

# Buy A&M – Access Request Form

**USER INFORMATION**

ADD     CHANGE     REMOVE

Employee Name:	<input type="text"/>	Home Campus Code:	<input type="text"/>
Employee Phone:	<input type="text"/>	Employee E-Mail:	<input type="text"/>
Job Title:	<input type="text"/>	Employee UIN:	<input type="text"/>
Default Department:	<input type="text"/>	Default Location:	<input type="text"/>

*(Default Department and Location are required for Basic Purchasing, Department Access, Accounts Payable and Inventory Users)*

Default Ship-to Address:	<input type="text"/>	Default Bill-to Address:	<input type="text"/>
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*(Generally Member Fiscal/Business Office)*

Default Account:  *(If supplied, new documents will be generated with this account, but it is not required)*

**MEMBER ACCESS**

*(Only one member per request; if access to multiple members is being requested, a form will need to be submitted for each request)*

- |  |   |  |  |
|--|---|--|--|
| <input type="radio"/> AM01 – TAMUS                   | <input type="radio"/> AM02 – TAMU                         | <input type="radio"/> AM04 – Tarleton              | <input type="radio"/> AM05 – Prairie View        |
| <input type="radio"/> AM06 – AgriLife Research       | <input type="radio"/> AM07 – AgriLife Extension           | <input type="radio"/> AM09 – Engineering Extension | <input type="radio"/> AM10 – Galveston           |
| <input type="radio"/> AM11 – Forest Service          | <input type="radio"/> AM12 – TTI                          | <input type="radio"/> AM15 – Corpus Christi        | <input type="radio"/> AM16 – International       |
| <input type="radio"/> AM17 – Kingsville              | <input type="radio"/> AM18 – West Texas                   | <input type="radio"/> AM20 – TVMDL                 | <input type="radio"/> AM21 – Commerce            |
| <input type="radio"/> AM22 – Texarkana               | <input type="radio"/> AM23 – Health Science               | <input type="radio"/> AM24 – Central Texas         | <input type="radio"/> AM25 – San Antonio         |
| <input type="radio"/> AM26 – SRS                     | <input type="radio"/> AM27 – Technology Commercialization | <input type="radio"/> AM28 – Engineering Research  | <input type="radio"/> AM99 – Research Foundation |
| <input type="radio"/> AMCO – Compliance Organization |   |  |  |

**PURCHASING RULES**

*Recommended defaults have been supplied, but may be overridden*

Open Market Request Limit	Direct Release/RPA Limit	Direct Open Market Limit <i>(Equal to or less than delegated limit)</i>
\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

**ADDITIONAL COMMENTS**

Name: \_\_\_\_\_

UIN: \_\_\_\_\_

**REQUESTED ROLES**

*Multiple roles may be selected*

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> <b>Vendor Administrator</b><br><i>(Must be set by Internal Admin)</i> | <input type="checkbox"/> <b>Organization Administrator</b><br><i>(Must be set by Internal Admin)</i> | <input type="checkbox"/> <b>Internal Administrator</b><br><i>(FAMIS Staff Only)</i>                             |
| <input type="checkbox"/> <b>Inquiry</b>  | <input type="checkbox"/> <b>Inventory Administrator</b>  | <input type="checkbox"/> <b>Inventory User</b>  |
| <input type="checkbox"/> <b>Grant Form Builder Rights</b>                                      | <input type="checkbox"/> <b>Grant Multiorg Approval Rights</b>                                       | <input type="checkbox"/> <b>Enable Req/PO Closeout</b><br><i>(Access should be limited within a department)</i> |

<input type="checkbox"/> <b>Departmental Access</b>	Department Access Role Privilege Type: _____	User role is: _____
<i>Recommended defaults for each role are marked with asterisk (*)</i>	<input type="checkbox"/> User is an Approver <input type="checkbox"/> Can Open Formal Bids <input type="checkbox"/> Allow Requisition Item Import	<i>Superuser must be a requisitioner</i> <input type="checkbox"/> Allow PO Receipts <input type="checkbox"/> Enable Change Order Creation <input type="checkbox"/> Disallow Ad-Hoc Reporting <input type="checkbox"/> User May Create Bids <input type="checkbox"/> Department Buyer Enabled <input type="checkbox"/> Allow Two Way Match

<input type="checkbox"/> <b>Basic Purchasing</b>	<input type="checkbox"/> Can Open Formal Bids <input type="checkbox"/> Allow Contract Import	<input type="checkbox"/> Can Create Demand Requisitions <input type="checkbox"/> Disallow Ad-Hoc Reporting	<input type="checkbox"/> Allow Requisition Item Import <input type="checkbox"/> Allow Two Way Match
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<input type="checkbox"/> <b>Accounts Payable</b>	Accounts Payable Role Privilege Type: _____	<input type="checkbox"/> Disallow Ad-Hoc Reporting
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**Proxy User:** \_\_\_\_\_  **Activate Proxy** *Select alternate user to receive emails and approve documents on behalf of the user*

Name: \_\_\_\_\_

UIN: \_\_\_\_\_

**DEPARTMENTAL ACCESS  
LOCATION PRIVILEGES**

*Departmental Access Role*

- Department Superuser; default Department and all associated Locations are automatically selected.
- Location Superuser; default Department and Location are automatically selected
- Access to additional departments and locations may be granted

*Inquiry Access Role*

- Specific Department/Location access is not required, access is granted across the organization

*Inquiry Access Role*

- Specific Department/Location access is not required, access is granted across the organization

Add All Depts/Locs

Add Specific Depts/Locs:

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**AP LOCATION PRIVILEGES**

*Default Department/Location is automatically selected.*

- To process all invoices across an organization, user will require access to all departments and locations.
- Access may also be restricted by department and location.

Add All Depts/Locs

Add Specific Depts/Locs:

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**SINGLE SIGN ON SETTINGS**

Disable Single Sign-On

*Must be checked to allow direct access to Buy A&M. Default access is via SSO Located in System Configuration, Configure Security Settings*

**\*\*\*This access should be given to a limited number of individuals that do not have access to SSO\*\*\***

Name:

UIN:

**MENTOR INFORMATION**

**Required for gaining entry access to Buy A&M prior to formal training**

As the mentor, I will provide training and assistance for the user. I have reviewed mentor policies and security <http://fmo.tamu.edu/access-security/docs/faq/getting-access/mentor-program/> and agree to abide by them.

\_\_\_\_\_  
Mentor Name

\_\_\_\_\_  
Mentor E-Mail

\_\_\_\_\_  
Mentor Phone Number

\_\_\_\_\_  
Mentor Signature

**TRAINING CERTIFICATION**

**TRAINING TYPE**

	Disbursement	Approver / Signer	HUB	Other
Training Date				

**STATEMENT OF RESPONSIBILITY**

I understand that I will be in violation of System regulations, State and Federal law if I gain or help others gain unauthorized access to the systems above. I acknowledge that neither I nor anyone else possess the authority to allow anyone to use my I.D. or password. I understand that if I violate System regulations and State and Federal laws by gaining or helping others gain unauthorized access, I will be subject to disciplinary action and criminal prosecution to the full extent of the law. (Chapter 33, Title 7 of the Texas Penal Code). I accept the responsibility of keeping the reports and information confidential. I understand, accept and will complete training related to the software provided to me by Texas A&M System Members. Misuse or abuse of this responsibility as User/Supervisor may be just cause for revocation of software access and disciplinary action. I agree further not to attempt to circumvent the computer security system by using or attempting to use any transactions, software, files or resources I am not authorized to use.

\_\_\_\_\_  
User Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Director or Delegate Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
TAMUS Security Contact Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Name:

UIN:

**USER ROLE DESCRIPTIONS**

*Recommended defaults for each role are marked with asterisk (\*)*

<p><b>Basic Purchasing</b></p>	<p>Basic purchasers can create all documents on the agency side, such as requisitions, POs, RPAs, Bids and their related documents such as amendments and revisions.</p> <p><b>Can Open Formal Bids</b> If the agency elects to turn on formal bid restrictions under Document and Account Settings, each BP user will need to have this field checked if they are allowed to open bids over the threshold limit.</p> <p>* <b>Can Create Demand Requisition</b> Each BP user will need to have this field checked if they are allowed to create and process Demand requisitions.</p> <p>* <b>Allow requisition item import</b> If checked, this BP user will have the ability to import requisition items via Excel plug in or XML utility and create in-progress Requisitions with multiple items. Buy A&amp;M runs this utility interactively and presents import related errors for user. For more information see BP role requisition.</p> <p>* <b>Allow contract import</b> If checked, this BP user will have the ability to upload large numbers of items into predefined Excel Format, which helps generates XML files for upload. Buy A&amp;M BSO process then parse, validate and generate in-progress Purchase Orders or Contracts if no errors. For more information see BP role requisition.</p> <p><b>Disallow Ad-Hoc reporting</b> If checked; this BP user will not have the ability to create ad-hoc reports (i.e. Ad-hoc icon invisible to BP user role on upper right corner).</p> <p><b>Allow Two Way Match</b> If checked; this BP user will not have the ability to create ad-hoc reports (i.e. Ad-hoc icon invisible to BP user role on upper right corner).</p>
<p><b>Department Access</b></p>	<p>Department access gives user the ability to be a requisitioner or contract shopper</p> <p>* <b>Superusers</b> Superusers have rights to the entire department or location. The user can then take control of any requisition for the dept/location and work on it.</p> <p>* <b>Requisitioner</b> Has full Department Access rights and can generate all types of requisitions</p> <p>* <b>Contract Shopper</b> Can only create release requisitions against master blankets and contracts.</p> <p>* <b>Approvals</b> Gives this user approval rights and permission to be on approval paths. <i>Note: If the user should only be an approver with no requisition creation rights, leave the Requisitioner/Contract Shopper field empty.</i></p> <p>* <b>Allow PO Receipts for DA Role</b> Must be checked if user is to do Receiving</p> <p><b>User May Create Bids</b> Must be checked if user is allowed to create Bids. <i>(Not recommended)</i></p> <p><b>Can Open Formal Bids</b> Must be checked if user is allowed to Open Formal Bids. Only available if User May Create Bids is selected.</p> <p><b>Enable Change Order Creation</b> Must be checked if user is allowed to create Open Market Change Orders <i>(Not recommended)</i></p> <p>* <b>Department Buyer Enabled</b> Must be checked to allow user to be selected as a buyer for a requisition or purchase order type.</p> <p>* <b>Allow requisition item import</b> If checked, this DA user will have the ability to import requisition items via Excel plug in or XML utility and create in-progress Requisitions with multiple items. Buy A&amp;M runs this utility interactively and presents import related errors for user. For more information see BP role requisition.</p>

Name:

UIN:

**USER ROLE DESCRIPTIONS (Cont'd)**

Recommended defaults for each role are marked with asterisk (\*)

<b>Department Access (Cont'd)</b>	<p><b>Disallow Ad-Hoc reporting</b> If checked; this DA user will not have the ability to create ad-hoc reports (i.e. Ad-hoc icon invisible to DA user role on upper right corner).</p> <p><b>Allow Two Way Match</b> If checked; this DA user will not have the ability to create ad-hoc reports (i.e. Ad-hoc icon invisible to BP user role on upper right corner).</p>
<b>Inquiry</b>	Inquiry allows user to look at basic purchasing but does not allow changes to be made.
<b>Accounts Payable</b>	AP users create invoices for received Purchase Orders and AP Supervisors approve invoices.  <b>Disallow Ad-Hoc reporting</b> If checked; this AP user will not have the ability to create ad-hoc reports (i.e. Ad-hoc icon invisible to AP user role on upper right corner).
<b>Grant Form Builder Rights</b>	Not used at this time
<b>Grant Multiorg Approval Rights</b>	If checked, the user will be allowed to be set up on approval paths for another organization and have approval rights.
<b>Enable Req/PO Closeout</b>	If checked, the user will be allowed to manually close out requisitions or purchase orders.
<b>Inventory User</b>	Inventory Users perform the inventory transactions such as issues and returns.
<b>Inventory Administrator</b>	Inventory Administrators maintain the warehouse and stock items
<b>Vendor Administrator</b>	<p>The vendor administrator configures vendor registration, chooses whether online quotes are allowed, maintains vendors and their user, and maintains certifications and vendor news items. For more information, see the Vendor Administrator manual.</p> <p><i>Please Note....If any changes are made to a user with the Vendor Administrator role while in the Organization Administrator role, the Vendor Administrator role will be removed and must be reinstated by a user in the Internal Administrator role.</i></p>
<b>Organization Administrator</b>	Organization Administrators are administrators with limited rights that allow them to maintain the organization users, approval paths, departments and settings.
<b>Internal Administrator</b>	Internal Administrator is the highest level role. Internal Administrator includes Vendor Administrator, Agency Administrator, as well as the ability to configure Buy A&M settings. An Internal Administrator can set the look and feel of Buy A&M, set the location for attachments and configure Buy A&M for integrated software