

## Manage Oracle R12 User Access

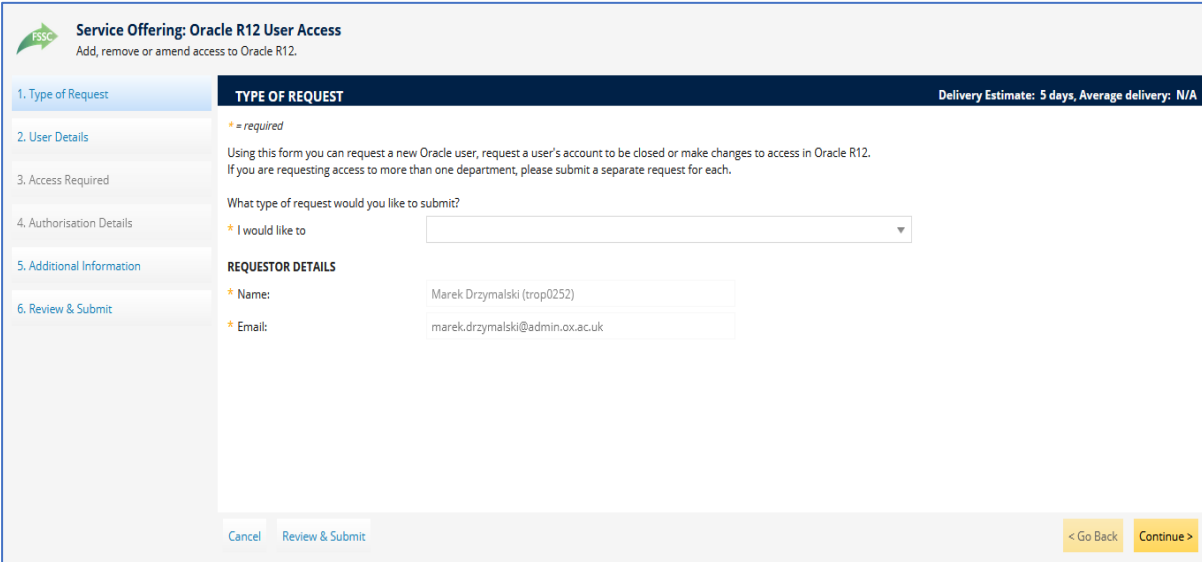
This How To document gives an overview of the process which allows a user or managers to add, amend or remove access to the Oracle R12 User Access Service Request.

Using this form you can request a new Oracle user, request a user's account to be closed or make changes to access.

If you are requesting access to more than one department, please submit a separate request for each.

### 1. Type of Request

On this page you will be asked to select the type of user request you would like to submit.



2. On the dropdown menu, the available options are:

- Request access to Oracle R12 for a new user
- Request access for an existing user changing department or team
- Request additional access, or amend existing access, for a user
- Reinstate Oracle R12 access for a returning user
- Amend or remove an end date on a temporary Oracle R12 account for an existing user
- Remove a user from Oracle R12

