

# Buy A&M Training – Configuration and Routing

Buy A&M Training will be conducted using generic user IDs and generic approver user IDs to simplify the configuration process of the training environment. These generic IDs have been established in the training environment, and all routing paths should utilize the generic approver user IDs as the **Approver User** for paths you establish for your training sessions.

## Training Organizations

Training Organizations have been established for each participating pilot member. These are setup as:

- AM01 – System Offices
- AM04 – Tarleton State University
- AM15 – Texas A&M University-Corpus Christi
- AM18 – West Texas A&M University
- AM21 – Texas A&M University-Commerce

The training environment appears in blue when you are logged in correctly.

## Training Users

Generic users have been configured for the Buy A&M training environment for each organization. There are 50 generic users for each organization, setup as follows:

- AM01USER01-AM01USER50
- AM04USER01-AM04USER50
- AM15USER01-AM15USER50
- AM18USER01-AM18USER50
- AM21USER01-AM21USER50

Example:

Login ID	First Name	Last Name	Status	Role(s)
AM01USER01	Training	User 01	Active	Accounts Payable Basic Purchasing Department Access
AM01USER02	Training	User 02	Active	Accounts Payable Basic Purchasing Department Access
AM01USER03	Training	User 03	Active	Accounts Payable Basic Purchasing Department Access

These generic users have been configured with Accounts Payable, Basic Purchasing and Departmental Access Roles for simplicity. When training, always be aware of the role the user is functioning under as options will be different according to their active role.

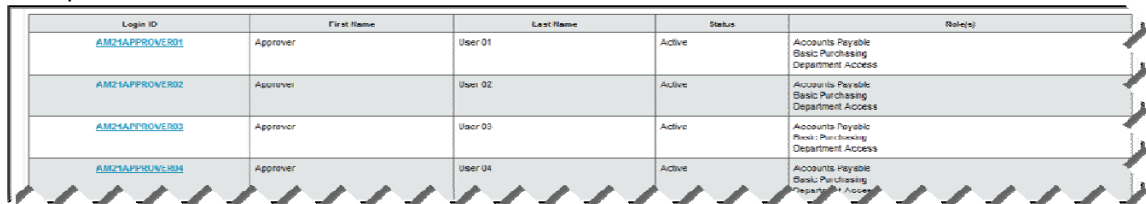
In preparation for training your departments you should ensure that the passwords are set to something common for all generic users, such as “training.” Users should not change the password for the generic user IDs they are using during training. Use of standard passwords will simplify the login process for training; these passwords will not require a reset when the user logs in.

### Approver Users

Generic approver users have been configured for the Buy A&M Training environment for each organization. There are 4 generic approver users for each organization setup as follows:

AM01APPROVER01-AM01APPROVER04  
AM04APPROVER01-AM04APPROVER04  
AM15APPROVER01-AM15APPROVER04  
AM18APPROVER01-AM18APPROVER04  
AM21APPROVER01-AM21APPROVER04

Example:



Login ID	First Name	Last Name	Status	Roles
AM21APPROVER01	Approver	User 01	Active	Accounts Payable Basic Purchasing Department Access
AM21APPROVER02	Approver	User 02	Active	Accounts Payable Basic Purchasing Department Access
AM21APPROVER03	Approver	User 03	Active	Accounts Payable Basic Purchasing Department Access
AM21APPROVER04	Approver	User 04	Active	Accounts Payable Basic Purchasing Department Access

In preparation for training your departments you should ensure that the passwords are set to something common for all generic approver users, such as “training.” Users should not change the password for the generic approver user IDs they are using during training. Use of standard passwords will simplify the login process for training; these passwords will not require a reset when the user logs in.

Routing paths should be setup in the training environment for the specific departments that you will be training. Utilize the generic approver users as the approvers on all paths. This will ensure that documents created in the Departmental Access, Basic Purchasing and Accounts Payable training sessions will be available to the approvers when they attend their training sessions.

