

# ESM Purchase<sup>™</sup> System Administrator Reference Guide



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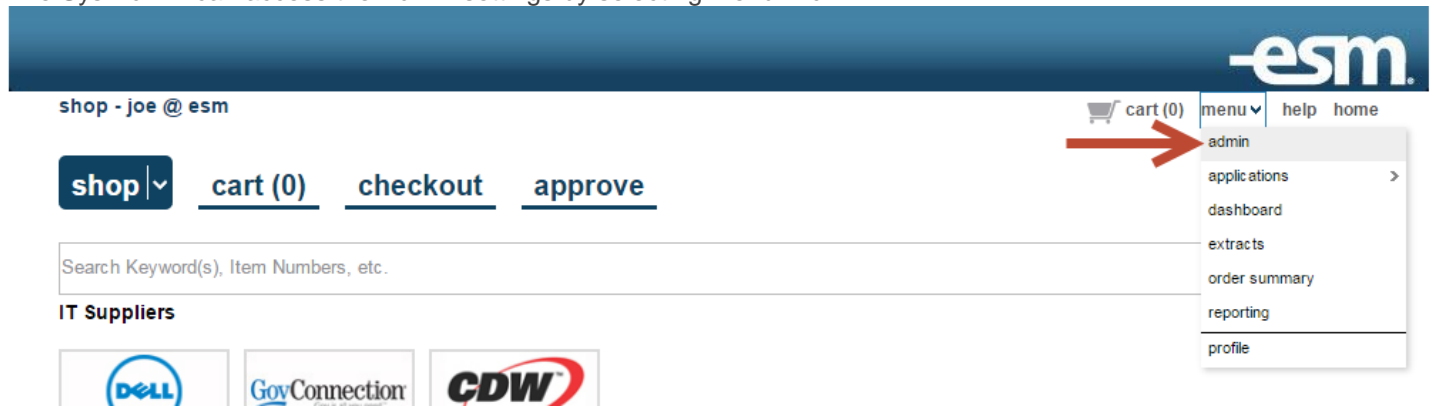
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## ESM Purchase™ System Administrator Process

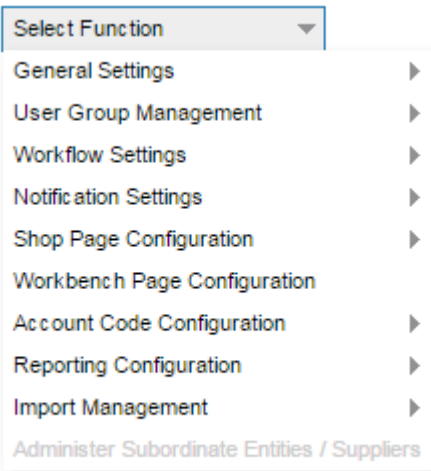
This document provides a condensed overview of the ESM Purchase™ System Administrator Process. It will demonstrate with short text descriptions supported by screen shots for each step explained. Based on system configuration, Sys Admins may not see all functionality shown within Reference Guide.

### Accessing Admin Settings

The Sys Admin can access the Admin settings by selecting Menu>Admin.





The Select Function displays all Sys Admin settings.



## General Settings

Under Edit Entity Settings, the Sys Admin can enable/disable specific system functionality.

- 1. Footer Support Message:** Customizable text at footer of ESM Purchase to replace ESM Support contact
- 2. Enhanced Shop Search bar:** Aesthetic change for searching catalogs  
 Disabled:  Enabled: 
- 3. Checkout Default View:** Collapsed vs Expanded view for line items after converting order to transaction on Checkout tab
- 4. Disable Default Qty in Shopping Results:** unchecked causes Qty of 1 entered when clicking into Qty field during selecting items in Shop
- 5. Checkout Forward:** ability to transfer transactions from Checkout user to Checkout user
- 6. Allow Mixed Item Source on Transaction:** allows for catalog/non-catalog items on same transaction if the same supplier
- 7. Approval Forward:** ability to transfer transactions from Approver to Approver to approve on another's behalf
- 8. Receiving (Quantity/Value):** Receive items based on physical amount (Quantity) and/or dollar amount (Value)
- 9. Standard Order Terms:** text/images that appear at the bottom of all Purchase Orders

Under Banners/Images, the Sys Admin can replace the existing ESM Top Banner, upload a logo to appear on all Printed Purchase Orders, or upload different images to display when users are logging into the application.

