at the bottom of the page consisting of several overlapping, semi-transparent geometric shapes in shades of orange, grey, and white, creating a layered, 3D effect.

2017

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2. Introduction

This guide has been created as a reference for University staff who have the 'ServiceDesk' 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, creating an Associate Accounts on an ad-hoc basis and requesting Temporary Accounts, as well as searching for Accounts within the system.

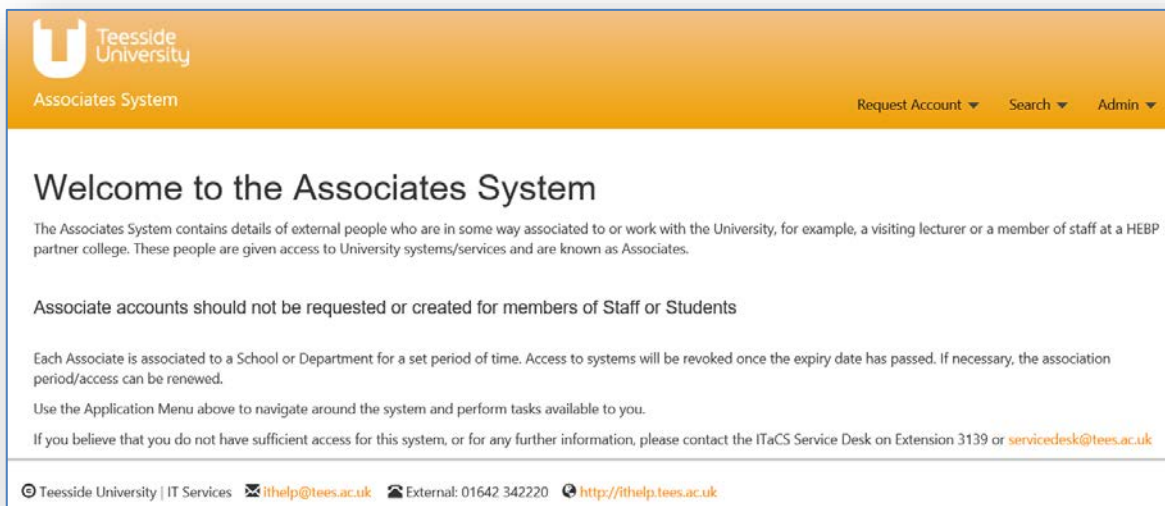
An Associate is an external person who is in some way associated with the University, for example, a visiting lecturer or a member of staff from a HEBP partner college.

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

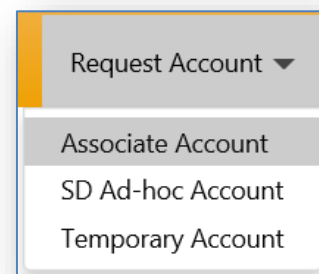
The Home Page contains information regarding Associates, including the important line "Associate accounts should not be requested for members of Staff or Students". Any user who falls into this category will already have system access as per their account.

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 'ServiceDesk' role will see the 'Request Account', 'Search' and 'Admin' options.

