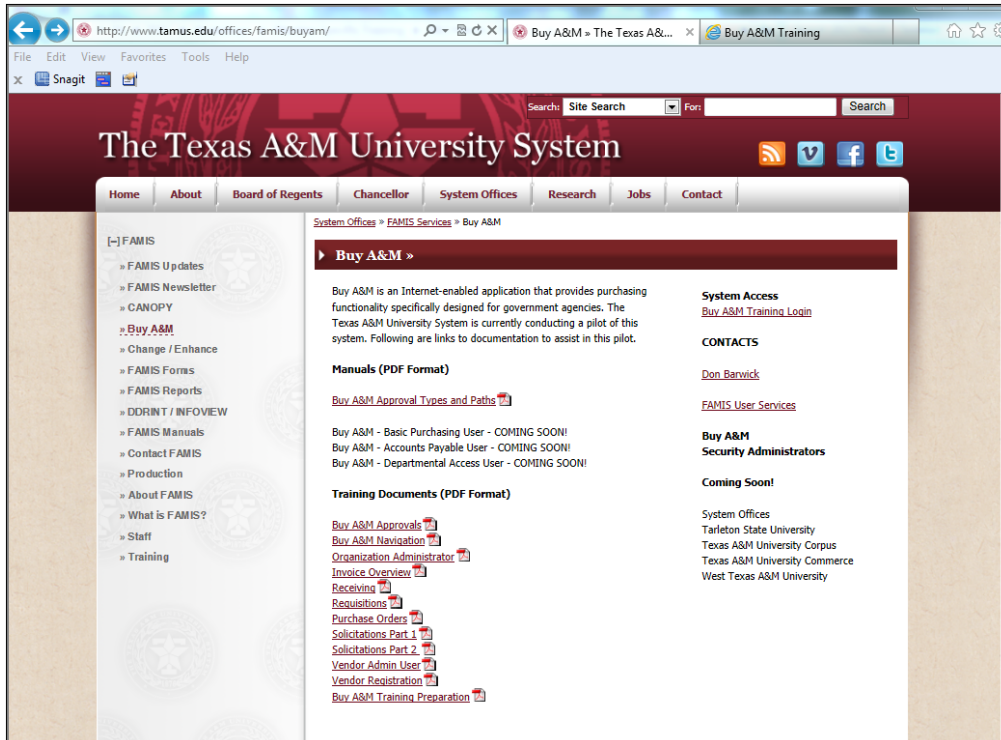


Buy A&M Org Admin - Tips and Techniques

Support Site

A site has been created to provide access to training materials, system links and Security Administrator information for the Buy A&M system. This site will be updated as new support documentation is released.

<http://www.tamus.edu/offices/famis/buyam/>



Updating Announcements

To add/update/delete an announcement/new item that EVERY user of a specified organization can see in the News tab:

- Log in as an “Organization Administrator” (or Internal Administrator)
- Your Current Organization should be pointing to your campus – make sure it is pointing to your target audience. The news you add will only be available to those in the “current Organization.”
- Select the “System Configuration” tab (Internal Administrators will select “Administer Agency”).
- Select “Maintain News”
- Note: The display of message is controlled by effective dates. There is no need to remove an expired message. In fact, for items like system upgrades, etc., you may wish to reuse them for the same purpose at a future date.

To Add an new message, select “Add New Items”:

- Fill in the effective date, end date, category, display to audience, title, news message, and link, if necessary. Note that you are limited to 250 characters in the “News” description. You might want to type your news item in an Excel cell (A1, for example). Then, write a formula in the next cell that says: =LEN(TRIM(A1)). The results of that cell will show the number of characters you have in your description.
- If you are signed on to the Agency Org (AM00), you can select “Select System Wide” at the “Organization Display” option. If you are not signed in at the Agency Org (AM00), you will see an “Organization Display” checkbox.
- Select “Save & Exit”
- If you need to make changes, follow the “Update an existing message” instructions.

To Update an existing message, select “Maintain News Items”:

- Choose the News Item you wish to modify by clicking on the underlined number of the item.
- Modify the effective date, end date, category, display to audience, title, news message, and link, if necessary.
- If you are signed on to the Agency Org (AM00), you can select “Select System Wide” at the “Organization Display” option. If you are not signed in at the Agency Org (AM00), you will see an “Organization Display” checkbox. AM00 is available for a selected group of users only.
- Select “Save & Exit”

Header and Navigation Bars – User Roles

Primary Roles:

The tabs indicate the role the user is in when working in Buy A&M. When addressing questions from users, you will want to verify their active tab.