Under Color Theme, the Sys Admin can update Menu Tab/Button colors based on preference.

Under Add/Edit Location, the Sys Admin can add/edit Ship to, Bill to and ESM Billing Address locations. Locations are assigned as a default at the user level.

Under Deactivate Locations, the Sys Admin can deactivate any locations by unchecking the Location Type.

**deactivate location(s)**

Entity Name: ESM

Find Location Name:

---

Location Name:

Location ID (GL):

Address Line 1:

Address Line 2:

City:

State:

Province:

Zip/Postal Code:

Country:

Phone:

Location Type:  Ship to  
 Bill to  
 ESM Billing Address

Bill to Attn:

---

Deactivating Default Location will delete the transaction activity displayed below. Any users listed below may also default to this location.

User	Transaction #	Location Type	Status	Create Date
<a href="#">[User Name]</a>	41827	Ship To/Bill To	Unsubmitted Transaction	10/26/2010
<a href="#">[User Name]</a>	44024	Ship To/Bill To	Unsubmitted Transaction	10/26/2010
<a href="#">[User Name]</a>		Ship To/Bill To		

Clicking Deactivate will delete all of the above transactions. The default location for each user can be updated in the Edit Users module. If these transactions should not be removed, please click Cancel and log in as the user to take appropriate action. Then, return to this screen to deactivate the location.

**Note:** The transaction activity displayed is **deleted** and note that any users displayed may currently default to the deactivated location.

Under Add/Edit User, the Sys Admin can add a user or edit user's contact information, system privileges, default locations, and reset their password.

**add/edit user**

User:

---

\* Email ID:

\* First Name:

\* Last Name:

GL User Name:

\* Phone:

Email Alerts:

Time Zone:

Language:

Reset Password:

\* Solutions:  Landing Page   
 easyPurchase   
 Sourcing

---

Additional Settings

▼ easyPurchase

Menu / Cart / Checkout	Approve Options	Privileges / Locations
<p><b>Menu Options:</b> <input checked="" type="checkbox"/> Order Summary  <input checked="" type="checkbox"/> Order Summary Edit  <input checked="" type="checkbox"/> Reporting  <input checked="" type="checkbox"/> Admin</p> <p><b>Privileges:</b> <input type="checkbox"/> Transfer Originator's Cart  <input type="checkbox"/> Edit Cart Transferred To  <input checked="" type="checkbox"/> Checkout tab</p> <p><b>Cart Transferred To:</b> <input type="text" value=""/></p> <p>* <b>Payment Forms Permitted:</b> <input checked="" type="checkbox"/> Credit Card <input checked="" type="checkbox"/> PO</p> <p><b>Change Order</b></p> <p><b>Privileges:</b> <input type="checkbox"/> Change Order</p> <p><b>Approval Process:</b> <input type="radio"/> Request Change  <input type="radio"/> Direct Release</p> <p><b>Change Order Filter:</b> <input type="radio"/> Entity Wide  <input checked="" type="radio"/> User Specific</p>	<p><b>Privileges:</b> <input checked="" type="checkbox"/> Approve tab</p> <p><b>Allow Approver Edits:</b> <input checked="" type="checkbox"/> Non-Catalog Item/Supplier  <input checked="" type="checkbox"/> Transaction Name  <input checked="" type="checkbox"/> Payment Form  <input checked="" type="checkbox"/> Purchase Order #  <input checked="" type="checkbox"/> Release Method  <input checked="" type="checkbox"/> Order Type  <input checked="" type="checkbox"/> Notes/Attachments  <input checked="" type="checkbox"/> Fiscal Date  <input checked="" type="checkbox"/> Aux Fields 1 &amp; 2  <input checked="" type="checkbox"/> Need By Date  <input checked="" type="checkbox"/> Account Code  <input checked="" type="checkbox"/> Quantity  <input checked="" type="checkbox"/> Commodity Code  <input checked="" type="checkbox"/> Tax Codes</p> <p><b>Delegate</b></p> <p>Delegate Email ID: <input type="text" value="Select Approver"/></p> <p>Delegate Status: <input type="radio"/> Active  <input checked="" type="radio"/> Inactive</p>	<p><b>Privileges:</b> <input type="checkbox"/> Manage tab  <input type="checkbox"/> Office tab  <input type="checkbox"/> Receive tab (Qty)  <input type="checkbox"/> Receive tab (Value)  <input type="checkbox"/> Create Non-Catalog Suppliers</p> <p><b>Receive Filter:</b> <input type="radio"/> Entity Wide  <input checked="" type="radio"/> User Specific</p> <p>* <b>Default Ship to:</b> <input type="text" value="Default Location"/>  <a href="#">[Address]</a> <a href="#">edit</a></p> <p>* <b>Default Bill to:</b> <input type="text" value="Default Location"/>  <a href="#">[Address]</a> <a href="#">edit</a></p>