4. Requesting an Associate Account

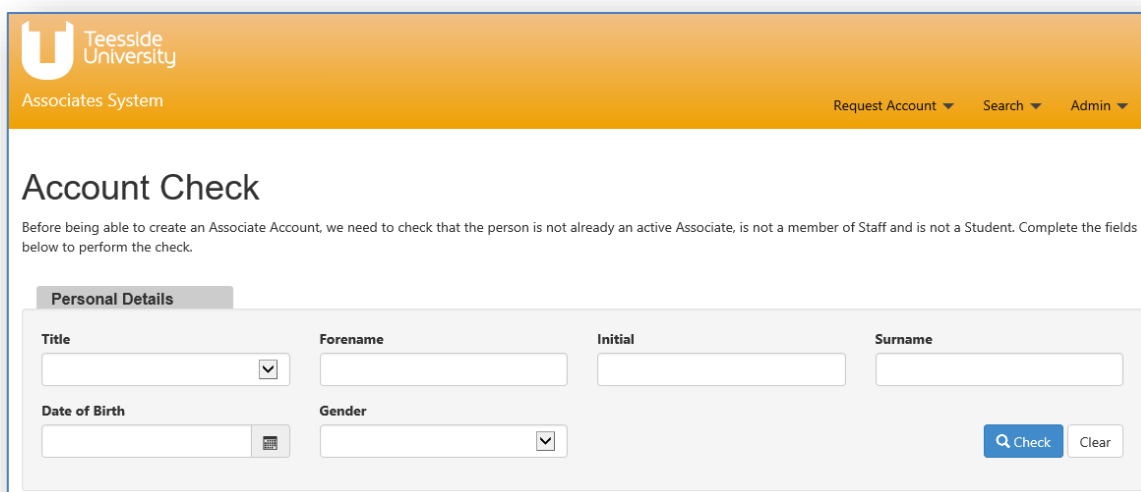
To begin the process of requesting an Associate Account, click the 'Request Account' menu item, and then select 'Associate Account' from the drop down list that appears (this is the method of requesting an account that general users will complete).



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 person in question.

A screenshot of the 'Account Check' screen. At the top left is the Teesside University logo and 'Associates System'. At the top right are navigation links: 'Request Account', 'Search', and 'Admin'. The main heading is 'Account Check'. Below it is a paragraph: 'Before being able to create an Associate Account, we need to check that the person is not already an active Associate, is not a member of Staff and is not a Student. Complete the fields below to perform the check.' There is a 'Personal Details' section with a tab. It contains fields for 'Title' (dropdown), 'Forename', 'Initial', 'Surname', 'Date of Birth' (calendar icon), and 'Gender' (dropdown). At the bottom right are 'Check' and 'Clear' buttons.

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.

The screenshot displays the 'Associates System' interface. At the top, there is a header with the Teesside University logo and the text 'Associates System'. Below the header, a message states: 'Before being able to create an Associate Account, we need to check that the person is not already an active Associate, is not a member of Staff and is not a Student. Complete the fields below to perform the check.' The form contains the following fields: Title (Mr), Forename (Thomas), Initial (R), Surname (Spargo), Date of Birth (15 Mar 1949), and Gender (Male). There are 'Check' and 'Clear' buttons. Below the form are three sections: 'Matching Associate Accounts', 'Matching Staff Accounts', and 'Matching Student Accounts', each with a 'No records found' message. At the bottom, a message reads: 'If no records were found, or the records that were found are not the individual for whom you were searching, click the button to request a new account.' A 'Request Associate Account' button is located at the bottom center.

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.

The screenshot shows the 'Request Account' form in the Teesside University Associates System. The form is organized into three main sections:

- Org. Details:** Contains a dropdown menu for 'Organisation' with an 'Add New' button next to it, and a text input field for 'Job Title / Role'.
- Contact Details:** Contains several input fields: 'Email Address', 'Confirm Email Address', 'Telephone Number', and 'Mobile Number'. Below these are fields for 'Address', 'Town', 'County', and 'Post Code'.
- Association Details:** Contains dropdown menus for 'School/Department' (with 'ITaCS' selected), 'Approver', 'Association Type', and 'Length of Association'. Below these is a note: 'Associates of the selected Type will receive the access shown below. Please uncheck any that are not required for this account.'

At the bottom of the form, there are two buttons: a green 'Submit' button and a white 'Cancel' button.

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* – Select an Approver from the drop down list (the list displays Approvers from the same School/Department), e.g., “Poole, Geoffrey”

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.

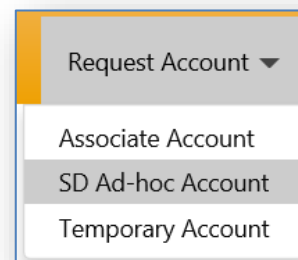
4.3 Request Approval Process

On successful submission of 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.

