PASS Buyer

Training Essentials Package

- Contains Guided Practices and Individual Exercises used during your training class

- Please print this document and bring it to PASS Buyer training

ASMP
Working As 1

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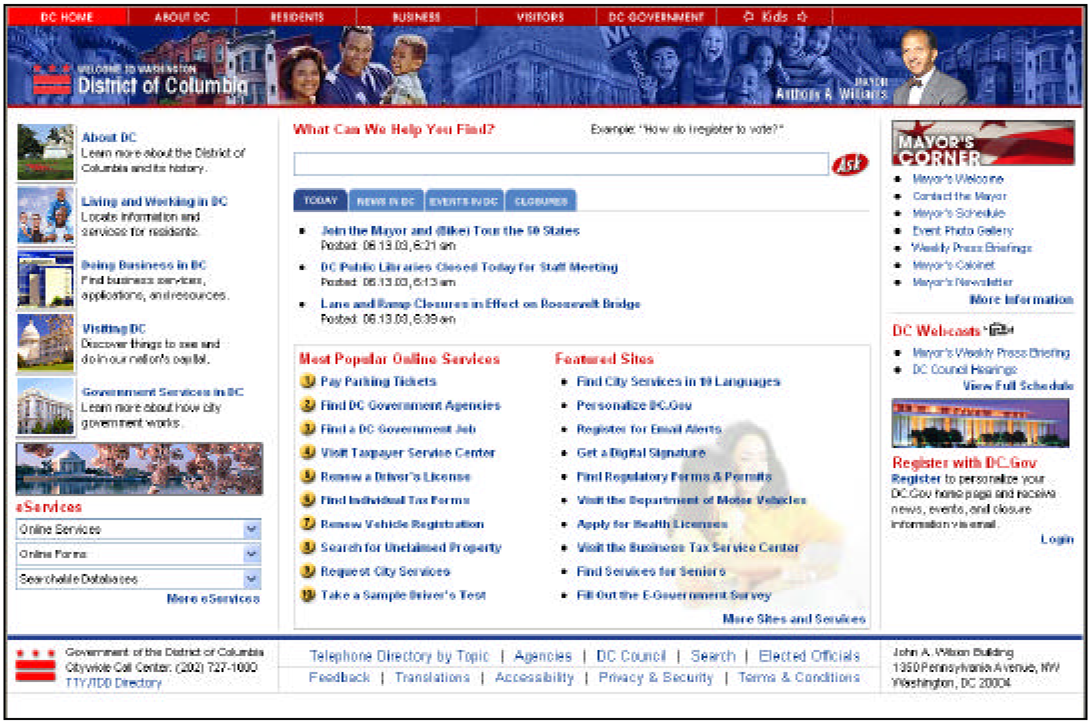
Guided Practice 2.1 - Log-In to PASS

1. Click the Internet Explorer icon on the desktop.
   The Internet Explorer main screen appears.



2. Type the PASS training website address in the address textbox.
   The training web address is:
   http://asmpw01.dc.gov:3377/Ariba

Note: Web site addresses are case sensitive. The training web address IS NOT the same as the production (the real system you will use when you receive your login and password).

Tip: You can mark the real website address as a Favorite, creating a short cut.

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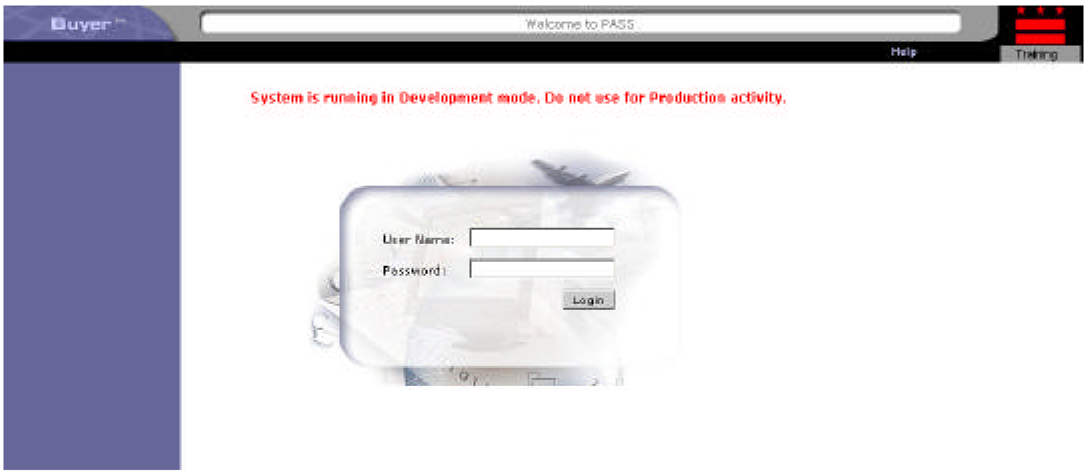
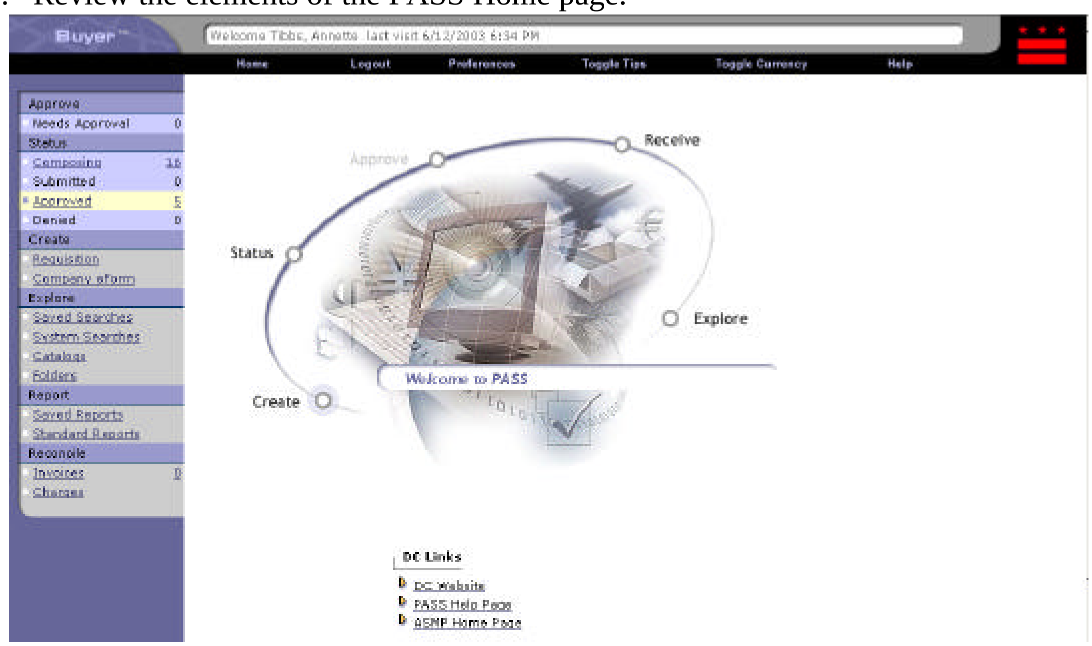
3. Type your user name and password in the User Name and Password fields from the Data Sheet.

You are logged into PASS.

Note: Your user name is typically the same as your District login name.



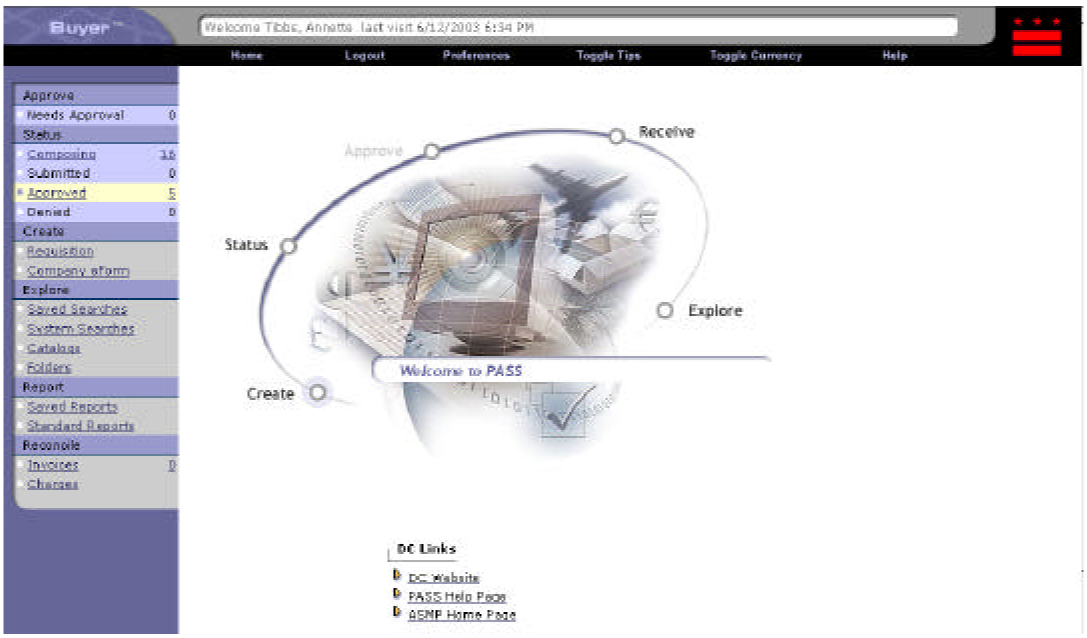
4. Review the elements of the PASS Home page.



Guided Practice 3.1 - Create a Requisition with Catalog Items

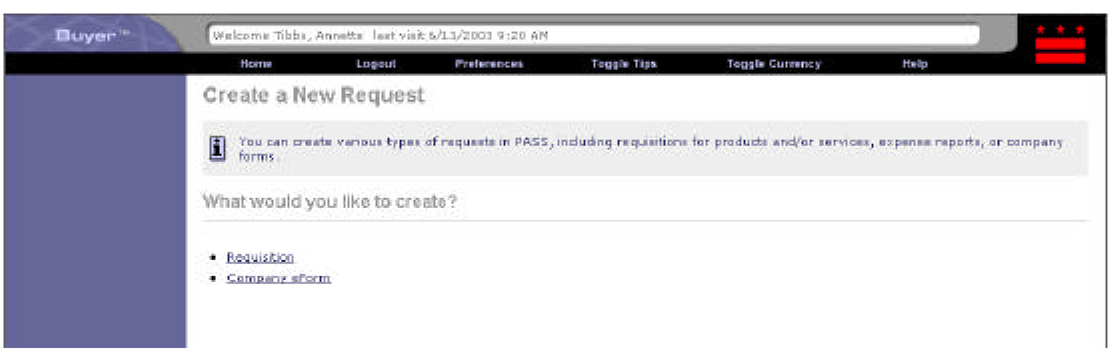
1. Complete the Requisition Preparation Sheet.

2. Log in as the Requestor according to your data sheet.



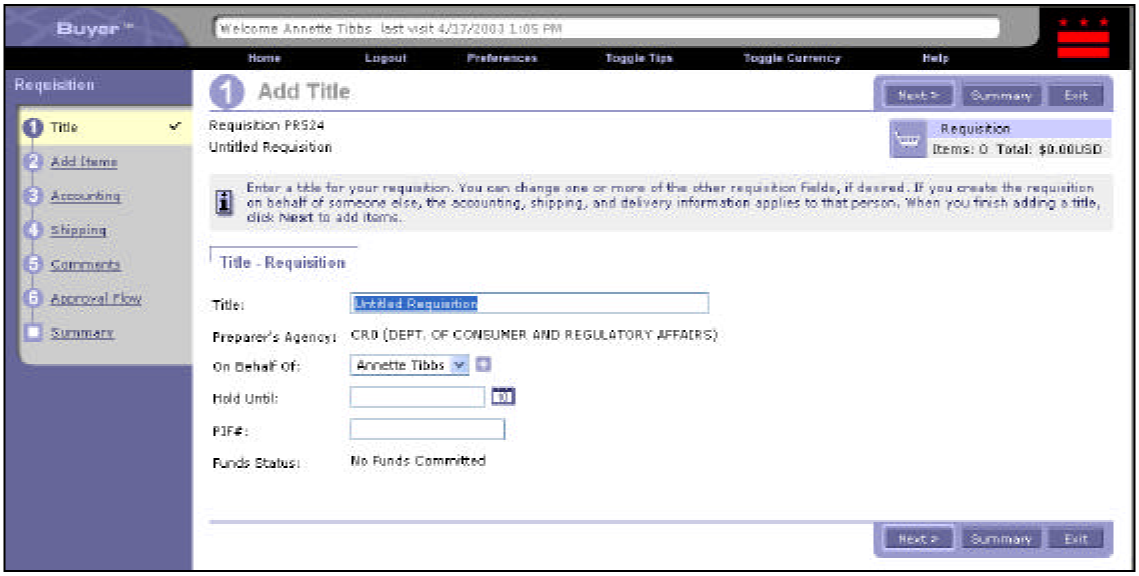
3. Click Create on the PASS Swoosh screen.

The Create a New Request screen appears. You can also initiate the requisition process by clicking Requisition under the Create section of the Process Step Area.



4. Click Requisition on the Create a New Request screen.

The Add Title screen appears. From here, you will provide general descriptive information for the requisition.

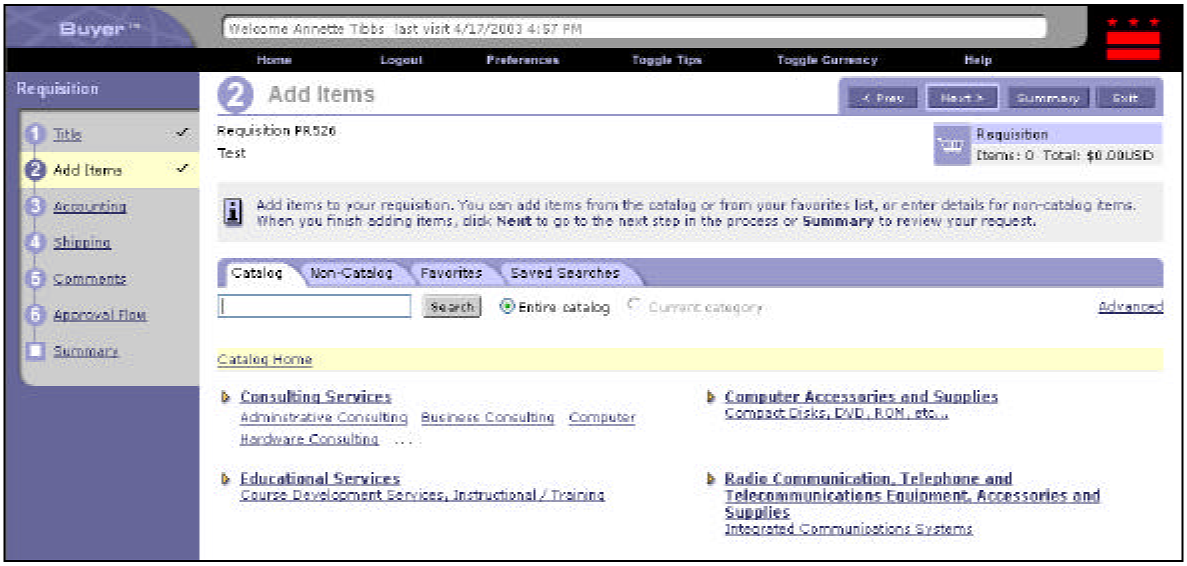


5. Write down the requisition number located at the top left of the Add Title screen.
6. Type "[**Your Name]- Catalog Requisition**" in the Title field on the Add Title screen.

    An example of the typed text is "Joe Smith- Catalog Requisition".

7. Click Next to proceed to the Add Items screen.

   Notice that the Requisition # and the Requisition's Title continue to appear in the top left corner. Notice that the Catalog Hierarchy is in alphabetical order.



8. Click on the Category and subcategory listed on your Data Sheet.

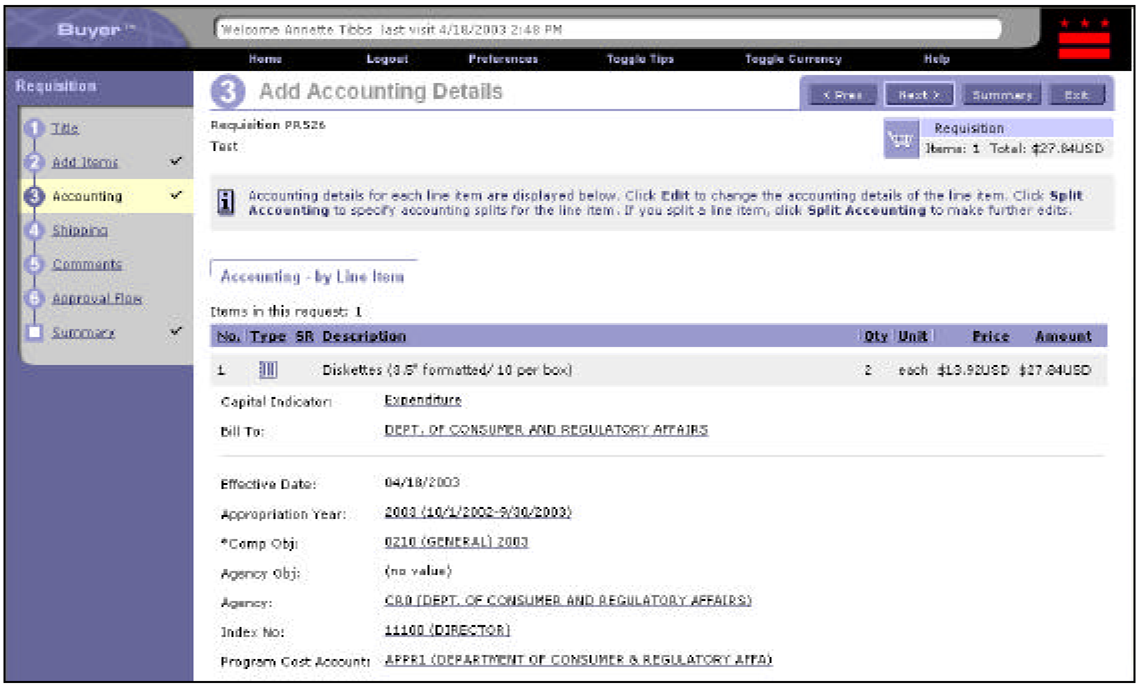
   The Add Items screen refreshes to display only categories or items under the subcategory selected. A list of available products under this category appears.

