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.

Please note that as of August 2021, new Associates do not automatically receive a Microsoft 365 (Word, Excel, PPT) licence to use desktop applications. Instead they will automatically receive online access via Office.com. When requesting an Associate account the line manager will need to specify Associate Premium when creating the 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:
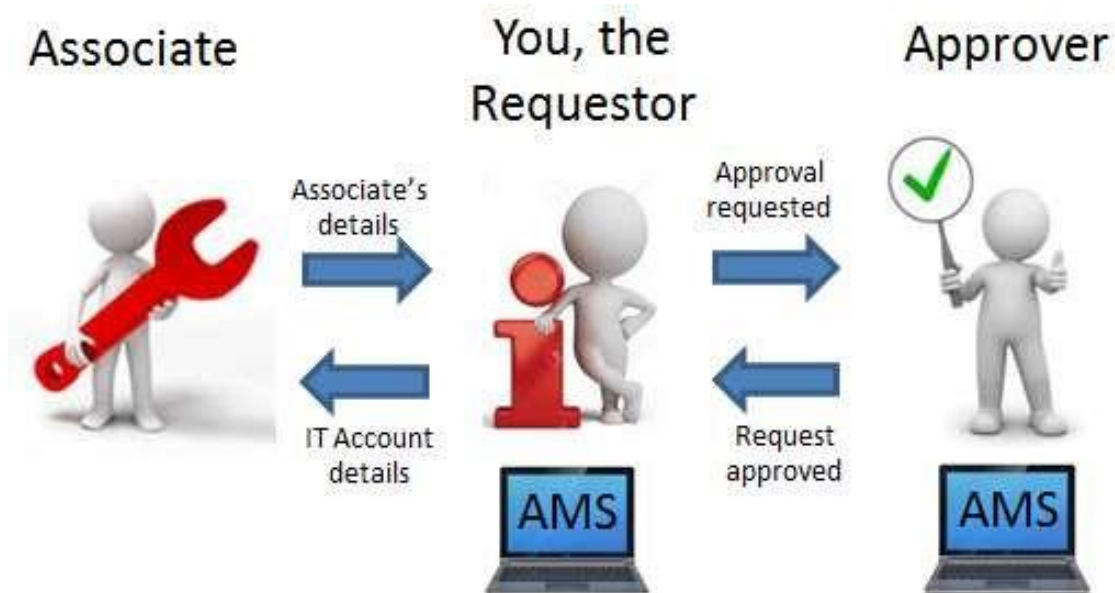
If you need any further assistance on any of the topics in this guide, please contact the IT Helpdesk.
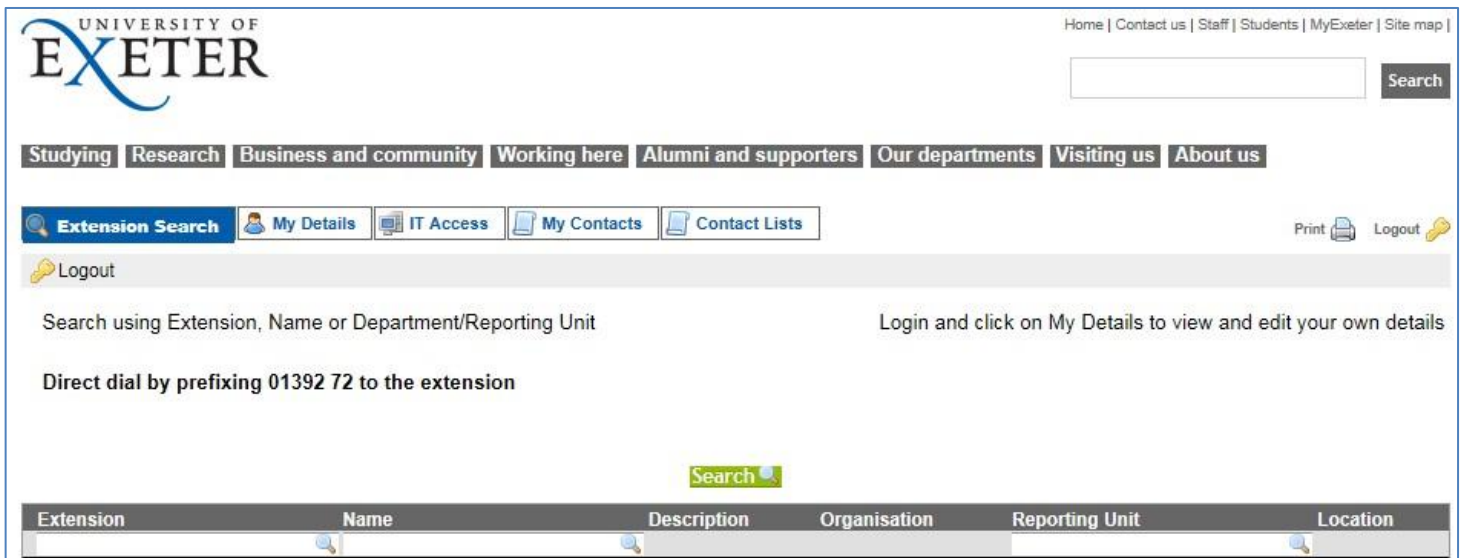
Access the University Directory