If the request is approved it is passed on 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. If, however, the request is declined by the Approver, you will receive an email informing you of this and the reason for the decision.

5. Creating an Ad-hoc Account

On occasion, 'ServiceDesk' users will be required to quickly create an Associate Account on the behest of another member of staff, without going through the approval process. To begin this process, click the 'Request Account' menu item, and then select 'SD Ad-hoc Account' from the drop down list.

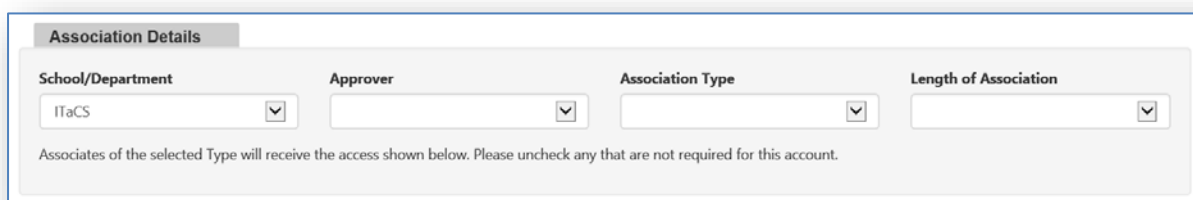


The user will then be taken to the 'Account Check' screen. This part of the process is the same as that described in Section 4.1, above. Having completed the account checking process, the screen below will be displayed.

5.1 Service Desk Ad-hoc Account Form

The full 'Service Desk Ad-hoc Account Form' opens when a user has not found an existing account and has clicked the 'Request Associate Account' button. The whole form is exactly the same as the one described in Section 4, except for what is detailed below.

5.1.1 Completing Association Details

A screenshot of the 'Association Details' form section. It contains four dropdown menus: 'School/Department' (with 'ITaCS' selected), 'Approver', 'Association Type', and 'Length of Association'. Below the dropdowns is a note: 'Associates of the selected Type will receive the access shown below. Please uncheck any that are not required for this account.'

When completing an Ad-hoc form, the 'Association Details' section can be completed on behalf of the member of staff who has requested the Account. In this instance, the ServiceDesk user would complete the details as below :

School/Department – Select the School/Department of the person requesting the Account

Approver – Select the person requesting the Account, or an appropriate Approver from the same School/Department

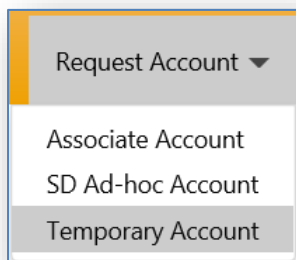
Association Type – Select appropriate Association Type

Length of Association – Select appropriate Length of Association

5.2 Ad-hoc Account Approval Process

It is assumed that the request has already been approved and so, on successful submission of the 'Ad-hoc Account Form', an automated email is sent 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. Requesting a Temporary Account



A 'Temporary Account' is a scaled-down version 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 user will then be taken to the 'Temporary Account Request Form'.

6.1 Temporary Account Request Form

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

A screenshot of the Teesside University Associates System 'Temporary Account Request Form'. The form is displayed on a white background with an orange header. The header contains the Teesside University logo, the text 'Associates System', and navigation links for 'Request Account', 'Search', and 'Admin'. The form title is 'Temporary Account Request Form'. Below the title is a paragraph of text explaining the purpose of the form. The form contains several input fields: 'Account Group/Name', 'Number of Accounts (max 100)', 'Reason for Accounts', 'Activation Date', 'Long Term Account', 'Days to Stay Active', 'Initial Password', and 'Responsible Staff Contact'. There are also checkboxes for 'PC Login' and 'WiFi Access'. At the bottom of the form, there is a note: 'Please note - Temporary Accounts for persons under the age of 18 should only be used where sessions are supervised'. Below the note are 'Save' and 'Cancel' buttons.

