Buy A&M Implementation
Core Team Readiness Guide

May 2015

Agency Readiness Components

This workbook is designed to assist the Buy A&M Core Team in completing required readiness tasks for the Buy A&M Implementation. Each section focuses on a different readiness topic.

1. Introduction: The Role of the Buy A&M Core Team

2. Select Organization Administrators
   a) Organization Administrator Role Description

3. Identify User Roles (Security Profiles) in Buy A&M
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7. Getting Ready for Training
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   a) Inventory of Current Contracts
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   c) Activate User Single Sign-On (SSO)

9. Summary To-Do Checklist

Section 1: Introduction — The Role of the Buy A&M Core Team

The Texas A&M University System is implementing Buy A&M (BAM), a single purchasing system, to all 21 members of the Texas A&M University System. BAM will allow for shared contracts and preferred pricing across all members, ease of access to spending information, and ease of purchasing by end users. In our effort to support your organization in this transition, we will be scheduling Core Team meetings and training sessions for your staff. This workbook provides guidance and instructions on a number of preliminary tasks that must be completed by each organization prior to go-live.

Each System Member is required to establish a BAM Core Team. The BAM Core Team is tasked to facilitate the organization and collection of this information for their organization. Recommended members of the Core Team include the following:

a. Purchasing leadership with decision-making authority
b. Accounts Payable leadership with decision-making authority
c. Trainers who will train users and will be active participants throughout the implementation
d. Security Administrators who will manage access rights to BAM for your institution; (if they also provide training, they will need to be involved throughout implementation; otherwise, a special training will be held for these users)

The following are key decisions the Buy A&M Core Team will need to make during the implementation. This guide will detail each of these decisions along with other important information for the Core Team.

1. **Identify the Core Team members**
2. **Define the Implementation Approach**
   a) Will all users within your campus have access to Buy A&M or will only a subset of users be granted access?
   b) Will you roll out to a few key groups to begin the rollout or train the full user base prior to go-live?
3. **Review/Approve the Organization Structure within BAM**
   a) Departments/Locations will need to be defined in Buy A&M.
   b) The TAMUS Project Support Team will provide an initial list of Departments/Sub Departments exported from FAMIS. These will need to be reviewed/approved prior to upload to Buy A&M.
4. **Define Routing (Approval Paths)**
   a) The TAMUS Project Support Team will assist by providing each Core Team a report with its current FAMIS Routing. This can be used as a starting point for configuring Routing/Approval Paths in Buy A&M.
5. **Users/Security Roles**
   a) Each user with access to Buy A&M will need to have specified security rights (see Section 2 for details).
   b) The TAMUS Project Support Team will provide a list of users from FAMIS as a starting point. The users will need to be reviewed/approved for upload to Buy A&M.

Setup	Task	Due Date
Identify Training Room Locations	Suggest a training room location for the following: Core Team Training, Train-the-Trainer, and End User Training.	
Assign Organization Administrator	Name 2–3 Organization Administrators (Section 2). Submit System Member URL, central phone number, and fax number to be entered in Buy A&M.	
Assign Core Team	Name team members who will be included in the Implementation Core Team.	
Confirm Organization setup Information	Confirm Department and Location configuration. Update Bill-To and Ship-To Addresses (Section 4).	
Identify workflow & approval paths	Specify approval paths using the Excel spreadsheet (Section 5).	
List active Contracts	Identify current department contracts that need to remain in use through the Buy A&M transition (Section 8).	
Determine User Roles	Assign user roles for staff reviewing, entering, and posting transactions in Buy A&M (Section 3).	
Assign Users to Training sessions	Identify all staff members who require training and the class(es) they should attend (Section 7).	

Section 2: Select Organization Administrators

Security, Approval, and Organization Maintenance

Each TAMUS System Member will be an "organization" in Buy A&M, and every organization needs to have an Organization Administrator. We suggest that each organization identify two people, no more than three people, to serve in the Organization Administrator role. A minimum of two is required to provide adequate coverage should one person be unavailable.

