General User Guide
Basware P2P 20.3

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1 General Functions

This chapter is an overview of the general layout of the system. It gives you fundamental information about the user interface to help familiarize you with the pages and explains some general functions such as logging in/out, using the messaging functionality, and other functions.

1.1 Login

The URL used to access the site is obtained from your organization's system administrator. We recommend the use of HTTPS for all site connections.

Before using the system, a system administrator pre-assigns your user account, available features, username, and password. To protect users' and clients' information, passwords are stored using a secure one-way hash. If the system database were compromised, attackers would be unable to decrypt users' passwords. Passwords are protected with a SHA-512 hash, utilizing a 64-bit salt.

You must enter your assigned username and password each time you access a new session. If you enter the incorrect username or password three times in a row, the system locks you out for a specified time and you must try again later.

If your organization uses single sign-on (SSO), you do not need to enter a separate username or password to access the system.

The login page displays in the language used for the last active session on the browser. If you have cleared your browser cookies or have never accessed the system before, the login page defaults to English.

An announcement area to the right of the login area displays information from Basware about various events, such as system upgrades or maintenance windows. The announcement area is usually an image with a direct link to a site with more detailed information. When the announcement area is no longer needed, it is no longer available.

Automatic Logout After Inactivity

If you are idle for a time in the system (default timeout is 30 minutes), 5 minutes before the session expires you receive a warning message. If you continue to be idle, you are automatically logged out of the system and must log in again to resume work.

Basware Access

If your system is configured to do so, you may be automatically routed from the Purchase Manager login page to the Basware Access login page. Simply enter your credentials as normal and you will be returned to the Purchase Manager dashboard after login.

From the Purchase Manager login page, you can also click **Login via Basware Access** and enter your credentials.

Logging in to Basware Access means you are logged in to all Basware modules your system uses, such as Vendor Manager, Product Manager, and AP Automation, as well as Purchase Manager.

1.1.1 Self-Register New User Account

Location: Login page

- You must have a key generated and provided by your employer or system administrator in order to self-register.

If you are a new user, you can self-register from the login page using **Register**. All self-registered users are automatically added to specified groups as configured by the administrator. For more information, refer to *General Admin Guide, Chapter 5*.

To self-register as a user:

1. Navigate to the registration URL provided by your employer or system administrator. If no URL was provided, navigate to your company's login URL and click **Register**.
2. If needed, enter the Registration Key provided to you.
3. Enter your email.

    This becomes your login name after registration is approved.
4. Complete the "I'm not a robot" reCAPTCHA action.
5. Click **Submit**.
6. On the next page, fill out the required information.
7. (Optional) For **Last 4 Digits on CC**, enter the last four digits of your company credit card number.
8. (Optional) For **Approval Manager Email**, enter the email address of the manager who normally approves your requests.
9. For **Default Location**, select the location that is to be your default Ship-To, Bill-To, and Expense location.
10. Click **Submit**.

The registration is sent to an administrator for approval. You are notified by email when the registration is approved or rejected. Once approved, you are granted access to the default modules configured by the administrator or to modules selected by the administrator at the time of approval.

1.1.2 Password Expiration

When this feature is enabled, you are required to change your password every X number of days (this is determined by the organization). Also, your organization may choose to prevent re-use of your last passwords as an added security measure.

When your password expires, you are prompted upon login to enter and confirm a new password. The new password must conform to the password guidelines set by your organization.

1.1.3 Request Temporary Password

Location: Login page

To request a temporary password:

1. Click the **Forgot Password** link.
2. In the **Username** field, enter your username or email used to log in.
3. Click **Request Password**.

You will receive an email shortly with the temporary password. The provided password must be used in 30 minutes or it will expire.

1.1.4 Language Shown on Login Page

The system determines what language to use on the Login Page and Forgot Password page based on the Locale set in your User Profile. If you have never logged in using your current browser, the system uses the first language in the browser's language preference list that is supported.

If no supported language is identified, the system displays in English by default.

1.1.5 Create or Change Mobile Password (SSO Users Only)

Location: Sam ▾ Username > Profile

You must have the following permission to create a mobile password:

- 12 - Change Password

The mobile website has limited functionality and support. Consider using the desktop website or the Basware - Verian mobile app to access the system.

If you use single sign-on (SSO) to access the system, you must set up a password if you want to access the Basware - Verian mobile app or the mobile website. The password only works with the mobile app or website and cannot be used to log in to the desktop application.

If you do not see the **New Mobile Password** field and need to create a mobile password, contact your system administrator.

If you are an admin, refer to the *General Admin Guide - Chapter 7* for information on managing mobile passwords.

To create a mobile password:

1. From the Dashboard, click the user's display name.
2. Click the **Profile** link.
3. Enter a password that meets the requirements for your system in the **New Mobile Password** field.
4. Re-enter the same password to confirm in the **Confirm Password** field.
5. Click **Save Profile**.

    The user is able to log into the mobile app or website.

1.2 Dashboard Navigation

The Dashboard is the task center for the system. You can access all your modules and view any items that need your attention. The modules, tasks, and statuses that are displayed depend on your system's configuration and your user permissions, and will vary from the screenshot below.