6.1.1 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.

6.1.2 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 log in to 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.

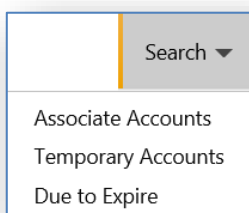
Once the form has been fully completed, click the ‘Save’ button to submit the application. A message will be shown on screen to confirm that the form was successfully submitted and the user will be returned to the Home Page.

6.2 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.

7. 'Search' Menu

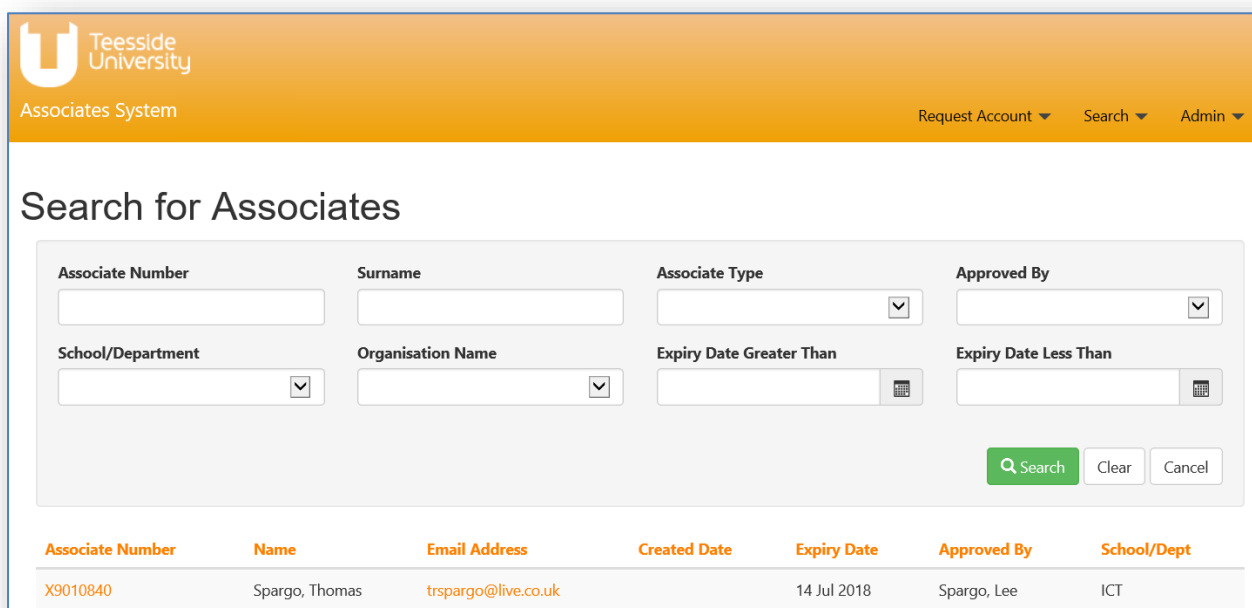


The 'Search' Menu is only visible by users with the 'ServiceDesk' role and gives the user the ability to search for Associate Accounts or Temporary Accounts, and to see a list of accounts which will soon expire.

Details of each search screen and how to use them, are below.

7.1 Search for Associate Accounts

To open the search screen, click the 'Search' menu item and then select the 'Associate Accounts' option. As default, all Associates are shown in the table at the bottom of the screen. The column headings can be clicked to sort the data (in ascending/descending order), whilst the filters can be used to locate a single account or all Associates matching a set of criteria.



