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:

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:

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.
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.

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:
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:

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