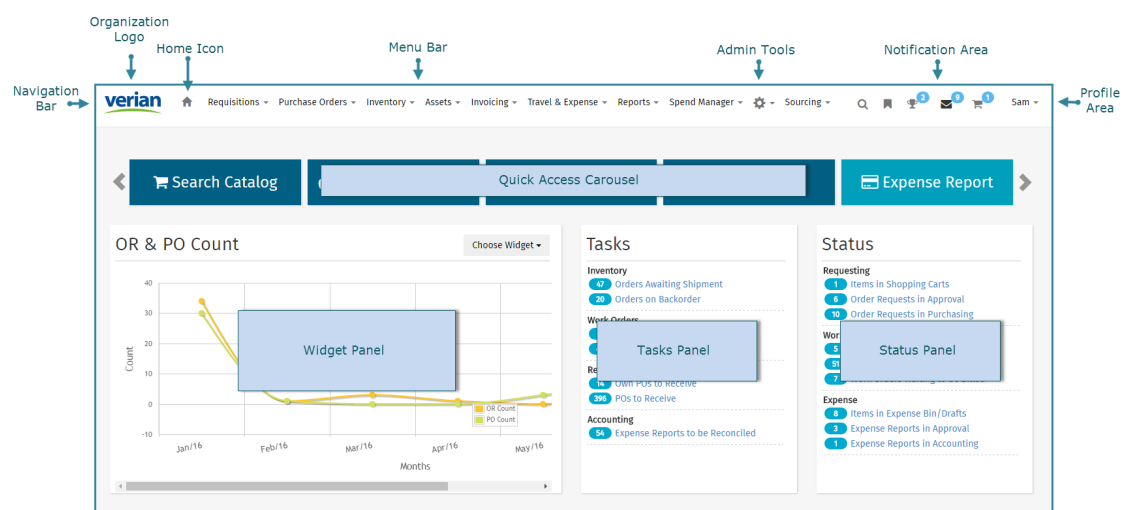The documentation refers to the areas of the dashboard using the labels below.

Figure 1: Dashboard for Admin User, Annotated

Tasks and Status

Items requiring actions appear and disappear from the Tasks and Status panels according to transaction status. The links in the **Tasks** and **Status** panels cut across all functions in the product to which a user has access.
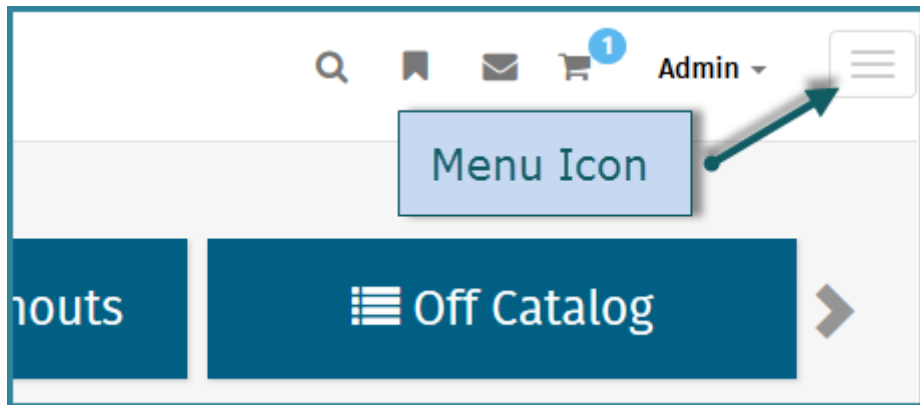
Collapsed Menu Icon

Figure 2: Menu Icon - Collapsed

If the browser window is not wide enough to display the full menu bar, the menu is collapsed into an icon on the right side of the page. Click the icon to display all menu bar items in a vertical list. To avoid having to use the menu icon, enlarge the browser window size or decrease the page zoom in the browser until the menu bar appears.

1.2.1 Widgets

You can select the widget that displays on the dashboard based on your permissions. Only one widget can be displayed on the dashboard at a time.

> If a widget is activated after the first of the month and the data is not calculated until the first of the month, data may not appear until the first of the next month. Contact your Basware Implementation Team or Client Care for more information.

Table 1: Widgets and Permissions

Widget	Permissions
User Logins in Past 6 Months	5 – Manage Users
OR and PO Counts	30 – Manage All Order Requests and 8 – Manage All Purchase Orders

Widget	Permissions
OR and PO Amounts	30 – Manage All Order Requests and 8 – Manage All Purchase Orders
Top 5 Utilized Budgets	160 – Manage Budgets or the user is selected as a "warning to" user for at least one active budget.

Table 2: Widgets and Data Updates

Widget	Data Update
User Logins in Past 6 Months	The data is recalculated the first day of each month.
OR and PO Counts	The data is recalculated the first day of each month.
OR and PO Amounts	The data is recalculated the first day of each month.
Top 5 Utilized Budgets	The data is shown in real time.

1.2.2 Tasks and Status Panels

Items requiring actions appear and disappear from the Tasks and Status panels according to transaction status. The links in the **Tasks** and **Status** panels cut across all functions in the product to which you have access. You can only view and click links if you have the permission to access them.

Work Queues

Work queues are set up for each customer by your Basware Implementation Team or Client Care Team.

Work queues are listed in the Tasks panel on the dashboard. They group together related work tasks together for you or your user group to work on more effectively. Click each work queue name to go to the work queue and perform actions on the pending items.

Some common elements seen when an item enters the work queue are as follows:

- The task center displays a message stating how many items are in certain queues. You can only see work queues that you have permission to access. If there are items in six or more queues to which you have access, you see "x Work Queue Item(s)," where x is the number of items in the queue. If there are items in five or less queues to

which you have access, you see each queue listed with the number of items in the
work queue.

- When on the Work Queue List page, you may see work queue items in red or blue. If
  the item is red, then another user has the item locked. You can only unlock these
  items if you are a member of the group that manages this work queue. You select the
  item and click **Force Unlock**. If the item is blue then it was locked by you. To unlock
  the item, select the item and click **Unlock**.