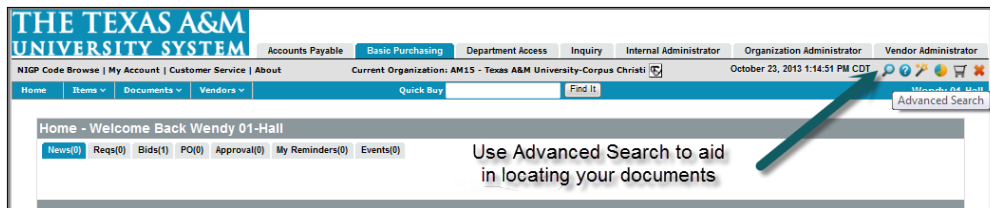
- Departmental Access – processes departmental documents
- Basic Purchasing – processes purchases over the departmental limit
- Accounts Payable – processes invoices to facilitate feed to FAMIS for payment

Other Roles:

- Organization Administrator – complete Org Admin tasks
- Internal Administrator – complete 000 Agency level tasks, reserved for FAMIS Services
- Vendor Administrator - process Vendor Administrator tasks

Common questions are “I have access to....., but I cannot see that option”. This usually happens when users with multiple roles are in the wrong role (tab) for the action they are trying to take.

Advanced Search:



Adding FPC Project Addresses

To create, modify or inactivate a Project address for FPC, you must be on the Organization Administrator tab.

- Select Administer Agency
- Select 'Department/Approval/Users' tab
- Select 'Maintain Agency Organizations/Departments/Locations' button
- Select 'Maintain Organization Departments' button
- Select '01FAPC' department hyperlink from the list of departments

Note: 'Ship To' Addresses have a prefix of 'F' and 'Bill To' Addresses have a prefix of 'P'. Additionally, each department in BAM has a unique last character of their address codes; for FAPC this is 'B'. With this in mind, the format for 'Ship To' Addresses will be FzzB and the format for 'Bill To' Addresses will be PzzB, where 'zz' represents then next available sequence

- Set up 'Ship To' Address
- Find the last 'Ship To' Address assigned (zz)
(It should be in the middle of all the addresses, so move to a page in the middle and position from there)
- Identify a 'Ship To' address to that has the same project manager as the one being set up. This will be used to copy information to the new address.

Suggested projects to copy from:

1. Bruce Karr – F01B - ***bkarr@tamus.edu***
2. Pete Schmid – F10B - ***pete-schmid@tamus.edu***
3. Randy Wipke – F30B - ***randy-wipke@tamus.edu***
4. Russ Wallace – F39B - ***rwallace@tamus.edu***

- **Select 'Add Department Address' at the bottom of the listing.**
- **Enter the following information:**
 1. Department Suffix ID:
Use the next 'Ship To' address number (see step 4.a.i), it will be referred to as 'zz' below. Ex: F50B where 50 is zz.
 2. Department Suffix Name:
Fzz - Project Account – Part Initials Project Name PRcc-nnnn
Example:
F50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173
 3. Status:
Active
 - a. You may then choose to copy the address information by selecting the eyeglasses icon to the right of 'Copy from a Department Address'.

The screenshot shows a web form titled "Add Department Address". It contains the following fields and values:

- Department: 01FAPC - FACILITIES PLANNING & CONSTRUCTION
- Department Suffix ID*: F50B
- Department Suffix Name*: F50 - 803408 - TAMU West Camp
- Status: Active (dropdown menu)
- Address Information (Copy from a Department Address) [eyeglasses icon]
- Control Name: (empty field)

A blue arrow points to the eyeglasses icon next to the "Address Information" label.

Choose one of the project manager's other BAM addresses as listed above, and typing the 'Ship To' ID in the 'Department Suffix ID' field and clicking the 'Find It' button

Department Address Lookup

Search Using:

Organization:

Search Fields:

Department ID: Department Name:

Department Suffix ID: Department Suffix Name:

City: County:

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name	Address Info	Status
<input type="radio"/>	01FAPC	FACILITIES PLANNING & CONSTRUCTION	F01B	F01 - 803401 - TAMU FY13 Utility Upgrade Pr2-3145	Attn: Bruce Karr TAMU - 02-3145 165 Asbury Street College Station, TX 77843 US Email: bkarr@tamus.edu Phone: (979)458-7042	Active