Under User Status, the Sys Admin can deactivate/reactivate users.

**user status**

User:

---

Email ID:

Active:

First Name:

Last Name:

Phone:

Privileges:

- Transfer Originator's Cart
- Checkout tab
- Approve tab
- Office tab
- Admin

User Groups  
Assigned: 0

---

Deactivating  will affect the transaction activity displayed below:

is listed as an approver for the workflow/s below. Please update the workflow/s in Add/Edit Workflow, then return to this screen to deactivate the user.

Transaction #	Status	Function	Create Date
41827	Unsubmitted Transaction	Requester	<input type="text"/>
41945	Pending Approval	Approver	<input type="text"/>
42921	Pending Approval	Approver	<input type="text"/>
43162	Pending Approval	Approver	<input type="text"/>
43306	Pending Approval	Approver	<input type="text"/>
43307	Pending Approval	Approver	<input type="text"/>
43310	Pending Approval	Approver	<input type="text"/>
43738	Pending Approval	Approver	<input type="text"/>
44015	Pending Approval	Approver	<input type="text"/>
44024	Unsubmitted Transaction	Requester	<input type="text"/>

Workflow Name

Approver for

Clicking Deactivate will delete the above transactions for the requester function and reject transactions in the approver's queue. If these transactions should not be affected, please click Cancel and log in as the user to take appropriate action. Then, return to this screen to deactivate the user.


**Note:** The transaction activity is deleted and transactions are rejected in approver queue if user is deactivated.

Under Add/Edit Supplier, the Sys Admin can add/edit a Manual (Non-Catalog) Supplier and verify their PO email. The Sys Admin can review Catalog Suppliers managed by ESM. The Sys Admin does have the ability to override the contact information or update Supplier GL Code for Catalog Suppliers. The Sys Admin can search via deactivated suppliers.

**add/edit supplier**

Supplier Name:    Search deactivated suppliers:

---

Supplier Address	Supplier Contact	Supplier Information
<p>* Supplier Name: GovConnection</p> <p>Supplier ID: 9</p> <p>Address ID: 9</p> <p>* Address Line 1: NA</p> <p>Address Line 2:</p> <ul style="list-style-type: none"> <li>* City: Merrimack</li> <li>* State: NH</li> <li>* Province:</li> <li>* Zip/Postal Code: 03054</li> <li>* Country: United States</li> </ul>	<p>First Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Email: <input type="text"/></p> <p>PO Email: (In the absence of an email address, orders will require manual processing.)</p>	<p><input type="button" value="Update"/></p> <p><input type="button" value="Cancel"/></p> <p>Supplier EIN: <input type="text"/></p> <p>Supplier URL: <input type="text"/></p> <p>Supplier GL Code: <input type="text"/> </p> <p>Map to Catalog Supplier:</p> <p>Supplier Terms:</p> <p>Deactivate Supplier: <input type="checkbox"/></p> <p><input type="button" value="Override"/></p>

Under Add/Edit Order Type, the Sys Admin can add/edit Order Types for requesters to select during the Checkout process.

**add/edit order type**

Order Type:

Order Type Sequence on Checkout page (drag and drop):

Standard [edit](#)

BPO [edit](#)

[Update](#) [Cancel](#)

Note: Order Type can be configured to bypass the General Ledger.

Under Transaction Copy Settings, the Sys Admin can select the desired information that will be included during the Copy Transaction function in the Checkout tab.