1.2.3 Notification Area

In the Notification Area, you can search the catalog, view messages, create Speed Links, view
badges, and quickly access your Shopping Cart.

Icon	Icon Name	Action
🔍	Search	Open the search box below the menu bar.
📢¹	Broadcast Messages	Open broadcast messages. This icon is only displayed when there are broadcast messages.
🔖	Speed Links	View or create speed links.
🏆²	Badges	View WeAchieve badges you have earned. The icon is only displayed when you have earned at least one badge.
✉²	Messages	View, send, or delete messages.
🛒³	Shopping Cart	View items the shopping cart.

1.2.3.1 Send Messages, Emails, Or Faxes to Users

Location: ✉² **Messages** in the notification bar.

To send a fax, you must have at least one of the following permissions:

- 31 - Send Faxes to Basware Users
- 32 - Send Faxes to Any Number

You can send messages to other individual system users using internal messaging, email,
and/or fax.

To send a message to one user:

1. Click **Send Message**.
2. Click 🔍 and select the message recipient.

3. Set the **Expiration** date. After the expiration date, the recipient can no longer view the message within the system, even if they have not yet seen it. By default, the message is set to expire in seven days.

4. If desired, select to send the message to the recipient's email address and/or fax number by selecting the checkbox beside **Use Email** or **Use Fax**. The availability of these options depends on your permissions and system configuration.

5. Enter the message for the user.

6. Click **Send Message**.

The recipient can see the message in the Messages list until the set expiration date. If you selected **Use Email** or **Use Fax**, the recipient also receives the message through email and/or fax.

1.2.3.2 Delete System and User Messages

Location: Messages in the notification bar.

You can delete several messages at once from the Messages page.

> Broadcast messages cannot be deleted. They disappear on their set expiration date.

To delete messages:

1. Click **View All Messages**.
2. Delete the desired messages.
   - To delete all inbox messages, click **Delete All.**
   - To delete selected messages, click the checkbox beside each message to delete, then click **Delete**.

1.2.3.3 Add Speed Links

Basware P2P covers a wide range of functionality and many pages, but you may only work on a few pages. You can create personal Speed Links to bookmark and name your most frequently visited pages, so you can access them more quickly.

To create a speed link:

1. Go to a page you would like to create a Speed Link for.
2. Click in Notification Area.
3. Enter the name in the text field. The name defaults to the page title.
4. Click **Add**.

Once a Speed Link is created, click the added link under to go to that page. To edit a link, you must delete it and add it again.

1.3 Profile Area

You can access your profile information, user management, and status management from the Profile Area drop-down list. You can also access the online Help from this list.

Link	Action
Sam Username	Access the Profile Area actions.
OMR - Company	View the company you are assigned to. This is only visible if system setting *19000 – Enable Multiple Companies* is set to Yes. i If only one company is assigned to you, the company name is just a display field. If you have been given permission to act on multiple companies, clicking this field will launch a pop-up modal which allows you to choose another company. You can open this modal from any page in the system to change the company you are working in. By default, the company will be set to the what was originally assigned to you by your administrator. If you have any unsaved information, it will be lost when you change to another company.
Info	View the View User page with basic profile and permissions information.
Profile	View and edit User Attributes, such as passwords or locales. You can only update information that you have the permission to update.
Help	View the online Help content in a separate browser tab.
Delegation	View and set delegate users for Expense Manager functions. For more information, see Add Users as Delegates for other Users/ Groups. The link only displays when you can act as a delegate for at least one other user.
Status	Access the User Preferences page to set your In/Out status, select your substitute approvers or delegates, and monitor other users' In/Out status.

1.3.1 User Info

The **Info** link directs you to the **View User** page. This page displays your basic system information and provides a link to view your system privileges. You may need to view these pages when working with the system administrator to edit system security.

The **System Privileges and Rights** page displays the following:

- Groups
- Purchasing Locations
- Purchasing Item Categories
- Purchasing Vendors
- Receiving Locations
- Requesting Locations
- Favorites List Restrictions
- Catalog Management Permissions
- Warehouse Management Permissions
- Requesting Warehouses
- User's Direct System Permissions
- User's Inherited System Permissions
- Immediate Rules Affecting the User
- Distributed Admin Permissions for Locations
- Distributed Admin Permissions for Groups

The system provides two pages that show how your user profile is set up in the system:

- **View User** shows general user attributes.
- **User Profile** shows permissions and locations.

1.3.1.1 View Your System Permissions

System permissions, sometimes referred to as privileges or rights, allow you to perform actions and view information in the system. You may need to view your permissions when speaking to an administrator or troubleshooting issues.

To view your assigned permissions:

1. Click your username in the top right corner.
2. Click **Info.**
3. On the View User page, click **System Privileges**.

All of your assigned permissions are displayed. You can also see what user groups you belong to at the top of the System Privileges and Rights page.

1.3.2 Profile

Click the **Profile** link to view the **Profile for User** page. You can edit the following profile information:

- Contact information
- Mobile password for SSO users
- Password (requires permission *12 – Change Password*)
- Approval email notification type
- Language (if system configuration allows)
- Accounts coding defaults for expense reports
- User account codes
- Managers

1.3.2.1 Change Contact Information

Location: Sam ⌄ **Username** > **Profile**

To change your contact information:

1. On the Dashboard, click your user name in the Profile Area located in the upper right corner.
2. Click the **Profile** link in the drop-down.
3. In the **Phone Number** field, enter your *new phone number*.
4. In the **Fax Number** field, enter your *new fax number*.
5. In the **Email** field, enter your *new email address*.
6. In the **Approval Email Notification Type** option, select the *email notification type preferred*.
7. Click **Save Profile**.