For many organizations, your Security Administrators are the natural choice to serve in this capacity or should be involved in identifying those who will and ensuring appropriate documentation of that role assignment.

Role Description

The Organization Administrator is responsible for the following activities for preliminary setup and ongoing maintenance activities:

- Creating and managing user security (user profiles)
- Managing approval paths (workflow) in the system to support agency business processes and ensuring ongoing compliance
- Maintaining Organizational/Entity-specific data that is required by the system (i.e., "Department," "Location," and "Address" data for the Organization)
- Managing users' access to reports and reporting tools within your organization

The user profile for the Organization Administrator grants high level access to system functions necessary to specify and configure agency specific information. Further detail about managing user security, maintaining organization-specific data, and managing approval paths is included in the following sections of this document.

Section 3: Identify User Roles (Security Profiles) in Buy A&M

Review of User Roles

There are four basic user roles in Buy A&M: Inquiry, Department Access, Basic Purchaser, and Accounts Payable. These user roles enable different types of activity. Organization Administrators will assign each Buy A&M user to a specific role in the system and will be able to configure specific permissions at the user level.

User Role	Role Description	Activities Enabled by the Role
Inquiry	This is a "view only" role in Buy A&M. The **Inquiry** role enables users to view fully processed documents within their organization, including any internal notes and attachments not visible to the public, but does not allow users assigned this role to edit or take action (such as approval) on documents.	• View completed Requisitions, Bids, Purchase Orders, and Invoices within the organization. • Often assigned to auditors.
Department Access	The **Department Access** role enables requisition creation and, if authorized by the Organization Administrator, document review and approval. Department Access allows users to submit requisitions electronically for approval. The Department Access role enables purchasing within the users' authorized delegated spending limit, if authorized by the Organization Administrator. The role can be configured at the user level to enable access to create requisitions within or across departments in the organization.	• Prepare requisitions to order items and: o Review and Approve Requisitions for purchases, if authorized by the Organization Administrator. o Review and Approve bid documents before publishing, if authorized by the Organization Administrator. o Review and approve agency blankets, purchase orders, or change orders related to them, if authorized by the Organization Administrator. o Participate in evaluating and scoring responses to a solicitation, if authorized by the Buyer. Note: Individuals participating in bid evaluations will require the Department Access (or Basic Purchaser) user role to review and score bid submissions.
Basic Purchaser	The **Basic Purchaser** role enables requisition, bid, PO and Blanket PO creation and review. This role has the authority to act as one of many approvers on documents such as requisitions, purchase orders, solicitations, and solicitation-related documents. The Basic Purchase role includes all the functional capabilities of the Department Access user role plus those mentioned above.	• Review requisitions from others within your organization to determine whether a solicitation is needed or to finalize a blanket or purchase order • Create requisitions to purchase goods or services from blankets or for eligible non-blanket (open market) purchases. • Create, post, and manage bids (solicitations) in Buy A&M, including the setup of selection criteria, development, and attachment of supplementary documents (i.e., RFRs, etc.). • Post blanket POs to Buy A&M. • Manage blankets and change orders/amendments after award.

Accounts Payable	The **Accounts Payable** role enables the following invoice management: creation, review/updates, approval, and authorization to send the document to your financial system for payment.	• Create invoice documents. • Review/approve invoices submitted by users initiating an RPA (Request for Payment Authorization) document. • Review/approve invoices submitted by vendors, if enabled in Buy A&M. • Authorize invoice documents to be sent to the financial system for payment.

Assigning Staff to User Roles

Use this table to review the types of common purchasing and procurement activities staff members typically undertake and the Buy A&M user role associated with those activities. Because Buy A&M enables organizations to delegate the preparation of requisitions, consider which staff members prepare requisitions when you assign the Department Access role in Buy A&M.