Associate Number	Name	Email Address	Created Date	Expiry Date	Approved By	School/Dept
X9010840	Spargo, Thomas	trspargo@live.co.uk		14 Jul 2018	Spargo, Lee	ICT

7.1.1 Using the Associate Search Filters

The filters on the form are described below:

Associate Number – Textbox to enter a specific Associate Number, e.g., “X9010840” (will return one Associate)

Surname – Textbox to enter a specific Surname, e.g., “Spargo” (will return all Associates with the entered Surname)

Associate Type – Dropdown menu to select a specific Associate Type, e.g., “HEBP Staff” (will return all Associates matching the selected Type)

Approved By – Dropdown menu to select the name of an Approver, e.g., “Gettings, Mike” (will return all Accounts that were approved by the selected Approver)

School/Department – Dropdown menu to select a School/Dept, e.g., “School of Computing” (will return all Accounts associated to the selected School/Dept)

Organisation Name – Dropdown menu to select an Organisation, e.g., “Middlesbrough College” (will return all Accounts belonging to the selected Organisation)

Expiry Date Greater Than – Calendar to select a date, e.g., “01/12/2017” (will return all Accounts with an Expiry Date after the selected date)

Expiry Date Less Than – Calendar to select a date, e.g., “31/12/2017” (will return all Accounts with an Expiry Date before the selected date)

There are three buttons beneath the filters:

‘Search’ – clicking this button will search for accounts matching the entered values and update the table at the bottom of the screen

‘Clear’ – clicking this button will clear all values entered into the filters

‘Cancel’ – clicking this button will return the user to the home page

7.2 Search for Temporary Accounts

To open the search screen, click the 'Search' menu item and then select the 'Temporary Accounts' option. As default, all Temporary Accounts are shown in the table at the bottom of the screen. The column headings can be clicked to sort the data (in ascending/descending order), whilst the filters can be used to locate a single account or all Temporary Accounts matching a set of criteria.

The screenshot shows the 'Search for Temporary Accounts' interface. At the top, there is a header with the Teesside University logo and 'Associates System' text. On the right, there are navigation links: 'Request Account', 'Search', and 'Admin'. The main heading is 'Search for Temporary Accounts'. Below this is a search form with the following fields:

- Temporary Account Number (text input)
- Account Group/Name (dropdown menu)
- School/Department (dropdown menu)
- Responsible Staff Contact (dropdown menu)
- Activation Date After (calendar input)
- Activation Date Before (calendar input)
- Expiry Date Greater Than (calendar input)
- Expiry Date Less Than (calendar input)

Below the form are three buttons: 'Search' (green), 'Clear', and 'Cancel'. Below the buttons is a table with the following columns: Account Number, Account Group/Name, Active Date, Expiry Date, Responsible Staff Contact, and School/Dept. The table contains three rows of data:

Account Number	Account Group/Name	Active Date	Expiry Date	Responsible Staff Contact	School/Dept
Z1079683	Northumbria staff visit	25 May 2017	26 May 2017	Rhodes, Philip	ICT
Z1079684	Northumbria staff visit	25 May 2017	26 May 2017	Rhodes, Philip	ICT
Z1079685	Northumbria staff visit	25 May 2017	26 May 2017	Rhodes, Philip	ICT

7.2.1 Using the Temporary Account Search Filters

The filters on the form are described below:

Temporary Account Number – Textbox to enter a specific Temporary Account Number, e.g., “Z1079683” (will return one Temporary Account)

Account Group/Name – Dropdown menu to select a specific Group of Temporary Accounts, e.g., “SCM Summer School” (will return all Temporary Accounts belonging to the selected Group)

School/Department – Dropdown menu to select a School/Dept, e.g., “School of Computing” (will return all Temporary Accounts associated to the selected School/Dept)

Responsible Staff Contact – Dropdown menu to select the name of a staff member who is responsible for Temporary Accounts, e.g., “Taylor, Bill” (will return all Temporary Accounts for which the selected person is responsible)

Activation Date After – Calendar to select a date, e.g., “01/12/2017” (will return all Accounts which become active after the selected date)

