

## How to request an Associate IT account

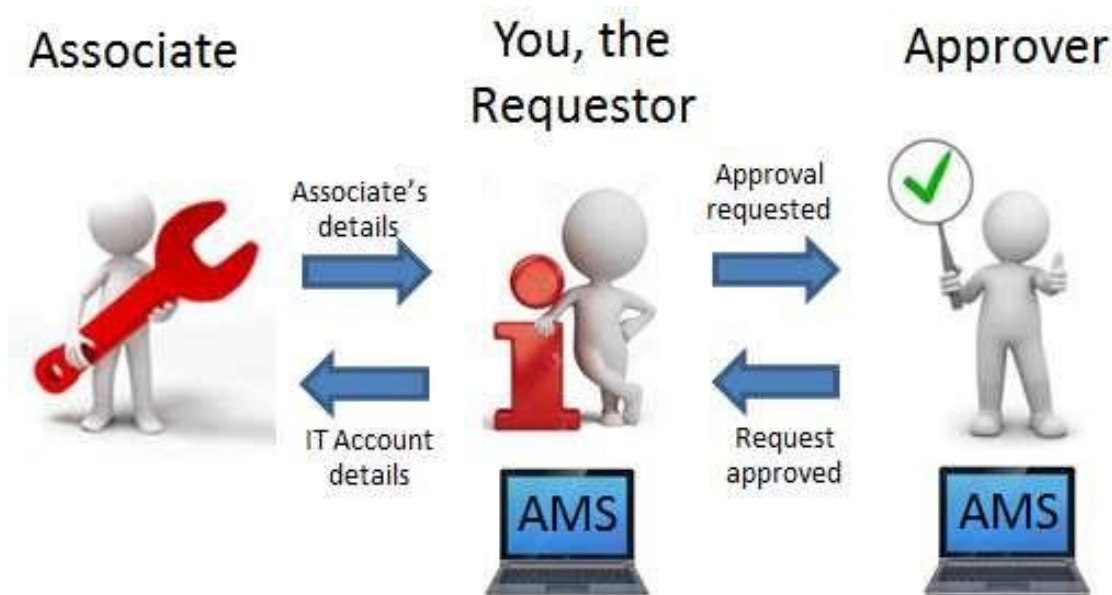
This guide gives details on how to request or amend an IT account for a University of Exeter Associate.

**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](#).

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## Access the University Directory

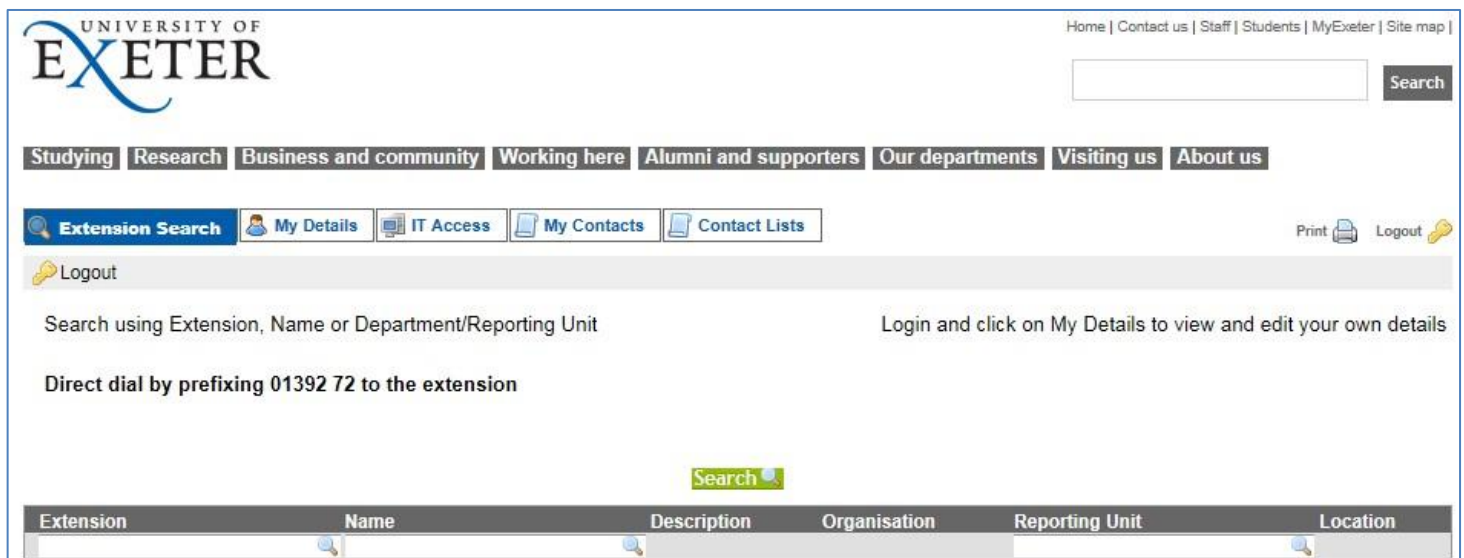
You can access the Directory at <https://directory.exeter.ac.uk/login.dhtml> This will give you the login screen as shown below:



The image shows the login screen for the University of Exeter Phone Directory. At the top is the University of Exeter logo. Below it, the text "Phone Directory Login" is centered. There are two input fields: "Username" with the value "as660" and "Password" with masked characters. Below the password field is a checkbox labeled "Remember Me". A blue "Login" button is at the bottom, with a mouse cursor pointing at it.