1.3.2.2 Set User Default Accounts Coding for Expense Reports

Location: Sam ⌄ **Username** > **Profile**

To access this functionality, the coding segment must have **Allow user to set Default?** set to Yes during segment configuration, and the accounts coding type must be enabled.

To set default values for accounts coding segments:

1. In the Accounts Coding Defaults for Expense Reports section, use the **Accounts Coding Type** drop-down to select the type to be configured.

2. Select or enter the desired accounts coding data in each segment. The fields may be drop-down, typeahead, text entry, select box, or radio button as determined during accounts coding type configuration.

3. Click **Save Defaults**.

4. Repeat for additional accounts coding types as needed.

5. When all accounts coding types are defaulted as desired, click **Save Profile**.

1.3.2.3 Change Locale/Language

Location: 🔲 **Username** > **Profile**

If system configuration allows, you can change the language setting for the system from your profile. The following languages are available:

- English – United States
- Dansk - Denmark
- Deutsch - Germany
- Español - Ecuador
- Español - Spain
- Français – France
- Italiano - Italy
- Português - Brazil
- Português – Portugal
- ру́сский - Российская Федерация (Russian - Russian Federation)
- 中文 - 中国 (Chinese - China)

Changing the locale affects the following:

- Language
- Date format
- Time format
- Numbering format

This only affects the system's non-transactional data (actions, labels, tooltips, hover help, and messages). All transactional data (user names, vendors, items, etc.) are displayed in the language they were uploaded in.

To change your locale/language:

1. Locate the Locale Settings heading.
2. Select your desired language.
3. Click **Save Profile**.
4. Log out.
5. Log in.

The system information is displayed in the language selected.

1.3.3 In/Out Status

In/Out Status for User

In this area, set your own status as *in* or *out*. Use **Substitute** to select a user to receive and approve requests normally routed to you, if your substitute approver is not already set as a delegate. When you set your status back to *in*, the substitute no longer receives the requests normally routed to you.

> It is important to set your substitute to ensure requests can be approved in a timely manner while you are out. You should monitor your substitutes' in/out statuses to make sure they are in when you set them as substitutes.

Delegation

Delegates are people designated to create order requests and/or expense requests on your behalf. A person designated as a delegate must have permission *14 - Can Change Requester Name on OR*. Additional delegates for Purchasing or Expense may also have been set for you by an administrator.

Users that have been added as a delegate are able to view the **On Behalf Of** drop-down field when creating an order request or expense draft. They then select the user on whose behalf they are creating the request or draft for in that field.

Depending on system configuration, you may be set as the first approver for all requests created on your behalf. After you approve the request, the normal approvers in the route can view and approve the request.

Monitoring

Add users here to monitor their in/out status. This can be especially useful to see if delegate or substitute users are in, or if your approver is available.

When monitoring other users, their statuses are updated in real time.

1.3.3.1 Change In/Out Status and Assign Substitute

Location: **Sam ▾** **Username** > **Status**

To change your status:

1. Select a *status* from the **Status** drop-down list.
2. (Optional) Enter a note and the expected return time and date. Anyone monitoring your status can see this information with your user details.

> **i** Your status does not automatically change back to *in* at the set date and time. You must manually change your status back to *in* when you return.

3. (Optional) Select a substitute approver to receive all requests routed to you for approval. The substitute must have permission *1 - Approve Requests*.

> **i** If your organization does approvals based on spending limits, please note that the substitute user's spending limits are not considered when doing approvals on your behalf. If you select a substitute user with a lower spending limit than your own, that user will be able to approve requests on your behalf that are in excess of their spending limit. When selecting a substitute, It is recommended that you select a user with a spending limit that is the same as or higher than your own.

4. Click **Update Status**.

The status reflects your change. Any user monitoring your status can immediately see the new status. The user set as your substitute receives an email and/or internal notification informing them of your status change. If you have set your status to *out*, your username in the top right corner is red.

1.3.3.2 Add Other Users as Your Delegates for Purchasing and/or Expense

Location: Sam ⌄ **Username** > **Status**

To delegate other users as your delegates for purchasing and/or expense tasks:

1. Under the delegation heading, select whether the delegates are for *purchasing & expense*, *purchasing*, or *expense*.
2. Under the delegation heading, click ⌕. A pop-up select box displays with all available users.
3. Select the users to add as delegates. To select more than one user, click and drag the mouse or hold CTRL and click each name. When finished, click **Select**.
4. Click **Done**. The select box closes and the name of the delegate is shown in the delegation field. If multiple users were selected, *Multiple Selection* is shown.
5. Click **Add**.

Each user's name and ID number are displayed in the purchasing and or expense delegate column as appropriate. The selected users are notified by internal messaging or email that you have added them as delegates.

If you need to delete a user that has been added as a delegate, click the **x** beside the user's name.

> **i** You cannot delete an expense delegate that has been designated for your entire user group. You may only delete one-to-one delegate relationships.

1.3.3.3 Add Users as Delegates for other Users/Groups

Location: ⚙· > **Users** > **User Delegates**

You must have the following permission to assign user/group delegates with this method:

- 4120 - Manage User Delegates

To add another user as a delegate for any user/group for managing expense or purchasing transactions:

1. Begin typing the user's first or last name in the *User* field. After three characters, a list of suggestions displays with each user's username and ID. Select the user to assign as a delegate. Only users with access to Purchase Manager and/or Expense Manager show up in the list of suggestions.

2. Select the area in which the user is to act as a delegate. The options are *Expenses* or *Order Requests*, depending on the delegate user's module access.

