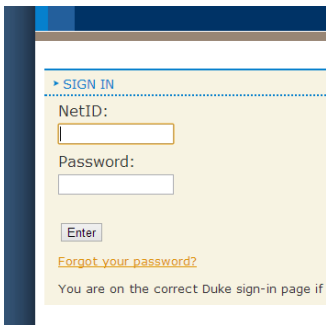


# CTMS External Account Instructions

## Requesting Guest Account:

Please note that the process can take three weeks to complete.

1 The DCRI sponsor will request an account via the guest account system. Go to <https://idms.oit.duke.edu/affiliates/sponsor>. The Net ID Sign In page appears:



2 Enter your NetID and Password.

3 Click Enter. If this is your first visit, the Welcome to Duke's Sponsored Guest Account Service page appears. Otherwise, proceed to step 5.

4 Read the Duke Sponsored Guest Account Policy. At the bottom of the page, click Accept Policy.

5 On the Welcome to Duke's Sponsored Guest Account Service page, click Request a guest account.

- + [Request a Duke Medicine DHE Account for a Duke employee or student](#)
- + [Request a guest account](#)
- + [View pending guest accounts](#)
- + [View upcoming expirations](#)
- + [View all guest accounts](#)

6 In the top field, enter the personal email address of the guest. The role is Long-term Contractor.

Non-Duke Email address of guest. The guest should currently have access to this email account.

Optional Short Description (e.g. "Summer TIP Student", "Cancer Center Volunteer", etc)

Select role:

- Volunteer A volunteer performs services at Duke for a Duke entity while not being paid, hence they are not listed in SAP/Payroll. A volunteer may need a NetID for access to Duke training systems for compliance.
- Building Contractor These individuals perform contract work at Duke in connection with any structure (i.e. Construction, HVAC, Plumbing, and various other Repair Professionals) for a specific job or short specified period of time.
- Temporary Staff/ Consultant These individuals act as short-term (e.g. 1 month) temporary employees, vendors, or consultants (dining, construction, UPS, FedEx, etc.), responsible for providing services to a Duke department or the larger community.
- Long-term Contractor These individuals act as longer-term (e.g. 6 months to a year) temporary employees of contractors (nurses, temporary employees, technology positions), responsible for providing contract work to Duke; professional consulting services; or other services to a Duke department or the larger community.
- Collaborator When cooperative work with individuals outside of Duke's population is required.
- Visiting Student/ Scholar/Faculty Individuals from other institutions visiting Duke for various academic reasons.
- Spouse/Partner Legal or registered partner of an existing Duke Student, Staff, or Faculty member.
- Alumni Alumni who are applying to graduate schools at Duke may be re-affiliated to regain access to ACES until they are converted back to an active student status.
- Parent of child in Duke child-care facility Parents of children attending Duke Children's Campus require photo identification for physical access to the facilities.
- Affiliated Physician Non-Duke paid provider of health and wellness services.
- TIP Student Talent Identification Program (TIP) Student

7 Make sure Duke NetID and Duke Medicine DHE Account is selected. Typically CTMS only users do **NOT** need DukeCard access or Duke Email. Unless there is an exception, leave those blank. When the Duke Medicine DHE Account box is checked, business justification will be asked for. Put down External Affiliate. Accounts are by default set to expire in a year; this is the maximum. Check that you agree to the terms, and hit submit.

Check services you want to provide your guest(s)

- Duke NetID
- Duke email
- University wireless network access
- University remote access (VPN)
- DukeCard
- Duke Medicine DHE Account
  - Business justification (required):
  - Guest is a minor (under 18 years of age)

Expiration of guest accounts:

By default, guest accounts will be given access for a period of one year, after an account's expiration.

Sponsor responsibilities

Individuals who receive a guest account are responsible for complying with

- I agree to the terms described in the *Sponsor responsibilities* above.
- Notify me when guest accounts are created.

8 The External Hire will receive an email from help@duke.edu, requesting some information that must be responded to for the process to continue. If the system will not accept the External Hire's phone number, enter a number for the DCRI sponsor.

You have been invited to register a Duke University guest account. Please click on this link to register:

<https://idms.oit.duke.edu/affiliates/request?barn=67d20094366ffc84102e215a37b9df81d0f08dd5>

OIT Service Desk  
919-684-2200  
[help@duke.edu](mailto:help@duke.edu)

9 Once the guest account has been created, the sponsor will receive an email from Duke Guest Account services with the External Hire's username. The sponsor will then submit an External Hire form to HR (form can be found [here](#))

**Please note it can take up to two weeks for the account to be ready after the form is submitted.**

10 The Service Desk will send the username and temporary password to the sponsor via email. The Sponsor will forward the information to the External Hire.

11 At this time, if the required training has been documented, the External Hire is eligible for CTMS access. The sponsor must now submit a CTMS Access form to the Service Desk requesting CTMS access.

## Accessing The Account:

**The External Hire must change their password before accessing CTMS**

How to change the temporary password via Citrix:

- 1) Go to <https://idcri.dcri.duke.edu>. Use Internet Explorer on a PC, and Safari on a Mac.
- 2) Log in with the temporary password. Make sure the domain is DHE

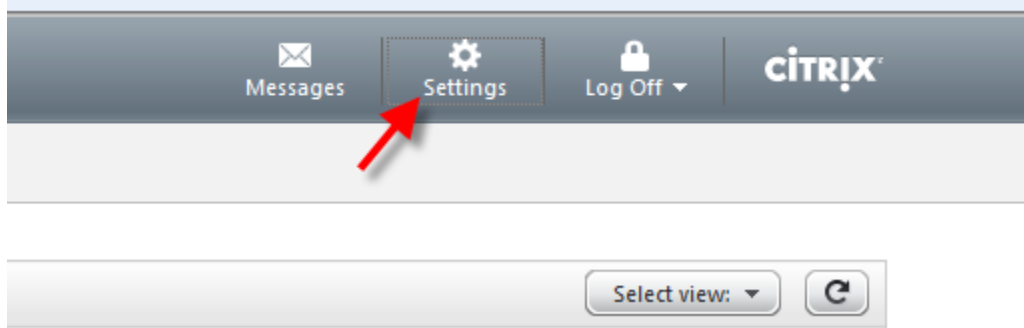
Online: <https://servicedesk.dcri.duke.edu>  
mail: <mailto:dcriservicedesk@dm.duke.edu>  
phone: 919-668-8916 (24x7x365)

User name:

Password:

Domain:

3) Click on settings in the upper right corner



4) Scroll down to change password and click on it.

5) This will set the CTMS password.

### IMPORTANT!

-Passwords expire every six months

-The External Hire **must** log into Citrix every 3 months to prevent the account from disabling.

### Maintenance:

To edit guest accounts, log into the guest account site. Click on View all guest accounts. Enter the account you are looking for, or select View all guests.

+ [Request a Duke Medicine DHE Acc](#)

+ [Request a guest account](#)

+ [View pending guest accounts](#)

+ [View upcoming expirations](#)

+ [View all guest accounts](#)

From here you can transfer sponsorship of accounts to someone else, terminate accounts, update expiration date, or change the role of the External Hire.

Perform an action on the guest(s) selected above:

- Transfer Sponsorship
- End Sponsorship
- Update Expiration Date
- Update Role

Submit

-To transfer a sponsorship, use the first and last name of the person that you transferring the account to. The person receiving the account must have already registered in the guest account system.

-Ending a sponsorship will lock out access for the External Hire. A standard termination request must still be submitted to properly close out their accounts

-Update Expiration Date allows the External Hire's account to be extended for up to a year.

-Update Role is used to edit the information for an External Hire.