How to log a School system User Access request on IT Traded Services to Derbyshire Schools Portal

This guide provides information on how to log a system access request on the IT Traded Services Derbyshire Schools Portal. Here you can complete requests for New users, Amendments to existing system users and Deletions of system users.

Contents:

Section 1- Information required to submit a User Access request

To log a system access request for a **new/amend/delete** school user they **must** have set up an **8 digit employee payroll number** and a **school email address which includes the user's name** for example:-
jon.richardson@hightownprimary.derbyshire.sch.uk
The **Smartphone Number of User** (For Multi-Factor Authentication)
We will use this number to send text codes which are necessary when logging onto the DCC network
Which roles are required?

<mark>RAP Portal</mark> All **New** users will need to request RAP Portal access

<mark>SAP roles –select one option</mark>
SAP Inputter – Input income received, input payroll, input journal transfers, input absences, input negotiable journals create customer invoices, upload budget, input Inventory
SAP Inputter with Reporting - All the same as the SAP Inputter however can also run SAP reports
SAP Approver with Reporting - Approve payroll, approve journal transfers, approve negotiable journals, run SAP reports, approve inventory write offs

VIM (Vendor Invoice Management) roles select one option
Coder – Code vendor invoices for approval
VIM £1K Approver – Approve payments of invoices up to £1,000
VIM £5K Approver – Approve payment of vendor invoices up to £5,000
VIM Unlimited Approver - Approve unlimited in accordance with school financial limit stated in School's Financial Regulations

OrderPoint roles select one option
OrderPoint Shopper – Create shopping carts, goods receipt ordered items
OrderPoint £1K Approver – Approve shopping carts up to £1,000
OrderPoint £5K Approver - Approve shopping carts up to £5,000
OrderPoint Unlimited Approver – Approve unlimited in accordance with school financial limit stated in School's Financial Regulations

Note There is a system requirement for an Unlimited Approver to be set up in school and it is recommended that this is the headteacher. This does not override the financial limits that have been set in the School's Financial Regulations which are reviewed annually in September.

Logging the system access request on the IT Traded Services Portal should only be done by the Headteacher (or Chair of Governors in the absence of the headteacher):

See **Section 2** of this guide for the link to the IT Traded Services to Derbyshire Schools Portal where you will log in to submit the system access request
Once you click on the **Submit** button the IT Traded Services portal ticket is created and a ticket reference number will appear on the screen.

New users will be contacted by email from the Service Desk once their access has been set up.
Further information

If you require assistance with logging into the IT Traded Services to Derbyshire Schools Portal please contact our Service Desk colleagues on **service.desk@derbyshire.gov.uk** or alternatively call them on 01629 537777 Option 2

If you require further advice regarding which employee access roles to select please contact the Budget Manager Support Team at:
CST.budgetsupport@derbyshire.gov.uk

Section 2 - Log into the IT Traded Services to Derbyshire Schools Portal

Click on the IT Traded Services to Derbyshire Schools Portal link to access the portal log on screen:

S4S : Derbyshire
Services for Schools

⚠ Welcome to IT Traded Services to Derbyshire Schools

Please log in to your account

👤 Email Address

🔒 Password

☐ Remember me
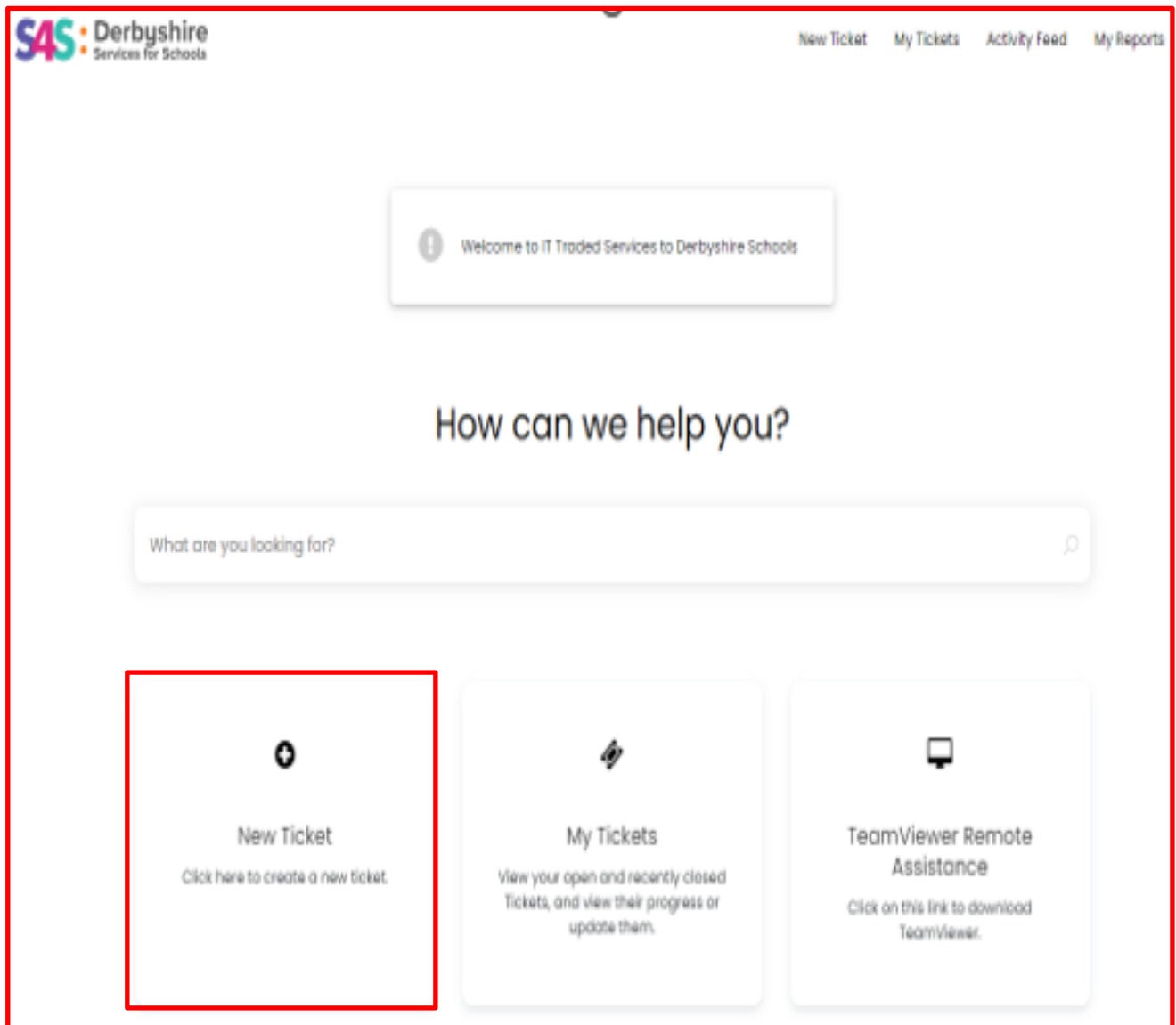
Log in

Create New User Account
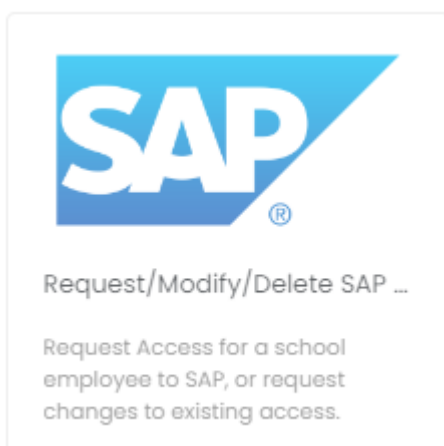
Forgotten Password?