9. Click Add to the right of the product listing on your Data Sheet. The View Line Items screen appears. Notice that a quantity is defaulted to 1 and is added to your shopping cart.

10. Change the quantity from one to 20.

11. Click Next to proceed to the Add Accounting Details screen.

The Add Accounting Details screen appears. From this screen, you will identify the correct accounting information so that the funds to pay for the purchase order will be pulled from the correct budget. Comptroller Object should be pre-filled (based on the commodity codes). You need to enter the correct Agency Object and Index No.; the remaining fields should default based on the two selections. If this information is not provided, you will receive an error message when you try to submit the requisition.



12. Click Edit to modify the default information.

The Edit Line Item Accounting screen appears. Notice that certain fields can now be changed. You must Click Edit to modify the accounting fields, which is done by line item.

13. Click to the right of the Agency Obj field to access a list of available Agency Objects for the agency.

The Choose Value for Agency Obj screen appears. The Choose Value for screen is a general screen used any time a field has multiple values from which to choose.

Note: You can view details of any data in a field or a column that appears with a hypertext link. For example, the Comptroller Object field has a link for the Comptroller Object data. If you click the link for this data, you will see detailed information on the Review Details for Comptroller Object screen, including effective beginning and ending dates. Once you review the information, click Done to return to the previous screen.

14. Click Select to the Agency Obj listed on your data sheet.
15. The Edit Line Items Accounting screen re-appears with the updated Agency Obj information.
16. Click ⊞ to the right of the Index No field to access a list of available Index numbers. The Choose Value for Index No screen appears.
17. Click Select to the right of the Index No. listed on your data sheet.

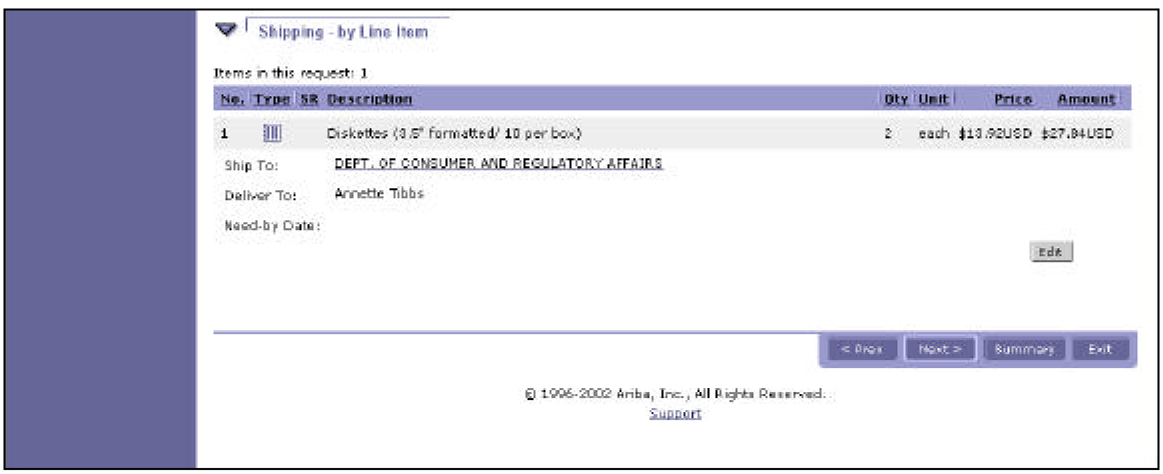
    The Edit Line Item Accounting re-appears. The Index number and other required accounting codes appear.

18. Click OK at the bottom right corner of the Edit Line Item Accounting screen to accept the change.

    The Add Accounting Details screen re-appears with the updated accounting information.

19. Click Next to proceed to the Add Shipping Details screen.

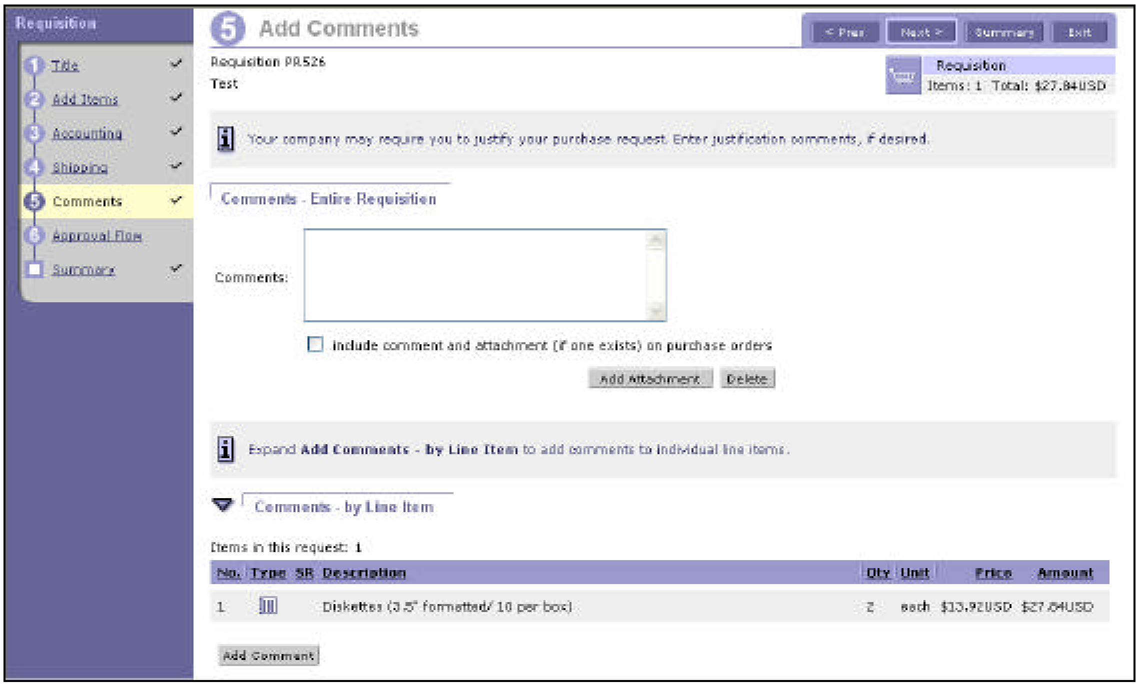
The Add Shipping Details screen appears. Notice that you can enter shipping information for the entire requisition (Header level) or by line item.



Note: Most PASS users will be limited to selecting agency-based addresses.

20. To edit shipping by line item, you need to click Edit below the line item on the screen.
21. Click Next to proceed to the Add Comments screen.

The Add Comments screen appears. From this screen, you can add comments and/or document attachments to the requisition.



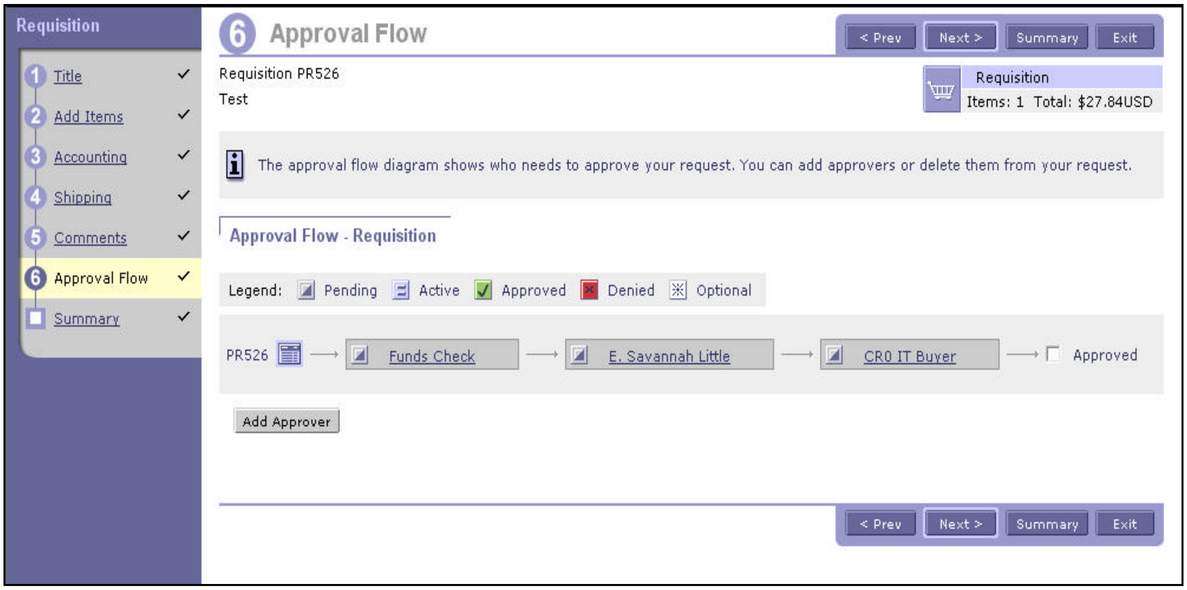
22. Type in the Comments textbox on the Add Comments screen.

If you are ordering on behalf of several people, you can use the Comments textbox to indicate the individuals, as well as which items on the requisition were ordered for each individual. You can also do this by adding comments to each line item.

Note: You can include comments/attachments on purchase orders (permitting the supplier to read them) or you can keep comments internal.

23. Click Next to proceed to the Approval Flow screen.

The Approval Flow screen appears. This screen displays the pre-configured approval flow for this requisition. You cannot modify or delete the existing Approvers; however, you can add Approvers as needed. Document the approval flow on your data sheet. You will use this information in subsequent modules.



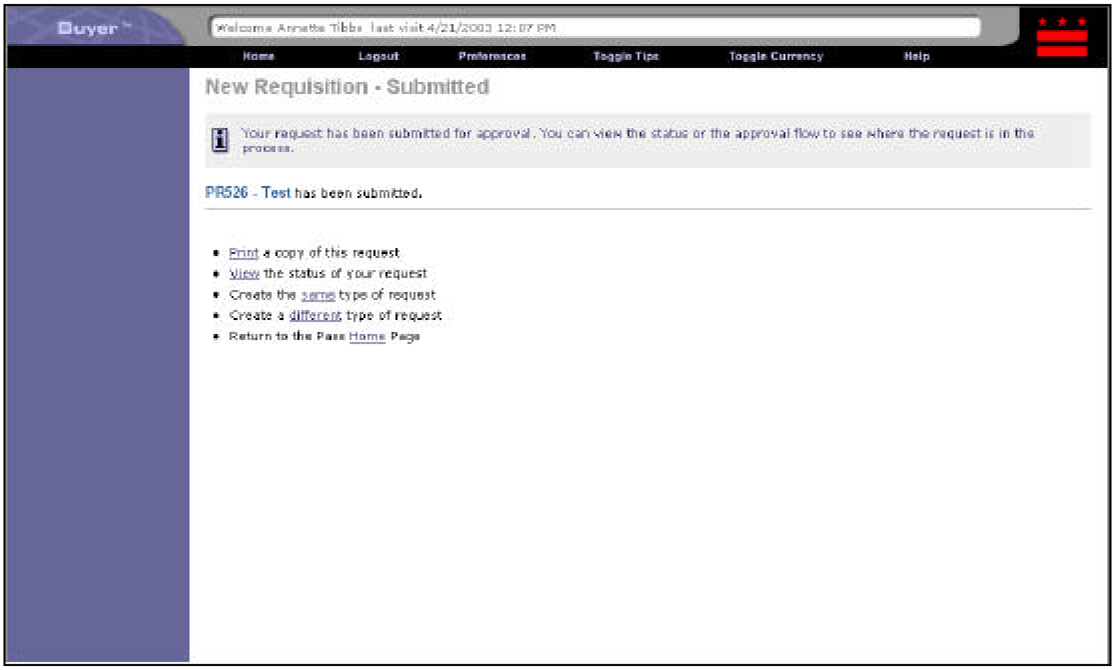
24. Click Next to proceed to the Summary screen.

The Summary screen appears. From this screen you can review the entire requisition before submitting it.

Note: To reduce the number of screens on which you work and wait time for refreshing screens, you can work directly from the Summary screen to prepare most of your requisition if it is straightforward. To do so, once you have initiated the requisition, click Summary in the Process Step Area to access the Summary screen.

25. Click Submit to proceed to the New Requisition – Submitted screen.

Your requisition is submitted and the New Requisition – Submitted screen appears.



26. Log out of PASS.

You are now logged out of PASS.

Individual Exercise 3.1 - Create a Catalog Requisition

Objective(s): Submit a requisition with catalog items.

Duration : 20 minutes

Instructions: Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

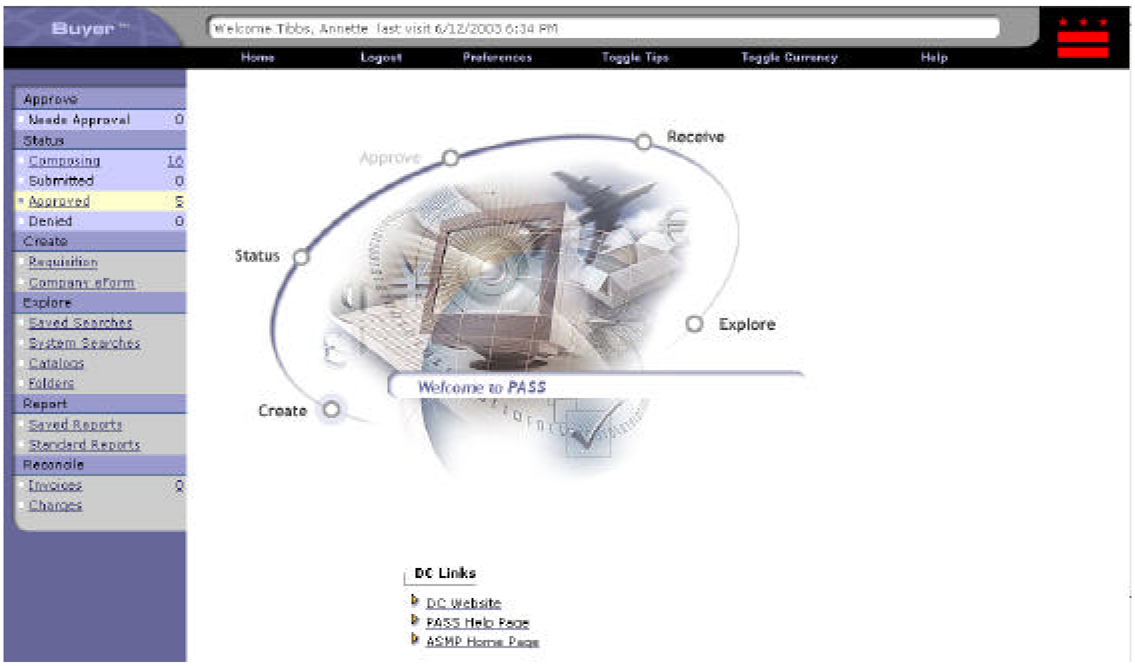
Step	Activity	Completed
COMPLETE REQUISITION PREPARATION SHEET FIRST		
1	Log into PASS using the login from the Data Sheet.	
2	Start a requisition.	
3	Name the requisition "(Your Name)- Lab 3.1".	
4	Browse for floppy diskettes.	
5	Add a quantity of 50 boxes of diskettes from a supplier with the lowest price per box to your requisition.	
6	Search the entire catalog for reams of 8 ½ x 11copy paper.	
7	Add a quantity of 245 reams of 8 ½ x 11copy paper from a supplier with the lowest price per ream and is an LSDBE entity to your requisition.	
8	Select the appropriate accounting codes from your data sheet.	
9	Change the shipping addresses on each item so that the shipping address of each item is a different location for your agency. (if possible)	

Step	Activity	Completed
10	Review and document your approval flow on your data sheet.	
11	Review the summary of the requisition.	
12	Submit the requisition.	
14	Log out of PASS.	

Guided Practice 3.2 - Requisitions with Non-Catalog Items

1. Complete Requisition Preparation Sheet.
2. Type in your Requestor login as per your Data Sheet.

   You are now logged into PASS.



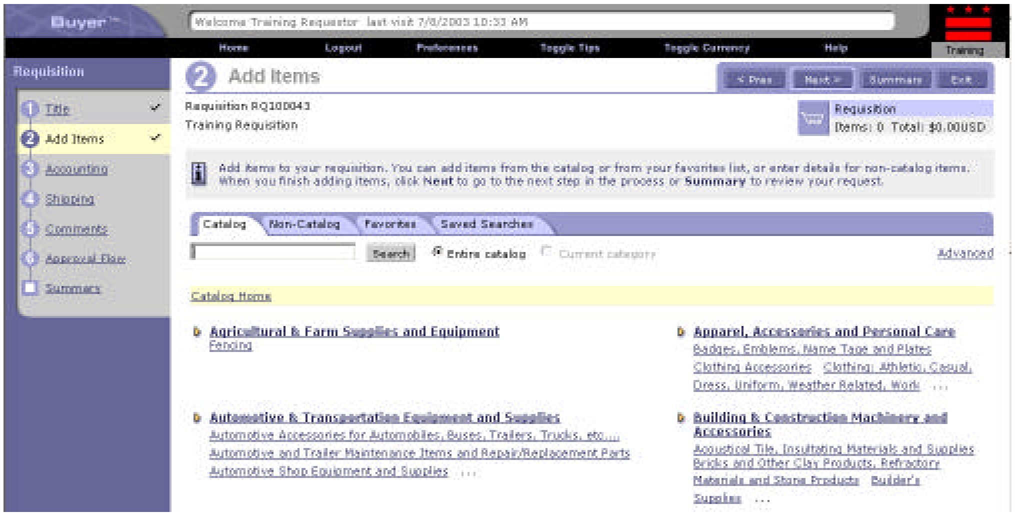
3. Click Requisition under Create on the Process Step Area on the PASS Swoosh screen.

   The Add Title screen appears.

