



Request for SAP User Access (Department)

INSTRUCTIONS FOR REQUESTING SAP USER ACCESS

1. To be filled in by a staff member experienced in SAP with an understanding of its structures and workflow.
2. Please print all information using a ball-point or felt-tip pen.
3. Complete applicable sections (**sections 1 and 7 are MANDATORY**)
 - For Finance access complete sections 1, 2-4 & 7
 - For HR access complete sections 1, 5-7
4. For both HR and Finance access forward all pages of the original form to the address shown at right. Do not forward direct to HR. This will delay processing.
5. Please keep a copy for your records. Allow for 2 weeks processing time
6. This form is CONFIDENTIAL when completed

Corporate Finance Division

PO Box 3F

Monash University

Vic 3800

Attention: Pam Greenwood

Or hand deliver to 710 Blackburn Road,
Building 2, 2nd Level

(faxed copies not accepted)

Procedures on how to correctly complete this form are at: http://www.adm.monash.edu.au/finance/systems/IAS034_req_user_proc.html.

SECTION 1. USER DETAILS: (Completion Mandatory)

Place a tick in the appropriate box:

- Setup new SAP User
 Update existing SAP User
 Delete SAP User_(complete Section 1 & 7 only)

Name:

Last name (Please print)

First name.

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Position Number (refer note)

Note: It is mandatory to complete the position number field. It must be an individual's unique position number - not a block position. To obtain your position number refer to eServices <http://eservices.sss.monash.edu.au/>

Department/
Centre:

Email
Address:

Personnel
No:

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Novell/SAP
User Name

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Phone No:
Either

or
Extension no:



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SECTION 2: SAP FINANCE PURCHASING GROUP and COST CENTRE ACCESS.

Both purchasing groups and cost centres must be nominated

2a) PURCHASING GROUPS: (A)dd or (D)elete Purchasing groups to the User's Security Profile
(If User already has the relevant purchasing groups and only additional roles are being added, complete section 3)

(A)dd or (D)elete	Purchasing Group Code (from) 3 digits			Purchasing Group Code (to) 3 digits		

2b) COST CENTRES: (A)dd or (D)elete Cost Centres from the User's Security Profile
(If User already have access to the relevant Cost Centres and only additional roles are being added, complete section 3)

(A)dd or (D)elete	Cost Centre Code (from) 6 digits						Cost Centre Code (to) 6 digits					

SECTION 3: SAP FINANCE PROCESSING ROLES

3a) SAP FINANCE ROLES: (A)dd or (D)elete roles from the User's Security Profile and insert scheduled training date to attend training. Refer to <http://www.adm.monash.edu.au/ias/SAP/Training/index.html> to book training or contact the SAP Service Desk for assistance. Where training is via Computer Based Training, provide the date the CBT was/will be completed. Access will not be given until training has been completed.

(A)dd or (D)elete	Cost Centre Role	Training course(s) date or date CBT was/will be completed	Training Checked (IAS Office use only)
	Asset Register Maintainer (AA10)		
	Credit Card Processor (CC20)		
	General Ledger Journals & IDNs (CBT - GL10)		
	Accounts Receivable Invoice/Credit Memo creator (AR10)		
	HR and Fin Report Navigation (CBT - RPT10)		
	Funds Management Reporting & Budgeting (FM20)		
(A)dd or (D)elete	Purchasing Group Role	Training course(s) date or date CBT was/will be completed	Training Checked (IAS Office use only)
	Requisitioner (PUR10)		
	Goods Receiver (CBT - GR10)		
	Accounts Payable Invoice Processor (AP10 or AP40)		
	Purchase Order Processor (PUR10 and possibly PUR20)		
	Requisition Authoriser (CBT – APV10)* <i>(tick category/s in section 3b below)</i>		

3b) REQUISITION AUTHORISER CATEGORIES

Please tick appropriate category/s below, for the Roles you are **appointed** by your department to undertake