Activity	**Role Required**			
	Inquiry	***Dept. Access***	***Basic Purchaser***	***Accounts Payable***
Preparing requisitions to purchase goods or services on behalf of their Department/Locations		X	(those with Basic Purchaser role can also prepare requisitions)	
Preparing requisitions to convert to Purchase Order within the user's authorized spending limits		X (with access to create Direct Open Market Requisitions)		
Creating Purchase Orders from approved open-market requisitions for goods or services			X	
Conducting procurements, creating solicitations, establishing blankets			X	
Serving on an evaluation committee for a bid; reviewing bid submissions		X	(those with Basic Purchaser role can also review bid submissions)	
View only access to documents for auditing and research purposes	X			
Creating requisitions on behalf of other Departments/Locations		X	(those with Basic Purchaser role can also create requisitions on behalf of other Departments/Locations)	
Approving requisitions to purchase goods or services		(those with Dept. Access can also approve requisitions if authorized to do so)	X	

Initiating invoice documents that were submitted by vendors				X
Initiating Change Orders to correct account codes used on POs			(those with Basic Purchaser can also initiate PO change orders to correct accounting)	X
Submitting invoice documents to FAMIS for payment				X

Assigning Users/Role(s) in Buy A&M

In order to begin defining users and user roles, the following information has been pulled directly from FAMIS for your review:

- User Ad-Loc
- First Name
- Last Name
- Job Title
- Email Address
- Phone Number
- Default User Role
- Proposed BAM User Role (for you to confirm or identify new BAM role); see **System User Data Template Supplement** document for additional detail on specific BAM user roles.

You may refine the list as needed by deleting names of staff that are no longer in the Agency or adding the names of staff members who will be required to use Buy A&M. This process will help you think through the roles that you assign to each user and consider how the role might be refined at a user level, if needed.

Section 4: Set Up Organization Structure and Addresses in Buy A&M

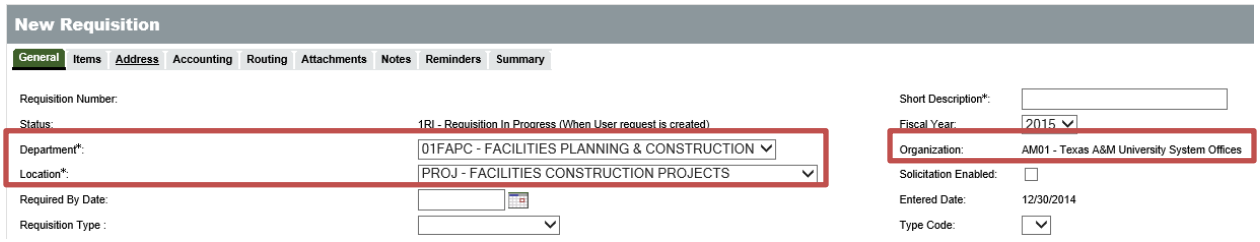
Guidance for specifying "Department" and "Location"
In Buy A&M, the TAMUS Project Support Team will manage the system-wide document, accounting, and interface settings to support Buy A&M purchasing policy. Please be advised that, in Buy A&M, each Part = one organization. (For example, 01-SAGO, 04-TSU, 16-TAMCC 18-WTAM, and 21-TAMUC are all organizations in Buy A&M.) While FAMIS will manage global settings, organizations will control their respective Department and Location data, workflow (document routing for approval), and user security.

At go-live, Buy A&M will contain your Part Number as an organization along with each of your Buy A&M Departments and Locations, as approved by your Core Team. Agencies (organizations) can subsequently add more Departments or Locations, but this is not required.

This section of the document walks through the concepts that the Core Team will need to share with the assigned Organization Administrators and other appropriate agency staff in order to set up the agency's Buy A&M organization structure. We ask that each agency work through these sections in preparation for discussions with the Buy A&M Project Support Team.

Mapping Your Current Model to Buy A&M
You are strongly encouraged to consider the agency's organization structure now, in order to determine your specific business needs and how to leverage the power of Buy A&M moving forward. The TAMUS Project Support Team will distribute a document with your current Ad-Loc configuration in FAMIS. This is recommended as a starting point for your Buy A&M Department/Location Configuration.

All documents in Buy A&M specify Department and Location. This data will provide you an opportunity for detailed reporting and searching capabilities at functional and location-specific levels.