4. Type **"[Your Name]- Non-Catalog item"** in the title.

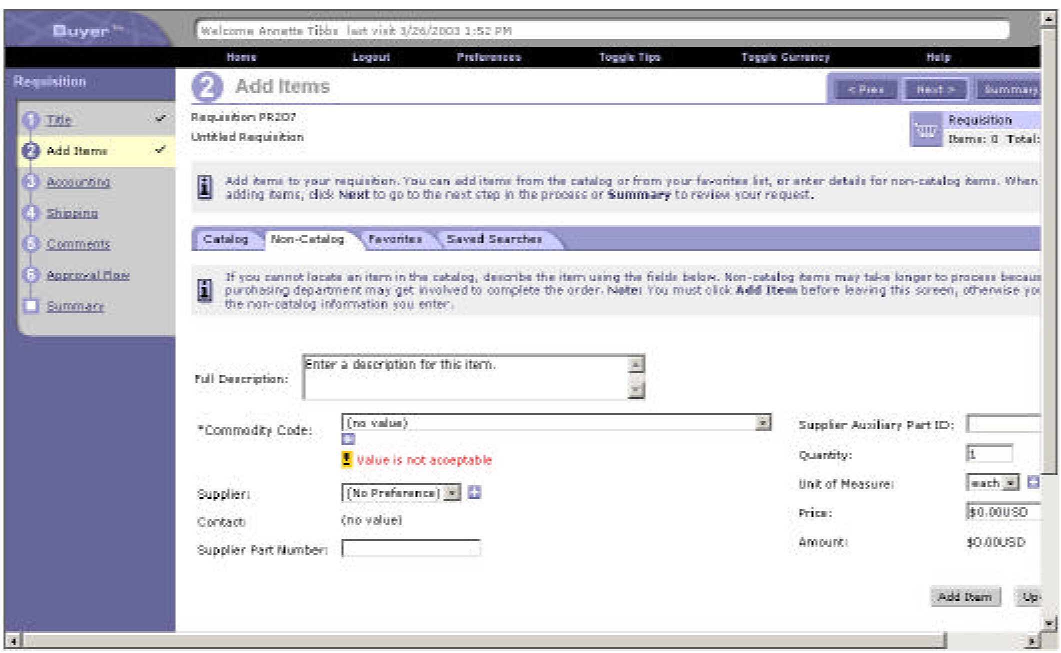
5. Click Next to proceed to use Add Items screen.

The Add Items screen appears.



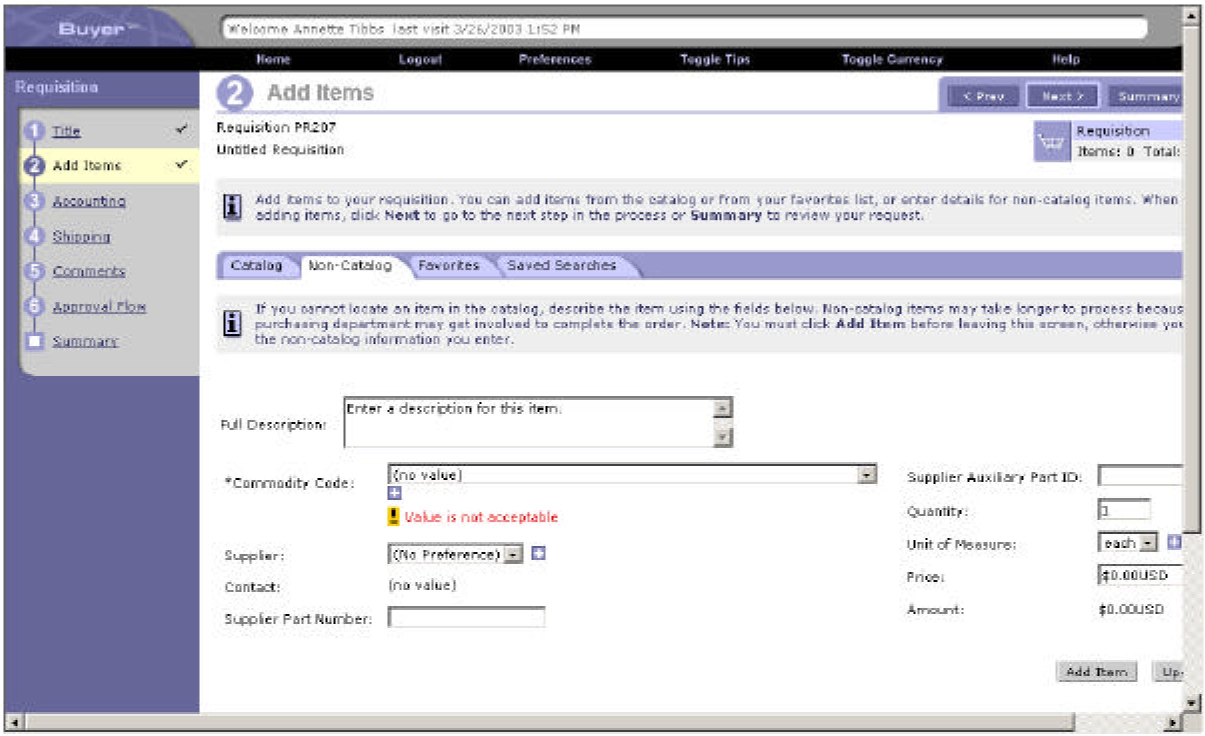
6. Click the Non-Catalog tab.

The Non-Catalog portion of the Add Items screen appears.



7. In the Description field, type in the details from your Data Sheet.

The Description field is a mandatory field. In this scenario, you are creating a services request with discrete line items.



8. Click next to the Commodity Code field.

The Choose Value for Commodity code screen appears.

9. Type the commodity code from your data sheet in the textbox, preceding the Search button, and then click Search.

The commodity code appears on the Choose Value for Commodity.

Note: Commodity codes are based on text and numbers.

You can do a search by using numbers or text.

10. Click Select to right of the commodity code.

The commodity code selected appears in the commodity code field on the Add Items screen.

11. Change price amount to $30,000.00.

12. Click Add Item to add non-catalog item to requisition.

    The View Line items screen appears. Notice your non-catalog items appear.

    Note: You must click the Add Item button or the item will not be attached to your non-catalog requisition.

13. Click Next to proceed to the Add Accounting details screen.

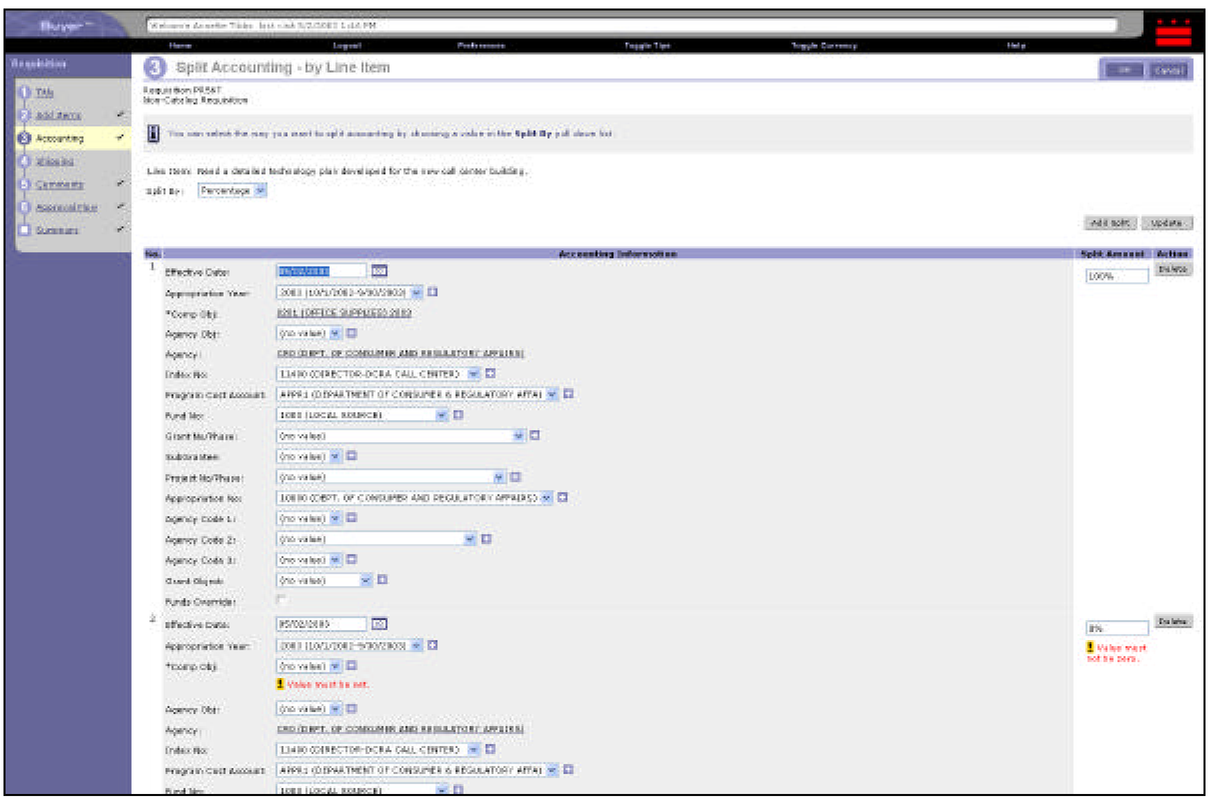
    The Add Accounting details screen appears.

14. Select the accounting codes for Agency object, and Index number from the drop-down list for each field.

    If you have previously used a code, it will appear in the drop-down list for the field.

15. Click Split Accounting to proceed to the Split Accounting by Line Item screen.

    The Split Accounting by Line Item screen appears.



16. Change the Split Amount for the first set of accounting to 50%.
17. Change the codes for the second set of accounting information.
18. Click OK to accept changes.

The Edit Line Item Accounting screen appears.

19. Click OK to accept changes.

The Add Accounting Details screen appears.

20. Click Comments on the Process Step Area.

The Add Comments screen appears.

21. Type in any comment in the Comments field.

Note: If you had an attachment, you may want to type "See attachment" which will notify the Contracting Officer that there is an attachment. The comment is optional since the Contracting Officer will also see a paper clip symbol if there are attachments to a requisition.

22. Click on Add Attachment to view the process.

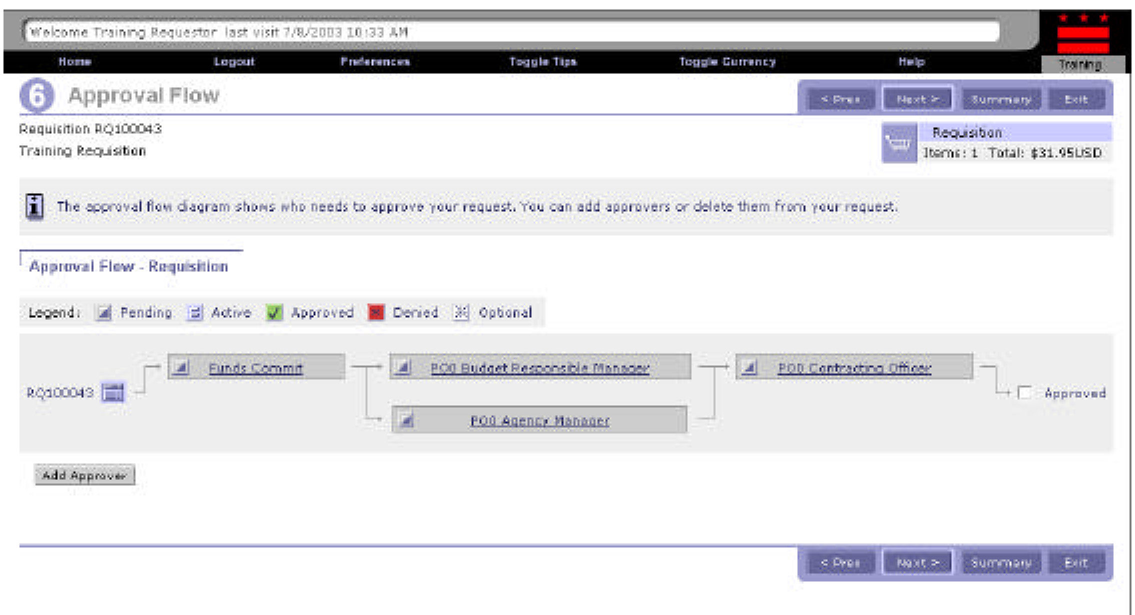
Note: The process is similar to add attachments in email.

23. Click Cancel to return to the Add Comments screen.

Note: You can add multiple file attachments to a requisition, but only one at a time. However, if you click Delete it will delete all your file attachments and you will need to re-build the file attachments list if you only intended to delete one or a few of the file attachments.

24. Click Approval Flow on the Process Step Area to the left of the Add Comments screen.

The Approval Flow screen appears. Notice the approval flow may be different depending on what you want to buy.



25. Review the requisition, and click Submit.

The New Requisition-Submitted screen appears.

Individual Exercise 3.2 – Create a Non-Catalog Requisition

Objective(s)

Submit a requisition with non-catalog items.

Duration

20 minutes

Instructions

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

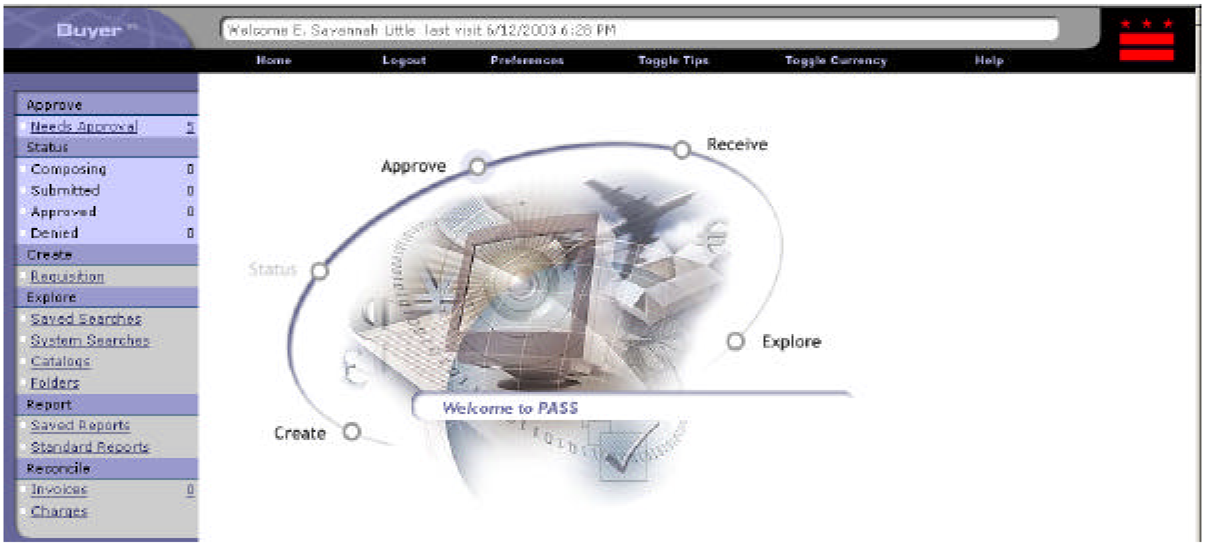
Step	Activity	Completed
COMPLETE REQUISITION PREPARATION WORKSHEET FIRST.		
1	Log into PASS using the login name from your Data Sheet.	
2	Start a requisition.	
3	Name the requisition "(Your Name – Lab 3.2".	
4	Add two separate non-catalog items to requisition.	
5	Select the appropriate accounting codes from data sheet.	
6	Review shipping details.	
7	Review and document your approval flow on your data sheet.	
8	Review the summary of the requisition.	
9	Submit the requisition.	

Step	Activity	Completed
10	Check to make sure the requisition has been submitted.	
11	Log out of PASS.	
12	Log back into PASS to check the status of your requisition.	
13	Check to make sure the requisition has been submitted and funds have been committed.	
14	Log out of PASS.	

Guided Practice 4.1 - Approve a requisition

1. Login as the Approver according to the Data Sheet.

   You are logged into PASS and the PASS Swoosh screen appears. The Swoosh screen will appear and the Approve button should be flashing. The flashing indicates there are requisitions awaiting your approval.



2. Click on the Approve button on the Swoosh menu.

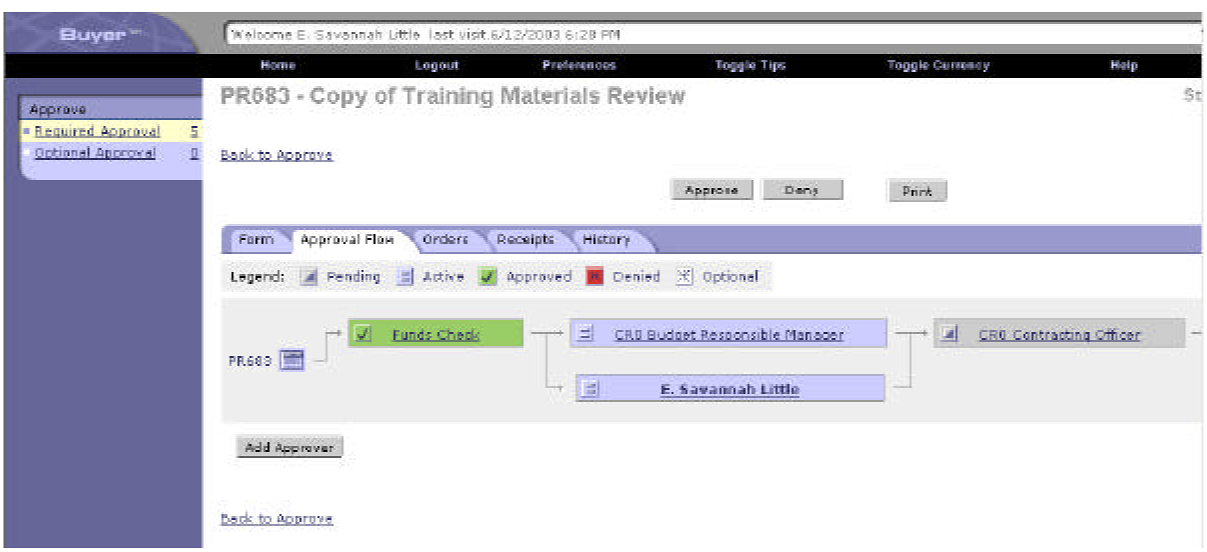
   The Approve Requests screen appears. The Process Step Area indicates how many approvals you are required to complete, as well as how many that are optional. Required and optional approvals do not appear in the same queue.