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- Click the radio button in the 'Select' column and then click the 'Select' button to bring the information into the new address set up.
 - You are then able to change the appropriate information as listed below
 1. Contact Name: 'Attn: xxxxxx' where xxxxx is Project Manager's name from above (Ex: Attn: Bruce Karr)
 2. Address Line 1: Part Initials – cc-Project Number
 3. Address Line 2-4: Street Address of Project
 4. Country, City, State, Zip: Self Explanatory
 5. Phone: Project Manager's Phone Number
 6. Email: Project Manager's Phone Email
 - Select 'Save & Exit'

The 'Ship To' address has now been created:

Department Suffix ID	Department Suffix Name	Address Info	Status
F50B	F50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173	Attn: Bruce Karr TAMU - 02-3173 225 Discovery Drive College Station, TX 77843 US Email: bkarr@tamus.edu Phone: (979)458-7042	Active

You may also choose to not to copy from an existing address and create the address manually

- Entering the appropriate information as listed below
 - Contact Name: 'Attn: xxxxxx' where xxxxx is Project Manager's name from 4.a.ii. (Ex:Attn: Bruce Karr)
 - Address Line 1: Part Initials – cc-Project Number
 - Address Line 2-4: Street Address of Project
 - Country, City, State, Zip: Self Explanatory
 - Phone: Project Manager's Phone Number
 - Email: Project Manager's Phone Email
- Select 'Save & Exit'

The 'Ship To' address has now been created:

Department Suffix ID	Department Suffix Name	Address Info	Status
F50B	F50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173	Attn: Bruce Karr TAMU - 02-3173 225 Discovery Drive College Station, TX 77843 US Email: bkarr@tamus.edu Phone: (979)458-7042	Active

Set up 'Bill To' Address

- Identify an address code to be created. Use the same address 'number' as was used for the 'Ship To' address, but prefix it with a 'P' instead of an 'F'. This one will be 'P50B' instead of 'F50B'
- Identify a 'Ship To' address to that has the same project manager as the one being set up. (Use the same one used for the Bill To address, but prefix it with a 'P' instead of an 'F'.) This will be used to copy information to the new address.
Suggested projects to copy from:
 - Bruce Karr – P01B - **bkarr@tamus.edu**
 - Pete Schmid – P10B - **pete-schmid@tamus.edu**
 - Randy Wipke – P30B - **randy-wipke@tamus.edu**
 - Russ Wallace – P39B - **rwallace@tamus.edu**
- Select 'Add Department Address' at the bottom of the listing.

- Enter the following information:
 - Department Suffix ID:
Use the next 'Ship To' address number (see step 4.a.i) It will be referred to as 'zz' below. Ex: P50B where 50 is zz.
 - Department Suffix Name:
Pzz - Project Account – Part Initials Project Name PRcc-nnnn
Example:
P50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173
 - Status:
Active
 - You may then choose to copy the address information by selecting the eyeglasses icon to the right of 'Copy from a Department Address'.

- Choose one of the project manager's other BAM addresses as listed in 4.a.ii, and typing the 'Ship To' ID in the 'Department Suffix ID' field and clicking the 'Find It' button

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name	Address Info	Status
<input type="radio"/>	01FAPC	FACILITIES PLANNING & CONSTRUCTION	P01B	P01 - 803401 - TAMU FY13 Utility Upgrade Pr2-3145	Attn: Bruce Karr ***** ATTENTION ***** **** DO NOT MAIL INVOICE **** *** INVOICE VIA EMAIL ONLY *** ***** ALL BILLS BY EMAIL ***** College Station, TX 77840 US Email: FY13_Utility_Production_Upgrade.02.18_PO_Payments@docs.e-builder.net Phone: (979)458-7042	Active

- Click the radio button in the 'Select' column and then click the 'Select' button to bring the information into the new address set up.

- You are then able to change the appropriate information as listed below
 1. Contact Name: 'Attn: xxxxxx' where xxxxx is Project Manager's name from above (Ex: Attn: Bruce Karr)
 2. Address Line 1: ***** ATTENTION *****
 3. Address Line 2: **** DO NOT MAIL INVOICE *****
 4. Address Line 3: *** INVOICE VIA EMAIL ONLY ***
 5. Address Line 4: ***** ALL BILLS BY EMAIL *****
 6. Country, City, State, Zip: Self Explanatory, there is no mailing address, so this just needs to valid information
 7. Phone: Project Manager's Phone Number
 8. Email: E-Builder email address as listed in note below.
- Select 'Save & Exit'

The 'Bill To' address has now been created:

