Procurement access and training requests - for Key Contacts

Key points
1. **UFS responsibility request form** submissions will be used to request both iProcurement access and required training and will be directed to Finance Training, who will arrange then assess the training, and send on to Helpdesk only when ready for Live access to be granted.
2. iProcurement courses on **UTBS** will ONLY be used by Finance Training to book learners on.

From 10th March 2020 onward...

iProcurement access requests will be on the same form as before with additional options to indicate that training is required.

Finance Training will book the learner onto the relevant course and email them with their log in details/joining instructions

Once the learner has successfully completed the course, Training will forward the responsibility request to the Finance Helpdesk who will set up the access and contact you in the usual way.

If an out of office is received from the requesting Key Contact, they will forward the email to the next available Key Contact.

The new process

**Key contact**  
**Staff member**

**Finance Training**

**Helpdesk**

Discuss requirements and training needs

Submit CUFs form

Receives request

Makes booking and emails SM (cc KC)

Completes training

Checks training, marks as complete, forwards request to HD

Sets up account, Emails details to KC (fwds on if out of office received)

Forwards details to SM

What if?

**Q:** I've filled in the UFS form but the staff member does not complete the training.  
**A:** We will send periodic reminders to staff members who have not completed their training.

**Q:** The staff member requires access to several CUFs modules?  
**A:** It will speed the process up if you complete two UFS access forms, with the iProcurement request on a separate one.

**Q:** I'm away when the staff member completes the training and the Helpdesk email me?  
**A:** The Helpdesk will receive your out of office (OOO) and will contact the next available Key Contact for your department.

**Q:** My staff member wants a classroom course?  
**A:** Tick the classroom option on the UFS form and Finance Training will book them on the next available F2F course. They will have the option to change the date if necessary.

**Q:** It is just a change of iProcurement responsibility?  
**A:** Complete the UFS request form without ticking the training required box and it will go directly to the Helpdesk as normal.

**Q:** The learner doesn’t let Training know that they have completed the training?  
**A:** The learner will complete a form embedded at the end of the course which will automatically inform Training of completion.

**Q:** What if a senior staff member just needs approval access?  
**A:** Complete the form as above and indicate in the other responsibilities box that they just require Approver access.
How to complete the UFS form for those who need iProcurement training

1. Select UFS access

2. Choose New user - iProcurement training
   (You may also request other responsibilities at the same time if this option selected, but it may be easier to complete two forms)

3. Select whether the User wishes to complete their training online or in the classroom.

4. Select the type of user
   (Staff, Student, TES etc)
   - Attach disclaimer form if requested

5. Select main Department code for the iProcurement responsibility

6. Fill in the User's name and contact details

7. Choose whether User is Buyer or Requisitioner

8. Select their purchasing limit
   - £100 must only be selected for Requisitioners
   - "Other" must only be used if your department has been granted non-standard amounts

9. Tick 1st box if User will be carrying out Approval on other colleague's requisitions

10. Tick 2nd box if User is a Buyer and will be Autocreating your Requisitioners' lines.

11. If there are any other responsibilities to request, or anything else you need to tell us (such as user will be an Approver only), add it in the Other responsibilities box

12. Carry on completing the form as before