**transaction copy settings**

Field Name	Include	If not included
External Note (Header Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
External Attachments (Header Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Internal Note (Header Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Internal Attachments (Header Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Aux Field 1 (Header and Line Item)	<input type="checkbox"/>	Removes content. Defaults to blank.
Aux Field 2 (Header and Line Item)	<input type="checkbox"/>	Removes content. Defaults to blank.
Commodity Code (Header and Line Item)	<input type="checkbox"/>	Removes content. Defaults to blank.
GL Acct. Code (Header and Line Item)	<input type="checkbox"/>	Removes content. Defaults to blank.
External Note (Line Item Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
External Attachments (Line Item Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Internal Note (Line Item Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Internal Attachments (Line Item Level)	<input type="checkbox"/>	Removes content. Defaults to blank.
Ship To Location	<input type="checkbox"/>	Removes content. Defaults from User Profile.
Bill To - Attn	<input type="checkbox"/>	Removes content. Default from Location Profile.
Bill To Location	<input type="checkbox"/>	Removes content. Defaults from User Profile.

[Update](#) [Cancel](#)

Note: Punchout Catalog transactions cannot be copied.

Under Unit of Measure Library, the Sys Admin add/edit Unit of Measures for requesters to choose from when creating a Non-Catalog item.

**unit of measure library**

UOM:

UOM sequence in Product Detail popup (drag and drop):

Each [edit](#)

[Update](#) [Cancel](#)

Note: If Unit of Measure Library is not configured, the Unit of Measure will be a text-entry field.



## User Group Management

Under Add/Edit User Group, the Sys Admin can add/edit/delete User Groups with the purpose of associating users together of a similar function.

**add/edit user group**

User Group:

---

\* User Group:

Default All Users to Group:

Available for Workflow:

Note: Users can be in more than one User Group.

Under User Group Assignment, the Sys Admin can select the desired users to be added or removed from existing User Groups.

**user group assignment**

User Group:

User Name:

Unassigned Users

Assigned Users

Navigation arrows: >>, >, <, <<

## Workflow Settings

Under Add/Edit Transaction Validation, the Sys Admin can add/edit/deactivate rules that generates a System Alert (Validation Message) to stop transactions from processing based on selected criteria.

**add/edit transaction validation**

Validation Name:

---

\* Validation Name:

Validation Message:

Deactivate Validation:

**Transaction Validation Criteria**

And

=

Note - These fields have the following limited choices:

- Payment Form: Credit Card or PO
- Release Method: Confirming Request, Electronic or Manual
- Item Source: Catalog or Non-Catalog

Under Add/Edit Workflow Bypass, the Sys Admin can permit transactions to deviate from applicable workflows based on selected criteria.

**add/edit workflow bypass**

Bypass Name:  Go

---

\* Bypass Name:  Update

Deactivate Bypass:  Cancel

**Bypass Criteria**

And

Order Type  Equals  BPO

Note - These fields have the following limited choices:  
 - Payment Form: Credit Card or PO  
 - Release Method: Confirming Request, Electronic or Manual  
 - Item Source: Catalog or Non-Catalog

Note: Orders eligible for Workflow Bypass will not touch any General Ledger integrations.

Under Add/Edit Workflow, the Sys Admin can add/edit/deactivate workflows and their priority. Workflows determine the Approvers based on selected criteria. The criteria can be nested as shown below. The nested workflow below is stating: Both of the following criteria need to be met based on the **AND** statement highlighted below

- Transaction total is greater than 100
- User Group Contains Test User Group **OR** Ship To Location Contains Default Location

If criteria are met, 'Buyer, Joe' needs to approve

**add/edit workflow**

Workflow Name:  Go

---

\* Workflow Name:  Update

\* Workflow Priority:  Cancel

Deactivate Workflow:

**Workflow Criteria**

And

Transaction Total  >=  100

Or

User Group  Contains  Test User Group

Ship To Location  Contains  Default Location

---

**Approver Sequence**

1

Note - These fields have the following limited choices:  
 - Payment Form: Credit Card or PO  
 - Release Method: Confirming Request, Electronic or Manual  
 - Item Source: Catalog or Non-Catalog

Note: It is recommended that the Sys Admin uses Contains when possible, instead of Equals. When making workflow updates, ESM encourages testing in Training Environment.