Activation Date Before – Calendar to select a date, e.g., “31/12/2017” (will return all Accounts which become active before the selected date)

Expiry Date Greater Than – Calendar to select a date, e.g., “01/12/2017” (will return all Accounts with an Expiry Date after the selected date)

Expiry Date Less Than – Calendar to select a date, e.g., “31/12/2017” (will return all Accounts with an Expiry Date before the selected date)

There are three buttons beneath the filters:

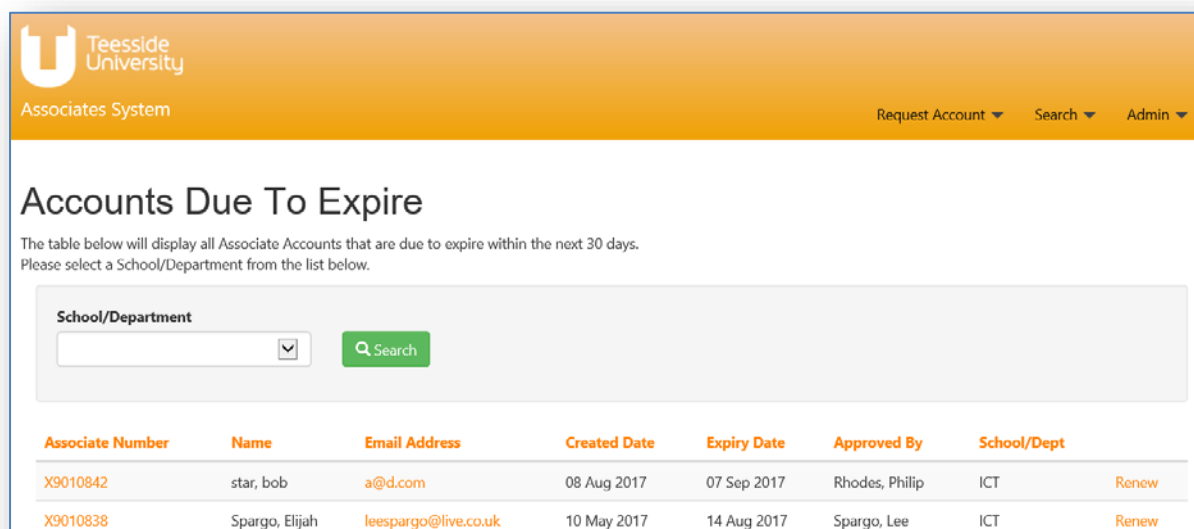
‘Search’ – clicking this button will search for accounts matching the entered values and update the table at the bottom of the screen

‘Clear’ – clicking this button will clear all values entered into the filters

‘Cancel’ – clicking this button will return the user to the home page

7.3 Accounts Due To Expire

To open the screen, click the ‘Search’ menu item and then select the ‘Due to Expire’ option. As default, all Associates Accounts that are due to expire in the next 30 days are shown in the table at the bottom of the screen.



The screenshot shows the 'Accounts Due To Expire' page in the Teesside University Associates System. The page has an orange header with the university logo and navigation links: 'Request Account', 'Search', and 'Admin'. Below the header, the title 'Accounts Due To Expire' is displayed, followed by a brief instruction: 'The table below will display all Associate Accounts that are due to expire within the next 30 days. Please select a School/Department from the list below.' A search filter is provided with a dropdown menu for 'School/Department' and a green 'Search' button. Below the filter is a table with the following data:

Associate Number	Name	Email Address	Created Date	Expiry Date	Approved By	School/Dept	
X9010842	star, bob	a@d.com	08 Aug 2017	07 Sep 2017	Rhodes, Philip	ICT	Renew
X9010838	Spargo, Elijah	leespargo@live.co.uk	10 May 2017	14 Aug 2017	Spargo, Lee	ICT	Renew