3. Click on the ID or Title of a requisition from your Data sheet to review the details.

   The details of the requisition appear defaulted to the Form tab.

4. Click on the Approval tab to view the other Approvers for this particular requisition.

   Notice the Active symbol next to the user name that you used to log on. Once you have acted on the requisition (approve or deny), the next Approver in the flow will receive it. The next Approver will be in a Pending state until you have acted.



5. Select Approve to approve the requisition.

The Add Comments screen appears. You may or may not add comments, but you must hit OK for the approval/denial to be submitted. If you have denied a requisition, you are encouraged to explain why you denied the request.

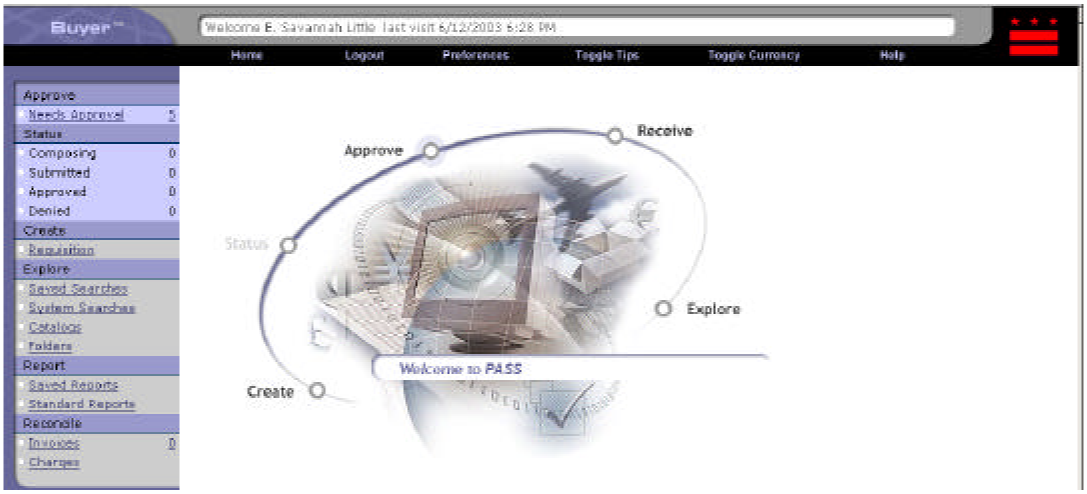
6. Click OK to confirm the approval.

You must Click OK even if you have not added any comments. If you want to rethink your decision, you can click on Cancel, which will bring you back to the requisition. Once you Click OK, the Approve Requests screen appears if you have more requisitions pending your approval. The requisition you just approved no longer appears in the queue. If you have no more requisitions to approve in either queue, you are returned to the Swoosh screen.

Guided Practice 4.2 - Adding Approvers

1. Log in as the last Approver in the approval flow from your original requisition.

You are logged into PASS.

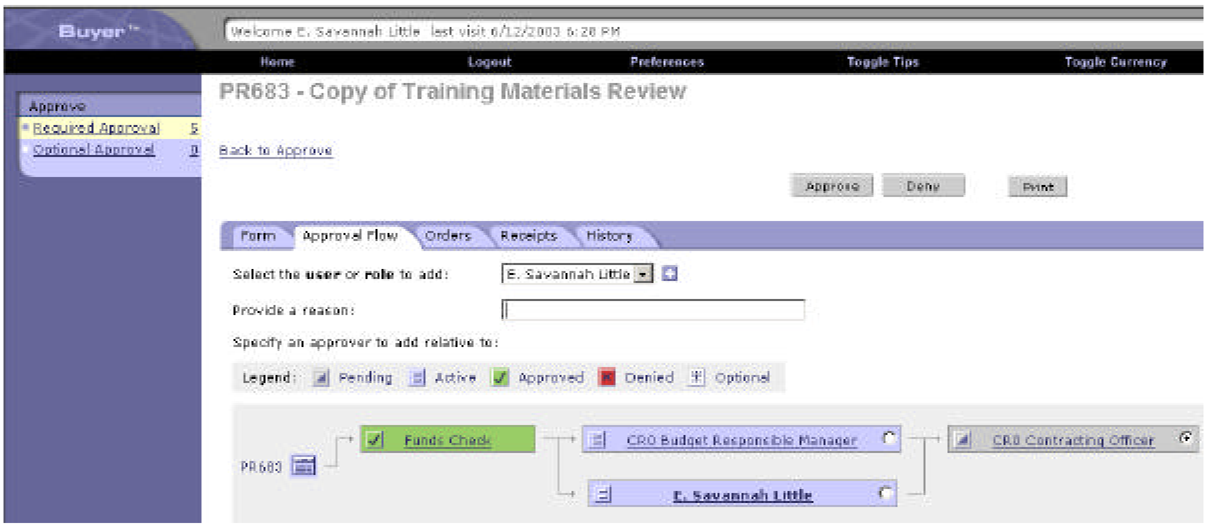


2. Click on the Approve button on the Swoosh menu.

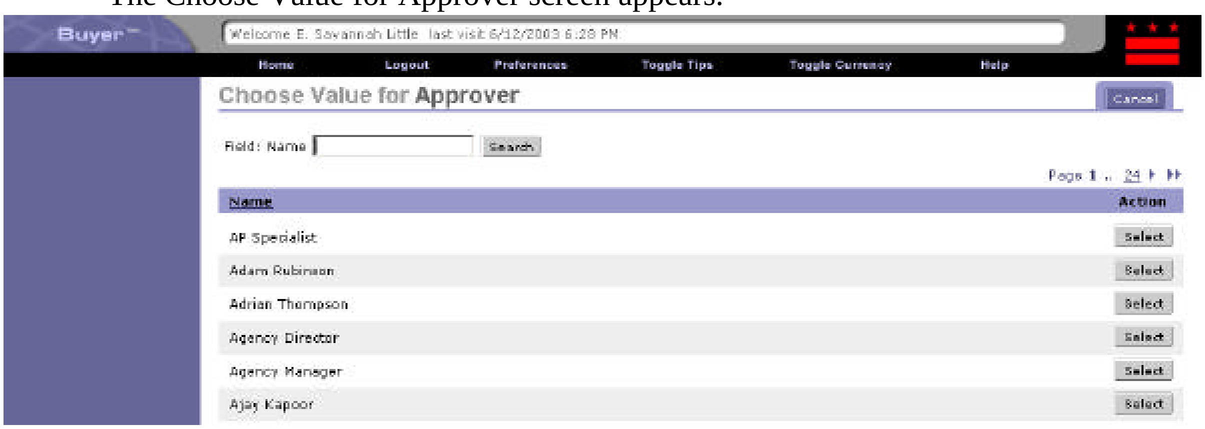
The Approve Requests screen appears. The Process Step Area indicates how many approvals you are required to complete, as well as how many that are optional. Required and optional approvals do not appear in the same queue.

3. Click on a requisition you created. Click on the Approval Flow tab.
4. Click Add Approver to add another approver to the requisition.

A form with the information required for adding an Approver appears.



5. Click to the right of the Select the User or Role to Add field.
   The Choose Value for Approver screen appears.



6. Type “Training” in the textbox preceding the Search button, and then click Search.

A list of all training ids, which contain “Training” in the name, appear.

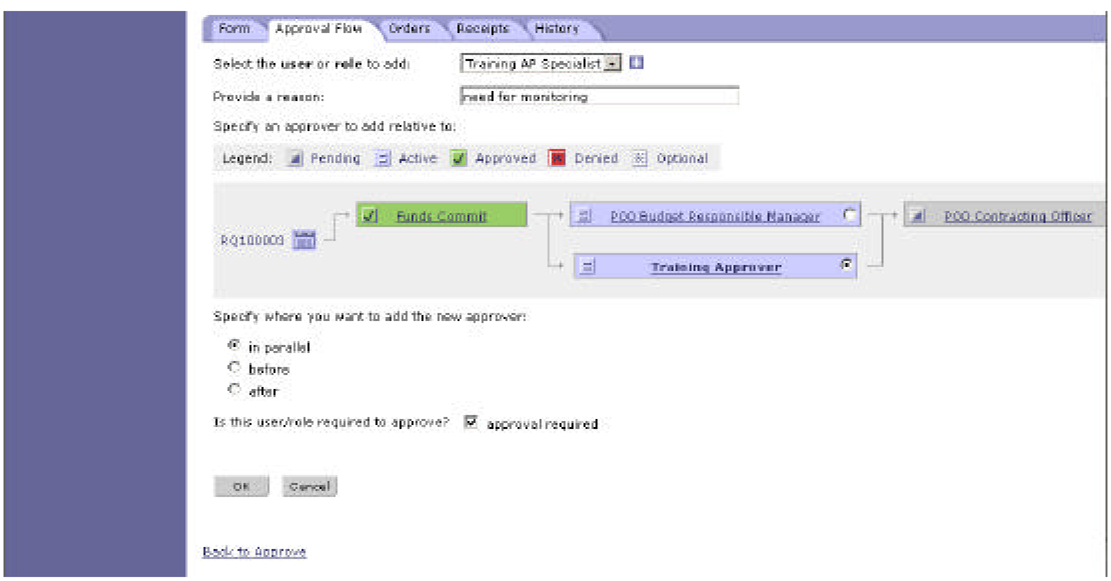
7. Click Select to the right of the Training Agency Director.

The approval flow screen re-appears.

8. Select the radio button of your approval node.

9. Choose the In Parallel radio button.

The new Approver will appear in parallel to you.



10. Remove the checkmark in the Approval Required checkbox.

    The new Approver will not need to approve this request before it proceeds to the next Approver. This new Approver will be a Watcher.

11. Click OK to confirm the new Approver.

    Notice how the new Approver is noted with a line extending throughout approval flow.

12. Log out of PASS.

    The PASS log in screen appears.

Individual Exercise 4.1 – Approve a requisition

Objective(s)

Approve a requisition

Duration

20 minutes

Instructions

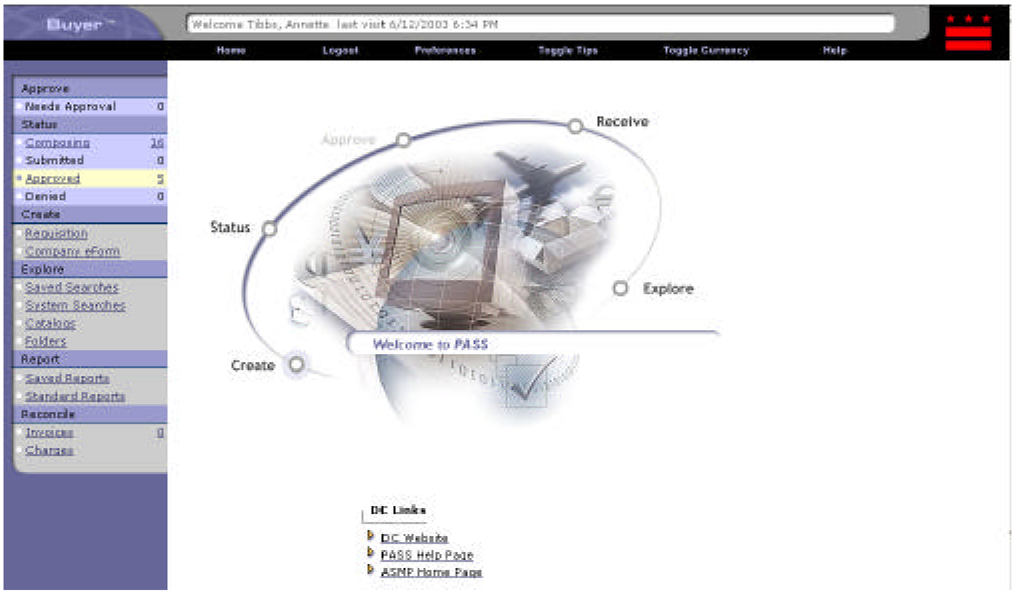
Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

Step	Activity	Completed
1	Log into PASS as the Approver for one of your requisitions.	
2	Click on the Approve button on the Swoosh.	
3	Review details of your requisition.	
4	Approve the requisition.	
5	Provide comments to support your approval.	
6	Click on OK.	
7	Review the approval status of other requisitions.	
8	Return to PASS Home page.	
9	Log out of PASS.	

Guided Practice 5.1:Reviewing Purchase Orders

1. Log in as the Requestor according to your Data Sheet.

   You are now logged into PASS. The Swoosh screen appears.



2. Click on Status on the Swoosh main screen.

   Every requisition that you have created will be displayed.

3. Select the ID or Title of the requisition you created with the Status of Ordered.

Selecting the link under Status will bring you to the Purchase order that the supplier received. This is in a printable format.

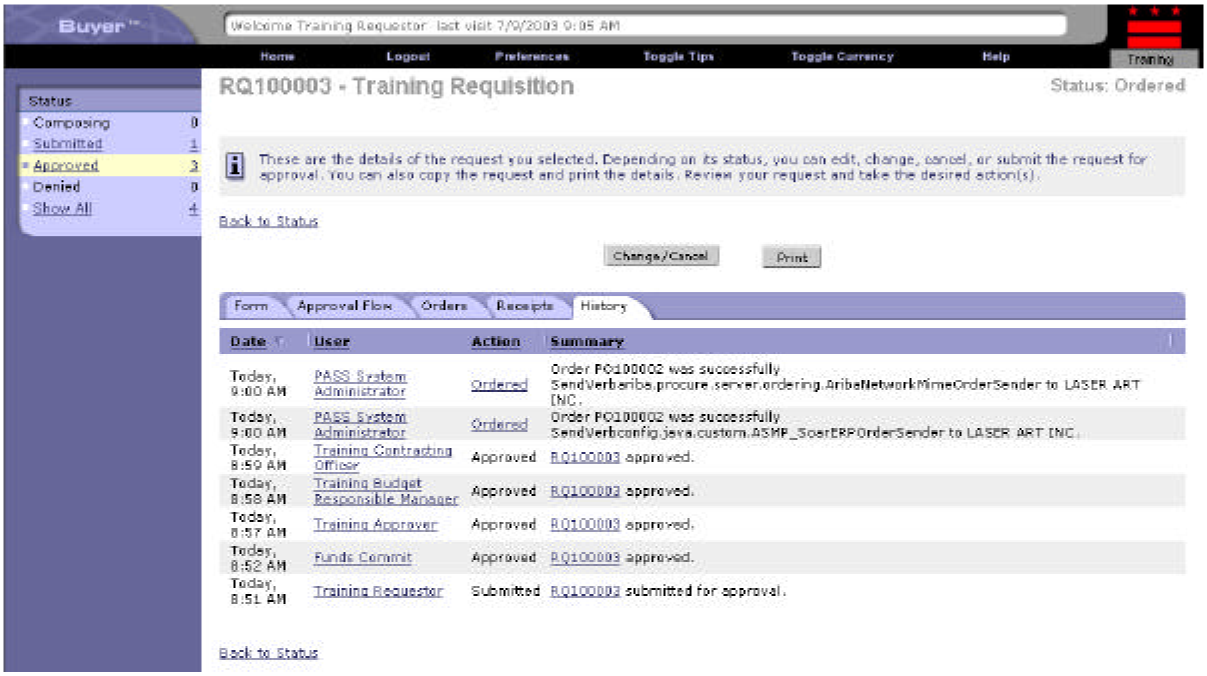
Reference: Refer to the Job Aide: How to Check the Status of a Requisition.

4. Select the Orders Tab.

You are able to see when the Order was made.

5. Select the History Tab.

You are able to see the entire history of your requisition.



6. Log out of PASS.

You are now logged out of PASS.

Tool: The Facilitator will demonstrate the Change/Cancel Purchase Order Process. A Change order must go through the approval flow one another time.

Individual Exercise 5.1 - Change Order Exercise

Objective(s)

Change order.

Duration:

20 minutes

Instructions:

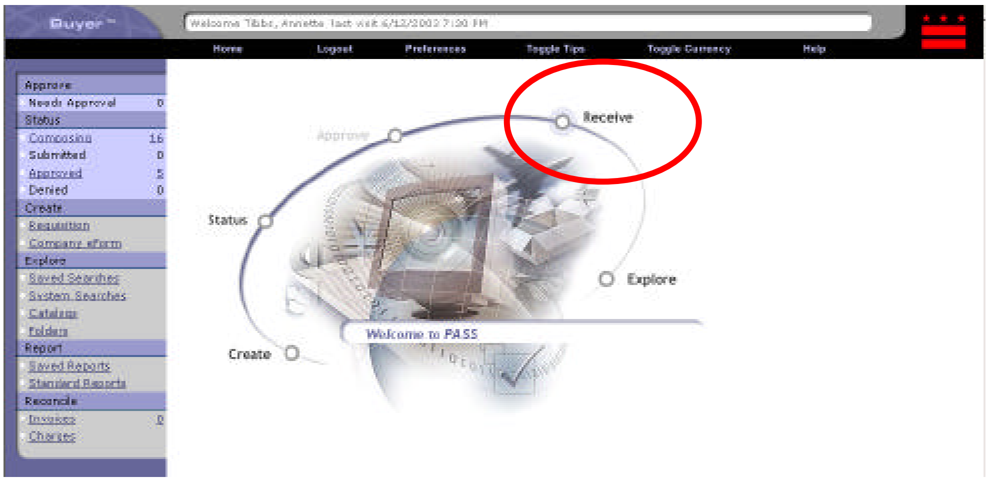
Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

Step	Activity	Completed
1	Log into PASS as a requestor.	
2	Select Status from the Swoosh.	
3	Select a requisition that has been ordered.	
4	View the details of the ordered requisition.	
5	Select the Change/Cancel button.	
6	Change the quantity on the line items.	
7	Review new approval flow.	
8	Submit new version.	
9	Log out and log in as all the Approvers on the Approval Flow to complete process to make the new version into a Purchase Order.	
10	Log out of PASS.	