The vehicle and contractor roles below are only available to specified Procurement and

- | | |
|---|---|
| <input type="checkbox"/> Safety Officer | <input type="checkbox"/> Animal Ethics Chair |
| <input type="checkbox"/> Radiation Safety Officer | <input type="checkbox"/> Chemical Weapons Permit/Warrant Holder |
| <input type="checkbox"/> Laser Safety Officer | <input type="checkbox"/> Computer Support Officer |

- | |
|--|
| <input type="checkbox"/> Contractor Services |
| <input type="checkbox"/> Vehicles |



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SECTION 4: SAP FINANCE APPROVING ROLES AND SETTING UP FINANCIAL DELEGATION

Complete all of section 4 if SAP finance approving authority role and financial delegation is required.

4a) NOMINATING REQUIRED APPROVING ROLES: (A)dd or (D)elete Approving roles from the User's Security Profile. The Approvals Training Course CBT (APV10) must be completed for access to these roles.

Table with 4 columns: (A)dd or (D)elete, Approving Roles, Provide date CBT was/will be completed, Training Checked (IAS Office use only). Rows include Asset Disposer/Authoriser, Accounts Payable Invoice & IDN Approver, Purchase Order Approver, Accounts Receivable Invoice/Credit Memo approver, Student Loan Processor/Approver, Paper based Non-SAP authority only, and Contractor agreement Notification.

4b) SETTING UP FINANCIAL DELEGATION - for both SAP electronic approvals and paper based signing (e.g. claim forms). Where financial authority is to be delegated temporarily, please complete a Request for Temporary Access/ Delegation form IAS033.

Place a tick in the appropriate box:

- Setup new Authority, Update existing Authority, Delete All Authority (also complete Sections 1 & 7)

Specimen Signature:

Empty box for specimen signature.

4c) FINANCIAL DELEGATION \$ LIMIT - place a tick in ONE Box only for the appropriate \$ limit for the role. (Refer Financial delegation approved limits http://www.adm.monash.edu.au/finance/payables/financial_delegations.html) The elected \$ limit gives financial delegation for all Centres and Purchasing Groups to which access is granted for this User

Table with 5 columns of radio button options for financial delegation limits: \$0, \$5,000, \$10,000, \$20,000, \$50,000, \$75,000, \$150,000, \$200,000, \$375,000.

4d) WORKFLOW RECEIPT FOR APPROVALS (FINANCIAL DELEGATION RANGE)

Notes : i) If designated to receive Workflow for Approval the user will receive electronic workflow messages to approve on-line Purchase Orders and/ or Invoice/ IDNs for the designated \$ range and for the Purchasing Group/s and Cost Centre/s requested in Section 2 of this form. If this section is not completed SAP workflow messages will not workflow to the approver's inbox (but may still be accessed manually - Purchase Order and Purchase Requisition ONLY).

ii) Staff must have the SAME financial authority level for all the cost centres and purchasing groups to which they have access to (e.g. they cannot have \$5,000 financial delegation for one cost centre and \$10,000 for another).

iii) Staff cannot split the range of financial authority (e.g. they cannot have \$2,000 to \$5,000 and then \$10,000 to \$20,000 in the selected cost centres or purchasing groups with someone else or no-one nominated for \$5,000 to \$10,000).

FINANCIAL DELEGATION APPROVAL RANGE

(A)dd (C)hange or (D)elete in LH box to Approving roles from the User's Security Profile. Please tick all boxes in the range required. The ticks must be in consecutive boxes.

Table with 9 columns for financial delegation ranges: \$1 to \$5,000, \$5,001 to \$10,000, \$10,001 to \$20,000, \$20,001 to \$50,000, \$50,001 to \$75,000, \$75,001 to \$150,000, \$150,001 to \$200,000, \$200,001 to \$375,000.