3. Once selected, some options will provide a brief description of what the request entails.

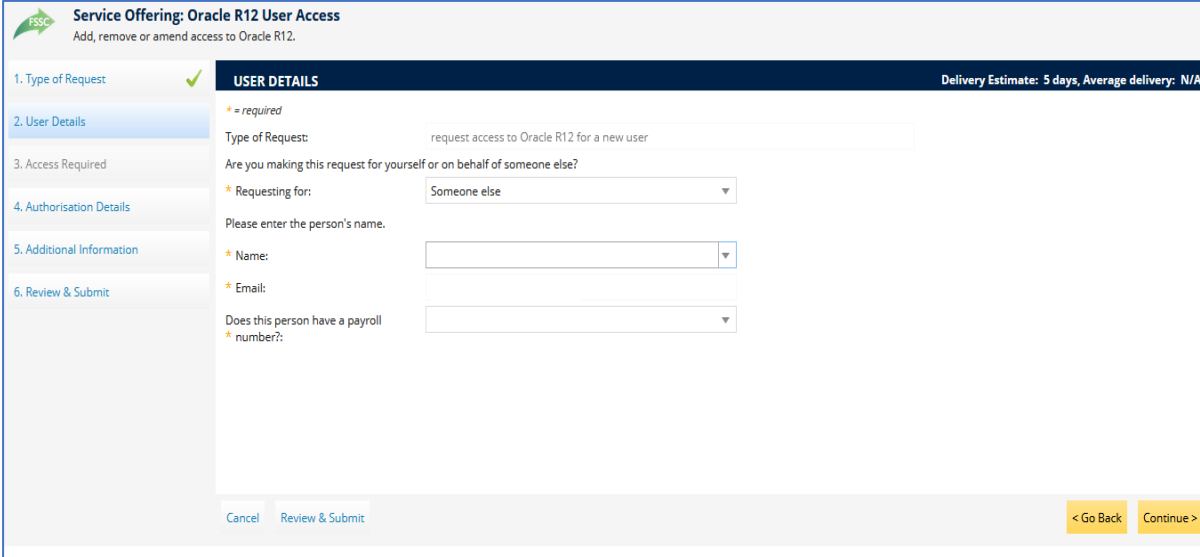
4. For the purposes of these guidance notes, we will choose 'Request access to Oracle R12 for a new user'.

5. For other types of request, similar information will be needed, including authorisation.

6. Click 'Continue' in the bottom right of the window

## 2. User Details:

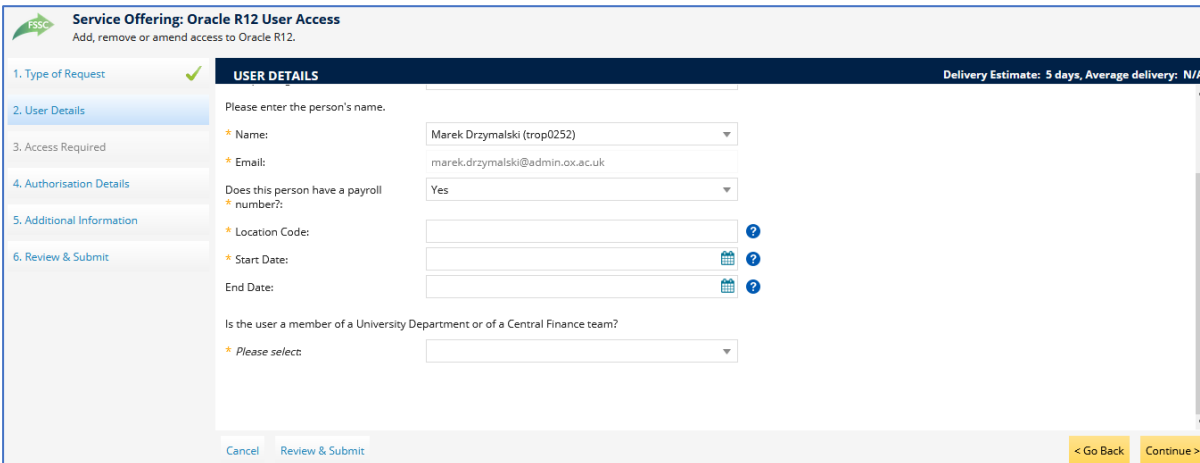
1. This page asks you for specific details regarding the Oracle R12 access for the new user
2. You may request access for yourself or on behalf of someone else. For the purposes of these guidance notes, we will assume that you are requesting access for someone else.



3. Enter the person's name in the Name field. If you start typing their name the field will auto-populate for you. Their email address will also automatically populate in the Email field. Any emails relating to this request, for the users information, will be sent to this email address.