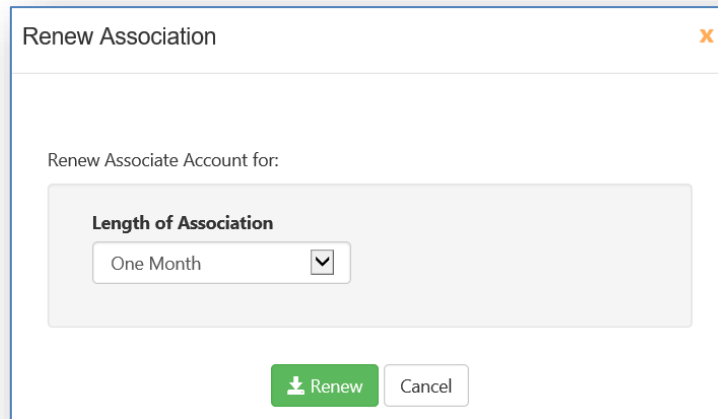
7.3.1 Using the Temporary Account Search Filters

The filter on the form is described below:

School/Department – Dropdown menu to select a School/Dept, e.g., “Information Technology and Communication Services” (will return all Associate Accounts associated to the selected School/Dept that are due to expire in the next 30 days)

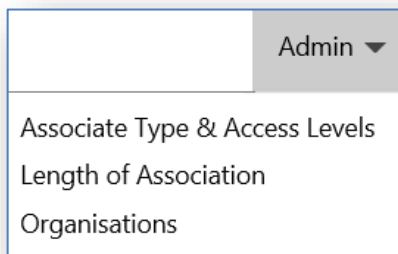
7.3.2 Renewing an Associate Account from the Due To Expire Screen

Accounts that are due to expire can be renewed by ServiceDesk users. To do this, click the 'Renew' button on the appropriate row of the table. The pop-up window will appear.



Select the Length of Association required, and click the 'Renew' button. The Associate will be sent an automated email to inform them of the renewal.

8. 'Admin' Menu



The 'Admin' Menu is only visible by users with the 'ServiceDesk' role and gives the user the ability to add or edit lookup values in the system.

Details of each search screen and how to use them, are below.

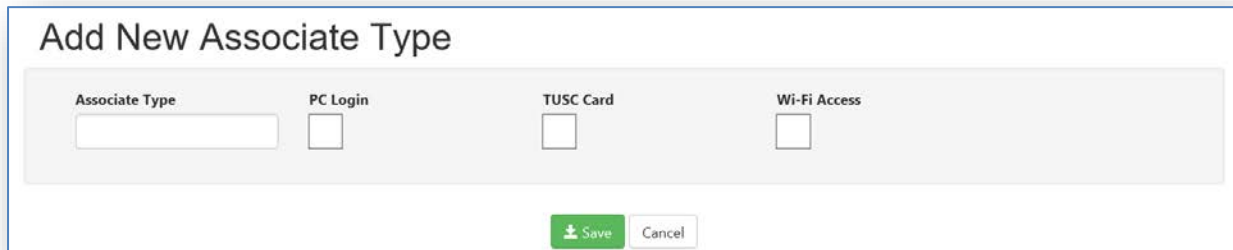
8.1 Associate Type & Access Levels

To open this screen, click the 'Admin' menu item and then select the 'Associate Type & Access Levels' option. The table displays all Associate Types and their associated levels of access. These feed through to the Associate Account Request Form (where the user selects the Associate Type).

These access levels have been agreed by the project board and should not be edited unless further agreements/decisions have been made.

8.1.1 Adding a New Associate Type

In the event that a new Associate Type is required, begin the process of adding one by clicking the 'Add' link at the top of the screen. The screen below will open.



The screenshot shows a form titled "Add New Associate Type". It contains four input fields: "Associate Type" (a text box), "PC Login" (a checkbox), "TUSC Card" (a checkbox), and "Wi-Fi Access" (a checkbox). At the bottom of the form, there are two buttons: "Save" (green) and "Cancel" (white).