3. If you want the specified user to act as an expense delegate for all other users, select *All Users* in the *As a Delegate for* drop-down list. Otherwise, leave it set to *Specify Below*.

4. Begin typing the individual username, group name, and/or location group name for the people or groups for which the user is to act as a delegate. The user is not limited to one set of people or groups - enter as many people or groups as is needed. The list of individual users is limited to those with access to the module chosen in the **Can Act On** field.

   > **i** If Locations Groups are selected, the affected users are determined by the users' User Profile Expense Location for expense reports or Ship-to Location for order requests.

5. When complete, click **Update**. A success message is displayed.

The user is assigned as a delegate to the selected users or groups. Each user to which the delegate user is assigned can see the delegate user listed on the Status page. The delegated user can see the users for which they have been delegated in the On Behalf Of drop-down list when creating an expense report or order request.

(For expense delegates only) The delegate user can view the users for which they are delegated on the Act as a Delegate grid.

1.3.3.4 Add Users to Monitor

Location: [Sam ▾] **Username** > **Status**

To monitor other users:

1. Under the **Monitoring** heading, click [🔍]. A pop-up select box displays with all available users.
2. Select the users to monitor. To select more than one user, click and drag the mouse or hold CTRL and click each name. When finished, click **Select**.
3. Click **Done**. The select box closes and the name of the selected user is shown in the field. If multiple users were selected, *Multiple Selection* is shown.
4. Click **Add**.

Users are notified in the message section that they are being monitored.

1.3.3.5 View Status of Monitored Users

Location: [Sam ▾] **Username** > **Status**

To view the status of your monitored users:

1. Under the **Monitoring** heading, select the monitored user whose status is to be viewed.
2. Click **Status**.

The View User page displays with the monitored user's information, including in/out status, date and time of return, notes, and other information.

1.3.4 Log In On Behalf Of Delegator User for Expenses

Location: [Sam ▾] **Username** > **Delegation**

Before logging in as a delegate user, you must be assigned as a delegate user for the manager or other delegator. See Add Users as Delegates for other Users/Groups for instructions on assigning delegate users.

Using the **Delegation** link, you can log in on behalf of another user, such as your manager, to enter and manage expense transactions on the manager's behalf. You inherit all of the following permissions, assuming the delegator currently has the permissions:

- 63 - Can Split Account Codes
- 2002 - Can Charge Expenses to Selected Locations
- 2009 - Can Associate Expenses with Selected Projects
- 2010 - Can Submit Expenses for Pre-Approval
- 2004 - Can Import Expense Data from External Sources

- 176 - Restrict to Accounts Coding Types

If the delegator has none of these permissions, the you log in with only permission *0 - Access System*.

You may not act as a delegate for inactive users, marked with an asterisk (*). An administrator must mark the user as Active again to manage their transactions, if needed.

Table 3: Act as a Delegate Column definitions

Column	Definition
Total Transactions	The total number of credit card transactions in any status on an expense report.
Total Amount	The sum of all transactions in any status on an expense report.
Not Added to Drafts	Number of level 1 credit card transactions that are in the Unprocessed queue and have not been added to an expense report yet.
Unassigned Receipts	Receipt images uploaded to the system via mobile app or email that have not been associated to an expense.
Pending in Drafts	The total number of expense drafts created and saved, but not yet submitted for approval and payment.
Open Reports	The total number of expense reports that have been submitted, but are not fully approved.

The data in all the fields can be filtered in several ways, including by date, using the Filter action at the top of the grid. The Date filter works with level 3 transactions and amounts by the Post Date, and all other data by the Date From.

To log in on behalf of a delegator user:

1. Click the **username** of the user for whom to log in on behalf of. This directs you to the Expense Dashboard with **[Username] on behalf of [delegator name]** in the top right corner.

2. Perform desired actions in Expense Manager.

3. To no longer act on behalf of the delegator, click **[Username] on behalf of [delegator name]** > **Delegation** in the top right corner.

4. From the Act as a Delegate grid, click **Return to My Dashboard** to no longer act on behalf of a user.

1.3.4.1 Export Delegator Information for Expenses

You may want to export information on receipts, transactions, and expense reports for users for whom you are a delegate for reporting purposes.

Location: Sam ▾ **Username** > **Delegation**

To export information from the Delegation grid:

1. Click **More Actions** on the Delegation grid page.
2. Choose from one of two options:
   - **Export current view**: exports only the data rows displayed on the current page. For example, if your page shows 1-20 of 50 items, only items 1-20 will be exported. All applied filters are reflected in the exported data.
   - **Export all rows**: exports all data rows based on the applied filters. For example, if your page shows 1-20 of 50 items, items 1-50 will be exported.
3. An Excel file is created and downloaded. Choose to save or open it from your web browser.

1.3.5 Change Company

To change companies, your organization must have Multiple Companies configured. You must also have permission 211 - *Can Act on Multiple Companies*.

If your organization has multiple companies set up and you have the correct permission, you may be able to act on companies outside of your default company. You may need to change companies to create requests for a different company or view their purchasing documents. To change the company you are acting on:

1. Click on your **username** in the Profile Area.
2. Click on the name of your company.

   > You can only click on the company if you can act on more than one company.

3. In the Change Company modal, select the company you want to act on. This list is determined by the companies selected with permission 211 - *Can Act on Multiple Companies*.

Your company has been changed. You can now view the new company's shopping cart, available catalog items, and other information. If a logo is set for the new company, it displays in your navigation bar.