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:

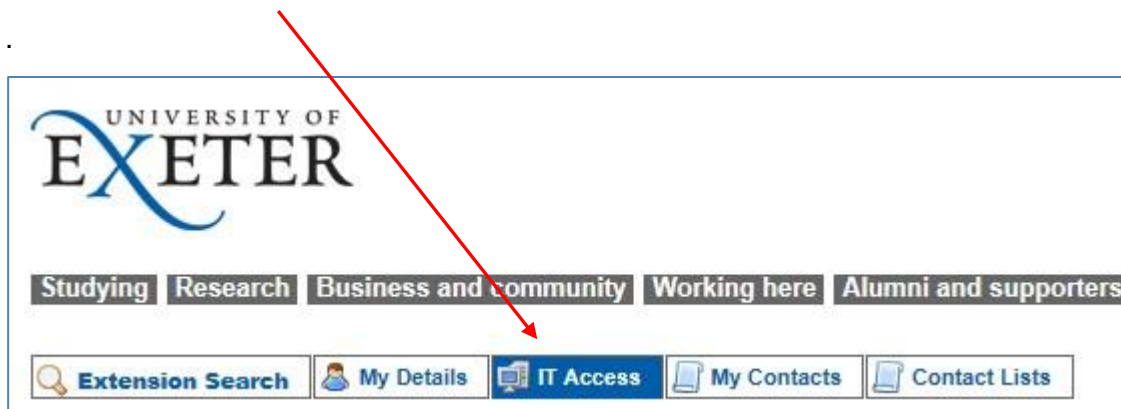


The image shows the University of Exeter Directory home page. At the top left is the University of Exeter logo. At the top right are links: Home | Contact us | Staff | Students | MyExeter | Site map |. Below these is a search bar with a "Search" button. A navigation bar contains links: Studying | Research | Business and community | Working here | Alumni and supporters | Our departments | Visiting us | About us. Below this is a row of buttons: Extension Search, My Details, IT Access, My Contacts, and Contact Lists. On the right of this row are links: Print, Logout, and a key icon. Below the buttons is a "Logout" link with a key icon. The main content area has two lines of text: "Search using Extension, Name or Department/Reporting Unit" and "Login and click on My Details to view and edit your own details". Below this is a line of text: "Direct dial by prefixing 01392 72 to the extension". At the bottom is a "Search" button with a key icon. Below the search button is a table with the following headers: Extension, Name, Description, Organisation, Reporting Unit, and Location. The table is currently empty.

Extension	Name	Description	Organisation	Reporting Unit	Location
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## 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](#).

## 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.

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

Logout

Request New IT Access | Check Existing Requests | Approve Requests | Activate Account

Search using Extension, Name or ID

Direct dial by prefixing 01392 72 to the extension

Extension	Name	Reporting Unit	Location
	Exeter Associate		
	Exeter Associate Premium		
	External Examiners		
	Honorary Appointment		
	Innovation Centre		
	Keypath		
	Medical School Exeter Academic		
	Medical School Exeter Research		
	Medical School Truro Academic		
	Medical School Truro Research		
	Staff Retired		
	Students Guild Staff		
	Temporary Staff Bank		
	University Affiliate		

Print | Logout

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 Premium

IT Access for associates requiring additional chargeable 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

*Premium Associate Accounts can be requested for a recent graduates who still require M365 access. Please provide this information in the 'notes/purpose' field when submitting a 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:

The form contains the following fields and controls:

- Title**: Dropdown menu with "-- Please select --".
- Forename**: Text input field.
- Surname**: Text input field.
- Library Access**: Dropdown menu with "-- Please Select --".
- University Card Required**: Dropdown menu with "-- Please Select --".
- IT Account required**: Dropdown menu with "-- Please Select --".
- Trent Reference Number (If known)**: Text input field.
- Enter IT Account ID to keep an old account - eg abc123**: Text input field.
- Gender**: Dropdown menu with "-- Please Select --".
- Date of Birth**: Text input field with placeholder "dd/mm/yyyy".
- College/Service**: Dropdown menu with "-- Please Select --".
- Discipline**: Dropdown menu with "-- Please Select --".
- Photograph**: Text input field with a "Browse..." button.
- Please enter a Contact Address**: Large text area.
- Start date**: Text input field with placeholder "dd/mm/yyyy".
- End date**: Text input field with placeholder "dd/mm/yyyy" and a "2 Years" button.
- Electronic Library Access**: Dropdown menu with "-- 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:

Existing IT Access Requests					
Show Issue Date					
Showing 1 to 2 of 2 results					
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	

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:



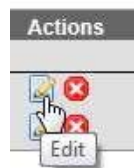
Existing IT Access Requests

Request New IT Access  
Check Existing Requests  
Approve Requests  
Activate Account

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	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 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:

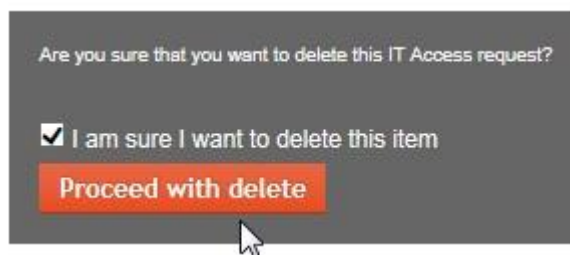




To delete an Associate's IT account, click on the **Delete** icon at the right of the line



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.