The fields are as described below:

Associate Type – Enter a name/description for the Associate Type, e.g., “Board of Governors”

PC Login – Place a check in the checkbox if the Associate Type should have PC Login as default (this can be turned off when a user is requesting the an account)

TUSC Card – Place a check in the checkbox if the Associate Type should have a TUSC Card printed as default (this can be turned off when a user is requesting the an account)

Wi-Fi Access – Place a check in the checkbox if the Associate Type should have a access to the eduroam wi-fi service (this can be turned off when a user is requesting the an account)

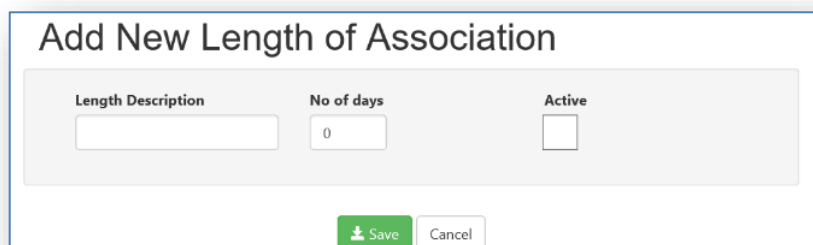
Having completed the form, click the 'Save' button. The new Associate Type will then be shown in the table on the 'Associate Type & Access Levels' screen, and will appear as an option in the 'Associate Type' dropdown list on the 'Associate Account Request Form'.

8.2 Length of Association

To open this screen, click the 'Admin' menu item and then select the 'Length of Association' option. The table displays all Lengths of Association currently in the system and these are options in the 'Length of Association' dropdown menu on the 'Associate Account Request Form'.

8.2.1 Adding a New Length of Association

To add a new Length of Association, click the 'Add' link at the top of the screen. The screen to the right will open.



The screenshot shows a form titled "Add New Length of Association". It contains three input fields: "Length Description" (a text box), "No of days" (a text box with the value "0"), and "Active" (a checkbox). At the bottom of the form, there are two buttons: "Save" (green) and "Cancel" (white).

The fields are as described below:

Length Description – Enter a name/description for the Length of Association, e.g., “One Month”

No of Days – Enter the number of days that the Length of Association is for, e.g., “30”

Active – Place a check in the checkbox to make the Length of Association active/to ensure that it appears in the dropdown on the ‘Associate Account Request Form’.

Having completed the form, click the ‘Save’ button. The new Length of Association will then be shown in the table on the ‘Length of Association’ screen and it will appear as an option in the ‘Length of Association’ dropdown list on the ‘Associate Account Request Form’.

8.3 Organisations

To open this screen, click the ‘Admin’ menu item and then select the ‘Organisations’ option. The table displays all Organisations currently in the system and these are options in the ‘Organisation’ dropdown menu on the ‘Associate Account Request Form’.

8.3.1 Adding a New Organisation

To add a new Organisation, click the ‘Add’ link at the top of the screen. The screen below will open.

The screenshot shows a web form titled "Add New Organisation". It contains four input fields: "Organisation Name", "Organisation Address", "Post Code", and "Active". The "Active" field is a checkbox. Below the fields are two buttons: "Save" (green) and "Cancel" (white).

The fields are as described below:

Organisation Name – Enter the name of the Organisation, e.g., “Middlesbrough College”

Organisation Address – Enter the address of the Organisation, e.g., “Dock Street, Middlesbrough”

Organisation Post Code – Enter the post code of the Organisation, e.g., “TS2 1AD”

Active – Place a check in the checkbox to make the Organisation active/to ensure that it appears in the dropdown on the ‘Associate Account Request Form’.

Having completed the form, click the ‘Save’ button. The new Organisation will then be shown in the table on the ‘Organisation’ screen and it will appear as an option in the ‘Organisation’ dropdown list on the ‘Associate Account Request Form’.