



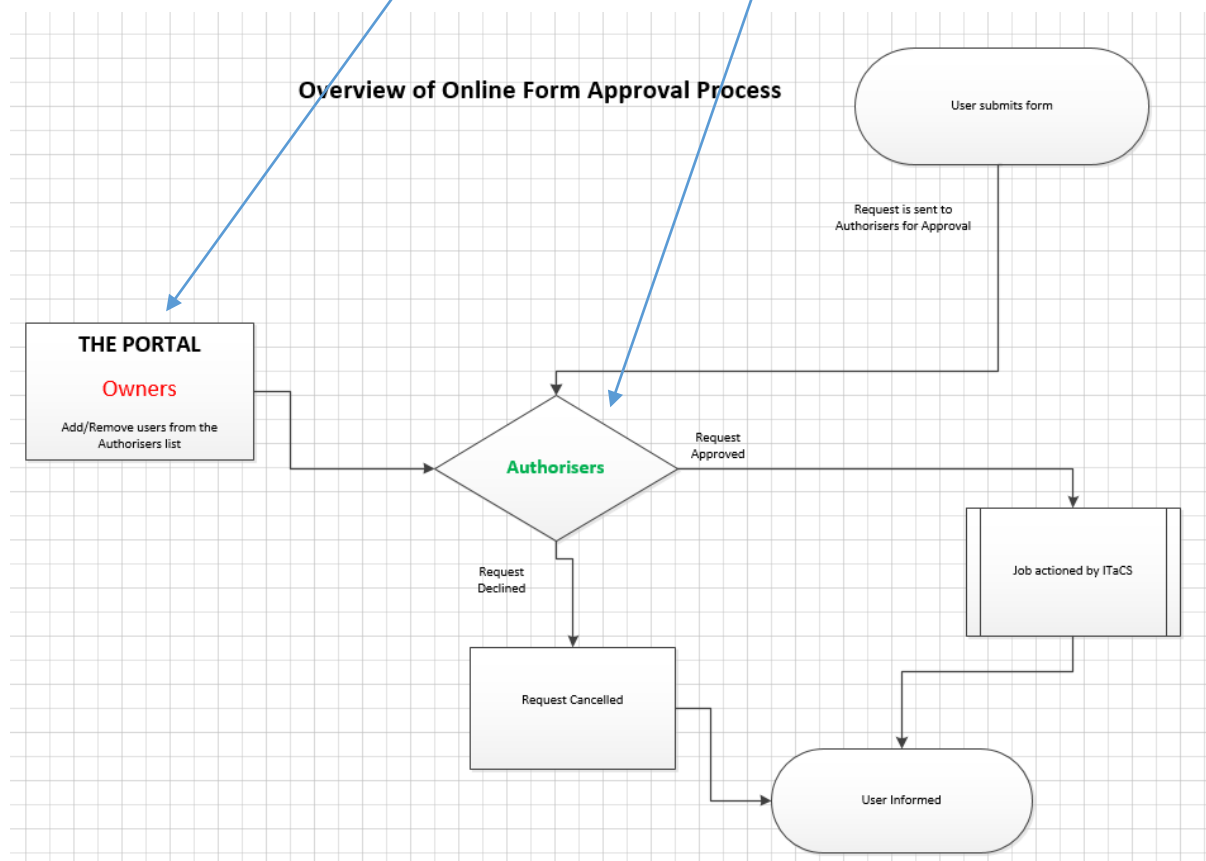
# Online Form Authorisers Portal



## User Guide

### What is the Portal used for?

The Portal is used by “Portal Owners” to designate Authorisers to online forms. When an online form is submitted, the Authorisers either Approve or Decline requests:



### Benefits to the Business

- Online Form Authorisers are managed by the schools/departments. The Portal owner(s) have a much better idea of who the Authorisers are likely to be within their own School/Department
- As a Portal owner, there is very little work involved in managing this system. -The Authorisers are unlikely to change that often
- Simple 2 step system to add/remove authorisers from forms

## Who has access to the Portal?

The Portal is only accessible by “Portal Owners”. Each School/Department has one or more named Portal owners.

The full list of Portal Owners is here:

<https://unity3.tees.ac.uk/departments/ict/Systems/0070/Operational/Online%20Form%20Authorisers%20Group%20Owners.docx>

If you wish to change your school/department Portal Owners, then please contact the IT Service Desk and mention the change of owner(s) for the “K2 Portal Owners Group”

The Service Desk can be contacted via any of the methods here:

<https://extra.tees.ac.uk/helpcentre/Pages/default.aspx>

## Adding/Removing Authorisers

- 1) Portal owners, please use the following link:

<https://forms.tees.ac.uk/Runtime/Runtime/Form/Online+Form+Authorisers+Portal/>

*Note: You may be prompted for your UserID and password if accessing the Portal from a device which is not connected to the University Network*

- 2) When the form opens, you will be presented with a list of currently available online Forms (Section 1a):

Welcome Habby Matharoo

1. Double-Click on a Form from the “Online Forms List” (Section 1a) to display the corresponding Authorisers in ICT (Section 1b)

2. Add or Remove Authorisers from the Form by typing in their User ID (e.g. U1234567) in the boxes provided and clicking on Add/Remove (Section 2)

| 1a |   | Online Forms List |
|----|---|-------------------|
| ID | Form Name   | Notes             |
| 1  | <a href="#">Email on Phone &amp; Tablets Request Form</a> |                   |
| 2  | <a href="#">Privacy and Monitoring Form</a>               |                   |

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- 3) Double-click on a form in the list.

You will then be presented with a list of current Authorisers (Section 1b). In the example below, I have clicked the “Email on Phone & Tablets Request Form”. If this is a new form, then the Authorisers list will be empty.

*Note: You can only view, add and remove Authorisers from your own School/Department*

| 1a Online Forms List |                                       |       |
|----------------------|---------------------------------------|-------|
| ID                   | Form Name                             | Notes |
| 1                    | Email on Phone & Tablets Request Form |       |
| 2                    | Privacy and Monitoring Form           |       |

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| 1b Email on Phone & Tablets Request Form Authorisers ICT |                 |                       |            |
|--|-----------------|-----------------------|------------|
| User ID  | Name            | Email                 | Department |
| U0011361   | Habby Matharoo  | H.Matharoo@tees.ac.uk | ICT        |
| STTEST002  | User2 STTEST002 | STTEST002@tees.ac.uk  | ICT        |

- 4) To add/remove Authorisers for a form (Section 2), type the UserID (i.e. U1234567) in the appropriate box and click on the Add or Remove button:


| 2 Add or Remove Authorisers            |  |
|--|--|
| <input type="text" value="sttest001"/> | <input type="text" value="Type Authoriser User ID"/> |
| <input type="button" value="+ Add"/>   | <input type="button" value="X Remove"/>              |

Form Name: Email on Phone & Tablets Request Form  
 AD Group Name: K2 Email on Phone and Tablets Form Authorisers


### How will Portal Owners be notified when a new form is released?

- 1) ITaCS will contact the Portal Owners via email when a new form is released.
- 2) Portal owners will be required to designate Authorisers to the new form

*Note: Users from your School/Department will not be able to access a Form if no Authorisers have been assigned and will be re-directed to an Access Denied page similar to below:*



## Email on Phone & Tablets Request Form



### Access Denied

There are no designated Authorisers from your School/Department to Approve any requests for this form

Please contact one of the below Portal Managers to assign Authorisers to this form

| Name           | Department | Email                | Telephone Number |
|----------------|------------|----------------------|------------------|
| Test STTEST006 | Habtest    | STTEST006@tees.ac.uk |                  |