

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...

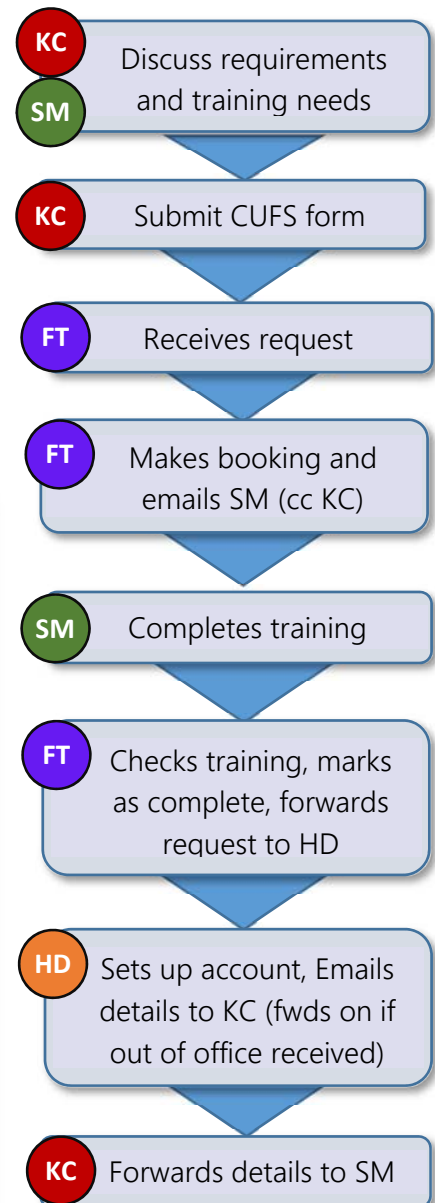
iProcurement access requests will be on the same form as before with additional options to indicate that training is required.

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



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**



Is this request for UFS or COGNOS access? *

UFS
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)



Purpose of request *

New user - iProcurement training
 New User - Other
 Reactivation
 Deactivation
 Responsibility change / other
3. Select whether the User wishes to complete their training **online or in the classroom.**



Type of iProcurement Training *

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


The user is *

Member of staff
5. Select main **Department** code for the iProcurement responsibility
 

Department Name *

LG - Astronomy
6. Fill in the User's **name and contact details**


Title *

Mr

Forename *

John

Middle initial(s)

L

Surname *


Smith

CRSid *


jls80

Staff Reference Number *

123456789

There is further guidance available on the [roles and responsibilities within iProcurement.](#)
7. Choose whether User is **Buyer or Requisitioner**



iProcurement access required *

Buyer
 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
 


UFS Purchasing limit *

Please note not all limits are available to


£2,500

£0 (Zero - must ALWAYS forward)
 £100 (Requisitioner only)
 £250
 £500
 £2,500
 £5,000
 £10,000
 £50,000
 £500,000
 No Limits (Unlimited)
 Other (only if pre-approved for your dept)
9. Tick 1st box if User will be carrying out **Approval** on other colleague's requisitions
 

Please tick if...

User will be APPROVING other people's requisitions
10. Tick 2nd box if User is a Buyer and will be **Autocreating** your Requisitioners' lines.
 

Please tick if...

User will be AUTOCREATING requisitions
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
 

Other responsibilities / changes required

Please detail if there is anything else we need to know about this request
12. Carry on completing the form as before