Department Suffix ID	Department Suffix Name	Address Info	Status
P50B	P50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173	Attn: Bruce Karr ***** ATTENTION ***** **** DO NOT MAIL INVOICE ***** *** INVOICE VIA EMAIL ONLY *** ***** ALL BILLS BY EMAIL ***** College Station, TX 77840 US Email: West_Campus_Housing_Streets_and_Infrastructure.02.18_PO_Payments@docs.e-builder.net Phone: (979)458-7042	Active

You may also choose to not to copy from an existing address and create the address manually

- Enter the appropriate information as listed below
 - Contact Name: 'Attn: xxxxxx' where xxxxx is Project Manager's name from above. (Ex: Attn: Bruce Karr)
 - Address Line 1: ***** ATTENTION *****
 - Address Line 2: **** DO NOT MAIL INVOICE *****
 - Address Line 3: *** INVOICE VIA EMAIL ONLY ***
 - Address Line 4: ***** ALL BILLS BY EMAIL *****
 - Country, City, State, Zip: Self Explanatory, there is no mailing address, so this just needs to valid information
 - Phone: Project Manager's Phone Number
 - Email: E-Builder email address as listed in note below.
- Select 'Save & Exit'

The 'Bill To' address has now been created:

Department Suffix ID	Department Suffix Name	Address Info	Status
P50B	P50 - 803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173	Attn: Bruce Karr ***** ATTENTION ***** **** DO NOT MAIL INVOICE ***** *** INVOICE VIA EMAIL ONLY *** ***** ALL BILLS BY EMAIL ***** College Station, TX 77840 US Email: West_Campus_Housing_Streets_and_Infrastructure.02.18_PO_Payments@docs.e-builder.net Phone: (979)458-7042	Active

Add a new Department Location. You need to do this because the 'Bill To' address must be the default for the department/location.

- At bottom of the Location List, select 'Add Location' button Information filled in should be:
 - Location id – last 4 digits of the project number (example below: it will be 3173)
 - Department: Leave as 01FAPC
 - Location Name:
 - Project Account – Part Initials Project Name PRcc-nnnn
(where cc-nnnn is Part-Project Number.)
 - Example:
803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173
 - Ship To Department Address:
 - Click on the 'Eyeglasses' Icon and select the FzzB ('Bill To' Address you just added)
 - Bill To Department Address:
 - Click on the 'Eyeglasses' Icon and select the PzzB ('Bill To' Address you just added)
 - The following should not be changed from checked and filled in info:
 2. Allow requisitions
 3. Allow Bid/Quote
 4. Allow Open Market PO
 5. Open Market PO dollar limit - \$0
 6. Req Required
 7. Add Ship-To Address Allowed
 - Select 'Save and Exit'

The Department Location has been created:

Location List		
		1-5 of 29 1 2 3 4 5 6
Location ID	Location Name	Status
3145	803401 - Tamu Fy13 Utility Upgrade Pr2-3145	Active
3142	803402/811510 - TAMUCC University Center Expansion	Active
3114	803403 - Tamu Renewal Francis Hall Pr2-3114	Active
3160	803406 - TVMDL Veterinary Medical Diagnostic Laboratory Pr20-3160	Active
3173	803408 - TAMU West Campus Housing Streets & Infrastructure Pr02-3173	Active

In Buy A&M (BAM), AP users must be given access to every department they will process documents for, but there is not an 'All Departments/Locations' option. So, the last step in adding an FPC Project to Buy A&M (BAM) is to add the new location to all users with the Accounts Payable Role.

- While still in the Organization Administrator role, Select Administer Agency
- Select 'Department/Approval/Users' tab
- Select 'Maintain Agency Users' button
 - On the User Maintenance Screen, all users will be listed.
 - To limit the display to active users with the 'Accounts Payable' role, select 'Active' under 'Status' and select 'Accounts Payable' under 'User Role' then click 'Find It'

- Select the first user by clicking on the hyperlink for their Logon ID
- On the User Maintenance screen, click the 'Edit' button to the right of 'AP Location Privileges' to add the new locations.
- Click the 'Add All Dept/Locs' at the bottom of the screen to ensure all will be added, including the one that was just created.

Buy A&M Org Admin Tips and Techniques (cont'd)

- Click 'Cancel & Exit' to return to 'User Maintenance' screen.
- Click 'Exit' to return the User Maintenance listing.
- Repeat steps 3a through 3g for all users with the Accounts Payable Role.
- For SOBA users that have Departmental Access and the Accounts Payable Role, both 'Location Privileges' and 'AP Location Privileges' will need to be modified to add all locations.
 - i. Location Privileges are added similar to AP Location Privileges