🏠
County Hall
Matlock
DE4 3AG

📞
01629 537777

- The following screen is now displayed
- Click on the '**New Ticket'** option

On the following screen click on this tile:-

- On the following screen click on the '**Log a Ticket'** button

In this screen scroll down to select your school '**Site**' from the dropdown list and then select your **Request Type**

Section 3 - Request for a New system user
Click on **Request Type** – in this example **New User**

Log a Ticket

denotes a mandatory field

Site *

Hotmail School –TESTING

Request Type *

Select...

| New User |
| User Amendment |
| User Deletion |

Now scroll down this screen and complete all the mandatory fields marked with a **red asterisk *:-**

Request Type *

New User

Cost Centre *

Name of user *

User Payroll Number *
This is an 8 digit number that may begin with 3, 7 or 9.

Start Date of Access *

Date

Email *
email addresses MUST NOT be generic (eg info@ or enquiries@) but must be unique to the user and be a school address

Job Title *

Is the User the User Responsible for the Cost Centre? *
Must be an unlimited approver

Yes

| No |
| Yes |

Continue to scroll down and complete the mandatory fields

Is the new user only employed at your school *

| No | ✕ ▾ |

Name of other school/establishment and details of position held *

[   ]

Roles   ⌃

Which Roles? *

| Select... | ▲ |

OrderPoint

SAP Finance (Payroll & Cash Entry)

SAP VIM (Invoices)

Roles   ⌃

Which Roles? *

| ✕ OrderPoint | ✕ SAP Finance (Payroll & Cash Entry) | ✕ SAP VIM (Invoices) | ▾ |

SAP Finance (Payroll & Cash Entry) *

| Select... | ▾ |

SAP VIM (Invoices) *

| Select... | ▾ |

OrderPoint *

| Select... | ▾ |

Remote Access Log In *

| Select... | ▾ |

SAP Finance (Payroll & Cash Entry) *

| Select... | ▲ |

Approver with reporting

Inputter with Reporting

Inputter only

SAP VIM (Invoices) *

| Select... | ▲ |

Unlimited Approver

£5k Approver

£1k Approver

Coder

Continue to scroll down and complete the mandatory fields

OrderPoint *

Select...

Unlimited Approver

£5k Approver

£1k Approver

Shopper

Remote Access Log In *

New one required

Smartphone Number of user (For Multi-Factor Authentication) *
We will use this number to send text codes which are necessary when logging onto the DCC network.

Once you have completed all the mandatory fields and selected the appropriate Approval option **click** on the **'Submit'** button to log the ticket.

Approval

Position held in School *

Select...

Chair of Governors (When the Headteacher is unavailable)

Headteacher

Attachments

Click here or drag and drop files to upload.

Submit   Cancel

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Matlock
DE4 3AG

01629 537777

The ticket is now created and a ticket reference number will appear on the screen.

New users will be contacted by email from the Service Desk once their access has been set up.

Section 4 – Request to Modify/Change system user

Select the **'Request Type'** option **User Amendment** from the dropdown list and scroll down to complete the mandatory fields

Request Type *

User Amendment   × ▾

Cost Centre *

Name of user *

User Payroll Number *
This is an 8 digit number that may begin with 3, 7 or 9.

Email *
email addresses MUST NOT be generic (eg info@ or enquiries@) but must be unique to the user and be a school address

Job Title *

Date to Action From *

Date

Is the User the User Responsible for the Cost Centre? *
Must be an unlimited approver

Select...   ▾

Is the new user only employed at your school *

Select...   ▾

Roles   ∧

Which Roles? *

Select...   ▴

OrderPoint

SAP Finance (Payroll & Cash Entry)

SAP VIM (Invoices)

SAP Finance (Payroll & Cash Entry) *

Select...   ▴

Approver with reporting

Inputter with Reporting

Inputter only

Continue to scroll down and complete the mandatory fields

Once you have completed all the mandatory fields and selected the appropriate Approval option **click** on the **'Submit'** button to log the ticket.

The ticket is now created and a ticket reference number will appear on the screen.

You will receive a notification by email from the Service Desk once the ticket has been completed.

Section 5 – Deleting a system user

Select the **Request Type** option **User Deletion** from the dropdown list and scroll down to complete the mandatory fields

Request Type *

User Deletion

Warning – Please ensure you have an alternative coder / approver in school. Ensure you also complete a new user for the replacement as soon as possible if required.