1.4 User Interface Conventions

This section describes the function of several commonly found page types within the system. These types are as follows:

- Administration List pages
- Management Grid pages
- Detail pages
- Data Entry pages

1.4.1 List Pages

The system shows summary lists of information in pages similar to the one below. You can narrow down the list by using the filter drop-down list, search keywords, or both.

You can select multiple items in these lists in two ways. To select consecutive items, click and drag down the list. To select non-consecutive items, hold CTRL and click the desired items.

Figure 3: List Page for Order Requests

1.4.2 Management Grids

The system has management grids for some information, similar to the one below.

Figure 4: Contract Management Grid

To reorder the columns in a management grid, click and drag the column header to the desired place.

Once you rearrange the columns, the new arrangement is stored in the browser's cookies. When you leave the page and return to the same page, the same order is applied until you change it, the browser's cookies are cleared, or 10 days have passed.

Table 4: Standard Grid Icons

Icon	Purpose
Page Tour	Click this icon to take a quick tour of on-screen help. This tour is always available.
Filter	Click this icon to filter for specific information in the grid.
Customize Views	Click this icon to customize the columns shown.
Add	Click this icon to add an item.
Edit	Click this icon to edit an item. This icon is active when one row is selected. It is not active when no rows or more than one row is selected.
Delete	Click this icon to delete an item. This icon is active is active when one or more rows are active.

Icon	Purpose
More Actions	Click this action to perform additional actions for the selected item or items. Depending on the number of items selected determines the actions that can be performed. Some actions are for single items only while other actions can be performed for multiple items. The actions listed are permissions based. If an action is grayed out, it cannot be performed.
Items Showing	Shows the number of items showing based on the total number of items available. The number of items changes based on filters and/or customize views.
Items per page	Shows the possible number of items to view per page. The number of items to view per page vary depending on the page being viewed.

Sort

You cannot sort by column if one or more rows is selected.

You can organize the information by any single column in the table. Click the column header once to sort in descending order (A > Z, 1 > 9) and click a second time to sort in ascending order (Z > A, 9 > 1).

Once you sort by a column, the sort option is stored in the browser's cookies. When you leave the page and return to the same page, the same sort is applied until you change it, the browser's cookies are cleared, or 10 days have passed.

Filter

You can narrow down the information in the table using the filter . The filters work in a funnel-like fashion to return the results. The first filter returns the most results, and each filter after that keeps narrowing down the information. There is one exception to this. When the same filter is repeated with different criteria, the results matching both filters are returned.

Once you set a filter, the filter is stored in the browser's cookies. When you leave the page and return to the same page, the same filter is applied until you change it, the browser's cookies are cleared, or 10 days have passed.

Grid Customization

For some grids, you have the option to show or hide data columns, so you see only the information you need to see. Click to set these column preferences.

1.4.3 Detail Pages

Detail pages usually contain many fields for viewing or editing. The example shown in the following figure shows the view requests mode of the order requests.

Figure 5: Details Page for Order Request (Truncated)

1.4.4 Data Entry Pages

The **Add** and **Edit** actions on list pages open data entry pages. Required fields have an asterisk at the end of the field name. A sample data entry page is shown in the following figure.

Figure 6: Data Entry Page – Create Order Request

1.5 Directories

You can use a directory to view user, location, vendor, and manufacturer information. Access the directories through Reports on the menu bar.

Permissions

You must have the following permission to view all directories:

- 28 – View All Directories

You must have the following permission to view the individual directories:

- 70 – View Users
- 68 – View Locations
- 71 – View Purchasing Vendors
- 69 – View Manufacturers

1.6 Email Approvals

If your system configuration allows it, you can approve requests via email. Reply to each email as instructed in the email body, or use the provided hyperlink to click through to the associated request in the system.

Your **Notify Via** setting on the Profile page must be set to *email* or *both email and internal* to receive approval emails. For instructions on how to change this setting, see Change Contact Information.

1.7 Overview of System Security Features

Security is managed by providing users restricted access to various pages. Every time a user logs into the system, the system looks at the user's security settings and permissions and presents only the menu items that the user is allowed to access. Security is provided in several ways to prevent unauthorized access.

- **The Idle User**: Access is denied if current access has been idle for a determined amount of time. The default value is 30 minutes. This prevents an unauthorized user from accessing the system from a terminal when the authorized user has stepped away.
- **Permission Levels**: Access is denied to users who try to access areas without the proper permissions.
- **Hack Proofing**: Access is denied if a false username or password is given three times.
- **Temporary Access**: Access can be assigned for a limited amount of time or limited number of uses. This is useful for temporary or contract workers.

Password Security

To protect users' and clients' information, passwords are stored using a secure one-way hash. If the system database were compromised, attackers would be unable to decrypt users' passwords. Passwords are protected with a SHA-512 hash, utilizing a 64-bit salt.

2 Locales

Basware P2P is available in the following languages:

- English – United States
- Dansk - Denmark
- Deutsch - Germany
- Español - Ecuador
- Español - Spain
- Français – France
- Italiano - Italy
- Português - Brazil
- Português – Portugal
- ру́сский - Российская Федерация (Russian - Russian Federation)
- 中文 - 中国 (Chinese - China)

Depending on your system configuration, you may be able to select the language in which you view the system.

Changing the locale affects the following:

- Language
- Date format
- Time format
- Numbering format

When you make this change, you must log out and log in again for the changes to take effect.

This only affects the system's non-transactional data (actions, labels, tooltips, hover help, and messages). All transactional data (user names, vendors, items, etc.) are displayed in the language it was uploaded in.