Guided Practice 6.1 – Receiving

1. Log in as Designated receiver according to the Data Sheet. The PASS Homepage appears. Click Receive on the Swoosh screen.

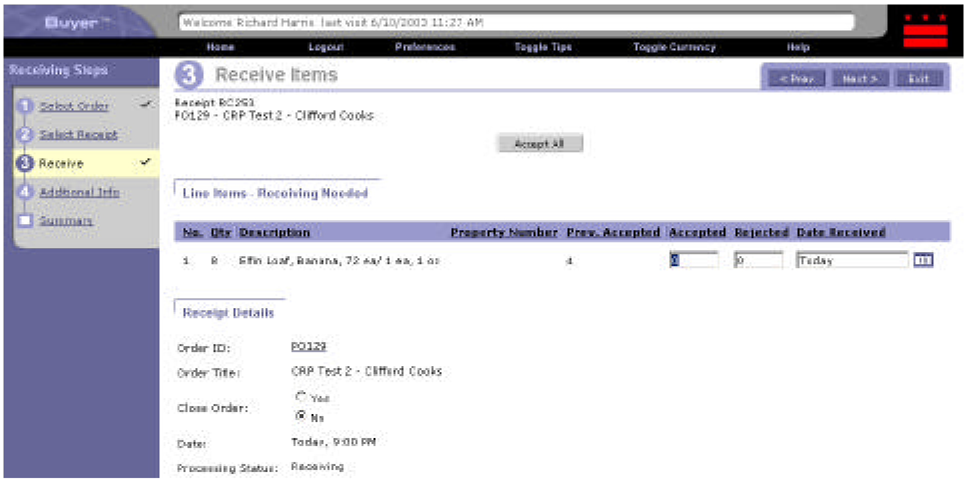
   If there are items that have been Ordered, the Receive button on the Swoosh menu should flash to indicate there are items waiting to be received.



2. The Select Order screen appears.

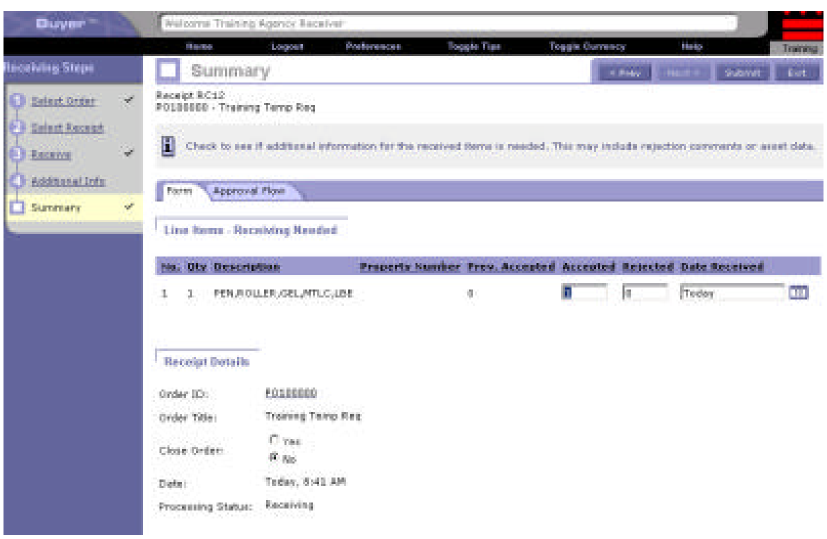
3. Choose an order to receive by clicking on the link.

The Receive Items screen appears. If you have many line items on the order, you may receive each line separately. You can also accept the entire order if all items were received properly.

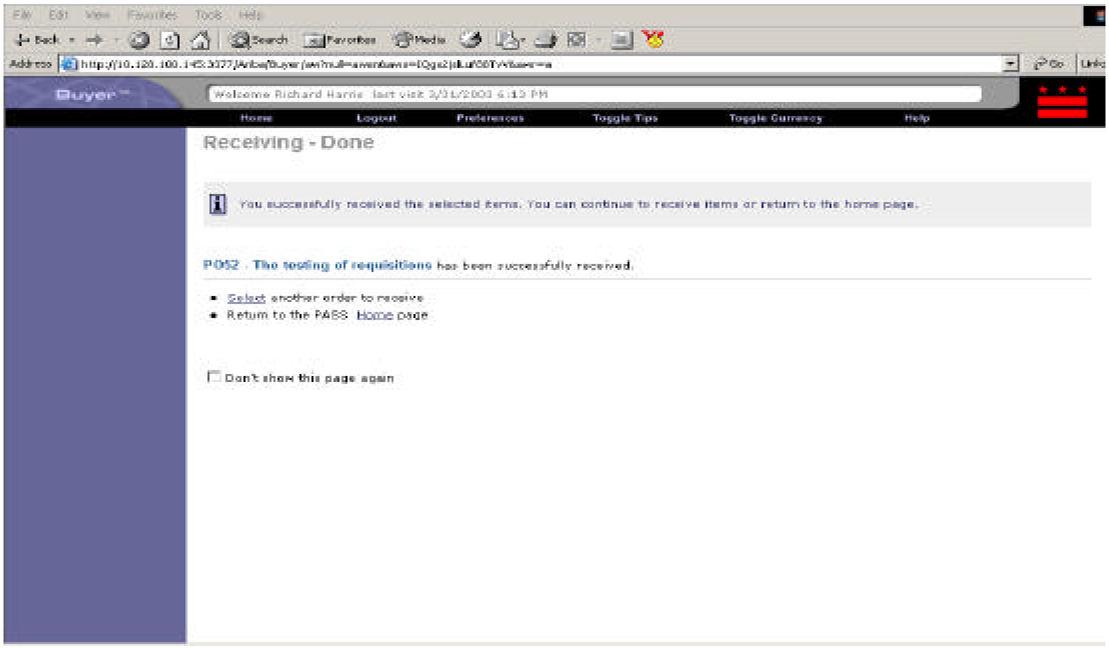


4. Choose to Accept All.

The Summary screen appears. Click Submit to process the receipt. The Receiving Done screen appears, and the receipt has been created.

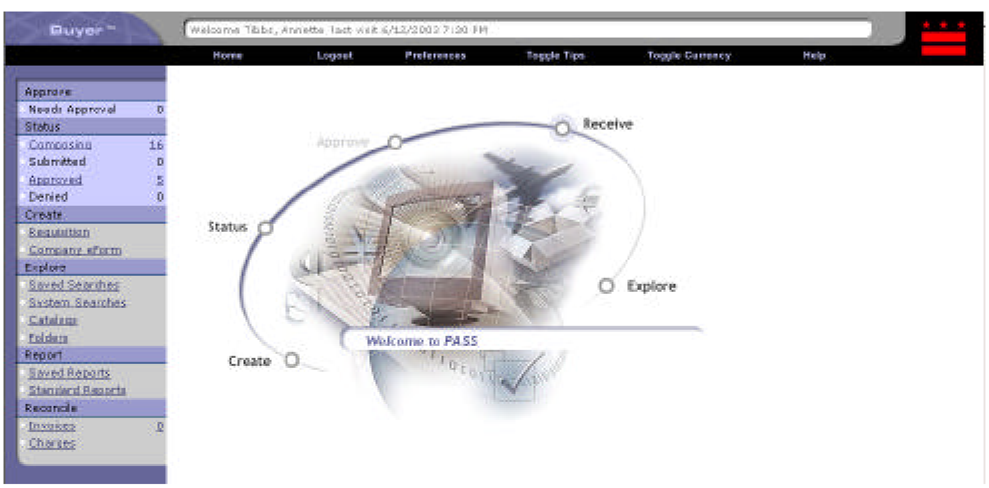


6. Click on the Logout button on the top navigation bar to exit the system.



7. Log back into the system using the Requestor according to your Data Sheet.

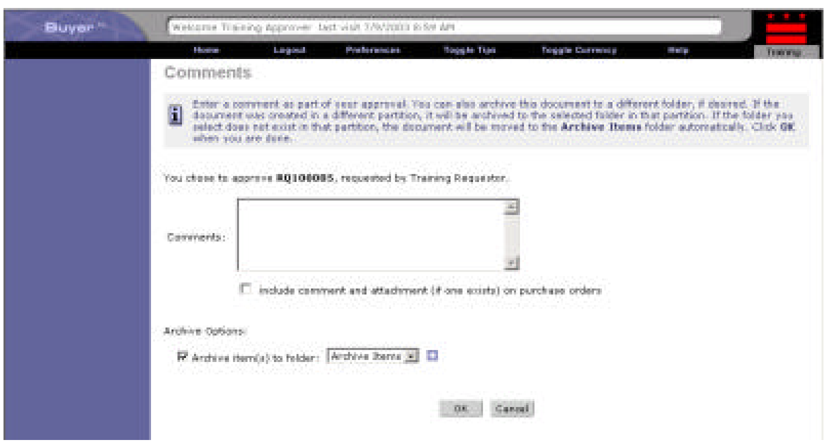
The Swoosh Screen appears. Select Approve.



8. Place a check mark in the check box preceding your Purchase Order.

9. Click Approve to approve the receipt of goods.

The Comments screen appears. Click OK to confirm approval. The receipt has now been approved and the process is finished.



Individual Exercise 6.1 – Receiving

Objective(s):

Partially receive and provide comments.

Duration:

20 minutes

Instructions:

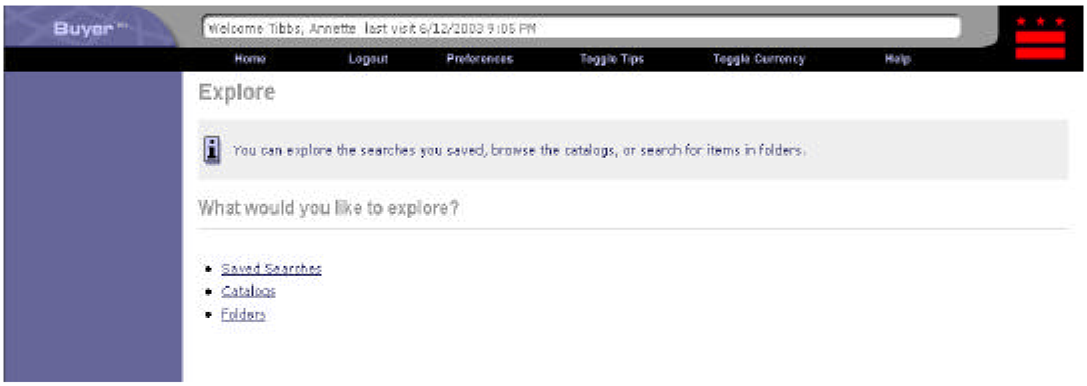
Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

Step	Activity	Completed
1	Log into PASS, using a Receiver's user name and password.	
2	Select an order to receive.	
3	Review each line item.	
4	If there is a line item with a quantity of more than 1, accept 1 and reject the remaining.	
5	Provide a reason to the supplier for the rejection of the line items.	
6	Review the approval flow process to ensure last Approver is original requestor.	
7	Submit the receipt.	
9	Log out of PASS.	

Guided Practice 7.1– Locating and Organizing Information

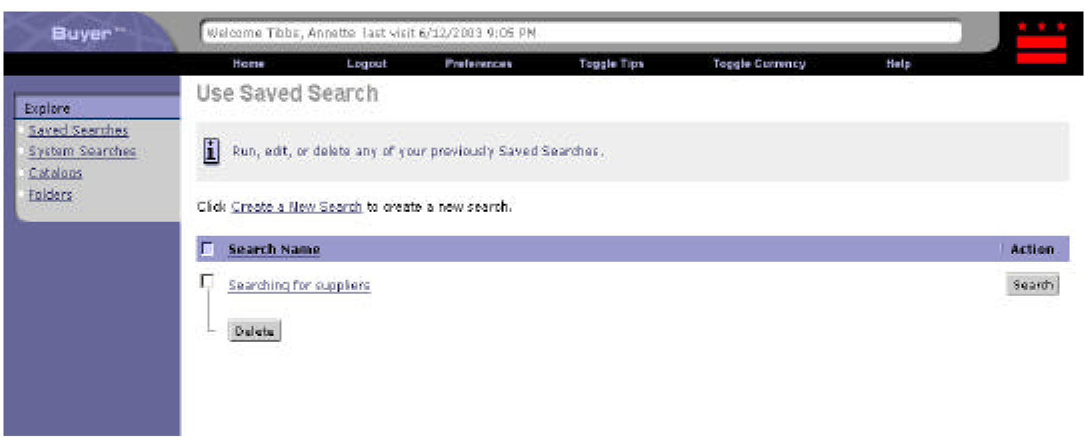
1. Select the Explore button on the Swoosh.

   The Explore button will bring you to many of the functions for locating and organizing information.



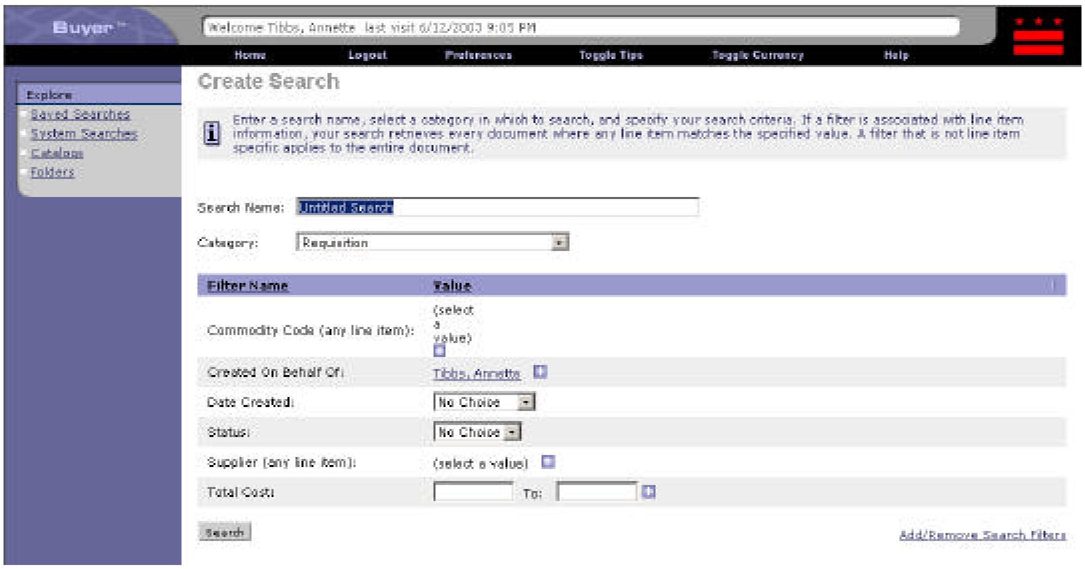
2. Select Saved Searches on the Explore screen.

   The Use Saved Search screen appears. If you already have saved searches, you are able to run them again.



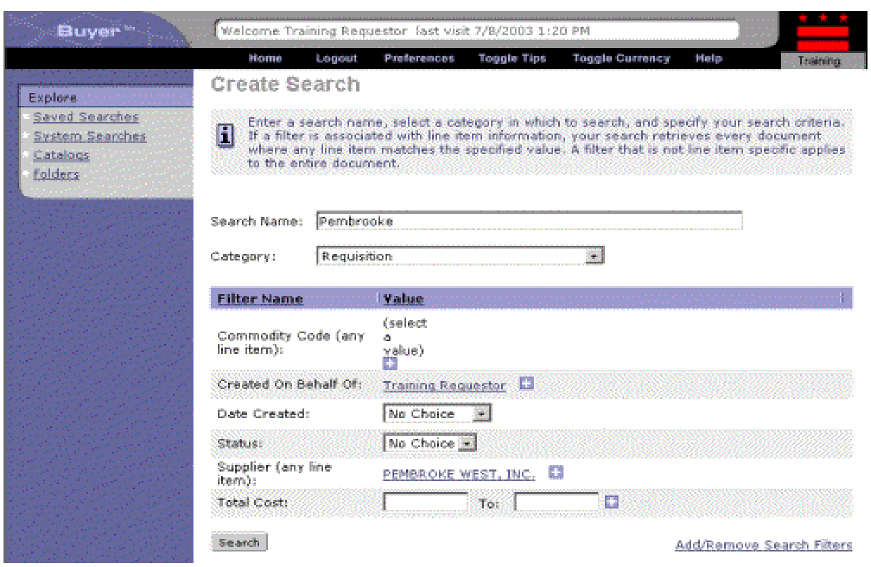
3. Click Create a New Search on the Saved Search screen.

The Create Search screen appears. Give your Search a descriptive name.



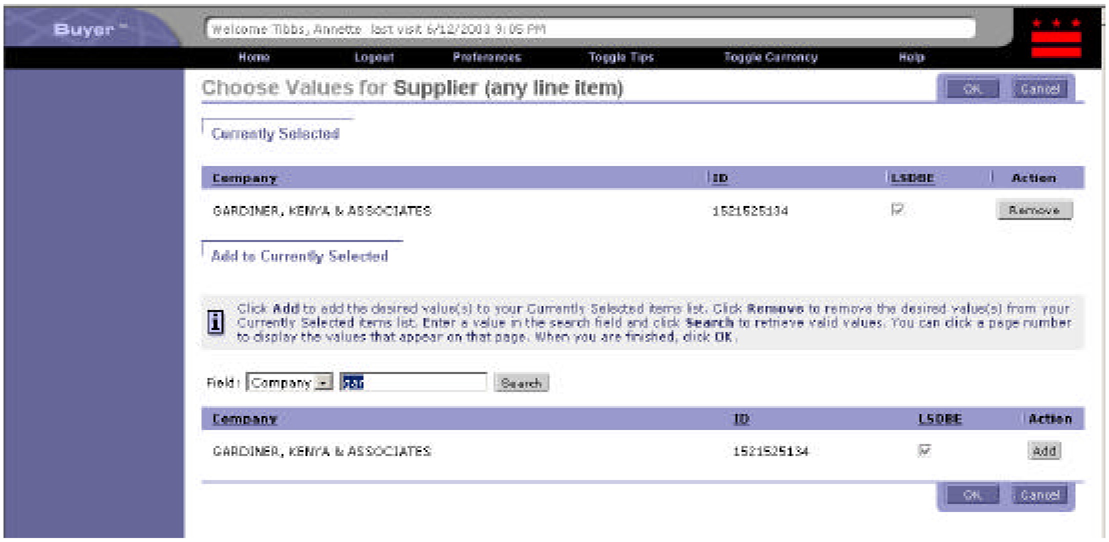
4. Select a Category for the Search.