## Configuring Routing for Buy A&M Training Sessions (cont'd)

You may configure the Approval Paths as complex as you desire in the training environment with this plan since you can always have approvers logging in with approver IDs. Approvers should always sign in with the approver IDs for training.

Approval Path PILOT - Pilot

General | Change Order | Misc/Freight | Department/Location | Email | NIGP Code | Account Segment | Vendor | Summary

Approval Path ID: PILOT  
 Organization: AM21 - AM21 - Texas A&M University-Commerce  
 Dollar Range\*: 0.00 to 99999999999999  
 Description\*: Pilot  
 Approval Type\*: PILOT - PILOT  
 Status: Inactive

Roles:  
 Basic Purchasing  
 Department Access  
 Inventory User  
 Accounts Payable

Approval Doc/Doc Sub Types

Requisition  Inventory  Demand  Open Market  RPA  Release  
 Unposted Bid  Blanket  Contract  Open Market  
 Evaluated Bid  Blanket  Contract  Open Market  
 Purchase Order  Blanket  Contract  Direct Open Market  Open Market  RPA  G2B Blanket  Release  
 PO Change Order  PO Receiving  Invoice  Invoice with Change Order  Invoice-Regular  Credit Memo

Approvers

Approver User	Level	Type	Delete
User 02, Approver		<input type="radio"/> Primary <input checked="" type="radio"/> Alternate	<input type="checkbox"/>
User 01, Approver		<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="checkbox"/>
		<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="checkbox"/>

Enter the Generic Approver User IDs as Approvers on your paths - you have up to 4 to choose from

Save & Continue | Reset

## Training Tips

When participating in training, users should enter documents that will route to the departments which currently have routing configured. Since the approvers will be the same for all paths (including departmental paths) they will be able to practice the approvals by logging in with the generic approver IDs (all pending approvals will be available for those IDs). Care should be taken to approve only those orders that have been routed for their specific department.

As preparation for training, the trainer should determine which users should be assigned the generic approver IDs based on what is pending approval at the time.

The following shows how you can determine if a document that is ready for approval is for the department that is currently being trained:

Home - Welcome Back Unique User

News(0) | Dashboard | Reqs(5) | Bids(1) | PO(3) | Approval(2) | My Reminders(1) | Events(0)

My Documents Pending Approval

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
1400451	09/29/2013	My Requisition	09/29/2013 05:35:22 PM 09/29/2013 05:35:22 PM 09/29/2013 05:35:22 PM 09/29/2013 05:35:22 PM 09/29/2013 05:35:22 PM 09/29/2013 05:35:22 PM	AMnnAPPROVER01 AMnnAPPROVER04	Approved Approved Waiting... Waiting... Waiting... Waiting...	09/29/2013 07:03:24 PM
1400415	09/17/2013	Requisition Entry	09/25/2013 02:37:37 PM 09/25/2013 02:37:37 PM 09/25/2013 02:37:37 PM 09/25/2013 02:37:37 PM	AMnnAPPROVER01 AMnnAPPROVER04	Approved Approved Waiting... Waiting...	09/25/2013 02:40:03 PM 09/26/2013 03:10:49 PM

AMnnAPPROVER01 - AMnnAPPROVER04 will be listed here

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## Configuring Routing for Buy A&M Training Sessions (cont'd)

Select the document to approve and verify that the department / sub-department is for the department that is currently being trained:

Item Information										
Item # 1: Test requisition		1RRA - Ready for Approval								
NIGP Code: <u>33935</u> Telephone Equipment Parts and Accessories (Not Otherwise Classified)										
Qty	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost	
1.0	\$45.33	\$45.33	EA - Each	0.00%	\$0.00		\$0.00	\$0.00	\$45.33	
Manufacturer:		Brand:		Model:						
Make:		Packaging:								
Create Asset:		No								
Add to Asset #:										
S-INRE-FAMIS-271030-00000-4010----N-CH-CI-								Amount		\$45.33

Approve only orders for the Department/Sub-department involved in the training session

Once the approver has verified that this is a document they should approve, they would proceed with the approval.

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