

How-to Guide to Establish Departmental Procurement Roles

Departmental staff may hold procurement roles as listed.

Role: Staff

Frequency: As Needed

Overview of Departmental Roles

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

SRM Role	Training Requirements
Shopper	Shoppers are required to take and pass two course modules in successive order via myUK Learning: SRM_SHO_305 SRM E-Catalog Shopping SRM_SHO_306 Free Text Shopping Carts
Approver	Approvers are required to take and pass the MM_APP_300 Combined Approvers course via myUK Learning.
Goods Confirmer	Goods Confirmers are required to take and pass the SRM_CON_300 SRM Goods Confirmations course via myUK Learning.

The following roles are used by Hospital areas:

SAP Role	Training Requirements
Requisitioner	Requisitioners are required to take and pass the MM_REQ_300 SAP Requisitions course via myUK Learning.
Approver	Approvers are required to take and pass the MM_APP_300 Combined Approvers course via myUK Learning.
Goods Receiver	Goods Recievers are required to take and pass the MM_REC_320 SAP Goods Receiving course via myUK Learning.

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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 myUK.

SIMILAR ROLES

SAP (R3/MM)	REQUISITIONER	APPROVER	RECEIVER
SRM	SHOPPER	APPROVER	GOODS CONFIRMER
PRD	CREATOR	APPROVER	

	PRD CREATOR	SAP REQUISITIONER	SRM SHOPPER	SAP/SRM/PRD APPROVER	SAP RECEIVER	SRM GOODS CONFIRMER
OPTION 1	✓	✓	✓	✗	✓	✓
OPTION 2	✗	✗	✗	✓	✓	✓
OPTION 3	✗	✓	✓	✓	✗	✗

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 provided link.



SAP Access Request Form

This **SAP Access Request Form** is used to indicate the required SAP access an employee needs in order to perform their job responsibilities in SAP for their **current position only**. When the employee leaves their current position, the SAP access indicated on this form is no longer valid and the department must submit this form again selecting the **Access Removal** option in the **Reason for Submission** section so the employee's SAP access can be removed.


The SAP access selected in this form will be provisioned to the employee upon the successful completion of the required SAP training course(s) in myUK Learning. The required course(s) are listed in parenthesis next to each type of access and will be emailed to the employee with further instructions once this form has received all approvals and been processed by SAP Training.

This form must be submitted by one of the following individuals for the employee*:

- Business Officer
- Immediate Supervisor (or their authorized delegate)
- Designated Contact for [SLCM Access Requests](#) (for an employee requiring ONLY Student Lifecycle Management (SLCM) access)

The employee is **not** permitted to submit their own form!

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<p>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.</p>	<div data-bbox="565 508 1016 646">Statement of Responsibility (SOR)</div>
<p>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</p>	<div data-bbox="922 970 1117 1134"></div> <div data-bbox="789 1218 1214 1281">UK_100 IRIS Awareness & Navigation (WBT ENT_APP_UK_100)</div>

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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



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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.

SIMILAR ROLES

SAP (R3/MM)	REQUISITIONER	APPROVER	RECEIVER
SRM	SHOPPER	APPROVER	GOODS CONFIRMER
PRD	CREATOR	APPROVER	

	PRD CREATOR	SAP REQUISITIONER	SRM SHOPPER	SAP/SRM/PRD APPROVER	SAP RECEIVER	SRM GOODS CONFIRMER
OPTION 1	✓	✓	✓	✗	✓	✓
OPTION 2	✗	✗	✗	✓	✓	✓
OPTION 3	✗	✓	✓	✓	✗	✗

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