When defining Department and Location information for your organization, consider your sourcing, procurement, and purchasing practices. Use the guidance offered in the diagrams below to determine how best to specify Departments and Locations. Prior to setup of Departments and Locations in Buy A&M, the Core Team, Organization Administrators, and any other key decision makers should be part of the planning process.

Please note: While all Department and Location IDs in Buy A&M need to be unique (as noted in the illustration, below), you should select Department and Location names that are familiar to those who will use the system. During setup of Departments and Locations in Buy A&M, the Organization Administrator will enter specific unique IDs for each Department and Location.

- Each **Organization** must have at least 1 **Department**, and may have as many as needed
- Allows for Department-specific approval paths
- Each has a unique Department ID, and as many billing and ship-to addresses as needed for orders placed by that Department
- All documents (requisition, bids, etc.) must specify a Department

- Each **Department** must have at least 1 **Location**, and may have as many as needed
- Allows for Location-specific approval paths
- Default billing and ship-to address pre-populates documents when they are being created
- All documents (requisition, bids, etc.) must specify a Location

Assigning Departments/Locations in Buy A&M
In order to begin defining your organizational structure (Departments/Locations), the following information has been pulled directly from FAMIS for your review:

- Department ID (Buy A&M Department)
- Department Name (Buy A&M Department)
- Sub-Department ID (Buy A&M Location)
- Sub-Department Name (Buy A&M Location)

You may refine the list as needed.

Providing Ship-To/Bill-To information
As you develop your organization model, you will need to specify Bill-To and Ship-To addresses for each Department. Documents created at the Location level will be pre-populated with default Bill-To and Ship-To addresses, selected from among the addresses established for the Department to which the Location belongs. Multiple Ship-To and Bill-To addresses can be entered in the system.

The TAMUS Project Support Team will distribute a document with your current addresses configured in FAMIS. The addresses will need to be reviewed and updated with the following information:

- The Email Address and Phone Number associated with that address. (Not currently included in FAMIS address)
- Does your organization have a centralized Bill-To Address?
    - If so, define that address.
    - If not, what Bill-To Address(es) should be available for each Buy A&M Department?
- Buy A&M Department that should have access to each Ship-To Address.

Assigning Addresses in Buy A&M
In order to begin defining your Ship-To and Bill-To addresses in Buy A&M, the following information has been pulled directly from FAMIS for your review:

- Address ID
- Address Name
- Contact Name
- Address Line 1

- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- Zip

You may refine the list as needed by deleting addresses that are no longer valid in the agency or adding additional addresses to be used in Buy A&M. Each address will also need to have the associated Email Address and Address Phone Number defined prior to upload into Buy A&M.

Section 5: Set Up Approval Paths and Procurement Workflow in Buy A&M

Thinking about Approval Paths

Agency Approval Paths are preset paths for documents, such as Requisitions, that require approvals. Approval paths are based on a variety of criteria, including account codes/segments used, and the item's NIGP code.

Each approval path is set up individually, but approval paths work in a "cascading" fashion. Approval paths automatically attach to documents and route them to the appropriate approvers.

For example: Let's say you are ordering a desktop PC. The standard approval path for your Agency is your supervisor and department head, but in the case of computer equipment, the requisition requires the IT department's approval. This path can be set up in Buy A&M.

Organization Administrators can set up individual approval paths for each criterion: one path for the department (with the path to include your supervisor and Agency head – based on your default department) and one for the item (with the path to include the IT department – based on the item's UNSPSC code). These approval paths will route the document automatically to those specific approvers in the order you set up in Buy A&M.

In most organizations, approval paths will be based on one or several of the variables in the list below; your current procedures and FAMIS approval configuration should assist in defining approval path configuration.

Please review the **Buy A&M Approval Types and Paths** document located at http://www.tamus.edu/offices/famis/buyam for details on Approval Path configuration in Buy A&M. The following information will be extracted from FAMIS to assist in your approval path configuration.