This will specify what PASS documents you would like to include in your search.



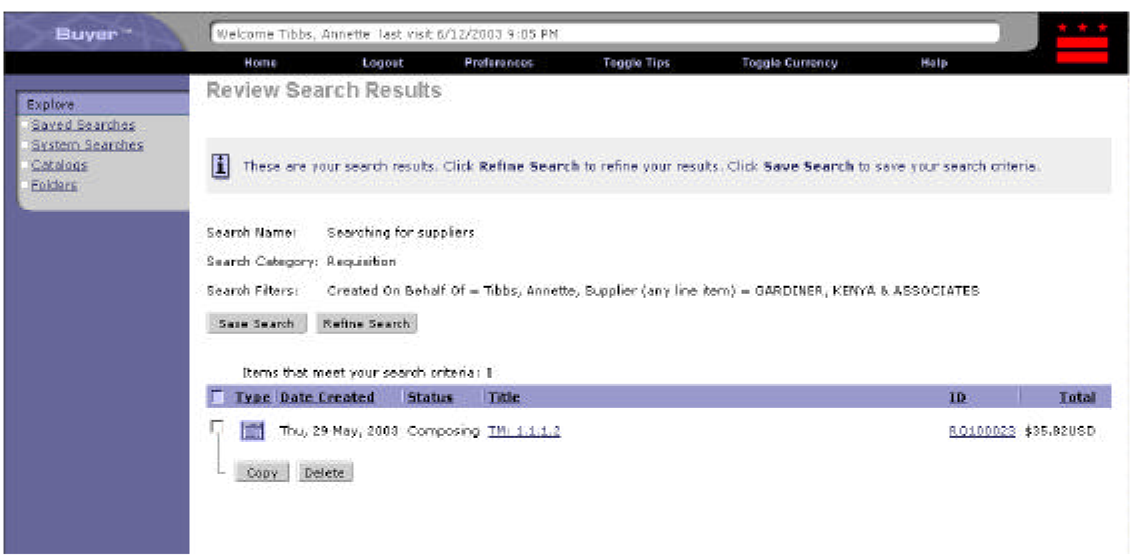
5. Select a filter to search.

Click to the right of the Supplier field to search Suppliers. The Choose Values for Supplier (any line item) screen appears.



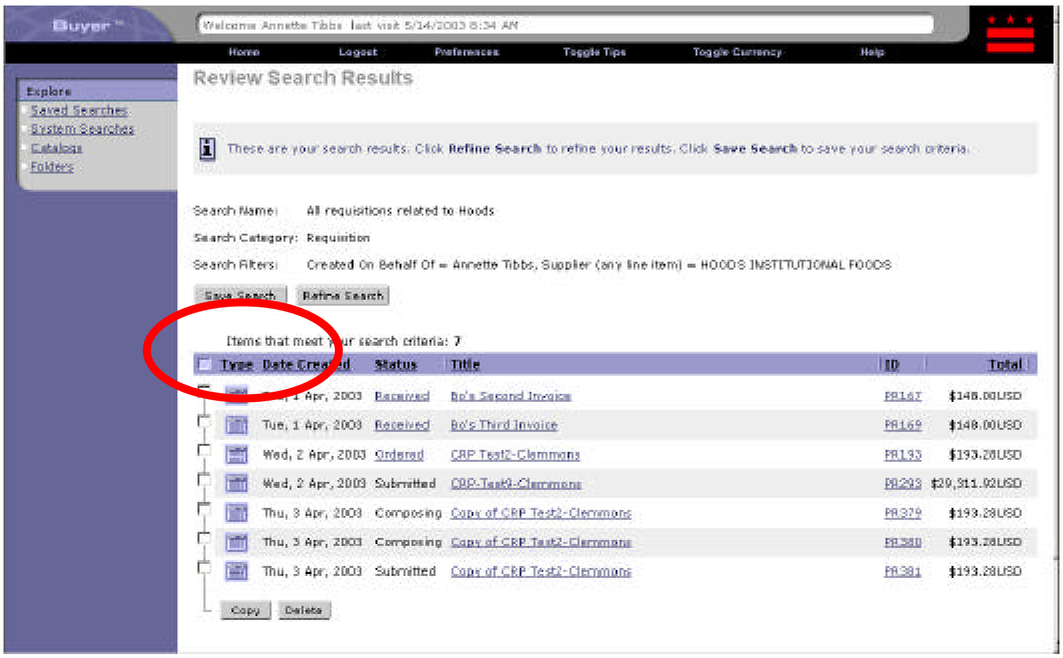
6. Type in any Supplier in the textbox preceding the Search button, and then Click Search.

Your results will be presented. Click Add to add the Supplier to your search. Then click OK to return to the Create Search page.



7. Click Search to generate your search.

The Review Search Results screen appears. All the requisitions that are related to your filter are displayed. You can further refine your search or save it

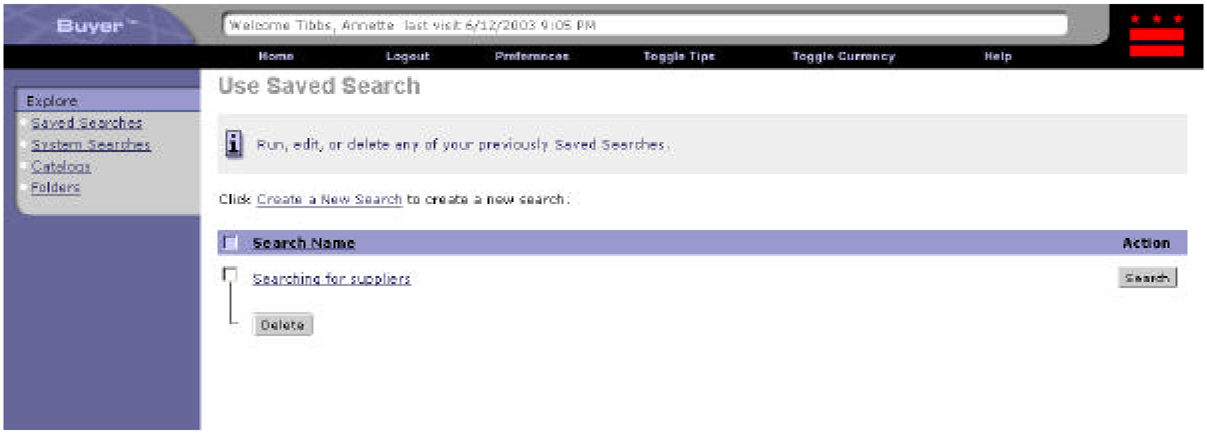


8. Click Save Search to save the search.

The Save Search screen appears. You can review the details of your search. Your search is not saved until the OK is selected.

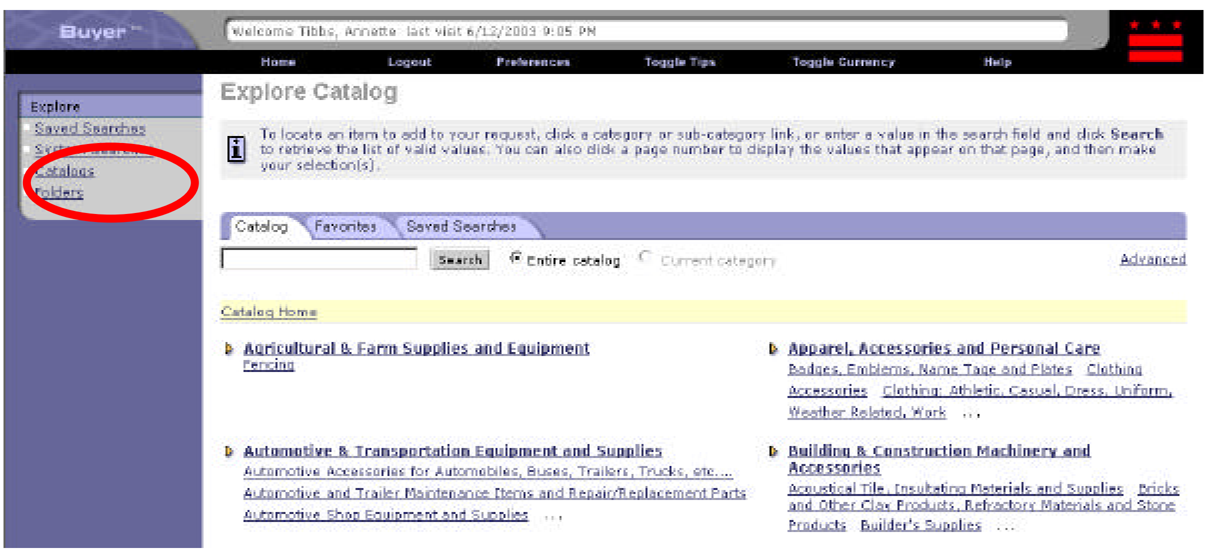
9. Click Saved Searches link in the Process Step Area.

The Use Saved Search screen appears. The search you recently created is now listed.



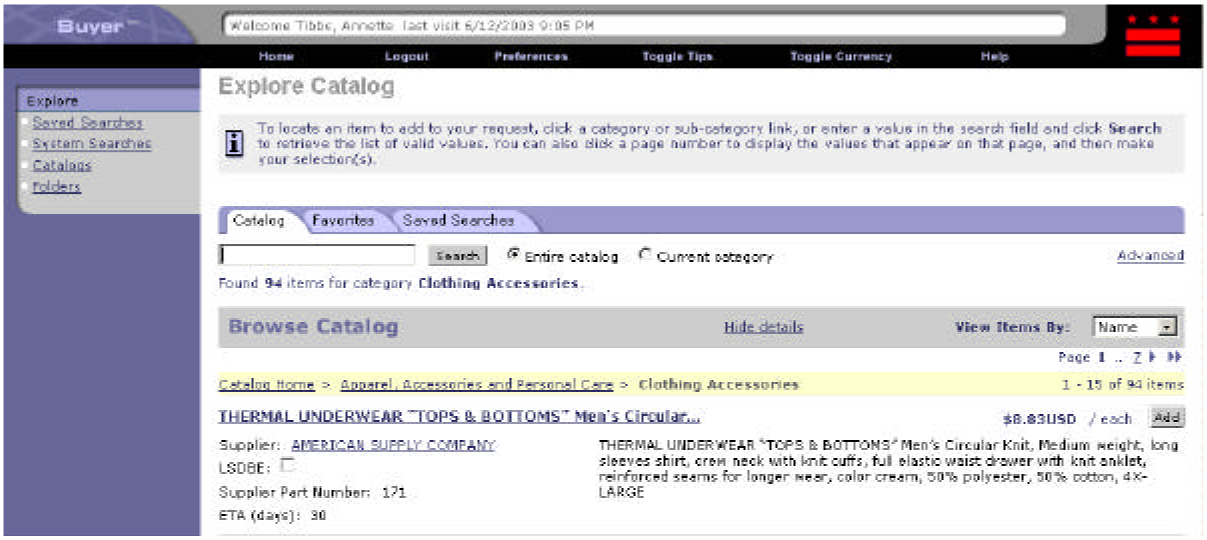
10. Click on the Catalog link in the Explorer bar.

The Explore Catalog screen appears. This screen is similar in content to the Add Items screen when you are creating a requisition (Lesson 3-Requisitioning).

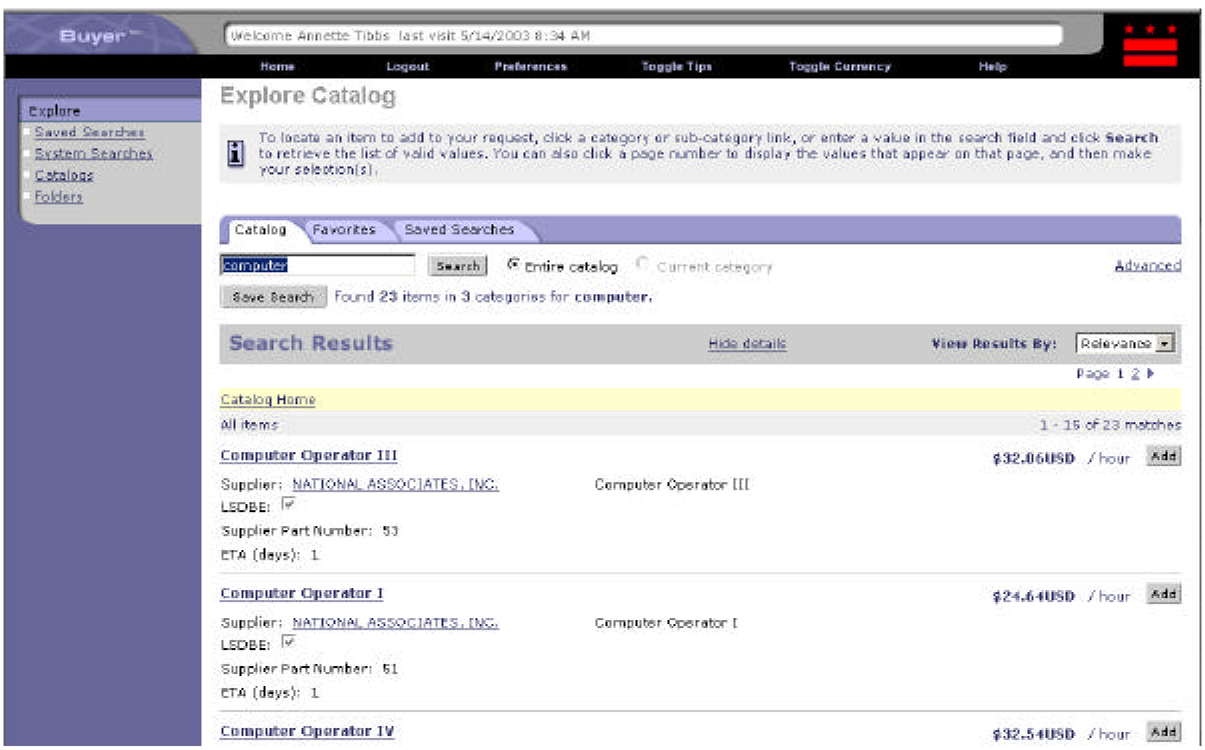


11. Type in a word or phrase in the Search field directly under the Catalog tab.

This is a general search for anything related to your word or phrase.

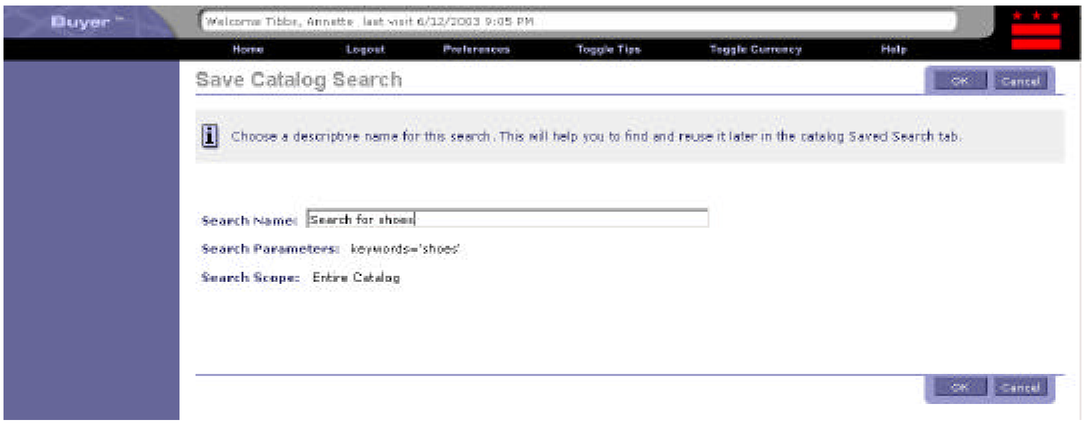


12. Click on Search to locate items meeting these criteria. All the items related to the term are displayed.



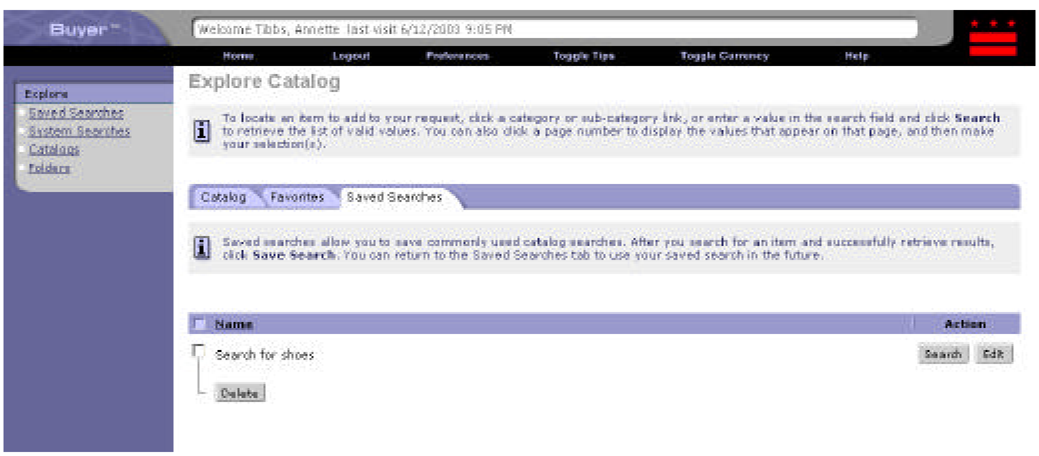
13. Click Save Search button to save this search.

The Save Catalog Search screen appears. Select a title that fits your needs. Click OK to generate saved search. The Explore Catalogs screen re-appears.