*Note: For the individual's name to appear in the field, they must have their record in OSM.*

3. Once you have answered the question: "Does this person have a payroll number?", some additional fields will appear.



5. Add the Location Code.

*Note: Please ensure that the Location Code reflects your department code.*

6. Add the Start Date.

*Note: Request will generally take 5 working days to process*

7. Add the End Date.

*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 (see below).*

8. Choose whether the user is 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.

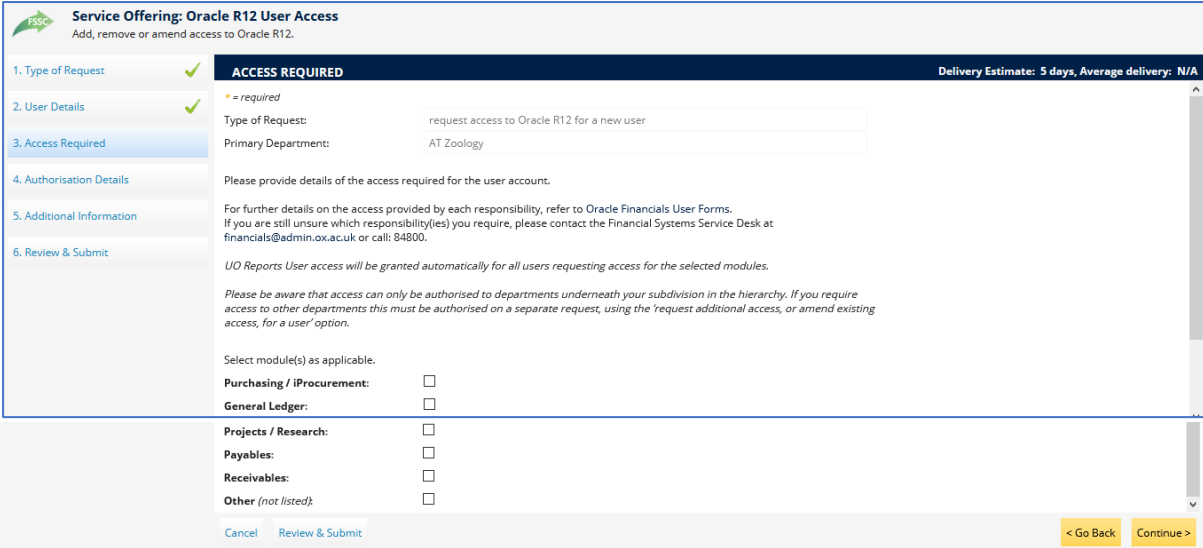
9. For the purposes of these guidance notes, we will set up user access for a user within a Department.

10. Choose your Department from the drop down menu. If you know the department code, you can start typing it for the field to auto-populate the Department name.

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

### 3. Access Required

1. This page will ask you to provide specific details as to the access required. Before filling out this page, please read the information at the top of the page carefully.



**Service Offering: Oracle R12 User Access**  
Add, remove or amend access to Oracle R12.

**1. Type of Request** ✓ **ACCESS REQUIRED** Delivery Estimate: 5 days, Average delivery: N/A

**2. User Details** ✓

**3. Access Required**

Type of Request: request access to Oracle R12 for a new user  
Primary Department: AT Zoology

Please provide details of the access required for the user account.

For further details on the access provided by each responsibility, refer to Oracle Financials User Forms. If you are still unsure which responsibility(ies) you require, please contact the Financial Systems Service Desk at financials@admin.ox.ac.uk or call: 84800.

UO Reports User access will be granted automatically for all users requesting access for the selected modules.

Please be aware that access can only be authorised to departments underneath your subdivision in the hierarchy. If you require access to other departments this must be authorised on a separate request, using the 'request additional access, or amend existing access, for a user' option.

Select module(s) as applicable.

Purchasing / iProcurement:

General Ledger:

Projects / Research:

Payables:

Receivables:

Other (not listed):

Cancel Review & Submit < Go Back Continue >

2. Ticking each of the general headings will expand the available access options.

3. As a default, all Oracle R12 users are given access to Reports (UO SplashBI responsibility).

4. It is possible to request 'Other' responsibilities that are not listed as options above, **EXAMPLES NEEDED**

5. As an illustration, this is what a completed Access Required page might look like:

Service Offering: Oracle R12 User Access

Add, remove or amend access to Oracle R12.