- Routing and Approvals Office and View
  - Type
    - P – Processing
    - D – Departmental
    - E – Executive
  - Form (for form-specific paths)
    - *, DT*, E**, PEP, PLP, P**, TDP etc…
  - Cat (Category)
    - The dollar amount the document is to be compared against
  - Department/Sub Department
  - Path (Route Path)
  - App Type (Approval Type)
  - Desk Name
    - Signer, CTE Approver, Signer E**, etc…
  - App Type (Approver Type)
    - Blank – Approver
    - S – Substitute Approver
  - Approver UIN
  - Approver Name

Variables to consider:

- The business unit (Departments and Locations, in Buy A&M terminology) originating the purchasing request
- The dollar amounts (or estimated dollar amounts) of the items being purchased or procured
- The account codes used for the items being purchased or procured
- The commodities being purchased or procured
- The stage of the purchasing/procurement process, by document type:
    - Requisitions – the request to purchase goods or services
    - Solicitations – the "bid" prior to publishing for vendor response
    - Solicitation Award Recommendations – prior to contract award/negotiation
    - Purchase Orders and Blankets – prior to being "sent" to vendors
    - Change Orders – prior to applying them to a PO or Contract
    - Invoice Change Orders – prior to applying accounting changes to the PO
    - Invoices – prior to sending to FAMIS for Payment

The Role of the "Purchaser" in the Buy A&M Workflow

The Purchaser role in Buy A&M converts an approved Open-Market Requisition into either a Purchase Order or a Solicitation. The information below will help you think through to whom the Purchaser role should be assigned under different circumstances.

How does your organization determine how requests for purchases or solicitations are routed to the Purchaser, the staff person who sources or buys the goods or services?

Buy A&M supports the following options (see **Requisitions Routing to Buyers.doc** for more detail):

- Do all Requisitions route to one person who then assigns them as needed to other buyers/procurement specialists who would have the role of Basic Purchaser? If yes, you will want to assign requisitions to a "catch-all" Basic Purchaser user so that this person can then assign the Requisitions to others.
- Do purchase requests route to different purchasers/procurement specialists (Basic Purchasers) within your organization based on commodity or service type? If so, you will want to assign workflow based on commodity codes, with any unassigned commodity codes being assigned to a "catch-all" Basic Purchaser user.
- Do Requisitions route to procurement/purchasers (Basic Purchasers) based on the business unit from which they were requested? If so, you will want to use Location "Default Purchaser" routing by naming a Default Purchaser for each Location you set up in your organization.

The following worksheet will assist in defining critical approval requirements that are organization-wide in nature or that pertain to particular document types or commodities.

Organization: Department of XYZ

When someone submits a document (requisition, bid, bid award, PO/contract, etc.) for approval (LIST THE DOCUMENT TYPES BELOW THAT YOU USE)	**..and (optional) it contains any of these types of commodities or services (LIST THE COMMODITIES OR SERVICES FOR WHICH ADDITIONAL APPROVAL MIGHT BE NEEDED)**	**..and (optional) it falls within the following estimated dollar range (LIST THE DOLLAR RANGES FOR WHICH YOU HAVE SPECIFIC APPROVAL RULES)**	**…this person must approve it (LIST THE NAMES OF THE PEOPLE DESIGNATED TO PERFORM THE APPROVALS)**	**…or if unavailable, this person may approve it (LIST THE NAMES OF THE ALTERNATE PEOPLE DESIGNATED TO PERFORM THE APPROVALS)**
Requisition	Desktop PCs	N/A	Mary Smith	Maureen Jones
Requisition	N/A	Above $5000	Julie Jones	Bob Harris
Bid (Solicitation)	IT services	Above $10,000	Sam Sullivan	Brian Booker

Worksheet

Organization: _____

When someone submits a document (requisition, bid, bid award, PO/contract, etc.) for approval (LIST THE DOCUMENT TYPES BELOW THAT YOU USE)	**..and (optional) it contains any of these types of commodities or services (LIST THE COMMODITIES OR SERVICES FOR WHICH ADDITIONAL APPROVAL MIGHT BE NEEDED)**	**..and (optional) it falls within the following estimated dollar range (LIST THE DOLLAR RANGES FOR WHICH YOU HAVE SPECIFIC APPROVAL RULES)**	**…this person must approve it (LIST THE NAMES OF THE PEOPLE DESIGNATED TO PERFORM THE APPROVALS)**	**…or if unavailable, this person may approve it (LIST THE NAMES OF THE ALTERNATE PEOPLE DESIGNATED TO PERFORM THE APPROVALS)**

Approval Types and Their Sequence

Now that you have thought through the approval requirements of your organization, the final task for approval path planning purposes is determining the sequence in which approvals must occur when a document triggers multiple layers of approval.