Under Workflow Priority, the Sys Admin can review/edit Workflow Priorities used to determine the order if multiple workflows are applicable for one transaction. The workflows will be in numeric order (the lower the number, the higher the priority).

**workflow priority**

rows / pg : 10 ▾ Go

---

<b>Workflow Priority</b>	<b>Workflow Name</b>	
<input type="text" value="200"/>	<a href="#">Test</a>	<span style="background-color: #d3d3d3; padding: 2px 10px;">Update</span>
<input type="text" value="100"/>	<a href="#">Approver for Shopper</a>	<span style="background-color: #d3d3d3; padding: 2px 10px;">Cancel</span>

Under Transaction Validation/Workflow Bypass Workbench, the Sys Admin can review based on Name, Criteria, and deactivation.

**transaction validation workbench**

Validation Name:  ▾ Search

Criteria:  ▾

Search Deactivated Validation:

**Transaction Validation Workbench Results** rows / pg : 10 ▾ Go

Validation Name ▲	Status
<a href="#">Test Validation</a>	Active

**workflow bypass workbench**

Bypass Name:  ▾ Search

Criteria:  ▾

Search Deactivated Bypass:

**Workflow Bypass Workbench Results** rows / pg : 10 ▾ Go

Bypass Name ▲	Status
<a href="#">entity Admin</a>	Active

Under Workflow Workbench, the Sys Admin can review based on Name, Approver, Criteria, Priority, and deactivation.

**workflow workbench**

Workflow Name:  ▾ Search

Approver:  ▾

Criteria:  ▾

Workflow Priority:  to

Search Deactivated Workflows:

**Workflow Workbench Results** rows / pg : 10 ▾ Go

Workflow Name ▲	Priority	Status
<a href="#">Approver for Shopper</a>	100	Active

Under Workflow/Validation Criteria, the Sys Admin can add/remove the desired criteria that displays on the drop-down selection when creating workflows and validations.

**workflow/validation criteria**

**Unassigned Criteria**

- Aux Field 1
- Aux Field 2
- CAS Number

➤

➤

➤

➤

**Assigned Criteria**

- Bill To Location
- Catalog Item #
- Catalog Name
- Chart of Accounts
- Commodity Code
- Contract Number
- External Note
- Fiscal Date

## Notification Settings

Under Add/Edit Order Notification, the Sys Admin can add/edit/deactivate notifications for submitted orders to inform new user(s).

**add/edit order notification**

Order Notification Name:

---

\* Order Notification Name:

Deactivate Notification:

**Order Notification Criteria**

And

>

---

**Notify Users**

User:

1. Buyer, Joe (entity.admin@esmsolutions.com)

Note - These fields have the following limited choices:

- Payment Form: Credit Card or PO
- Release Method: Confirming Request, Electronic or Manual
- Item Source: Catalog or Non-Catalog

Under Order Notification Workbench, the Sys Admin can review based on Name, Criteria, and deactivation.

**order notification workbench**

Order Notification Name:

Criteria:

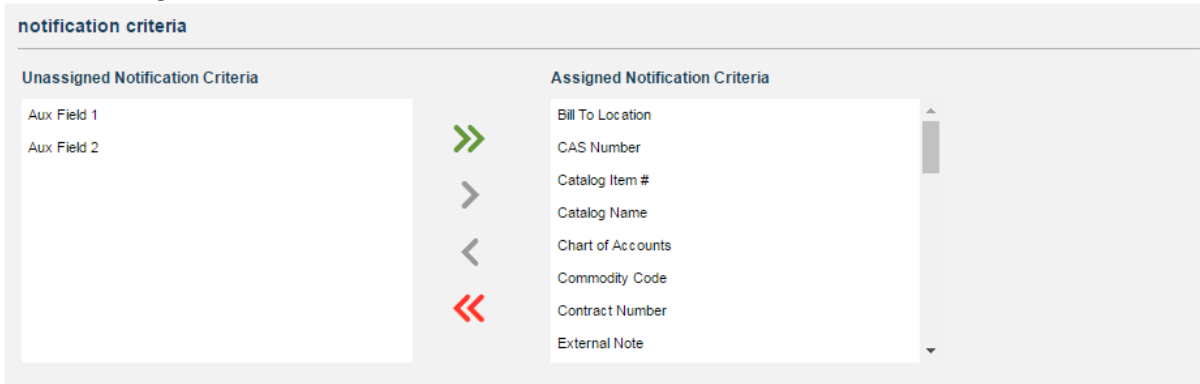
Search Deactivated Order Notifications:

---

**Order Notification Workbench Results** rows / pg :

Order Notification Name ▲	Status
<a href="#">Test Order Notification</a>	Active

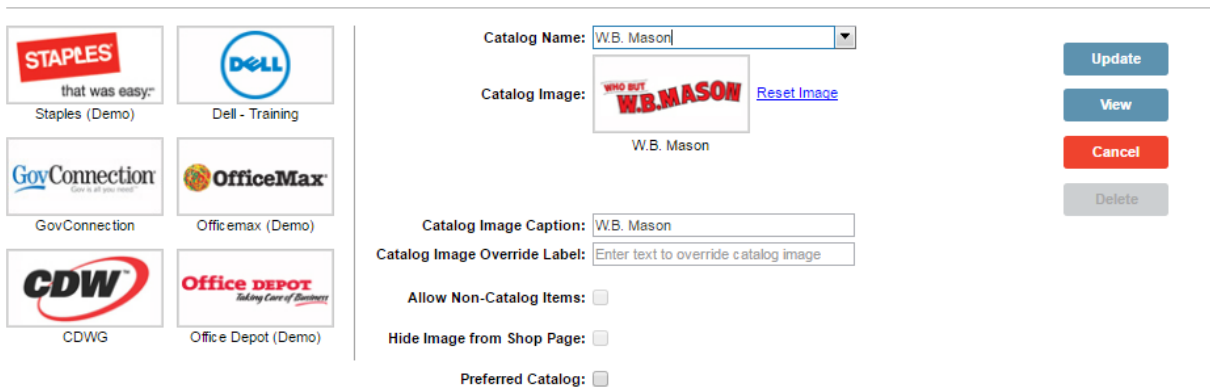
Under Notification Criteria, the Sys Admin can add/remove the desired criteria that displays on the drop-down selection when creating notifications.



## Shop Page Configuration

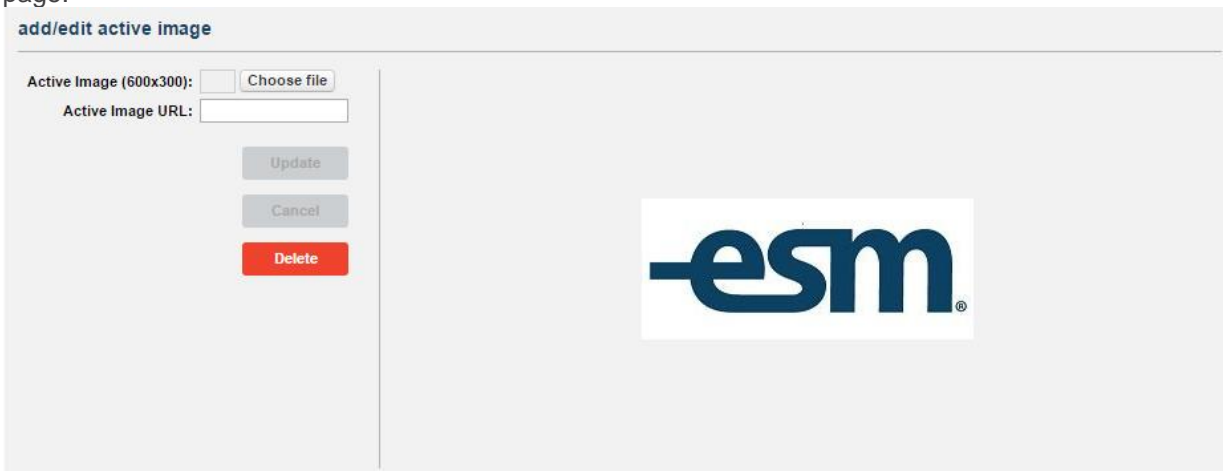
Under Vertical>Add/Edit Catalog, the Sys Admins can assign/delete catalogs to their environment using the Catalog Name drop-down menu. View displays the items within the Catalog.

### add/edit catalog



Note: Preferred Catalog brings the catalog items to the top of the search results on Shop.