Delivery Estimate: 5 days, Average delivery: N/A

1. Type of Request ✓
2. User Details ✓
3. Access Required
4. Authorisation Details
5. Additional Information
6. Review & Submit

ACCESS REQUIRED

\* = required

Type of Request:

request access to Oracle R12 for a new user

Primary Department:

AT Zoology

Please provide details of the access required for the user account.

For further details on the access provided by each responsibility, refer to Oracle Financials User Forms. If you are still unsure which responsibility(ies) you require, please contact the Financial Systems Service Desk at [financials@admin.ox.ac.uk](mailto:financials@admin.ox.ac.uk) or call: 84800.

*UO Reports User access will be granted automatically for all users requesting access for the selected modules.*

*Please be aware that access can only be authorised to departments underneath your subdivision in the hierarchy. If you require access to other departments this must be authorised on a separate request, using the 'request additional access, or amend existing access, for a user' option.*

Select module(s) as applicable.

**Purchasing / iProcurement:**

Shop/Requisition/Approve - Select one of:

Raise/review requisitions and receipt own purchases?:

Approve requisitions?:

\* Purchasing Role:

Requisitioner - £0.03p ?

Approvals Only?:

?

Default Expense Account Cost Centre:

AT0001 ?

\* Position (if known):

AT.Requisitioner.AA ?

View Project Tasks for other Departments?:

?

UO iProcurement Goods in:

Receipt purchases for any user (Receipting only)

**Managing Purchase Orders:**

UO Purchase Order Enquiry:

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Buyer Work List (Level 3-10 only):

Approvals only e.g. new suppliers and amendments

Buyer Work Centre (Level 3-10 only):

Approvals plus e.g. manually generate POs/close for receipting

**General Ledger:**

XX General Ledger Enquiry:

View department journals and balances

UO Trust Fund General Ledger Enquiry:

View items relating to Trust Funds

XX General Ledger Approval Only:

XX General Ledger:

Enter and approve journals (not salary)

XX General Ledger Sal:

Enter and approve journals (incl. salary)

**Projects / Research:**

UO Projects Manager:

Review projects where user is named as Project Manager

UO Projects Departmental Enquiry:

Review all projects in the department

UO Projects Departmental User:

Review all projects in the department and enter journals and transfers

Do you require access to department codes under your division or sub division?

\* Please select:

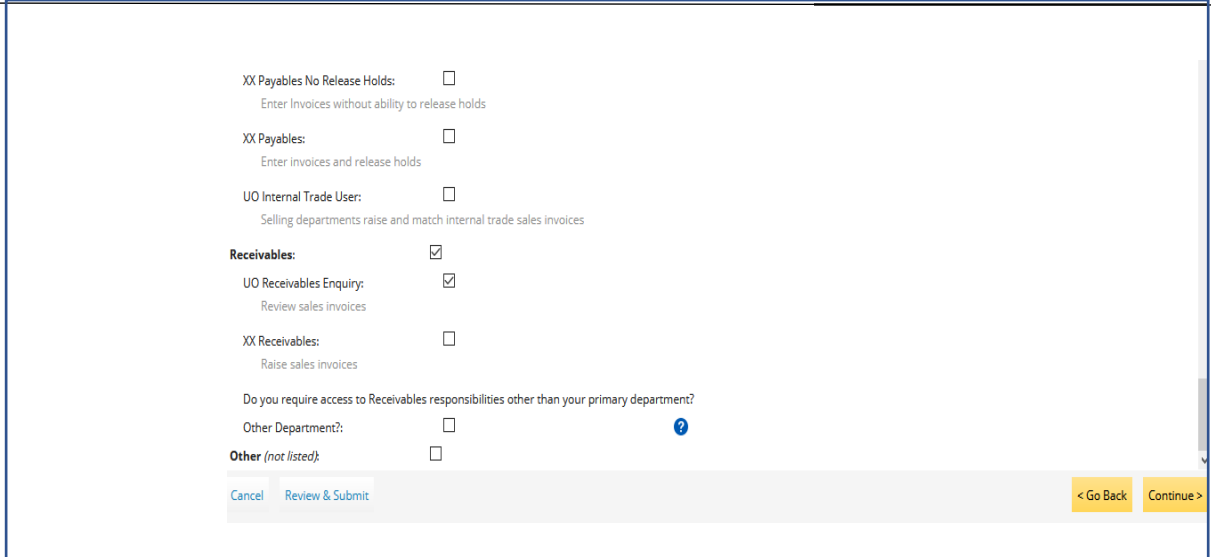
No ?