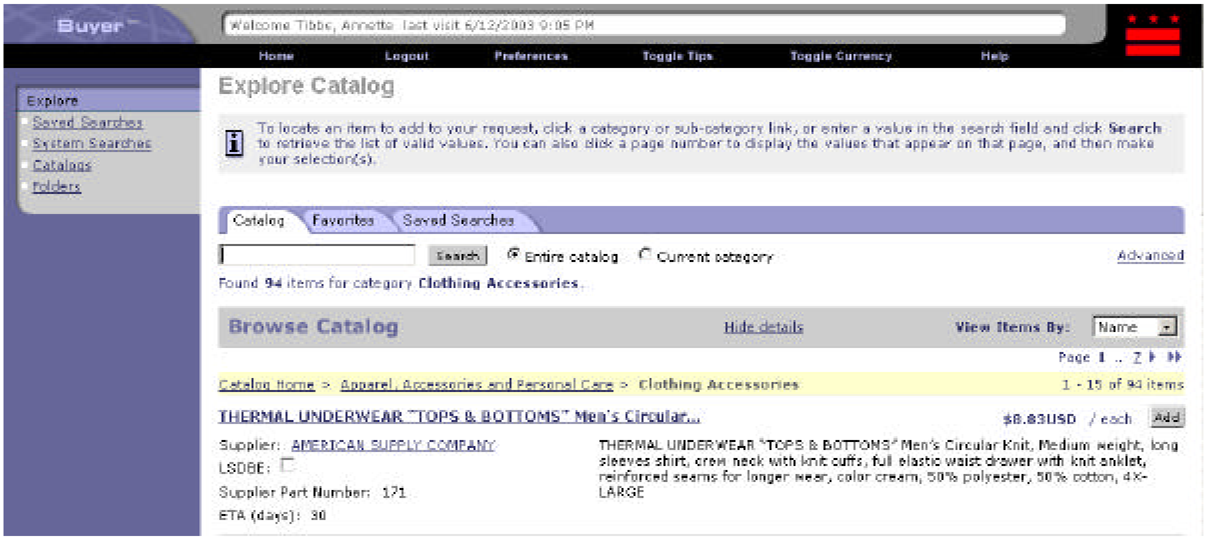
14. Click Saved Searches tab.

Your search is now listed under Saved Searches. You will be able to run the search in future.



15. Click Catalogs link in the Process Step Area.

This enables you to clear the screen and return to original catalogs. Perform another search for an item.

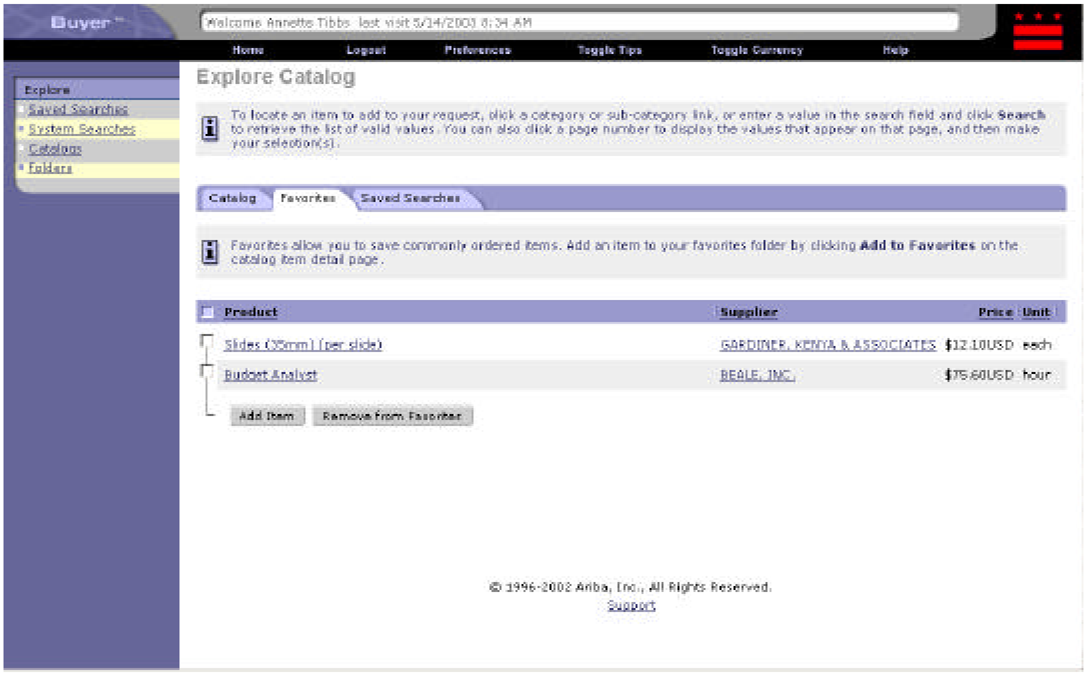


16. Click the link on an item in the catalog.

The details for the item appear. Click Add to Favorites.

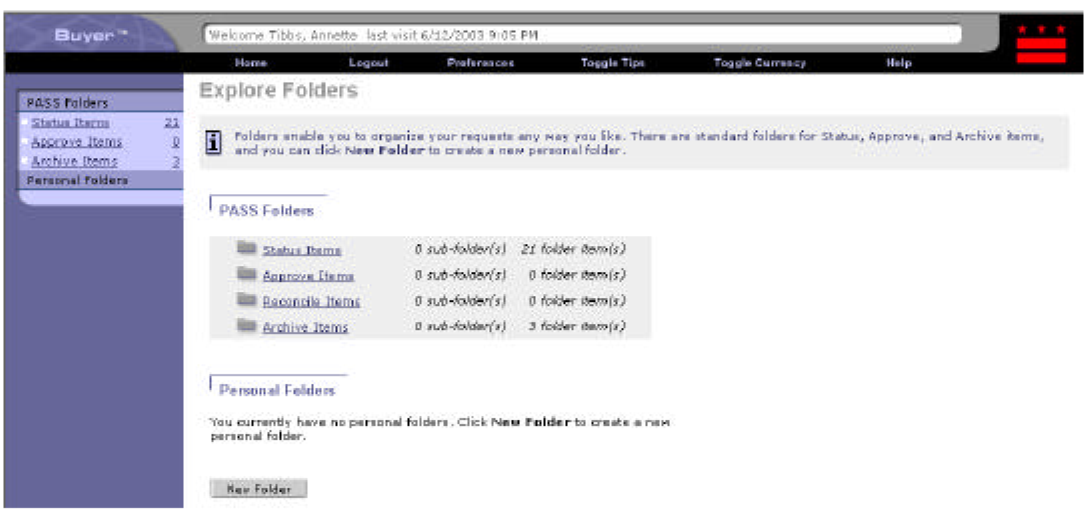
< Back

17. The item is added as a favorite, which you can access directly from the Catalog page under the Favorites tab.



18. Click Folders in the Process Step Area.

The Explore Folders screen appears. Take note of the PASS folders already available and the Personal folders that can be created.

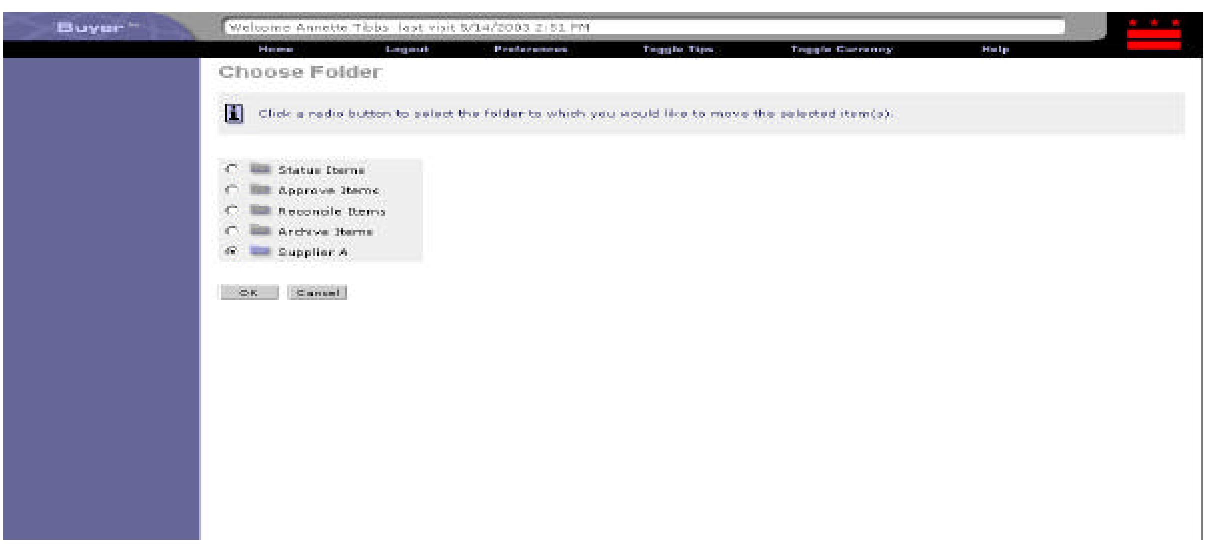


19. Click New Folder to create new folder.

The Create New Folder screen appears. Select a title that will fit your needs. Click OK to generate the new folder. The new folder is now listed under your Personal Folders. You have the option to rename it, move it or delete it.

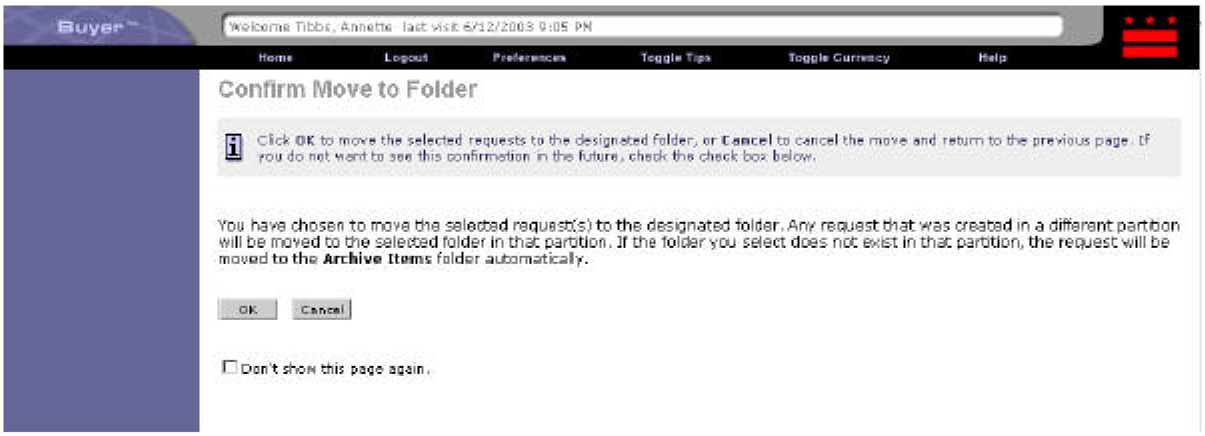
20. Click Status Items in the Process Step Area for Personal Folders.

All of the requisitions are displayed. Click next to the Move to Folder field to select your newly created Personal Folder. Select the folder you just created, and then click OK.



21. Select one of your requisitions and select the option to Add Instead of Move. Click Move to Folder to add requisitions to your personal folder.

    The Confirm Move to Folder screen appears. Click OK to confirm move. You are returned to the View Folders screen. You can continue to organize your items into folders from this screen.

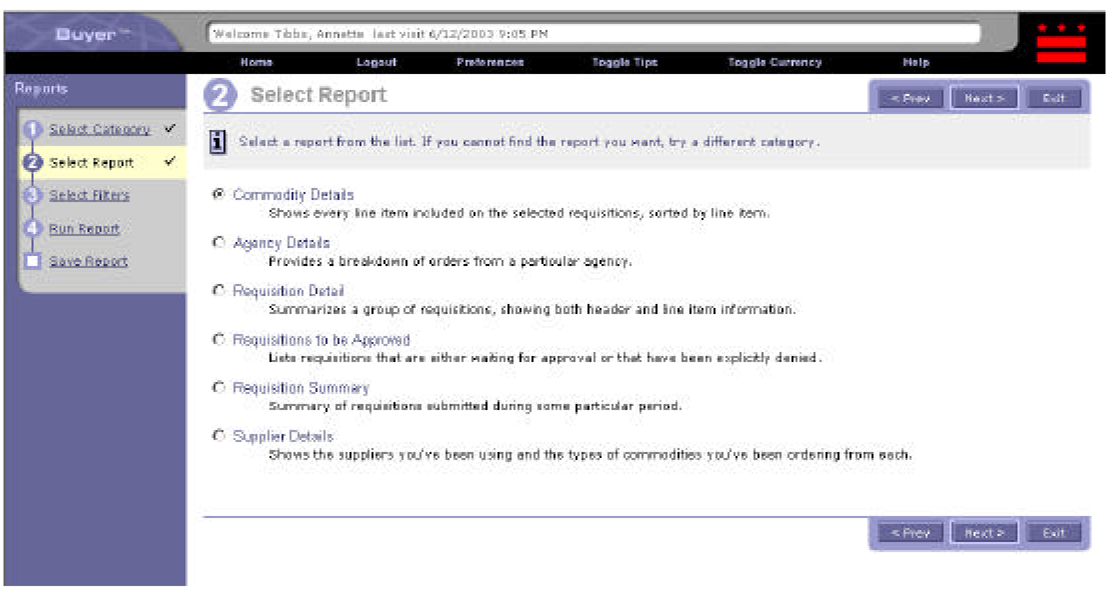


Guided Practice 7.2 - Create a basic report

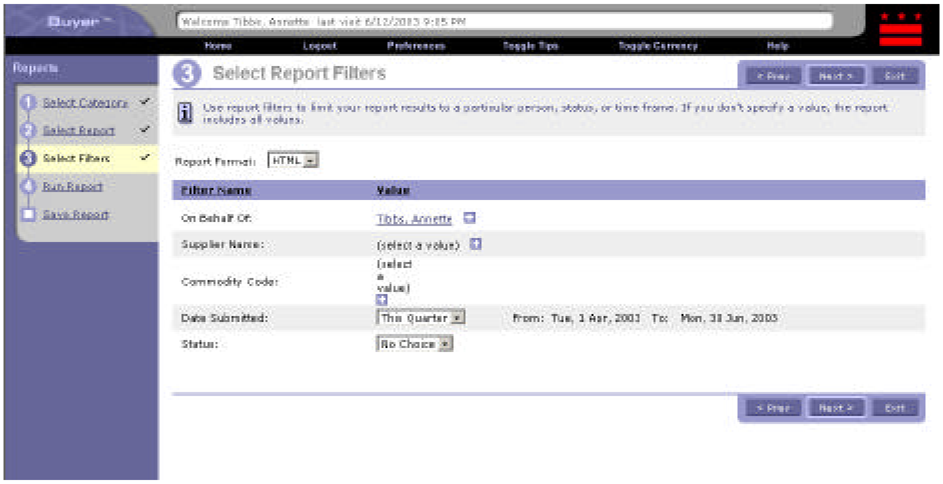
1. Select Standard Reports under Report section of the PASS main home page. The Select Report Category screen appears.

Note there are step-by-step procedures for creating a report, much like creating a requisition. Select a category and click Next.

2. The Select Report screen appears. These are all the reports available within the category you have chosen. Select a report and click Next.

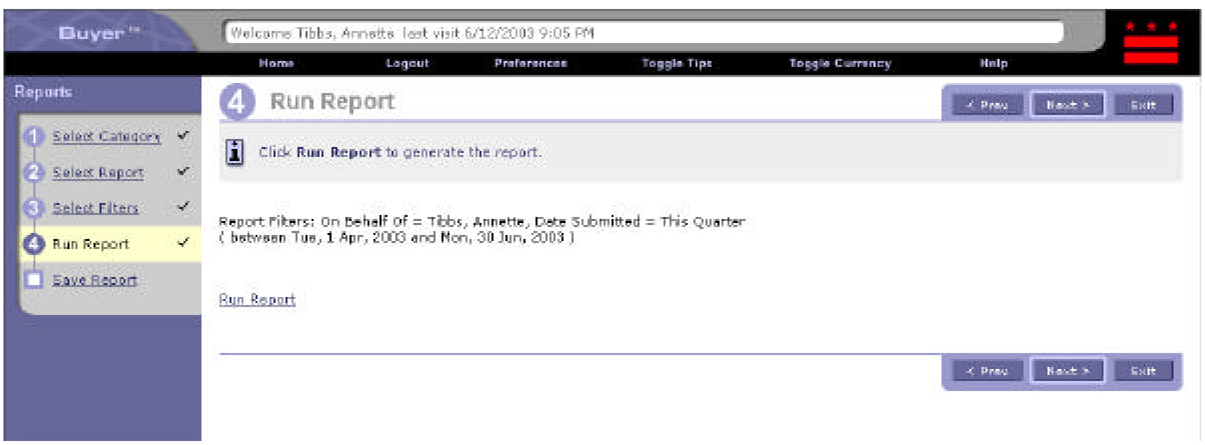


3. The Select Report Filters screen appears. You will need to add parameters for your report.



4.Click to access the each of the values next to the fields.

5. Click Next to proceed to the Run Report screen.



6. Click the Run Report link.

The report appears in a new window. This is a report that has been run in html format. Close report window and make PASS window active.

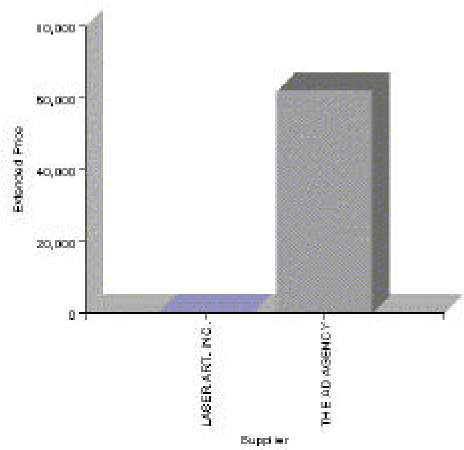
District of Columbia

Supplier Details

On Behalf Of = Tibbs, Annette, Date Submitted = This Quarter (between Tue, 1 Apr, 2003 and Mon, 30 Jun, 2003)

Fri, 13 Jun, 2003

Amount by Supplier



Supplier: LASER ART, INC.

