

Online GeorgiaFIRST Training

AM Course 3: Integrating Asset Management with Purchasing and Accounts

Payable

Session Description:

This is the third online course in the Asset Management section. This course centers on the primary method of adding assets to the system, which is through the Payables/Purchasing Interface. This course covers the many steps required for interfacing your assets, including the steps on creating the original purchase order, receipt, and voucher. Within this course, you will walk through each step in the process, from identifying PO Receipts and Vouchers for assets to the last step of assigning Asset IDs. In order to listen to the audio portions of this course, headphones are required.

To enroll, complete the **Online GeorgiaFIRST Training Enrollment Form** and email to helpdesk@usg.edu. Once enrolled, you will receive login and course access instructions.

Objectives:

- Review the process flow of integrating Asset Management with the Purchasing and Accounts Payable modules
- Identify what information is required on a purchase order for an asset
- Identify what information is required on a PO Receipt for an asset
- Identify how to create a voucher for an asset
- Identify the query that lists assets that are ready to be loaded from the Purchasing and Accounts Payable modules
- Define what the PO_RECVPUSH process does
- Demonstrate how to run the PO_RECVPUSH process
- Define what the INTFAPAM process does
- Demonstrate how to load assets from vouchers
- Identify when to review Pre AM pages
- Demonstrate how to review and update the Pre AM pages
- Identify what types of transactions should be deleted from the Pre AM pages
- Demonstrate how to delete transactions from the Pre AM pages
- Demonstrate how to run the Payables/Purchasing Interface
- Identify when to review the Interface pages
- Demonstrate how to review and update the Interface pages
- Review when and why to consolidated assets
- Demonstrate how to consolidate assets
- Review when and why to unitize assets
- Demonstrate how to unitize assets
- Identify the purpose of the Transloader Process
- Demonstrate how to run the Transloader Process
- Identify additional steps that may need to be taken after assets have been added to the AM Module
- Identify tools to review the newly added assets

Lessons:

- Lesson 1: Introduction to Integrating Asset Management with Purchasing and Accounts Payable
- Lesson 2: Asset Requirements for Purchase Orders, Receipts and Vouchers
- Lesson 3: Pushing Receivers and Loading Vouchers
- Lesson 4: Running the Payables/Purchasing Interface
- Lesson 5: Consolidating and Unitizing Assets
- Lesson 6: Running the Transloader Process

Practice Exercises:

- Practice Exercise #1: Interfacing Assets
- Practice Exercise #2: Interfacing Assets, plus Changing information on the Interface Pages
- Practice Exercise #3: Interfacing Assets, plus Deleting Items from the Pre AM Pages
- Practice Exercise #4: Interfacing Assets, plus Consolidating Assets
- Practice Exercise #5: Interfacing Assets, plus Unitizing Assets

End-of-Course Evaluation:

- In order to receive credit for this course, you must pass the end-of-course evaluation, with a score of at least 70% (259 out of 370). Upon successful completion, you will receive your certificate of completion via email.

Training Hours:

- 3.0 Training Hours

Prerequisites:

- AM Course 1: Introduction to Asset Management
- AM Course 2: Creating Assets Manually

Course Number:

- PSFINAM10-010