**Payables:**

Select one Payables responsibility only:

UO Payables Enquiry:

## HOW TO...



XX Payables No Release Holds:   
Enter Invoices without ability to release holds

XX Payables:   
Enter invoices and release holds

UO Internal Trade User:   
Selling departments raise and match internal trade sales invoices

**Receivables:**

UO Receivables Enquiry:   
Review sales invoices

XX Receivables:   
Raise sales invoices

Do you require access to Receivables responsibilities other than your primary department?  
Other Department?:  ⓘ

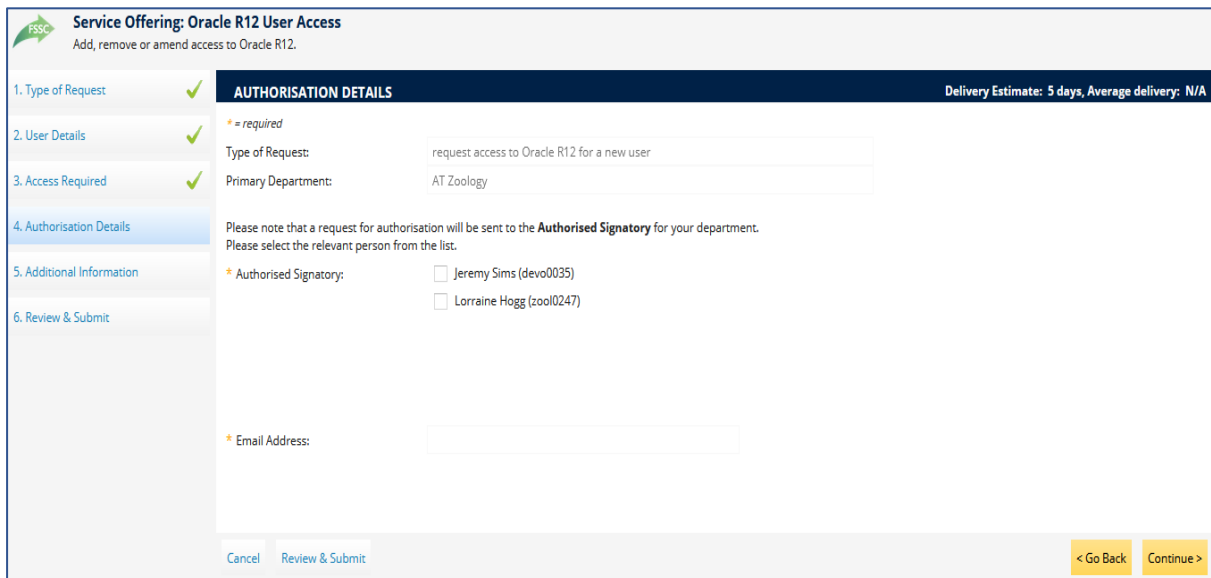
Other (not listed):

Cancel Review & Submit < Go Back Continue >

6. If you are satisfied with all the chosen options, click 'Continue' in the bottom right of the window.

### 4. Authorisation Details

1. This page lists the Departmental Authorisers for your Oracle R12 User Access request. The Authorised Signatories which are listed here are dependent on when Departmental, Sub-Divisional or Divisional is chosen.