For example, if your location will have supervisor approvals at the Location level, think about whether you want those Location supervisor approvals to occur before or after Department level approval. If you have approvals based on the commodity being purchased or the dollar value of the purchase, do you want the approval at the Location level to take place before or after commodity or purely dollar-based approvals?

In order to sequence approvals, the Organization Administrator will need to transform these types of procedures into Approval Types and their Approval Type Sequence in Buy A&M. Organization Administrators will learn more about Approval Types and their sequence in Organization Administrator training.

Section 6: Participate in User Acceptance Testing (UAT)

User Acceptance Testing is a critical step in the journey as it is the "dress rehearsal" for Buy A&M. This is where we prove that the product provides the expected functionality and capacity. Test Users play an important role, putting Buy A&M through an exhaustive series of tests. The time commitment for testing is not insignificant, so it is acknowledged up front that the Testers are making a valuable contribution to Buy A&M, our user community, and vendors. A preliminary schedule follows:

Session 1: (2–4 hours total)

- Attend an optional Buy A&M System Overview and Demonstration (new users).
- Attend a mandatory UAT preparation session which will include the following:
  - Logging in to the system
  - Testing Overview
  - Evaluating Scripts
  - Providing feedback

Session 2: (4–6 hours total)

- Receive inventory of base test scripts.
- Become familiar with Buy A&M navigation.
- Testers will write and submit test scripts that are fundamental to their business or department for inclusion in UAT testing.

Session 3: (20–25 hours total)

- Attend UAT sessions.
  - Sessions will typically run from 10am to 3pm.
  - Test Scripts will be tracked with a Pass/Fail by the Tester with applicable comments.

When selecting staff to participate in Buy A&M testing, UAT testers should meet the following recommendations:

- Have some experience with FAMIS as well as knowledge of the procurement regulations and policy.
- Possess strong problem-solving skills and good analytical skills.
- Pay strong attention to detail .
- Have excellent written and verbal communication skills.
- Enjoy working on puzzles and working in an environment that is under development.

Section 7: Getting Ready for Training

Buy A&M training will include Train-the-Trainer sessions for each Organization's designated Trainers. During Train-the-Trainer, we will provide your trainers the Buy A&M Training Manuals, provide information on overall instruction, and answer questions on the training process and system functionality. Upon attending the multi-day Train-the-Trainer session, the following courses and timeframes are recommended for Buy A&M users based on role.

Training Options and Schedule

Dates	Course	Instructional Media	Length
	Organization Administrator Training	• Classroom Training • Training Guide	6 Hours
	Department Access Training: Creating Requisitions, Receiving, and Approvals	• Classroom Training • Training Guide	4 Hours
	Basic Purchaser Training: Creating Solicitations, Bid Evaluation, Creating POs, and Approvals	• Classroom Training • Training Guide	12 Hours
	Accounts Payable Training: Creating Invoices and Approvals	• Classroom Training • Training Guide	4 Hours

Selecting Staff for Training

Organization Administrator Training

Organization Administrator training will provide in-depth review and hands-on practice of the various Organization information, approval, workflow, and user profile setup activities. Following Buy A&M go-live, Organization Administrators will be required to manage Organization-specific data and the configuration of a range of settings in the system. This is an intensive course for those identified as Organization Administrators and will cover each of these activities, in detail, so that the Organization Administrator is fully prepared to fulfill his or her role in Buy A&M.

Department Access Training

This course will cover all aspects of creating Requisition documents, releasing from blanket POs, and purchasing from vendors within the users authorized delegated spending limit. The course will also cover creation of Receipt documents for goods procured in Buy A&M, along with Approvals.

Basic Purchaser Training

This course is designed for procurement staff and those who are involved in the process of soliciting goods or services for TAMUS. The course will cover solicitation development, solicitation amendments, managing attachments, online bid evaluation, contract award, and posting awarded blankets online in Buy A&M. The course will also cover the creation and submission of Purchase Orders and Change Orders to vendors.

Accounts Payable Training

This course is designed for AP staff members who are involved in the processing of invoice documents for TAMUS. The course will cover creation of change order for accounting modifications, creation and submission of invoice documents, and approval for sending to FAMIS for payment.

Training Location or Facility Recommendations

Buy A&M Training Room Requirements:

- At least 12 or more computers with browser IE8.0 or higher installed
- Internet connection for each training computer (required)
- Projector and screen with PC hook-up for use by the instructor

Getting Ready for Training Notes

Worksheets for training class assignments:

Organization Administrator Training			
Name	Trainee Location	Phone	Email

Department Access Role Training			
Name	Trainee Location	Phone	Email

Basic Purchaser Role Training			
Name	Trainee Location	Phone	Email

Accounts Payable Role Training			
Name	Trainee Location	Phone	Email

Section 8: Planning for Cutover

Inventory of Current Blankets
We would like a list of your Agency's current blankets/contracts that are in effect now and will remain in effect through the transition to Buy A&M. The ***Blanket Contract Conversion Template.xls*** document details the information that will be required to upload the Blankets POs to BAM.

The following can be used as a guide for collecting all your Blankets; however, the *Blanket Contract Conversion Template* will need to be completed for upload.

Blanket Vendor Name	Goods/Services Provided	Contract Start Date	Contract End Date	Contract Coordinator	Coordinate Contact Info

Blanket Contract Conversion Template
The following instructions are included with the Template: Each tab in this spreadsheet reflects a tab on a Purchase Order document in BAM. By clicking on the tab, you will see which data elements are available to be uploaded to BAM. For a description of each individual data element, hover your mouse over the name of the element in row 1 of each tab. Some data elements are required* for a successful load of data into BAM. If any required* fields are left empty, the blanket/contract will not load into BAM.

Load FAMIS Account Codes to Buy A&M
Accounts are loaded to Buy A&M on a nightly basis, Monday thru Friday. A file is produced from FAMIS that includes all account codes that will be active in Buy A&M for users to select on their documents. After your Organization Administrators have completed creation of Approval Paths for the accounts, the following steps can be taken in FAMIS to have the accounts added to BAM in the next Account Import load.

<FAMIS to add details on how to activate accounts in BAM>

Activate User Single Sign-On (SSO)
Texas A&M University System users will be logging into BAM using the TAMUS SSO Portal. All A&M System users will be configured with their UIN as the Login ID to ensure SSO access. As your AdLocs are trained and users activated in BAM, the following steps detail how to add the BAM link to the A&M System SSO Portal for each AdLoc that will be logging into BAM for your organizations. Users within the AdLoc that do not have an active account in BAM will be directed to the BAM homepage when selecting the link.

<FAMIS to add details on how to activate SSO for users in BAM>

Section 9: Summary To-Do Checklist

Setup	Task	Due Date	Status
Identify Training Room Locations	Suggest/reserve a training room location for the following: Core Team Training, Train-the-Trainer, and End User Training.		
Assign Organization Administrator	Name 2 – 3 Organization Administrators (Section 2) and submit System Member URL, central phone number, and fax number to be entered in Buy A&M.		
Determine User Roles	Assign user roles for staff reviewing, entering, and posting transactions in Buy A&M (Section 3).		
Assign Users to Training sessions	Identify all staff members needing training and the class(es) they should attend (Section 7).		
Identify Organization setup Information	Specify Department, Location, and Bill-To and Ship-To information using the Excel spreadsheet (Section 4).		
Identify workflow & approval paths	Specify approval paths using the Excel spreadsheet (Section 5).		
List active Contracts/Blankets	List current department contracts that need to remain in use through the Buy A&M transition (Section 8).		