

Oracle R12 Authorised Signatory and User Reports

This *How To* document gives an overview of the process which allows user to maintain Departmental Authorised Signatories and users with access to UO User Access Reports.

Before submitting a request please ensure you are familiar with the responsibilities associated with the role of an Authorised Signatory.

Authorised Signatories are responsible for managing departmental users and changes to departmental structures and as such it is important that only appropriate people are given this responsibility. The form here requires the user to update their own details and does not allow them carry out this task on behalf of someone else.

1. Authorised Signatory Details

1. On this page you will be asked to select the type of action you would like to carry out.

Service Offering: Oracle R12 Authorised Signatory and User Reports
Maintain the departmental authorised signatories for Financials changes using the Authorised Signatories form.

1. Authorised Signatory Details

2. Department Details

3. Responsibility Details

4. Authorisation Details

5. Additional Information

6. Review & Submit

Authorised Signatory Details

* = required

This form should be used to maintain Departmental Authorised Signatories and users with access to UO User Access Reports. Before submitting a request please ensure you are familiar with the responsibilities associated with the role of an Authorised Signatory. Authorised Signatories are responsible for managing departmental users and changes to departmental structures and as such it is important that only appropriate people are given this responsibility.

Authorised Signatory Details


* Name: Marek Drzymalski (trop0252)

* Email: marek.drzymalski@tss.ox.ac.uk

Type of Request

* I would like to

2. On the dropdown menu, the available options are:
 - Add myself as an Authorised Signatory
 - Remove myself as an Authorised Signatory
 - Change my authorisation level
3. In these guidance notes, we will look at adding yourself as an Authorised Signatory.
4. Then click 'Continue' in the bottom right of the window.

 **Note:** Choosing the 'Remove myself as an Authorised Signatory' or 'Change my authorisation level' options negates the need to go through step '3. Responsibility Details'.


2. Department Details

1. Here you are asked whether you are an Authorised Signatory for a University Department or a Central Finance team.
2. Then, choose whether you are a member of a University Department or Central Finance, then choose whether the Primary Department is a Division, Sub-Division or Department, followed by the name of the Division, Sub-Division or Department itself.
3. For the purposes of these guidance notes, we will set up an Authorised Signatory for a University Department.
4. Choose your Department from the drop down menu. If you know the department code, you can start typing it for the field to autocomplete the Department name.
5. Choose the Authorisation Level required. You have 2 options: 'Authorised Signatory' and No Authorisation – UO User Access Reports only'.

The screenshot shows a web form titled "Service Offering: Oracle R12 Authorized Signatory and User Reports" with the subtitle "Maintain the departmental authorised signatories for Financials changes using the Authorised Signatories form." The form has a left-hand navigation menu with six items: "1. Authorised Signatory Details" (checked with a green checkmark), "2. Department Details", "3. Responsibility Details", "4. Authorisation Details", "5. Additional Information", and "6. Review & Submit". The main content area is titled "Department Details" and contains the following fields:

- A question: "Are you an Authorised Signatory for a University Department or a Central Finance team?" with a dropdown menu set to "University Department".
- A note: "Please select the Department you are Authorised Signatory for. Authorised signatories are able to authorise access and changes for their Department and any Sub-Departments under their Primary Department." followed by a dropdown menu set to "Department".
- A field for "Department:" with a dropdown menu set to "ED Ashmolean Museum".
- A field for "Authorisation Level:" with a dropdown menu set to "No Authorisation - UO User Access Reports only".

Question mark icons are present to the right of the "Department" and "Authorisation Level" dropdown menus.

 **Note:** Wherever you see the question mark symbol to the right hand side of a field, hold your mouse over it for an explanation of what information is expected, in that field.

6. Once you are satisfied with the details, click 'Continue' in the bottom right of the window.

3. Responsibility Details

1. This page outlines the responsibility of an Authorised Signatory. Please read this section carefully before continuing.

4. Authorisation Details

1. This page lists the Departmental Authorisers for your Oracle R12 Authorised Signatory and User Reports request.

The screenshot shows the 'Authorisation Details' step of a multi-step process. On the left is a vertical navigation menu with six items: '1. Authorised Signatory Details' (checked), '2. Department Details' (checked), '3. Responsibility Details' (checked), '4. Authorisation Details' (highlighted in blue), '5. Additional Information', and '6. Review & Submit'. The main content area has a blue header 'Authorisation Details'. Below it, a note states: '* = required' and 'Please note that a request for authorisation will be sent to the Authorised Signatory for the selected department. Please select the relevant person from the list.' Underneath, there is a section for '* Authorised Signatory:' with three radio button options: 'Andrew Noton (ashm0268)', 'Kevin Rodd (admn1494)', and 'Marek Drzymalski (trop0252)'. At the bottom, there is a label for '* Email Address:'.

2. Select the appropriate person (only one selection is permitted) and click 'Continue' in the bottom right of the window.

5. Additional Details

1. On this page, if necessary, please add any other relevant details in support of your Authorised Signatory request.

The screenshot shows the 'Additional Information' step of the same multi-step process. The navigation menu on the left is identical to the previous step, but '5. Additional Information' is now highlighted in blue. The main content area has a blue header 'Additional Information'. Below it, a question asks: 'Is there any other information you wish to provide?' followed by a label 'Additional Information:' and a large empty text input box.

2. Click 'Continue' in the bottom right of the window to continue.

6. Review & Submit

1. This page allows you to check the details and options which you have selected across all the previous sections.
2. If you are satisfied with all the information, click 'Submit' in the bottom right of the window to continue. Otherwise, click on any of the section headings on the left hand side to go to the relevant page to make an amendment.
3. Once you have submitted the Service Request you will again see a summary of the details and options which you requested.
4. Crucially, on the left hand side, you will see the request number; the general details of the Service Request; the estimated delivery time and an option to cancel the request.
5. A confirming email will also be sent to you containing the Service Request number and basic details.
6. Once approved by the Authorised Signatory, the request will be received and actioned by the FSM team and the user will receive an email confirming this.

Checking on the status of your Authorised Signatory and User Reports request

It is possible to see the progress of an Authorised Signatory and User Reports request, via <https://oxford.saasiteu.com/>

The user can log into HEAT using their SSO and click on My Items, towards the top left of the page and they should see something like this:

ID	Summary	Type	Status	Due Date	Progress	Created On	Modified On
30029851	Oracle R12 Authorised Signatory and User Reports	Service Request	Fulfilled	11/11/2018 13:35	<div style="width: 100%; height: 10px; background-color: green;"></div>	6/11/2018 13:35	13/11/2018 09:24

You will also receive an automated email confirming that your Departmental Authoriser has received your request. Once approved, the request is automatically sent to the FSM Team who will action it and once the set up has been completed you will receive a confirmation email with the next steps required.