IF REQUESTING FINANCE ACCESS ONLY- SECTION 7 OF THIS FORM MUST ALSO BE COMPLETED

HR/PAYROLL ACCESS (Section 1 must also be completed in full)

SECTION 5: HR ROLES

Access to SAP HR will only be granted when training is completed by the individual. For all training enquiries, please contact the SAP Service Desk on 990 56990.

If user already has access to SAP HR and wishes to include access to additional Organisational Units, please go to Section 6.

Require Access

Remove Access

Tick the relevant HR access that is required	HR training required	HR training course dates including dates when CBTs have been completed	Tick the relevant HR access to be removed
<input type="checkbox"/> HR Display – to view ONLY Casuals and Sessionals details	Computer Based Training: HRD10		<input type="checkbox"/> HR Display – to view ONLY Casuals and Sessionals details
<input type="checkbox"/> HR Display – to view staff details	Computer Based Training: HRD10		<input type="checkbox"/> HR Display – to view staff details
<input type="checkbox"/> HR Reporting*	Computer Based Training: HRD10 Course code: HRR10		<input type="checkbox"/> HR Reporting
<input type="checkbox"/> Timesheet Entry	Computer Based Training: HRD10 Course code: HRT10		<input type="checkbox"/> Timesheet Entry
<input type="checkbox"/> View Access – Library & Service staff ONLY #	Computer Based Training: SR10		<input type="checkbox"/> View Access – Library & Service staff ONLY #

* If you require access to the Salary Expenditure or Planner Reports, please ensure that you tick the HR Reporting option and nominate your cost centre under **Section 2b**.

Access to this role cannot be combined with any other HR options. Instructions are available from the SAP Training website as a PowerPoint presentation.

SECTION 6: NOMINATING ORGANISATIONAL UNIT(S)

NOTE: Organisational Units are not the same as Cost Centres

Complete this section if access to additional Organisational Units is required

Additional Organisational Units. Please (A)dd or (D)elete Organisational Units to/from the User's Security Profile below:								
(A)dd or (D)elete	Organisational Unit Number 8 numbers							Organisational Unit Description



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MANDATORY SECTION TO BE COMPLETED FOR ALL FINANCE AND HR USER REQUESTS

SECTION 7: SAP USER ACCESS AUTHORISATION - The person completing the form must sign and then obtain the Head of Department's (or Officer with relevant financial delegation) signature of approval.

- Notes: i) The person authorising the financial delegation/departmental access must have a higher financial delegation than the person requiring access. ii) Where the request is for Head of Department or higher, authority must be approved by the person to whom the requestor directly reports. iii) The SAP Nominated Faculty/Division Officer http://www.adm.monash.edu.au/finance/systems/Nominated_approvers_SAP_form.htm is to check that the form complies with the user access/workflow guidelines http://www.adm.monash.edu.au/finance/systems/workflow_guide.html

AUTHORISATION OF PERSON COMPLETING THE FORM

Person completing the form (print name) Ext. _____
Person completing the form (signature) _____ (Date) ____/____/____
Position title of the person completing the form _____

HEAD OF DEPT's (OR DELEGATED OFFICER's) AUTHORISATION

I, (print name) _____, authorise this staff member be given the requested SAP user access and where required relevant approval access and financial delegation.
Head of Department or officer with relevant financial delegation (signature) _____ (Date) ____/____/____
Authorisor's position title (e.g. Head, Dean, Director) Ext. _____

SAP NOMINATED FACULTY/DIVISION OFFICER AUTHORISATION

I, (print name) _____ confirm the user details on this form are correct for this Faculty/Division and that I authorise this staff member be given the requested SAP user access.

SAP NOMINATED FACULTY/DIVISION OFFICER AUTHORISATION

SAP Nominated Faculty/Division Officer or Deputy (signature) _____ Ext. _____ (Date) ____/____/____

Corporate Finance Use Only

ACTIONED BY: _____ DATE: ____/____/____

Human Resources Division Use Only

ACTIONED BY: _____ DATE: ____/____/____
POSITION No.: _____