Below are examples of the dashboard in several different languages.
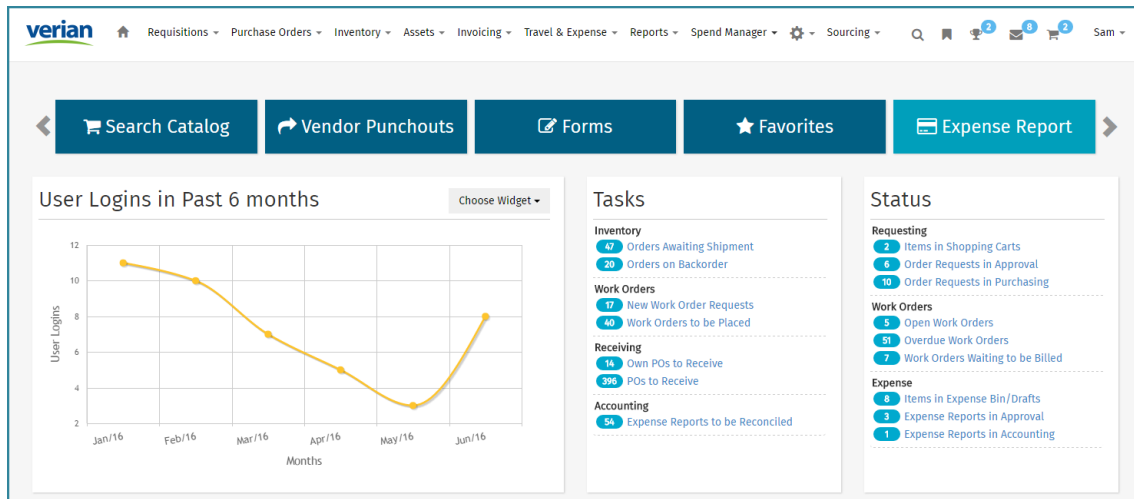
Figure 7: Dashboard with Default Locale Set to English (United States)

Figure 8: Dashboard with User Profile Locale Set to Français (France)
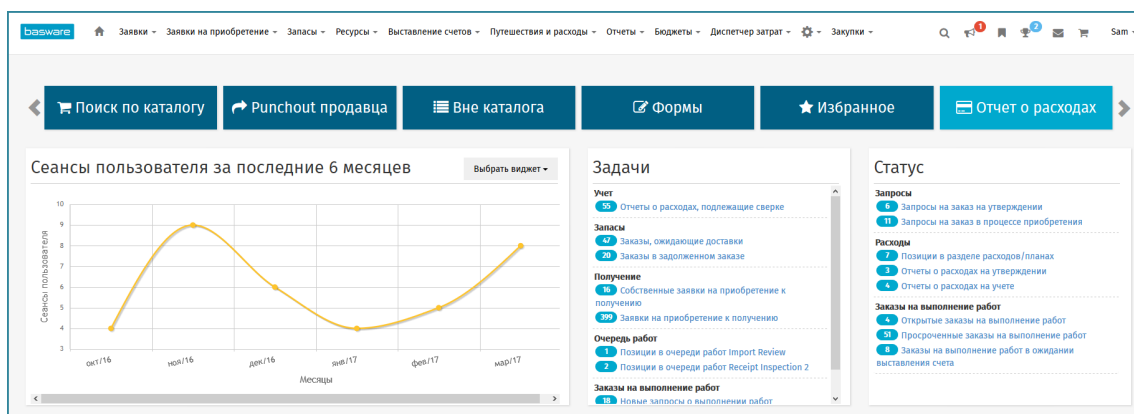
Figure 9: Dashboard with User Profile Locale Set to Iру́сский - Российская Федерация

For more information setting up locales by users, see Change Locale/Language.

3 WeAchieve

WeAchieve is a fun, competitive way to learn to use the system more efficiently. By performing certain behaviors, you can win badges and claim a spot on each WeAchievement's leaderboard. If you continue the behavior, they'll keep their spot on the leaderboard and win more badges.

WeAchieve is intended to foster easier user adoption and more consistent user behavior of the system by rewarding desirable actions with badges and leaderboard recognition. These incentives reinforce positive behavior, increase user acceptance, and make strategic spend management possible across an organization.

You are rewarded with badges by completing certain tasks, depending on the WeAchievement type the tenant administrator has enabled. Types include User Onboarding, Timely Approval, Responsible Buyer, and Content Builder. Leading scorers also display on the each WeAchievement's Leaderboard, ranked by number of badges earned.

Competitive WeAchievements can be set up within user groups to encourage team or department participation. WeAchievements also can be configured with a minimum eligibility criteria, such as making at least five requisitions or approving 10 requests over the course of the game.

> User Onboarding, Responsible Buyer, and Content Builder types will be available soon.

WeAchievements are created and managed by your tenant administrator.

3.1 WeAchieve Navigation

Badge Menu

The Badge icon displays on the Dashboard whenever you have earned at least one badge through WeAchieve. The number indicates the number of badges you have earned.

Your Badges

Click **All Badges** from the Badges drop-down to display the Your Badges page, which includes summary information of all your current badges.