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

will give you the login screen as shown below:

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:

IT Access

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

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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.

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.

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

IT Access Request - Exeter Associate Premium

IT Access for associates requiring additional chargable software. The Associate Premium account has an additional charge of £44.64 +VAT per year, giving access to the Desktop Applications for Microsoft Office. You will be contacted separately to confirm the budget to charge for this Premium access. If the associate requires online 'browser only' access to the Microsoft Office services, the standard Exeter Associate account would provide this at no charge.

Title	-- Please select --
Forename	
Surname	
Enter IT Account ID to keep an old account - eg abc123	
Gender	-- Please Select --
Date of birth	dd/mm/yyyy
College/Service	-- Please Select --
Photograph	Choose file No file chosen Upload a photograph if access card is required
Please enter a Contact Address	
Staff member responsible for training. Search by surname.	Find User
Start date	dd/mm/yyyy
End date	dd/mm/yyyy 5 Years
Notes/purpose	
Message	Your request for IT access requires approval. Once it has been approved you will be sent a link containing the account details.

Submit Request

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:

Field		Input
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	○	Browse...
Please enter a Contact Address	○	
Start date	○	dd/mm/yyyy
End date	○	dd/mm/yyyy 2 Years
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:

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.

Please note: The Associate will also need to setup themselves on Multi-Factor Authentication
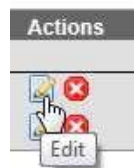
4 Amend an existing Associate's IT account

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

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	Ms	
Forename	Jane	
Surname	Smith	
Library Access	Yes	
University Card Required	Yes	
IT Account required	Yes	
Trent Reference Number (If known)		
Enter IT Account ID to keep an old account - eg abc123		
Gender	Female	
Date of Birth	06/04/1968	
College/Service	Academic Services	
Discipline	Academic Services	
Photograph	[ ] Browse...	Please upload a photograph if one is available
Please enter a Contact Address	1 Rose Cottage Tiverton Exeter EX16 5AZ	
Start date	03/04/2014	
End date	31/08/2014 [2 Years]	
Electronic Library Access	Yes	
Notes / Reason for request	Jane will be working on the KSpa 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.	

[Save]

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.

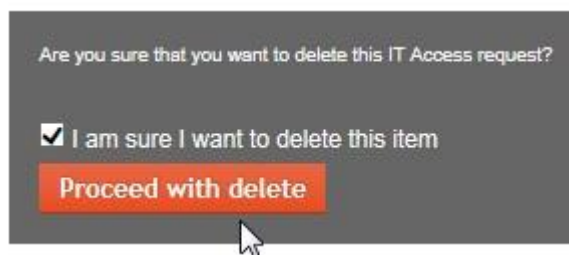# 5   Delete an existing Associate's IT account

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

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 :

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

6 Changing an existing Associate's IT account

If you wish to upgrade or downgrade an Associate account (Standard Associate with online Microsoft 365 access or Premium Associate with Microsoft 365 desktop access) please add an end date to the original request (cancel it) then recreate the Associate in the new profile (i.e. 'Exeter Associate' to 'Exeter Associate Premium'). Please note you need to ensure there is NO gap between requests.