

Agresso User Access Form

Please refer to the "Completing the Agresso access form notes" for guidance before completing this form.

Please send completed forms to the Financial System Team by raising a self service ticket via <https://helpdesk.qmul.ac.uk> or call the helpdesk on x8888.

Important: New users must have attended any local Procurement training (where appropriate) and Agresso training before access is given to the live Agresso system.

New user access: Change existing access: Read only access (provide exact details in the notes section of the form):

First Name: _____	Last Name _____	Payroll Number: _____
Tel No.: _____	Full Department name: _____	Job Title: _____
Email: _____	College User Name (e.g. aaw999): _____	Replacement for: _____

Requisitioner access only!

Default budget code (should be most commonly used)	
Which cost centre(s) do you need access?	
Access to Payroll Info (by exception only):	
Delivery Address (this will default when you create a requisition)	

Authoriser access only!

Approval limit delegated to me (as per Scheme of Delegated Financial Authority) see note 2 below:	£
Cost centre(s) you need to access to approve requisitions?	
Designated substitute approver (to delegate your limit when out of the office), must be peer or higher:	
Access to Payroll Info (by exception only):	
Note: (1) In line with the approved Scheme of Delegation of Financial Authority, a user can either be a requisitioner or an approver (never both). (2) You can access the latest copy of the Scheme of Delegation of Financial Authority on the policy zone here http://www.arcs.qmul.ac.uk/policy/index.html	

(Must be Institute Manager/HOD/School or Director)

Name of authoriser: _____

Signature: _____

Ext. No. _____

Date: _____

Notes:

Completing the Agresso User Access Form

Please note:

- New users must attend QMUL's Procurement Buyer Training and Agresso training before being given access to the live Agresso system.
- New users will be contacted by the Procurement Team and the Financial Systems Team to book on a training session, when the user access form is submitted.
- Users can also book on the QMUL Buyer Training by using the following link - <http://www.esdcourses.org.uk/userlistcourse.php>

The course reference is "P117 – Buyer Training"

1. When to complete the Agresso User Access Form

The Agresso User Access Form must be completed to request:

- Agresso access for new users
- Access changes for current Agresso users within the department
- Access changes for user moving to a new department

Note: You can notify the Financial Systems Team by raising an ITS Helpdesk ticket (see item 9) - you do not need to complete this form.

2. Requesting user's access to be deactivated (user no longer requires access to Agresso)

- If a user no longer requires access to Agresso (e.g. left QMUL, changed roles), please raise a ticket through the IT Helpdesk to ask for the access to be deactivated.

Note: Please ensure you provide the name and email address of a user who will be taking responsibility for the tasks/reports of the user who has left.

Note: You do not need to complete this form to request a user's access to be deactivated.

3. User access being requested - Please complete the 'Requisitioner access' section OR 'Authoriser access' section, please do not complete both these sections.

- A user can be a **Requisitioner** (to create requisitions) or an **Approver** (to review and approve requisitions), but not both.
- The user access being requested must be in line with the approved Scheme of Delegation of Financial Authority which can be found on the Policy Zone here <http://www.arcs.qmul.ac.uk/policy/index.html>

4. Requisitioner access

Self-approval limits are either zero or £100, and are based on the cost centre used, **as agreed with the relevant department**. The limits are no longer based on the requisitioner.

- Please state the **cost centre(s)** required, to enable the requisitioner to raise requisitions against them. **If you are unsure please consult with your Institute Manager/School Director of Administration**
- Please provide a default budget code - this will automatically default when the requisitioner creates the requisition - however this can be over-written if an alternative budget code needs to be used
- Please provide a **complete** default delivery address - this will appear on the approved purchase order to be sent to the supplier, when an order is being placed for goods.

5. Approvers access and approval limits

- Approval limits requested for an approver must be in line with the approved Scheme of Delegation of Financial Authority which can be found on the Policy Zone here <http://www.arcs.qmul.ac.uk/policy/index.html>
- Please confirm which cost centres the approver needs access to, to be included in the workflow approval chain.
- Please confirm the approver's substitute to be set up on Agresso, to enable the approver to self-delegate their approval limit on Agresso, when they are out of the office.

Note: The substitute must be a peer or the person assigned to the next approver value in the chain.

Note: All Approvers will have a Supervisor, the next approver value in the chain. Tasks not actioned within 7 days will be escalated to the Supervisor.

Note: Please make it clear in the 'Notes' box if the approver is to be added to any authoriser group for any cost centre.

6. Read only access

- If you don't need to create or approve requisitions, you can request "Read only" access to Agresso (e.g. to run reports).
- You will need to specify the cost centres you need access to, for enquiry and reporting purposes.

7. Payroll access (by exception only)

- If you need access to Payroll information (e.g. for reporting purposes), please indicate on the form, otherwise non-payroll detail access is given.

Note: by requesting access to Payroll information, you will be given access to the data related to the cost centre(s) you have access to.

Note: Payroll access should only be requested for members of staff who need to monitor staff costs, due to the sensitive nature of the information.

8. Access Authorisation by Department

- The completed Agresso User Access Form must be authorised by the Institute Manager / School's Director of Administration or Head of School/Institute

Note: Incomplete forms, or forms authorised by anyone other than the levels listed above will delay set up.

9. Submitting the authorised Agresso User Access Form

Completed authorised forms should be submitted to the Financial Systems Team by:

- raising a self-service helpdesk ticket and attaching a scanned copy of the approved form

Note: If you raise a ticket using the IT Helpdesk self-service portal, the request will be directly allocated to the Financial Systems Team. The link to use is: <https://helpdesk.qmul.ac.uk/>

(you will need your college log-in details)

- you can also raise a ticket by emailing the IT Helpdesk (its-helpdesk@qmul.ac.uk), however it will take longer for the ticket to be allocated to the Financial Systems Team to action.