Click any badge to see competition details and the leaderboard for that WeAchievement.
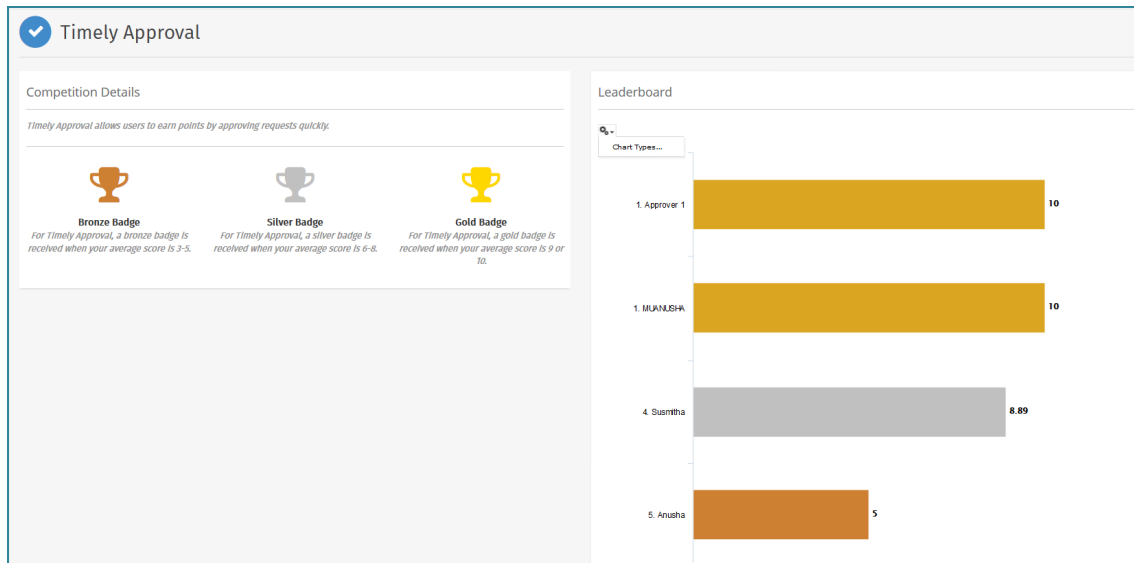
Figure 10: WeAchievement Details Page

Leaderboards

Click Leaderboards from the Badges drop-down to view the standings for users across all your active WeAchievements.
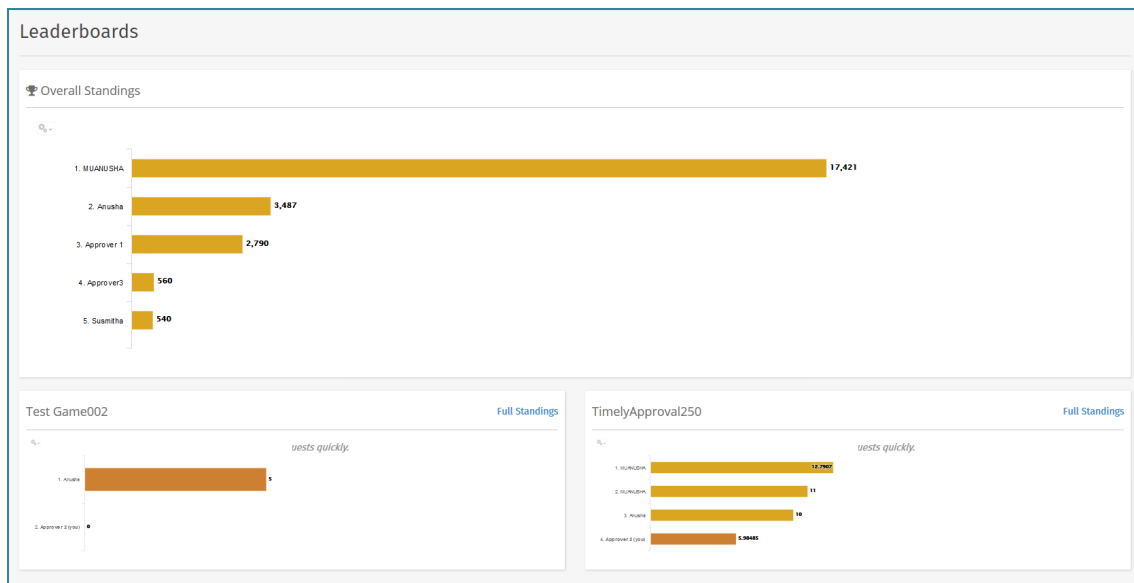

Figure 11: Leaderboards

3.2 WeAchievement Types

Timely Approval

The Timely Approval WeAchievement type tracks how long it takes you to approve documents routed to you, including order requests, expense requests, work order requests, and invoices. The faster each document is approved, the higher your score.

The scoring is as follows:

Days to Approve	Points Scored
0	10
1	9
2	8
3	7
4	6
5	5
6	4
7	3
8	2
9	1
10 and above	0

Over the course of the WeAchievement, your score is averaged. For example, if you approve one request after 4 days (for 6 points) and another request on the same day (for 10 points), your average score is 8.

Based on your score, you are awarded a gold, silver, or bronze badge:

- 9-10: Gold Badge
- 6-8.9: Silver Badge
- 3-5.9: Bronze Badge
- 0-2.9: No badge awarded

Scores are updated on an hourly basis.

4 Basware Assistant

Our intuitive, conversational tool for navigating the system and getting things done.

To accomplish certain tasks, you can use the Basware Assistant. The Assistant can help accomplish the following tasks:

- Finding order requests
- Finding purchase orders

You must have permission 4206 - *Use Chatbot* to access this feature.

4.1 Find ORs and POs with Basware Assistant

Basware Assistant can help you locate order requests and purchase orders quickly.

You can use Basware Assistant to locate order requests and purchase orders easily. To do this, you can search by the following criteria:

- ID or document number
- Vendor
- Item name
- User the document is created for

Simply follow the prompts and enter the information you know about the document to get back a list of results. You can narrow them down even further by entering the document date or ID number.

When the assistant finds results for the criteria you entered, it is displayed in a table format, like these results for an order request search:

You can click on the number to open the order request or purchase order.

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