Under Vertical>Add/Edit Active Image, the Sys Admin can upload a JPEG file or Image URL to display on the Shop page.



Below, is an example of the User Interface with a Vertical Shop Page Configuration.

**shop** | cart (0) | checkout | approve

Search Keyword(s), Item Numbers, etc.

 that was easy. Staples (Demo)	 Dell - Training
 GovConnection	 OfficeMax (Demo)
 CDWG	 Office Depot (Demo)



Under Horizontal, the Sys Admin can Add/Edit Catalogs with or without Categories. Under Horizontal>Catalog with Categories>Add/Edit Categories, the Sys Admin can add/edit/deactivate categories to organize catalogs assigned to the entity. IT Suppliers, Office Suppliers, and MRO are example categories.

**add/edit category**

Category Name:

Category Sequence on Shop page (drag and drop):

- IT Suppliers [edit](#)
- Office Suppliers [edit](#)
- MRO [edit](#)

Note: Vertical does not allow for Categories.



Below, is an example of the User Interface with a Horizontal Shop Page Configuration. The Catalogs are separated into Categories (IT Suppliers and Office Suppliers).

shop | v    cart (0)    checkout    approve

Search Keyword(s), Item Numbers, etc.    Go

**Welcome to the ESM Purchase!**

**News & Events**

Travel Card Small Balance Write-Off - In instances when a cardholder carries a small balance between -\$1.00 and \$1.00 for four statement cycles yet without any activity... [\(more\)](#)

**User Help**

[User Guides](#)

Need a refresher? Watch the video:

**IT Suppliers**

Dell - Training

[GovConnection](#)

CDWG

**Office Suppliers**

Staples (Demo)

Officemax (Demo)

Office Depot (Demo)

Under Catalog Visibility, the Sys Admin assigns catalogs via individual users or user groups. The Sys Admin can filter results by user/group name or visibility status.

**catalog visibility**

\* Catalog Name:     Search

User/Group Name:     X

Visibility:     v

---

Catalog Name: GovConnection    rows / pg : 50    Go    Update    Cancel

User/Group Name ▲	First Name	Last Name	Assigned
entity.admin@esmsolutions.com	Joe	Buyer	<input checked="" type="checkbox"/>
shopper@esmsolutions.com	Shopper	user	<input checked="" type="checkbox"/>
Test User Group			<input checked="" type="checkbox"/>
transfer.cart@esmsolutions.com	Transfer	Cart	<input type="checkbox"/>

Note: It is recommended that Sys Admins use User Groups for large amount of users.



## Workbench Page Configuration

The Sys Admin can remove any fields displayed on the Checkout tab by selecting edit and checking Hide. The Sys Admin can also change any Field Names displayed on the Checkout tab by selecting Edit.

### workbench page configuration

#### workbench header

Transaction #: Transaction Number  
 \* Transaction Name:  Hide  
 User Group: User Group [edit](#)  
 Cart Originator: Cart Originator  
 Create Date: mm/dd/yyyy  
 Supplier: Supplier Name  
 Total Line Items:  Hide  
 Total Value: Total Value USD

Payment Form: Payment Form <a href="#">edit</a>
Release Method: Release Method <a href="#">edit</a>
Order Type: Order Type <a href="#">edit</a>
External Note: External Note <a href="#">edit</a>
Internal Note: Internal Note <a href="#">edit</a>
Ship To - Attn: Ship To Attention <a href="#">edit</a>
Commodity Code: Commodity Code <a href="#">edit</a>
Fiscal Date: Fiscal Date <a href="#">edit</a>
Purchase Order #: Purchase Order # <a href="#">edit</a>
Aux Field 1: Aux Field 1 <a href="#">edit</a>
Aux Field 2: Aux Field 2 <a href="#">edit</a>
Tax Code 1: Tax Code 1 <a href="#">edit</a>
Tax Code 2: Tax Code 2 <a href="#">edit</a>
Chart of Accounts: Chart of Accounts <a href="#">edit</a>
Index Code: Index Code <a href="#">edit</a>
GL Acct. Code: GL Account Code <a href="#">edit</a>

Selection: Selection  
 Status: Status  
 Next Step: Next Step

[Update](#)  
[Cancel](#)

