How-To Guide to Establish Departmental Procurement Roles

Overview of Departmental Roles

Departmental staff may hold procurement roles as listed below. Please note the University is in transition from the SAP ECC system to SRM (Supplier Relationship Management) as its formal e-procurement system.

Departments within the academic campus sector (all areas excluding Hospital) use the following roles:

SRM Role	Required Training Course via *my*UK
Shopper	Four-course module, completed in sequence: • SRM_SHO_301 SRM Shoppers Introduction • SRM_SHO_302 SRM Punch-out Catalogs • SRM_SHO_303 SRM Free Text Carts • SRM_SHO_304 SRM Supplementary Information
Approver	MM_APP_300 Combined Approvers
Goods Confirmer	SRM_CON_300 SRM Goods Confirmations

The following roles are used by Hospital areas:

SAP Role	Required Training Course via *my*UK
Requisitioner	MM_REQ_300 SAP Requisitions
Approver	MM_APP_300 Combined Approvers
Goods Receiver	MM_REC_320 SAP Goods Receiving

Role Combinations

In order to maintain checks and balances there is a limit on the number and structure of roles any one person may hold. The Role Combinations Matrix shows all permissible combinations for various procurement roles within *my*UK.

Course Registration and Participation

All SAP and SRM training courses are available via the Employee Self-Service tab within *myUK*. After reaching the Employee Self-Service tab, click the Training icon to arrive at the course selection screen. Using the search feature on the left, participants can identify and book needed courses.

Steps to Request and Receive Training

1. Complete and submit a Training Plan Request Form located on the IRIS website. The plan must be approved by the department's Area Security Officer (ASO). The ASOs are listed on the above link.

2. Once the Training Request Plan is submitted and approved, first-time participants must sign the Statement of Responsibility within myUK. This only needs done once.

3. Persons from Hospital areas who are enrolling in SAP courses MM_REQ_300 SAP Requisitions and MM_REC_320 SAP Goods Receiving must take UK_100 IRIS Awareness & Navigation as a prerequisite. UK_100 can be accessed and completed via *myUK* Training.

4. Locate, book, and complete the required procurement course(s) via *myUK*. All procurement training courses are web-based and can be taken from the participant's desktop computer.

5. Once the above curriculum has been completed, permissions for system roles will be loaded and available to the end user via *myUK* within 1-2 business days.

Adding Additional Roles

Persons who have completed the above training requirements and wish to add additional roles only need to repeat steps 1 and 4. Remember to check the Role Combinations Matrix to ensure additional roles will not conflict with current ones.