LSDBE: Yes

Commodity: 6208100 Pen Refills (General Writing Types): Ball Point, Nylon Tip, Plastic Tip, etc.

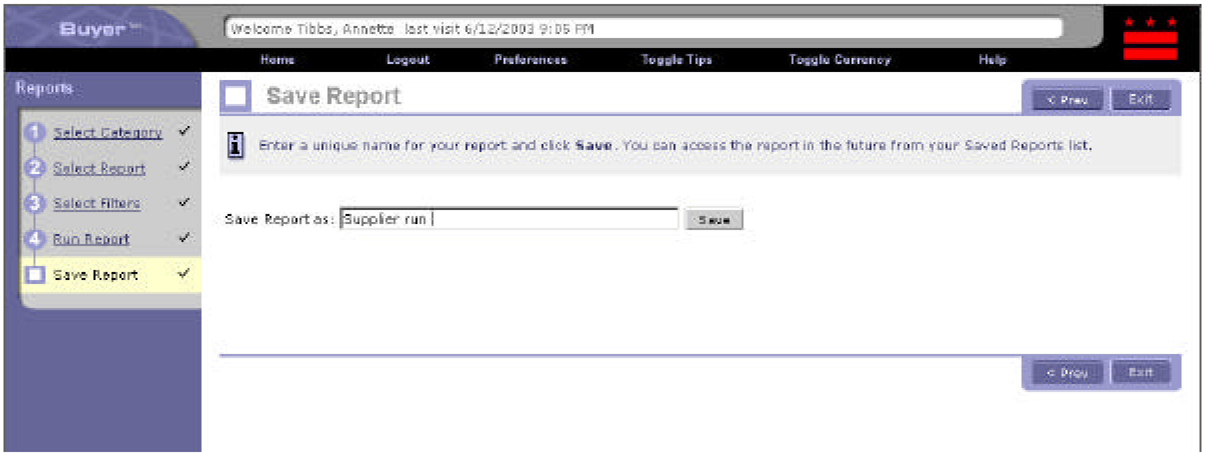
Requisition No.: RQ100480

Description	Contract ID	Qty	UOM	Unit Price	Extended Price
REFILL,F/ERASER,PENSTYLE,2/PK	PODS-2003-C-0515-01	15	each	$1.04USD	$15.60USD
Requisition No. total					$15.60USD
Commodity total					$15.60USD
Supplier total					$15.60USD

Supplier: THE AD AGENCY

LSDBE: Yes

7. Click Next to proceed to the Save report screen. Click Save to save report.



Individual Exercise 7.1 – Creating a standard report

Objective(s):

Create a new report.

Duration :

20 minutes

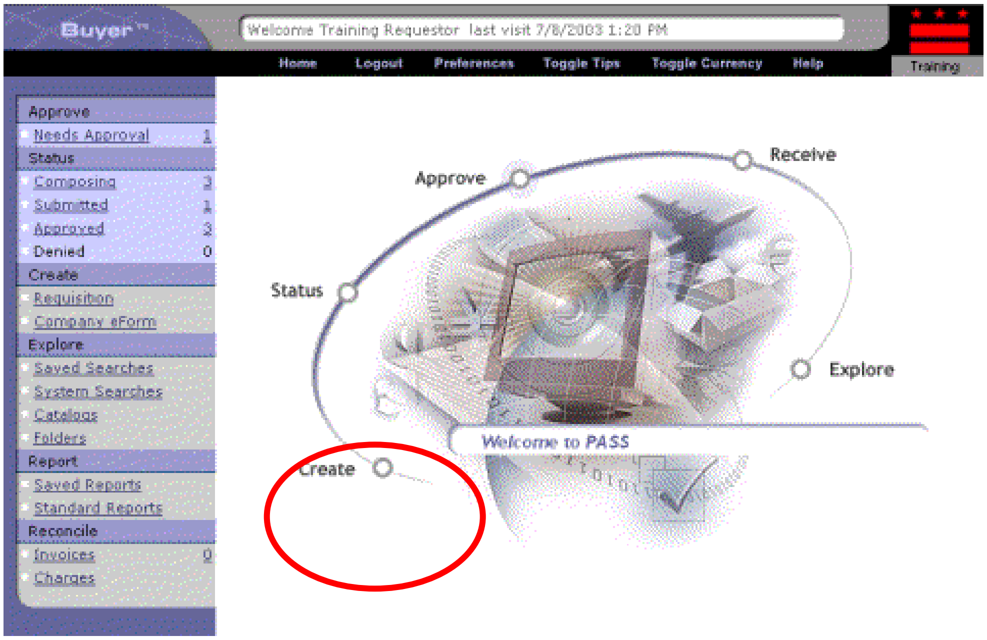
Instructions:

Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

Step	Activity	Completed
1	Log into PASS.	
2	Click on Standard reports.	
3	Select Orders as the report category.	
4	Select Order Summary by LSDBE Supplier.	
5	Select the Yes radio button next to LSDBE.	
6	Run report.	
7	Title Report.	
9	Save Report.	

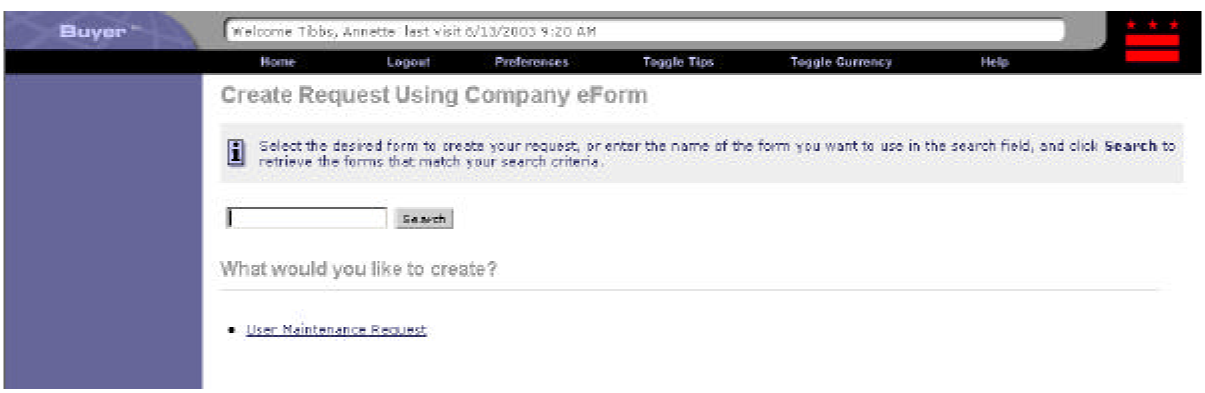
Guided Practice 8.1 - Changing Personal Profile Information

1. Log in to the PASS and select Create on the Swoosh



2. Select Company eForm. On the next screen, select User Maintenance Form.

   The Create Request Using Company eForm screen appears. The structure of the eForm is similar to requisitions. To complete the eForm, follow the step-by-step wizard



3. Add title to User Maintenance eform

4. Select Maintain radio button.

The User field defaults to the person logged in. You are able to send changes to another user's profile but that person will be in the approval flow to ensure that changes are not made without his/her permission.

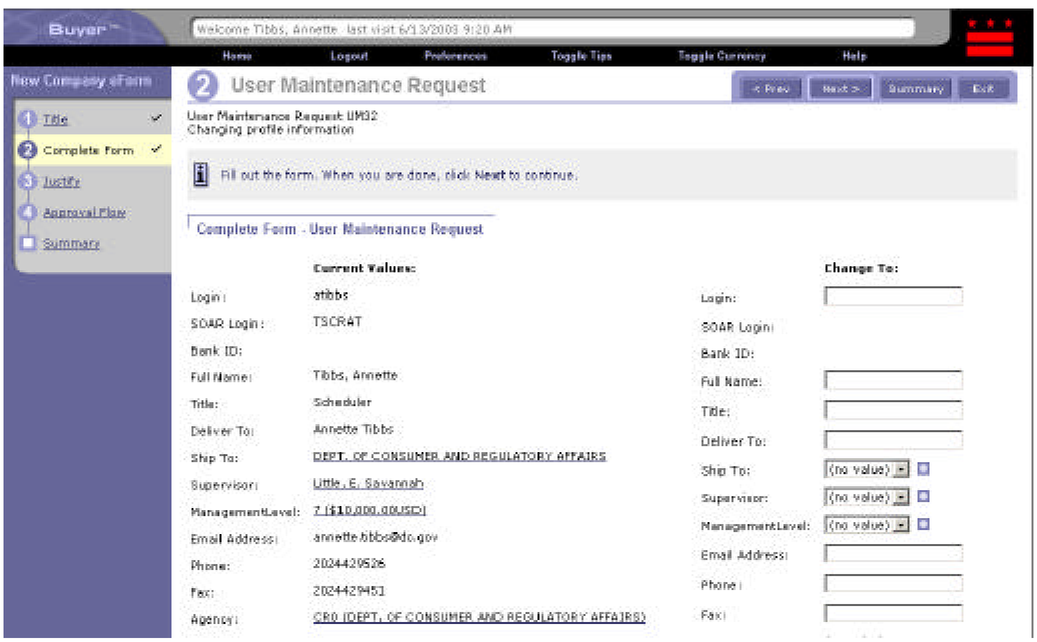
Note: Add indicates that you are adding a new PASS user.

Delete indicates that you are deactivating a PASS user.

5. If the request is on behalf of someone, you may use the ⊞ button to select another user within your agency.

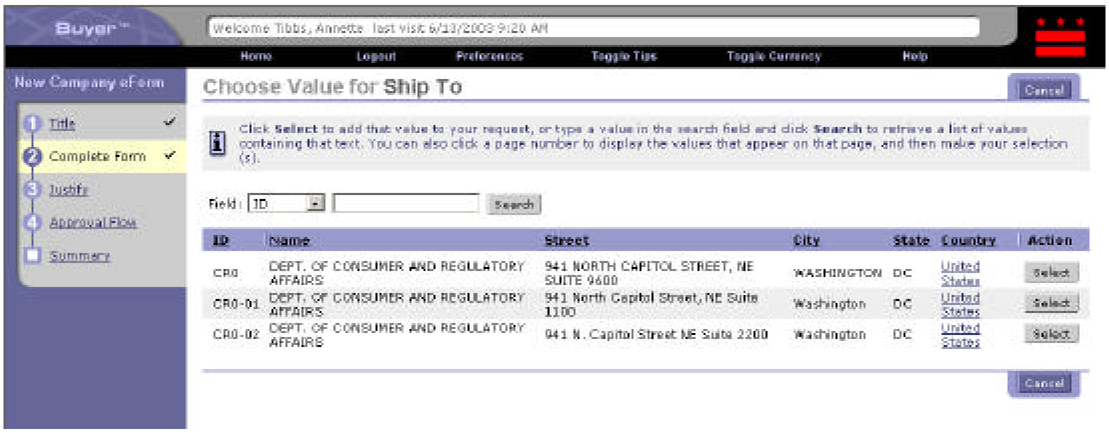
6. Click Next. The User Maintenance Request screen appears.

On the left side, you can view all the current values of your profile. On the right side, you can change the values to your profile. Some fields offer a pull-down or chooser (+) option, while others are free form text.



7. Select a Ship-To address by clicking the proceeding the Ship to field.

In some cases, an agency may have only one Ship-To address. Others may have many.

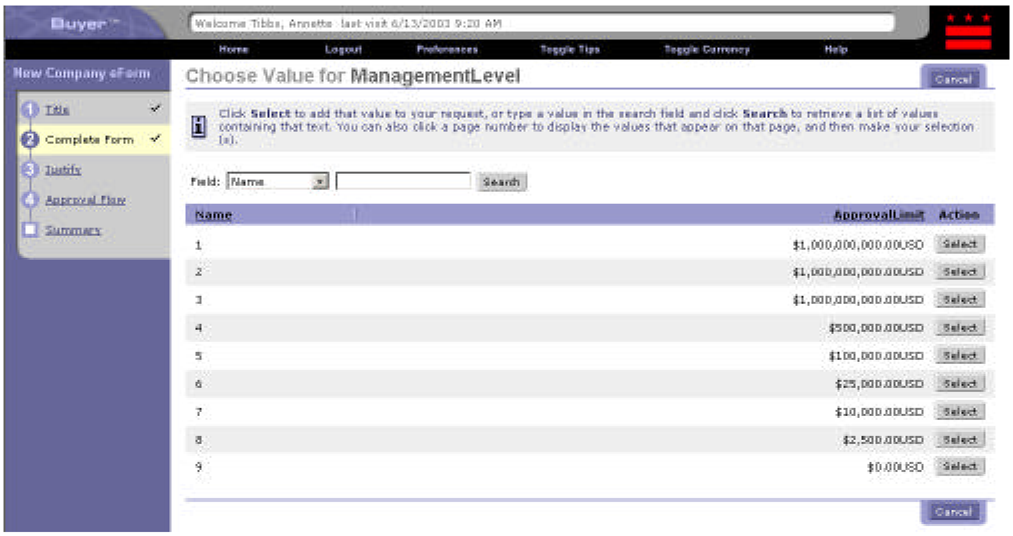


8. Select a Supervisor by clicking the proceeding the Supervisor field.

Due to a promotion, the User may have changed Supervisor. The Choose Value for Supervisor allows you to select another Supervisor within your agency.

9. Select a Management Level

Management Levels are monetary thresholds that are associated with your profile. Most Users will have a management level of 9, which indicates that every purchase made will have at least one approver (usually the User's supervisor).

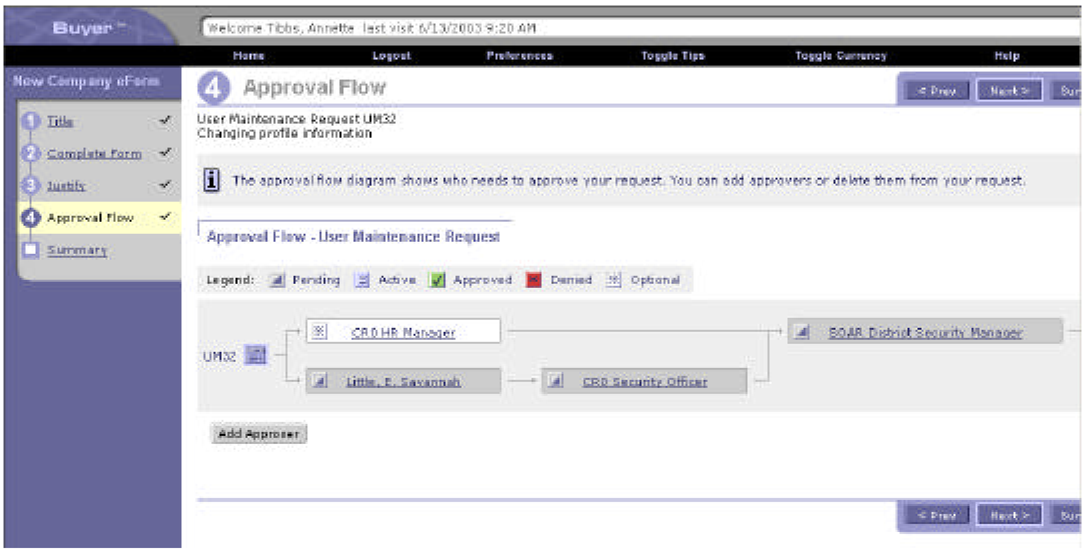


10. Change your Fax Number using free-form text, then click the Next button.

The Justify Request screen appears where you can provide justification comments. You can also attach files to justify the changes to your profile.

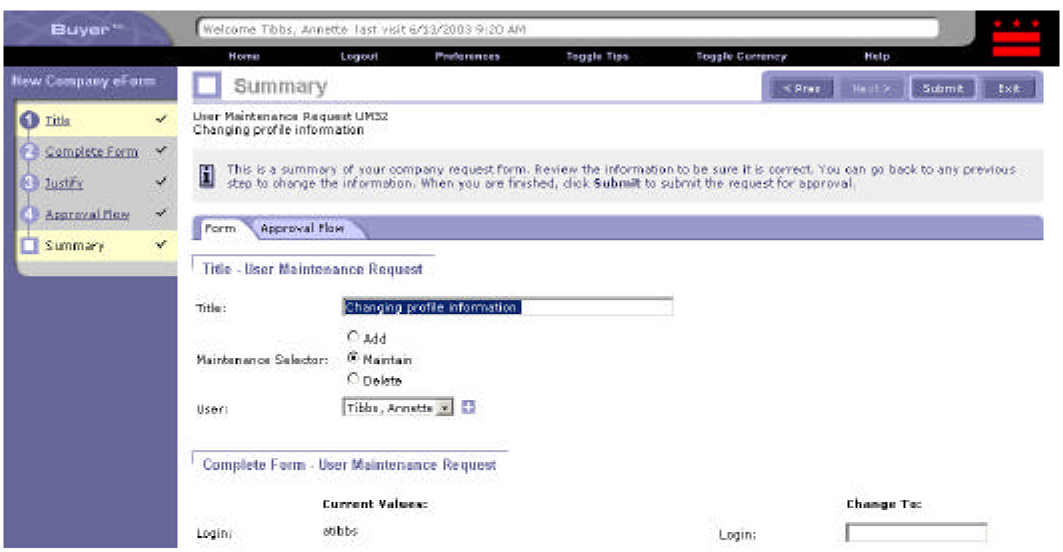
11. Review approval flow.

Like the requisition process, user profile changes need to go through approvals to ensure that information is accurate and legitimate. Note the HR Manager is a Watcher and will receive your changes for informational purposes.



12. Review the summary details.

When you are ready, press the Submit button to send your request for approval.



Individual Exercise 8.1 - Customizing User Settings

Objective(s):
Delegate your approval authority for 2 weeks.

Duration:
20 minutes

Instructions:
Complete each step in the following exercise. Be prepared to discuss how you accomplished each step.

Step	Activity	Completed
1	Log into PASS.	
2	Select Preferences.	
3	Select Delegate Approval Authority.	
4	Choose a user as a delegate.	
5	Select a delegation start date next month.	
6	Select a delegation end date of 2 weeks after your start date.	
7	Select to be notified via email.	
8	Click Next.	
9	Click Submit.	