THE TEXAS A&M UNIVERSITY SYSTEM

Buy A&M (BAM) - Access Request Form

USER INFORMATION

☐ **ADD**   ☐ **CHANGE**   ☐ **REMOVE**

Employee Name:	**Home Campus Code:**
Employee Phone:	**Employee E-Mail:**
Job Title:	**Employee UIN:**
Default Department:	**Default Location:**

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

Default Ship-to Address:	**Default Bill-to Address:**

(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)

- ● **AM01 – TAMUS**
- ○ AM02 – TAMU
- ● **AM04 – Tarleton**
- ○ AM05 – Prairie View
- ○ AM06 – AgriLife Research
- ○ AM07 – AgriLife Extension
- ○ AM09 – Engineering Extension
- ○ AM10 – Galveston
- ○ AM11 – Forest Service
- ○ AM12 – TTI
- ● **AM15 – Corpus Christi**
- ○ AM16 – International
- ○ AM17 – Kingsville
- ● **AM18 – West Texas**
- ○ AM20 – TVMDL
- ● **AM21 – Commerce**
- ○ AM22 – Texarkana
- ○ AM23 – Health Science
- ○ AM24 – Central Texas
- ○ AM25 – San Antonio
- ○ AM26 – SRS
- ○ AM27 – Technology Commercialization
- ○ AM28 – Engineering Research

PURCHASING RULES

Recommended defaults have been supplies, but may be overridden

Open Market Request Limit	Direct Release/ RPA Limit	Direct Open Market Limit *(Equal to or less than delegated limit)*
$	$	$

ADDITIONAL COMMENTS

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Name: **UIN:**

| **REQUESTED ROLES** | *Multiple roles may be selected* |

❑ **Inquiry**   ❑ **Vendor Administrator**   ❑ **Organization Administrator**   ❑ **Internal Administrator**
                   (Must be set by Internal Admn)   *(FAMIS Staff Only)*

❑ **Inventory User**

❑ **Departmental Access**   Department Access Role Privilege Type: _____   User role is: _____

SuperUser must be a requisitioner

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

* ❑ User is an Approver?   * ❑ Allow PO Receipts?   ❑ Enable Change Order Creation?

* ❑ Department Buyer Enabled?   * ❑ Allow Requisition Item Import?   ❑ Disallow Ad-Hoc Reporting?

❑ **Basic Purchasing**   ❑ Can Open Formal Bids?   * ❑ Can Create Demand Requisitions?   * ❑ Allow Requisition Item Import?

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

* ❑ Allow Contract Import?   ❑ Disallow Ad-Hoc Reporting?

❑ **Accounts Payable**   Accounts Payable Role Privilege Type: _____   ❑ Disallow Ad-Hoc Reporting?

❑ **Inventory Administrator**   ❑ All Sites?   Add Site Department _____   Location: _____

Proxy User: [_____]   ❑ Activate Proxy   *Select alternate user to receive emails and approve documents on behalf of the user*

Name: **UIN:**

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: _____ _____ _____ _____ _____

_____ _____ _____ _____ _____

_____ _____ _____ _____ _____

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: _____ _____ _____ _____ _____

_____ _____ _____ _____ _____

_____ _____ _____ _____ _____

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Name: **UIN:**

MENTOR INFORMATION   **Required for gaining entry access to Buy A&M (BAM) 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 (*)* |

Basic Purchasing		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.
		Can Open Formal Bids 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.
	*	**Can Create Demand Requisition** Each BP user will need to have this field checked if they are allowed to create and process Demand requisitions.
	*	**Allow requisition item import** 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&M (BAM) runs this utility interactively and presents import related errors for user. For more information see BP role requisition.
	*	**Allow contract import** 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&M (BAM) BSO process then parse, validate and generate in-progress Purchase Orders or Contracts if no errors. For more information see BP role requisition.
		Disallow Ad-Hoc reporting 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).
Department Access		Department access gives user the ability to be a requisitioner or contract shopper
	*	**Superusers** 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.
	*	**Requisitioner** Has full Department Access rights and can generate all types of requisitions
	*	**Contract Shopper** Can only create release requisitions against master blankets and contracts.
	*	**Approvals** Gives this user approval rights and permission to be on approval paths. *Note: If the user should only be an approver with no requisition creation rights, leave the Requisitioner/Contract Shopper field empty.*
	*	**Allow PO Receipts for DA Role** Must be checked if user is to do Receiving
		Enable Change Order Creation Must be checked if user is allowed to create Open Market Change Orders *(Not recommended)*
	*	**Department Buyer Enabled** Must be checked to allow user to be selected as a buyer for a requisition or purchase order type.
	*	**Allow requisition item import** 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&M (BAM) runs this utility interactively and presents import related errors for user. For more information see BP role requisition.
		Disallow Ad-Hoc reporting 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).

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Name: **UIN:**

USER ROLE DESCRIPTIONS *(Cont'd)*	*Recommended defaults for each role are marked with asterisk (*)*

Inquiry	Inquiry allows user to look at basic purchasing but does not allow changes to be made.
Accounts Payable	AP users create invoices for received Purchase Orders and AP Supervisors approve invoices. **Disallow Ad-Hoc reporting** 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).
Inventory User	*Inventory Users perform the inventory transactions such as issues and returns.*
Inventory Administrator	*Inventory Administrators maintain the warehouse and stock items*
Vendor Administrator	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. *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.*
Organization Administrator	Organization Administrators are administrators with limited rights that allow them to maintain the organization users, approval paths, departments and settings.
Internal Administrator	Internal Administrator is the highest level role. Internal Administrator includes Vendor Administrator, Agency Administrator, as well as the ability to configure Buy A&M (BAM) settings. An Internal Administrator can set the look and feel of Buy A&M (BAM), set the location for attachments and configure Buy A&M (BAM) for integrated software

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