**Service Offering: Oracle R12 User Access**  
Add, remove or amend access to Oracle R12.

1. Type of Request ✓ **AUTHORISATION DETAILS** Delivery Estimate: 5 days, Average delivery: N/A

2. User Details ✓

3. Access Required ✓

4. Authorisation Details

5. Additional Information

6. Review & Submit

\* = required

Type of Request: request access to Oracle R12 for a new user

Primary Department: AT Zoology

Please note that a request for authorisation will be sent to the **Authorised Signatory** for your department. Please select the relevant person from the list.

\* Authorised Signatory:  Jeremy Sims (devo0035)  
 Lorraine Hogg (zool0247)

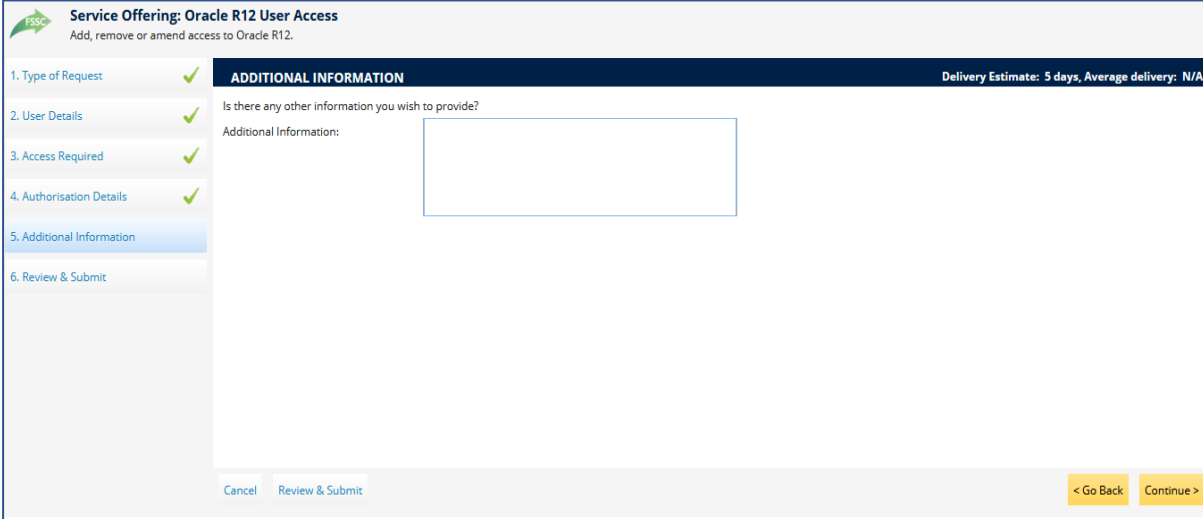
\* Email Address:

Cancel Review & Submit < Go Back Continue >

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, please add any other relevant details in support of your Oracle R12 User Access request.



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

## 6. Review & Submit

4. This page allows you to check the details and options which you have selected across all the preceding sections.
5. 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.
6. Once you have submitted the Service Request you will again see a summary of the details and options which you requested.
7. Crucially, on the left hand side, you will see the Service Request number; the general details of the Service Request; the estimated delivery time and an option to cancel the request.
8. A confirming email will also be sent to you containing the Service Request number and basic details.
9. 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 an Oracle R12 User Access request**

It is possible to see the progress of an Oracle R12 User Access request, via <https://oxford.saasiteu.com/>

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

The user for whom the request has been made, will receive an automated email confirming that their Departmental Authoriser has received their request. Once approved, the request is automatically sent to the FSM Team who will action it. When the set up has been completed the user will receive a confirmation email with the next steps required. As a new user, please read this email carefully as it contains details of how to log into Oracle R12, as well as details of any training which you may require.