

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

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

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

1. Type of Request

Type of Request

* = required

Add, amend or remove access to Oracle R12.

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.

What type of request would you like to submit?

* I would like to

Requestor Details

* Name: Marek Drzymalski (trop0252)

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

2. On the dropdown menu, the available options are:
 - Add new shopper(s)
 - 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

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1. Type of Request ✓

2. User Details

3. Access Required

4. Authorisation Details

5. Additional Information

6. Review & Submit

User Details

* = required

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

Are you making this request for yourself or on behalf of someone else?

* Requesting for:

* Location Code: ?

* Start Date: ?

End Date: ?

Is the user a member of a University Department or of a Central Finance team?

* Please select:

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.

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User Details

* = required

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

Are you making this request for yourself or on behalf of someone else?

* Requesting for: Someone else

Please enter the person's name.

* Name:

* Email:

* Location Code: ?


* Start Date: ?

End Date: ?

Is the user a member of a University Department or of a Central Finance team?


* Please select:

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 HEAT.


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4. Add the Location Code.



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







5. Add the Start Date.



Note: Request will generally take 5 working days to process

6. 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).

	* Location Code:	ED01	
	* Start Date:	18/11/2018	 
	End Date:	5/11/2019	 

Please be aware that the last day of Oracle R12 access will be the day before the entered end date.
The end date is the day on which access is lost.

Location Code:
Maximum 4 characters (e.g. AA01)
For details of Location Codes please see
https://www1.admin.ox.ac.uk/finance/support/forms_tools/useful_docs/

7. 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.
8. For the purposes of these guidance notes, we will set up user access for a user within a Department.
9. 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.
10. 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.

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6. Review & Submit

Access Required

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

Primary Department: ED Ashmolean Museum

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

For further details on the access provided by each responsibility, refer to https://www1.admin.ox.ac.uk/finance/support/forms_tools/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 tel: 84800.

Select module(s) as applicable.

Purchasing / iProcurement:

General Ledger:

Projects / Research:

Payables:

Receivables:

Reporting:

Reports User: ?

FSG Distribution Groups:

Other (not listed):

2. Ticking each of the general headings will expand the available access options.
3. As a default, all Oracle R12 users (with the exception of Shoppers) are given access to Reports (UO Reports User responsibility).
4. It is possible to request 'Other' responsibilities that are not listed as options above, in the free text box at the bottom of this page, for example, access to another departments General Ledger.
5. As an illustration, this is what a completed Access Required page might look like:

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Access Required

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

Primary Department: ED Ashmolean Museum

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

For further details on the access provided by each responsibility, refer to https://www1.admin.ox.ac.uk/finance/support/forms_tools/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 tel: 84800.

Select module(s) as applicable.

Purchasing / iProcurement: ?

Purchase Order Enquiry: ?

Receiving Only: ?

iProcurement Shop/Requisition /Approve: ?

* Purchasing Limit: £1,000 (Level 4) ?

* You will be assigned responsibility: UO iProcurement - Finance Preparer

WARNING: Please be aware that this role allows self-approval of requisitions up to your purchasing limit. It is highly recommended that approvals only access be used wherever possible.

Approvals Only?: ?

* Position (if known): ED Level 04 Buyer.AA ?

Position not known?: ?

Add Departmental Buyer?: ?

WARNING: Please be aware that Buyer WorkCentre is a powerful responsibility and it is recommended that departments limit the number of users and that it is only given to appropriate people. Many of the tools available in Buyer WorkCentre are available elsewhere. If you would like more details of alternatives please contact the Financial Systems Service Desk on financials@admin.ox.ac.uk or tel: 84800.

Default Expense Account Cost: KH0001 ?

* Centre:

View Project Tasks for other Departments?: ?

1. Type of Request ✓

2. User Details ✓

3. Access Required

4. Authorisation Details

5. Additional Information

6. Review & Submit

Access Required

General Ledger: ?

General Ledger Enquiry: ?

General Ledger: ?

General Ledger Sal: ?

Trust Fund General Ledger Enquiry: ?

Projects / Research: ?

Projects Manager Enquiry Access (UO Projects Manager): ?

UO Projects Departmental Enquiry: ?

UO Projects Departmental User: ?

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

* Please select: No ?

Payables: ?

Select one Payables responsibility only:

Enquiry Only: ?

Payables No Release Holds: ?

Payables Release Holds: ?

Internal Trade: ?

Receivables: ?

Enquiry Only: ?

Departmental Receivables: ?

ED Cash Receipting: ?

Reporting: ?

Reports User: ?

FSG Distribution Groups: ?

Other (not listed): ?

Please provide names of other responsibilities that should be added.
Only responsibilities not listed previously on the form will be accepted by this method.
If this is a responsibility for a secondary department, please submit a separate request.

* Responsibility Name(s): FW General Ledger

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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.

The screenshot shows a web interface for 'Service Offering: Oracle R12 User Access'. On the left is a navigation menu with six items: '1. Type of Request' (checked), '2. User Details' (checked), '3. Access Required' (checked), '4. Authorisation Details' (selected), '5. Additional Information', and '6. Review & Submit'. The main content area is titled 'Authorisation Details' and contains the following information:

- * = required
- Type of Request: request access to Oracle R12 for a new user
- Primary Department: ED Ashmolean Museum
- 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:
 - Andrew Noton (ashm0268)
 - Kevin Rodd (admn1494)
 - Marek Drzymalski (trop0252)
- * 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, please add any other relevant details in support of your Oracle R12 User Access request.

The screenshot shows a web interface for 'Service Offering: Oracle R12 User Access'. On the left is a navigation menu with six items: '1. Type of Request' (checked), '2. User Details' (checked), '3. Access Required' (checked), '4. Authorisation Details' (checked), '5. Additional Information' (selected), and '6. Review & Submit'. The main content area is titled 'Additional Information' and contains the following information:

- Is there any other information you wish to provide?
- Additional Information: [Text input field]

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

6. Review & Submit

3. This page allows you to check the details and options which you have selected across all the preceding sections.
4. 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.
5. Once you have submitted the Service Request you will again see a summary of the details and options which you requested.
6. 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.
7. A confirming email will also be sent to you containing the Service Request number and basic details.
8. 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 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
30029645	Oracle R12 User Access	Service Request	Approved	10/11/2018 14:00	<div style="width: 100%; height: 10px; background-color: green;"></div>	5/11/2018 14:00	5/11/2018 14:58

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 contain details of how to log into Oracle R12, as well as details of any training which you may require.