Name of user *

User Payroll Number *
This is an 8 digit number that may begin with 3, 7 or 9.

Email *
email addresses MUST NOT be generic (eg info@ or enquiries@) but must be unique to the user and be a school address

Date to Action From *

Date

Is the User the User Responsible for the Cost Centre eg Headteacher *
If the deleted person is the User responsible for your cost centre, you must notify us of their replacement by submitting a New User request.

Select...

Reason for leaving *
eg retirement, moved school

Does the User have access to any other school's SAP and/or OrderPoint *

Yes

Please specify the school and if the access needs to be maintained *

Once you have completed all the mandatory fields **click** on the **'Submit'** button to log the ticket

The ticket is now created and a ticket reference number will appear on the screen.

You will receive a notification by email from the Service Desk once the ticket has been completed.

Section 6 - How to check the progress of your tickets

From Main menu Click on '**My Tickets'** to view the tickets you have raised
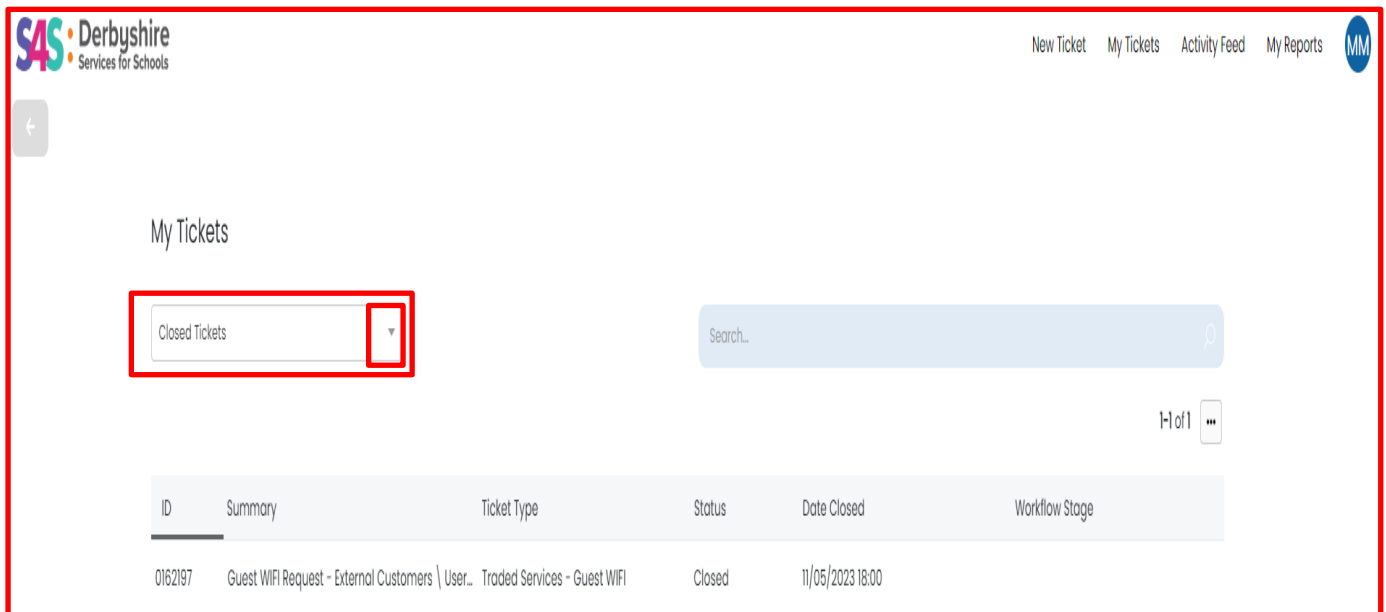
- Your tickets are now displayed
- You can filter tickets based on their status – **Open**, **Awaiting Input**, **Closed** or **All**
- Use the black triangle to display these filter options
- In this example 'Closed Tickets has been selected
- Clicking on a ticket entry will display specific ticket details, when it was logged, what status it is at and what the last updates were on the ticket