1. The requestor and the departmental user must have a TXState NetID(User ID). If user does not have a NetID, request one by accessing this link: <https://tim.txstate.edu/netidrequest>
2. **Make sure you are using the most up-to-date Security Authorization Form found at the following link:** <http://www.tr.txstate.edu/forms/sap-forms.html>
3. In Section 1, the Requestor must identify the departmental user who needs SAP access added (granted) or deleted (revoked) by completing the required departmental user information.

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| **Section 1: User Information, security authorization is being requested for the person identified below** |
| **Name:**      | **TXState NetID:**      | **Classification:** **[ ]  Faculty/Staff [ ]  Temporary Employee** **(pick one) [ ]  Student Employee [ ]  Consultant [ ]  Special/Guest** |
| **Department Name:**      | **Office Building & Room:**   | **Phone Number:**         |
| **Authorization Effective Dates****From:** **To:**        | **Reason for request: [ ]  New Hire [ ]  Termination** **(pick one) [ ]  Change of Job Duties [ ]  Transfer between Departments [ ]  Account Manager Change [ ]  Other:**  |

* If no effective dates are specified, the privileges granted will remain in effect until a request to remove the privileges is submitted.
1. In Section 2a, the Requestor should select the SAP user roles to be added (granted) or deleted (revoked). These roles are not restricted by account (example: the Purchasing Display role will allow the user to view purchasing documents for any account).

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| **Section 2: Action, Role & Account Code** |
| **[ ]  DELETE ALL Roles** |
| **a. General Display and Entry (no account code required)** |
| **[ ]  DELETE****[ ]  ADD** | **Budget Display** | **[ ]  DELETE****[ ]  ADD** | **LSO Followup Administrator** |
| **[ ]  DELETE****[ ]  ADD** | **Budget Revisions** | **[ ]  DELETE****[ ]  ADD** | **Purchasing Display** |
| **[ ]  DELETE****[ ]  ADD** | **Departmental Receipting (SBS only)** | **[ ]  DELETE****[ ]  ADD** | **Requisition Entry✯** |
| **[ ]  DELETE****[ ]  ADD** | **General Financial Display** | **[ ]  DELETE****[ ]  ADD** | **Travel Assistant (Requires completion of Travel Tracks training and additional Approval – see page 3) ✈** |
| **[ ]  DELETE****[ ]  ADD** | **General Grant Display** |  |  |

**✯**The Requisition Entry role cannot be granted in conjunction with the Requisition Approval role without the prior approval of the General Accounting Office.

1. In Section 2b, the Requestor should select the SAP user roles to be added or deleted and supply the relevant account codes. The roles listed in Section 2b are restricted by account (example: the Requisition Approval**✯** role will allow the user to approve requisitions for those Internal Orders, Cost Centers and WBS elements specified by the requestor).

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| **Section 2: Action, Role & Account Code** |
| **…**  |
| **b. Restricted Displays and Entry (must specify applicable account codes\*)** |
| **Role** | **Restricted by** | **Account Codes** |
| **[ ]  DELETE****[ ]  ADD** | **Budget Restricted Display** | **Fund Centers** |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **Funded Prgrms****Ex: 9#########** |  |  |  |  |
|  |  |  |  |  |  |  |
| **[ ]  DELETE****[ ]  ADD** | **Financial Restricted Display for Statistical Orders** | **Internal Order****Ex: 5#########** |  |  |  |  |
|  |  |  |  |  |  |  |
| **[ ]  DELETE****[ ]  ADD** | **Grant Restricted Display** | **Internal Orders****Ex: 80########** |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **WBS****Ex: 89########** |  |  |  |  |
|  |  |  |  |  |  |  |
| **[ ]  DELETE****[ ]  ADD** | **Requisition Approval✯** | **Internal Orders** |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **Cost Centers** |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **WBS** |  |  |  |  |
|  |  |  |  |  |  |  |
| **[ ]  DELETE****[ ]  ADD** | **TSUS Marketplace Approval****(*must have Requisition Approval role*)** | **Internal Orders** |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  | **Cost Centers** |  |  |  |  |
|  |  |  |  |  |  |  |
| **Comments:**       |

\*Ranges may be used. If entering information on screen, account code boxes will expand. If using a hardcopy and adequate space is not provided, supply remaining responsible areas on an additional SAP departmental user access request form.

**✯**The Requisition Approval role cannot be granted in conjunction with the Requisition Entryl role without the prior approval of the General Accounting Office.

1. In Section 3, the requestor must identify themself by completing the required requestor information.
2. Requestor will obtain the Account Manager’s signature. Alternate signatures will not be accepted.
* Requestor can submit the form by scanning the completed form into a PDF file with their Last Name and Initial of First Name (i.e. Smith\_T.pdf) and emailing the file as an attachment to: itac@txstate.edu or by mailing the hardcopy to ITAC – SAP, MCS 366. Please allow lead time when making the request so that security actions can be completed by the time the individual needs the access.

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| **Section 3: Requestor & Account Manager Information** |
| **Requested By:** | **TXState NetID:** | **Phone Number:** | **Date:** |
| **Account Manager Signature:** | **Account Manager Name:****Account Manager NetID:** | **Date:** |
| **✈Cabinet Officer or Academic Dean****Signature (for Travel Assistant role):** | **Cabinet Officer or Academic Dean Name:****Cabinet Officer or Academic Dean NetID:** | **Date:** |
| **✈Travel Training Completed** **Yes \_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_** | **Training Validation Signature: (Accounts Payable Office)** | **Date:** |
| **✈ *If requesting the Travel Assistant role, do not forward the security form to ITAC until Cabinet Officer or Academic Dean and Training Validation signatures are complete.******By signing above, the Manager acknowledges that they are responsible for the management of all account numbers requested and that the staff member needs this access in order to perform his/her job duties.*** |
| Complete, Sign & Submit Form. Send scanned PDF to: itac@txstate.edu or mail hardcopy to: ITAC – SAP, MCS 366 ⚫ Questions: Call 245-4822 or Email: itac@txstate.eduRevised: 08/25/2017 |

1. ITAC staff will verify information on the form, log the request, and forward it to the appropriate office for final approval. The request will be sent to either the General Accounting Office (GAO) or the FI Competency Center. ITAC will retain a copy of the request.
2. If the request was forwarded to the GAO or the FI Competency Center, the information on the form will be verified, necessary adjustments will be made in consultation with the Account Manager, and the approved request will be returned to ITAC for processing.
3. The security roles are assigned to individuals and are not position-based. If the holder of these roles leaves the position and it is filled by another person, a new security form will need to be completed to have the roles assigned to the new holder of the position.
4. ITAC staff will create the requested SAP access for the specified person.
* The departmental user will be emailed their new SAP User ID and password, if applicable.
* The departmental user will be notified of role changes.
* The requestor and the account manager will be notified when the requested access has been granted.
* The approved document will be archived by ITAC.