#### workbench line item detail

Item/Service: Item Name  
 Catalog Item #: Catalog Item #

Ship To - Attn: Ship To - Attn
Need By Date: Need By Date <a href="#">edit</a>
External Note: External Note <a href="#">edit</a>
Commodity Code: Commodity Code
Internal Note: Internal Note <a href="#">edit</a>
Aux Field 1: Aux Field 1
Aux Field 2: Aux Field 2
Tax Code 1: Tax Code 1
Tax Code 2: Tax Code 2
Chart of Accounts: Chart of Accounts
Index Code: Index Code
GL Acct. Code: GL Account Code

Contract Price: Contract Price [edit](#)  
 UOM: UOM  
 \* Qty: Quantity  
 Item Subtotal: Item Subtotal USD  
 Tax Code 1: Tax Code 1 USD  
 Tax Code 2: Tax Code 2 USD  
 S & H: S & H USD [edit](#)  
 Total: Item Total USD

#### workbench summary

Transaction #: Transaction Number  
 Supplier's Terms:  Hide

Ship To: Ship To Location  
 Bill To - Attn: Bill To Attention  
 Bill To Location

Subtotal: Subtotal USD  
 Tax Code 1: Tax Code 1 USD  
 Tax Code 2: Tax Code 2 USD  
 S & H: S & H USD  
 Total: Total USD

Note: The Sys Admin can build Aux Field 1 & 2 as Searchable Dropdown or Text Input.

## Account Code Configuration

To import Account Codes, the Sys Admin can select the Import Account Code option or Import Management>Import Templates. Select Account Code from the Template Type.

Under Chart of Accounts, the Sys Admin can add/deactivate Chart Names.

**chart of accounts**

Chart:

---

Deactivate Chart

Chart1

Chart2

Test Chart

Note: The Sys Admin cannot delete any added Charts.

Under Account Code Settings, the Sys Admin enters segments (portion of the Account Code), their type, and if they are required by the General Ledger for each Chart.

**account code settings**

Charts:

Segment Name	Segment Type	Required by GL	<input type="button" value="Update"/>
Segment 1: <input type="text" value="Fund"/>	<input type="radio"/> Alphanumeric <input checked="" type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="button" value="Cancel"/>
Segment 2: <input type="text" value="Org"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Segment 3: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 4: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 5: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 6: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 7: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 8: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Segment 9: <input type="text"/>	<input checked="" type="radio"/> Alphanumeric <input type="radio"/> Numeric	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Under Account Code Assignment, the Sys Admin selects a user to assign existing Account Code(s).

**account code assignment**

User Name:

---

User Name: Joe Buyer

Chart:

---

Chart Name: Test Chart

Index:

Fund:

\* Org:

---

**assigned accounts**

Delete	Chart	Index	Segment Values
--------	-------	-------	----------------

## Reporting Configuration

Please see TheReporter Reference Guide for further instructions on these configuration settings and the Reporter tool.

## Import Management

Under Import Template, the Sys Admin can upload Account Assignment, Index Assignment, Account Code, Index Code, Account Favorites, Commodity Code, Location, Non-Catalog Supplier, User, Workflow/Notification, Aux Field 1 & 2, or Tax Code templates. The acceptable versions of templates can be downloaded using the link below Upload File. The Sys Admin can setup the FTP / SFTP Server or upload through the ESM Purchase environment. The Sys Admin can review all uploaded/failed files in the Template Upload History.

### Import Templates

Template Type:

Upload File:    
[Download User Template](#)

Upload Type:  Update  
 Replace

**FTP / SFTP Details**

Server Address:

Server Port Number:

Server Path:

Server User Name:

Server Password:

Acceptable File Name: USER\_1-7.csv  
USER\_1-6.csv  
USER\_1-5.csv

### Template Upload History

rows / pg :

File Name	Template Type	Upload Type	Submitted	Validated	Loaded	Status	Cancel Load
<a href="#">4759_User Upload Template With UserGroups (3).csv</a>	User	Update	07/27/2016 15:28			Error	
<a href="#">4759_User Upload Template With UserGroups (3)_Error.csv</a>	User					Error	

Under Cross References, the Sys Admin Can adjust the Reference Value for ESM Values of State and Country. The adjustment is typically made for General Ledger requirements.

### cross reference values

\* ESM Field:

\* ESM Value:

\* Reference Value: