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RM Implementation Training

- Web Purchase Requisition (Part 1)

2026-05-28

Agenda

1. Introduction
2. Training Overview
3. System Environment Setup
4. RM Back-end Setup
5. RM Web Admin Portal Setup
6. Create and Post Purchase Requisition
7. Advance Topics
8. Q&A

Introduction

- **Key functions of RM Web PR**

1. Create and Submit Purchase Request from Web/Mobile UI

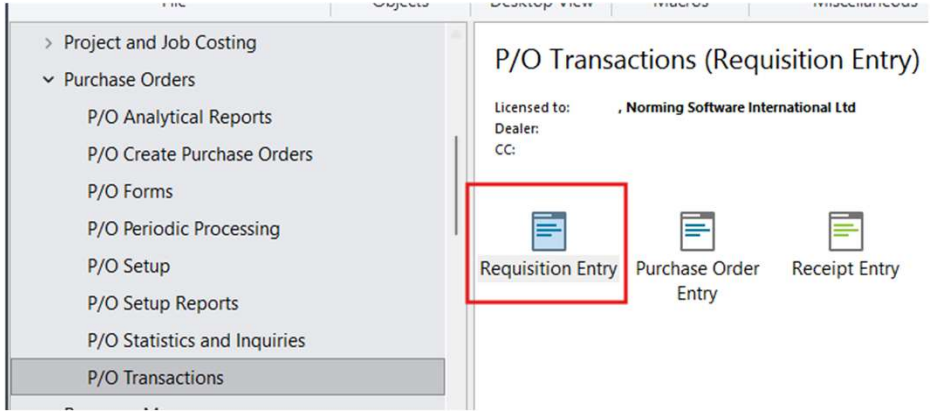
User

Create/Submit Purchase Request

Approver(s)

Review, Approve/Reject Purchase Request

Sage300 PO



Introduction

- **Key functions of RM Web PR**

  2. Create and Submit Purchase Order from Web/Mobile UI

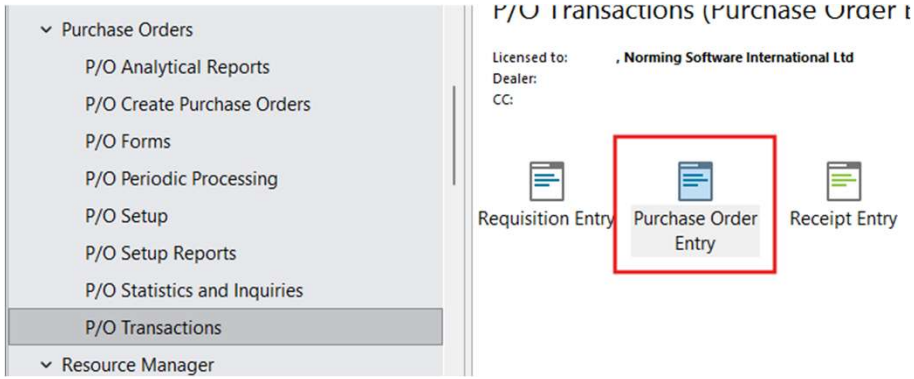
User

Create/Submit Purchase Order

Approver(s)

Review, Approve/Reject Purchase Order

Sage300 PO

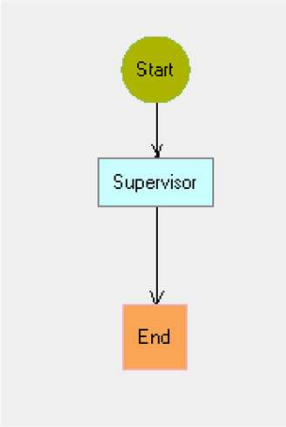


Introduction

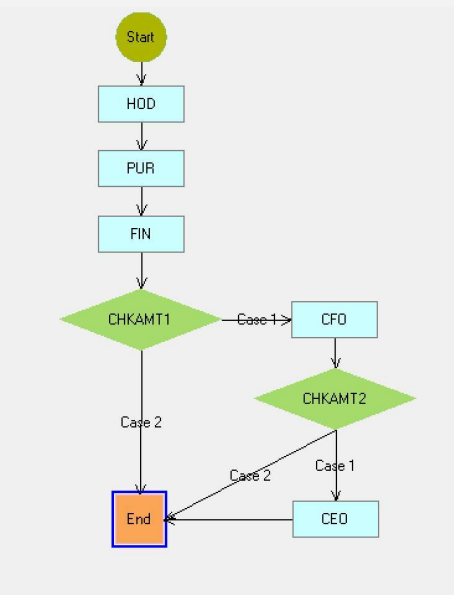
- **Key functions of RM Web PR**

  3. Powerful and Flexible Workflow Engine

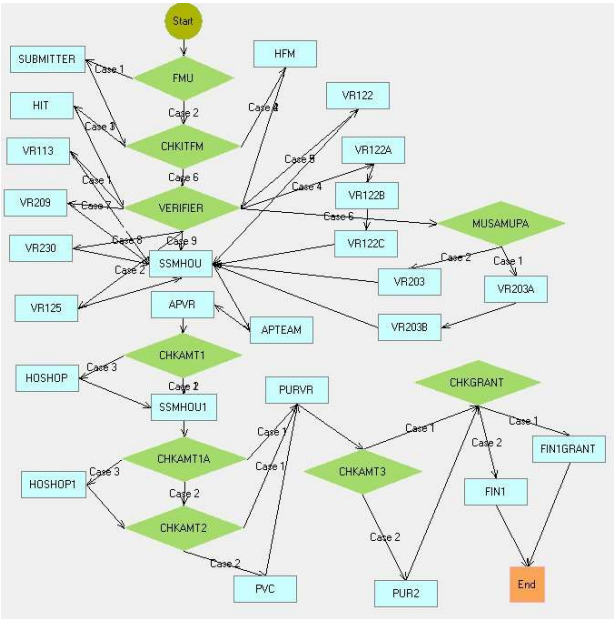
1 level of Approval workflow



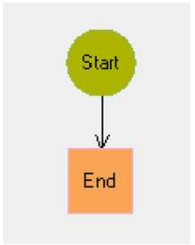
Multiple Level Approval Workflow



Complex Approval Workflow



No Approval workflow



Training Overview

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- **Hypothetical Example for Training**

Employee Name	Department	Designation
A	MFG	Engineer
B	MFG	Manager
C	Purchasing	Buyer
D	Finance	Finance Manager
E	Finance	CFO

- A creates and submits Purchase Order Requisition -> route to B
- B reviews and approves/rejects the Requisition -> route to C if approved
- C gets quotations and confirms purchase price -> route to D
- D checks and approves to become PO if total PO amount <=5K, else routes E
- E checks and approves to become PO if total PO amount exceeds 5K

System Environment Setup

1. RM2025 PU2 will be used for this training session.
2. RM2025 PU2 can be downloaded from Norming Partner Portal.
3. It is recommended to install RM2025 or a later version before the training.
4. Please prepare a valid RM2025 partner license, which will be used to activate the database during the training. If you do not have the partner license yet, please request it in advance.
5. Download the RM2025 sample databases from the Norming Partner Portal, and set them up in Sage 300 before the training.
6. Install the Sage 300 sample programs on your PC. The **SAMLTD sample database provided with Sage 300** will be used during the demonstration.
7. You may refer to this video for a fresh installation of Norming Resource Manager: https://www.youtube.com/watch?v=unlUvW4BR_o
8. You may refer to this video for upgrading Norming Resource Manager from an older version: https://www.youtube.com/watch?v=ySzfz4lWRG4

Note:

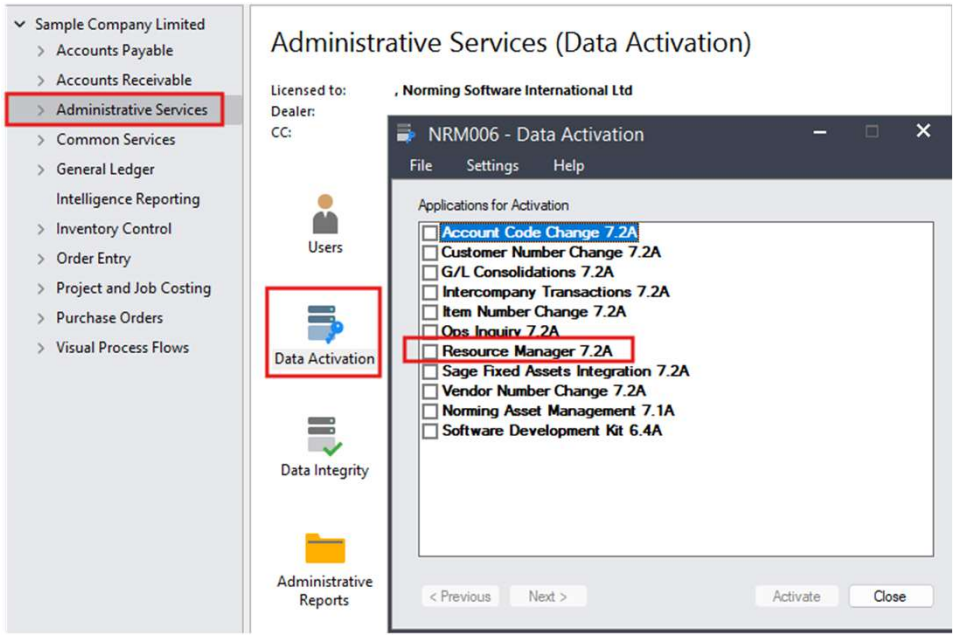
- RM2025 PU2 Software and RM2025 sample database can also be downloaded from: RM2025 PU2
- RM2025 PU2 Software supports Sage 300 from v6.0 to v2026.
- RM2025 and RM205 PU1 Software supports Sage 300 from v6.0 to v2025

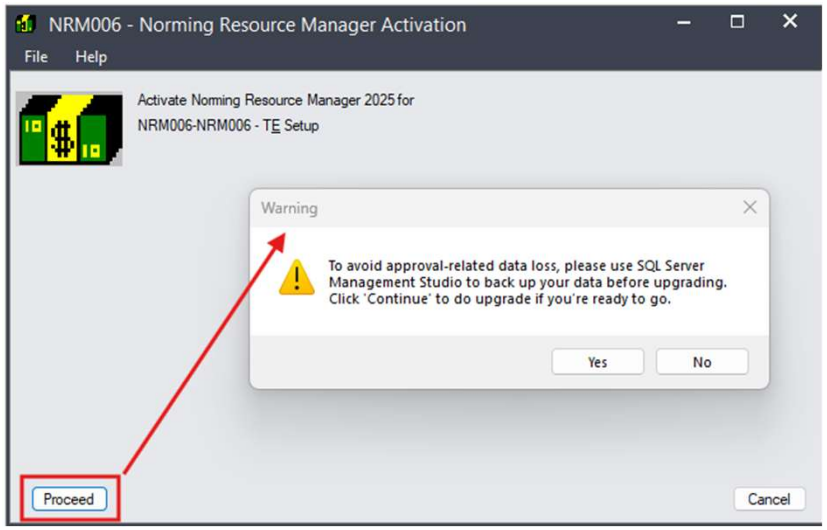
RM Back-end Setup

1. Activate RM module from Administrative Services > Data Activation Screen
2. Activate RM License
3. Configure settings in **Resource Manager > Setup > Options** Screen
4. Configure settings in **Resource Manager > Setup > Account Sets** Screen
5. Configure settings in Resource Manager > Setup > Department Screen
6. Configure settings in **Employees > Employee Templates** Screen
7. Configure settings in **Employees > Employee Registers** Screen
8. Configure settings in **Approval Workflows > Email Service** Screen
9. Create E-mail Templates using **Approval Workflows > E-mail Templates** Screen
10. Create approval workflow using **Approval Workflows > Approval Workflows** Screen
11. Create purchase type using **Procure to Pay > Setup > Purchase Types** Screen
12. Add access right to purchase types using **Procure to Pay > Setup > Buyers** Screen

RM Back-end Setup

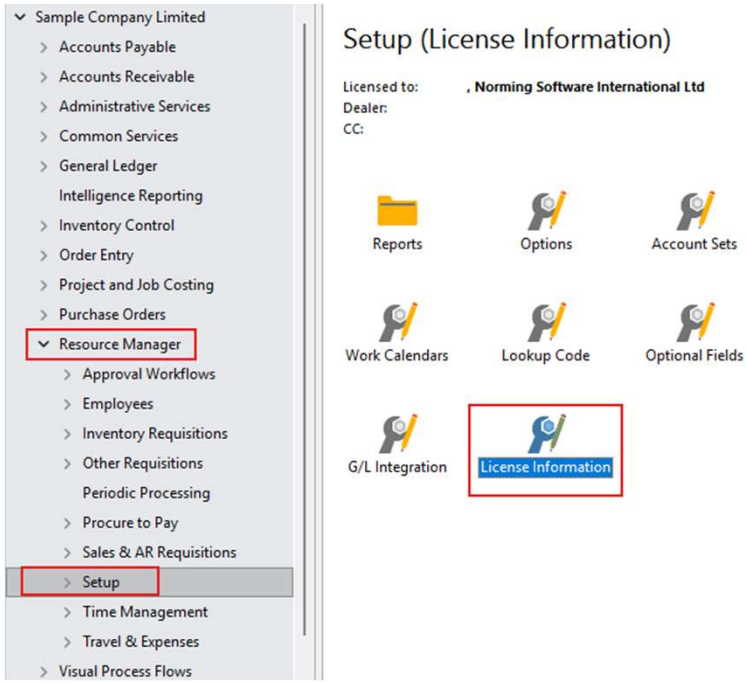
1. Activate RM module from Administrative Services > Data Activation Screen



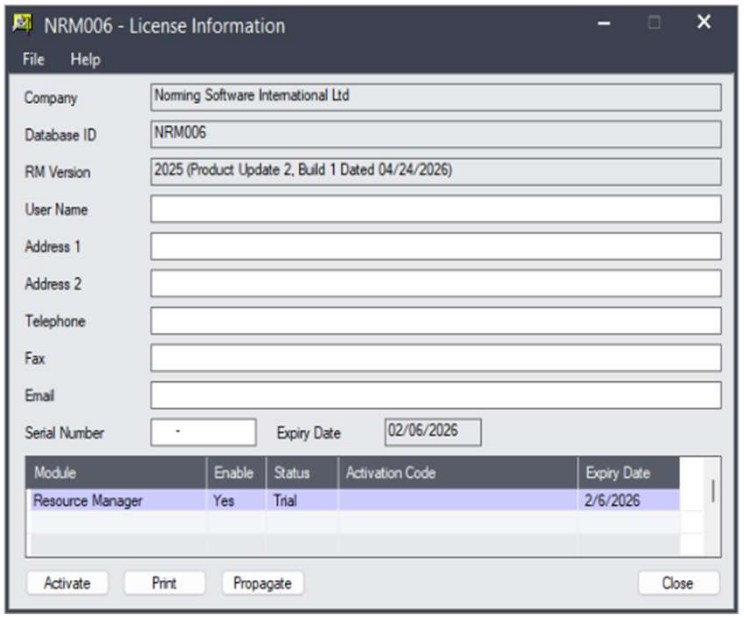


RM Back-end Setup

2. Activate RM License



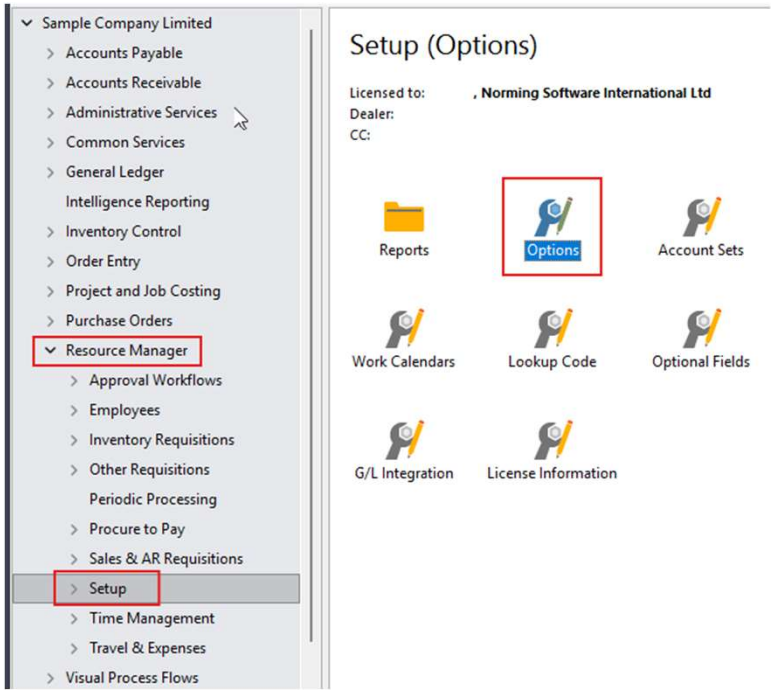




Note: RM provides a 30-days trial period

RM Back-end Setup

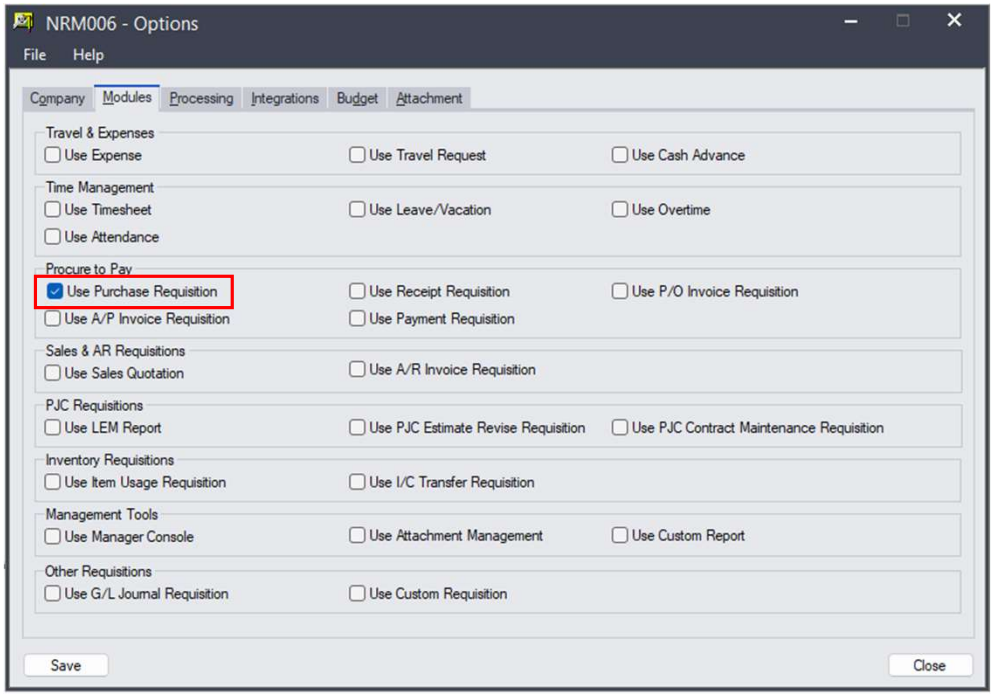
3. Configure settings in **Resource Manager > Setup > Options** Screen



RM Back-end Setup

3. Configure settings in **Resource Manager > Setup > Options** Screen

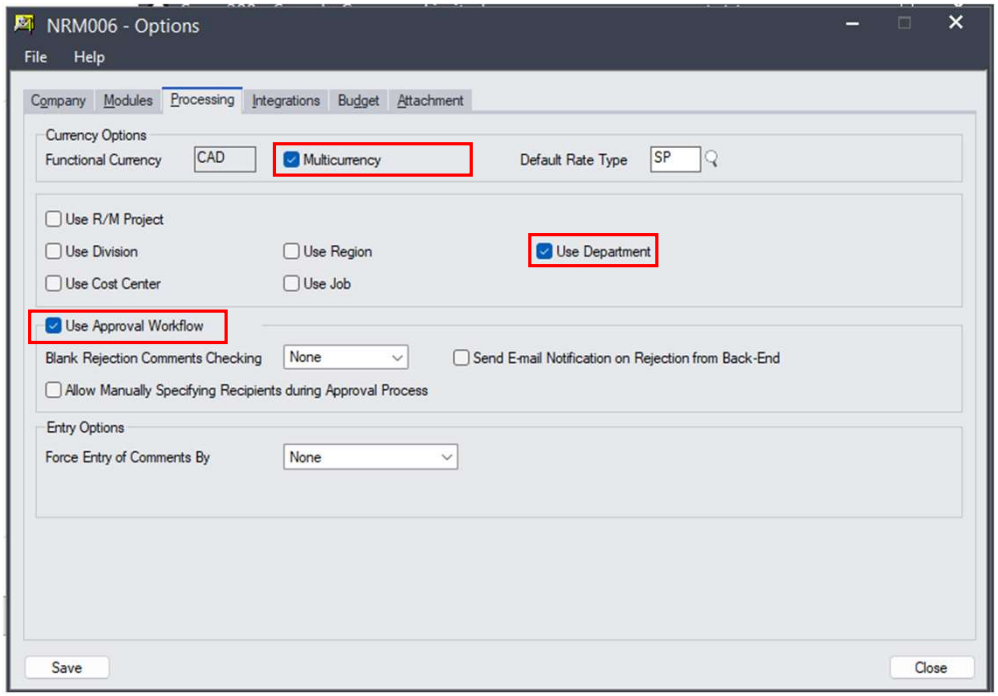
3.1 Modules Tab



RM Back-end Setup

3. Configure settings in **Resource Manager > Setup > Options** Screen

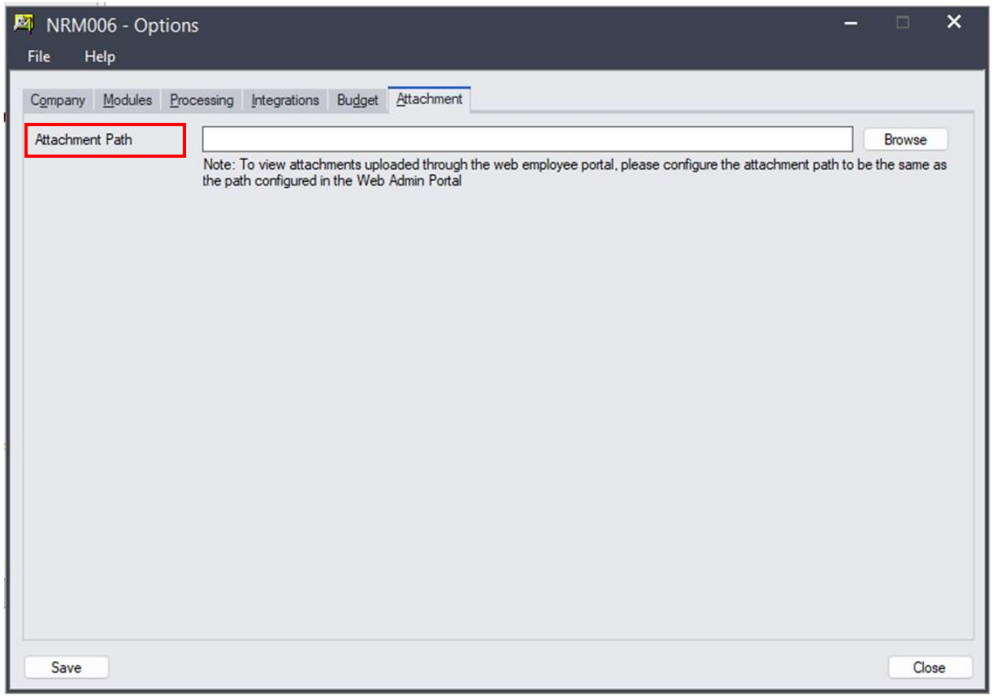
   3.2 Processing Tab



RM Back-end Setup

3. Configure settings in **Resource Manager > Setup > Options** Screen

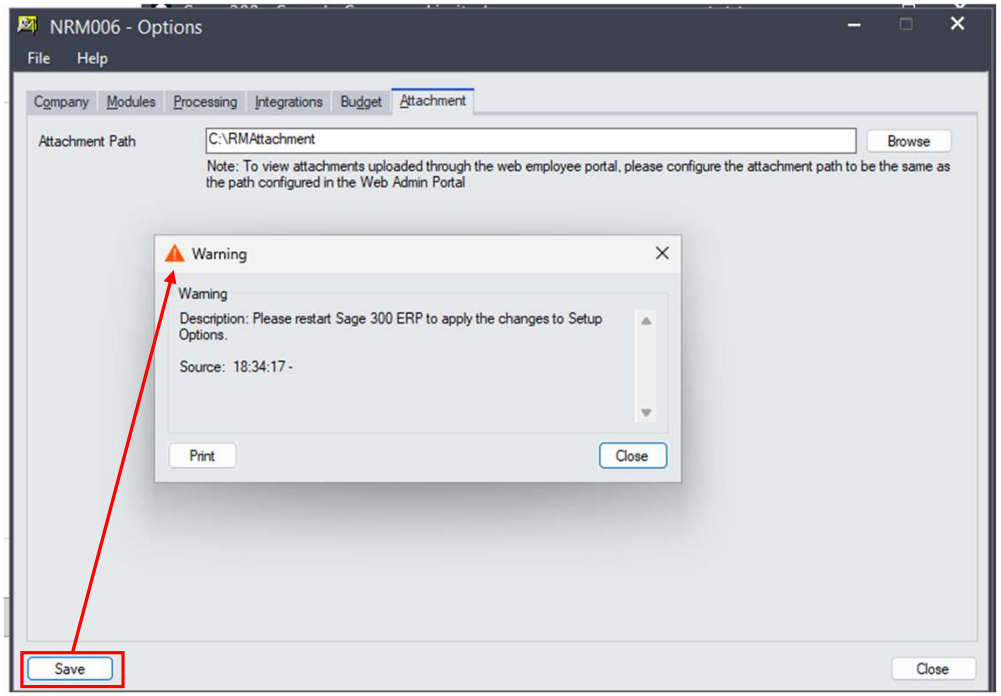
   3.3 Attachment Tab

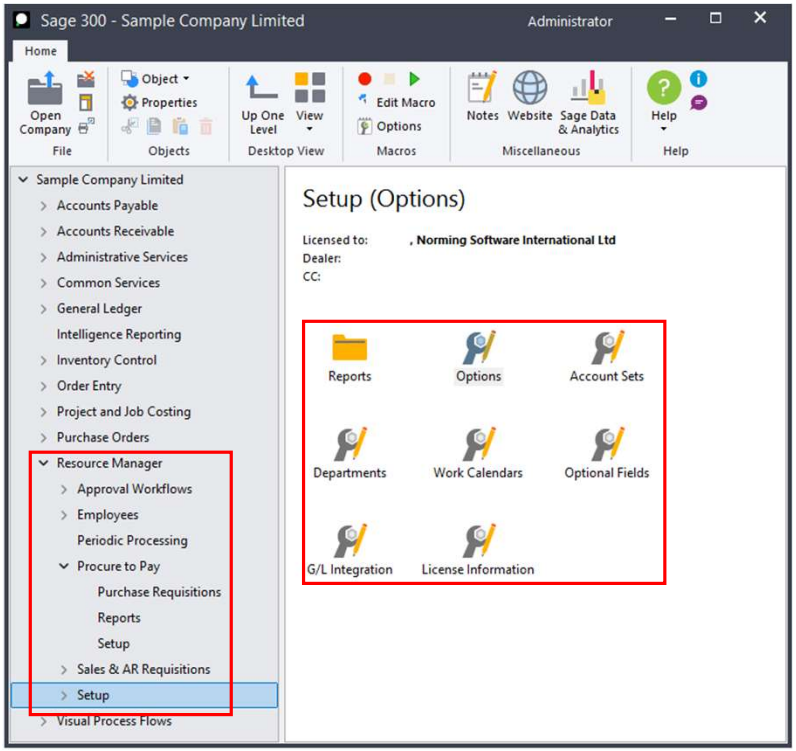


RM Back-end Setup

3. Configure settings in **Resource Manager > Setup > Options** Screen

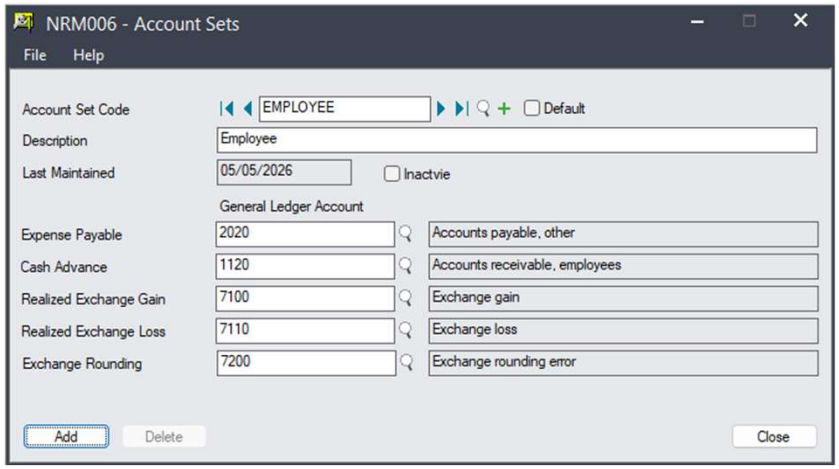
   3.4 Save Setting and re-open the company





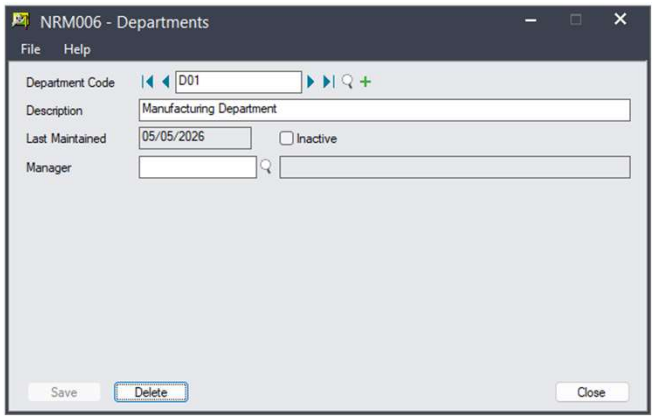
RM Back-end Setup

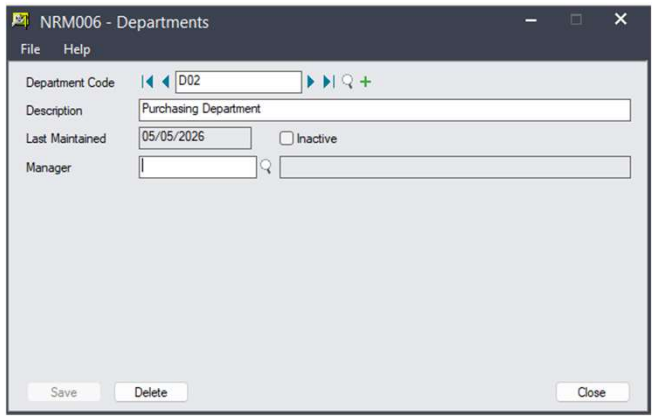
4. Configure settings in **Resource Manager > Setup > Account Sets** Screen

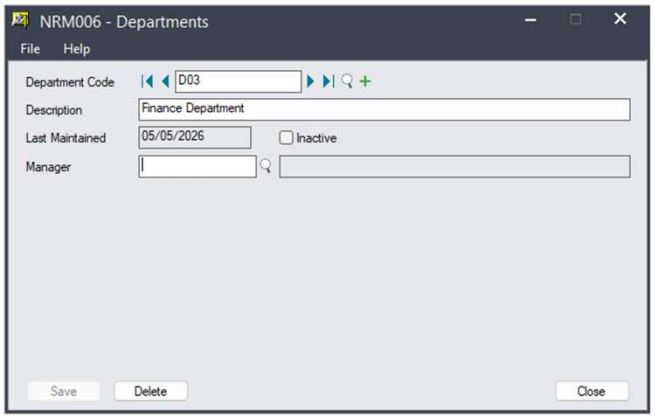


RM Back-end Setup

5. Configure settings in **Resource Manager > Setup > Department** Screen

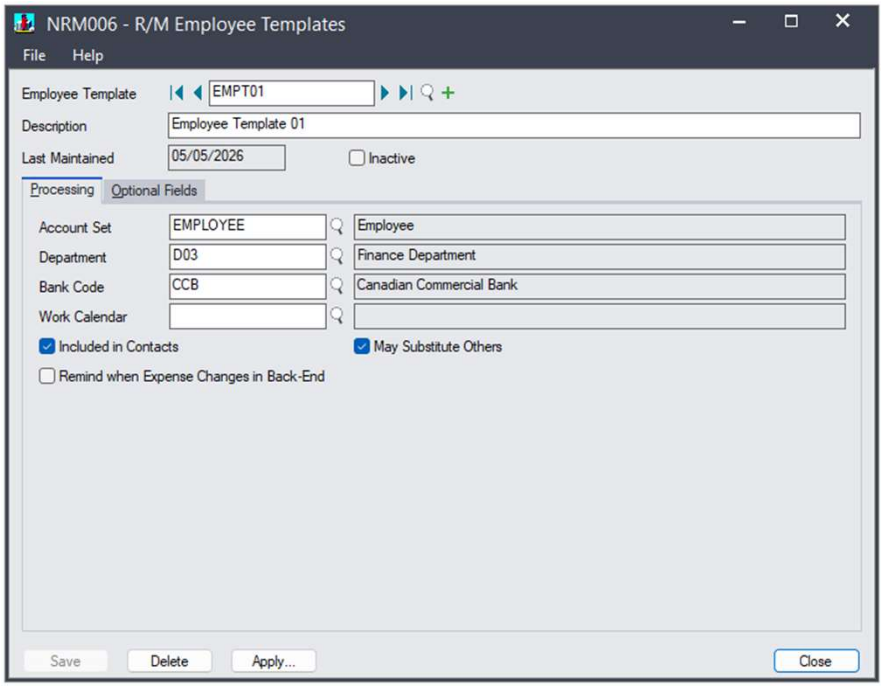






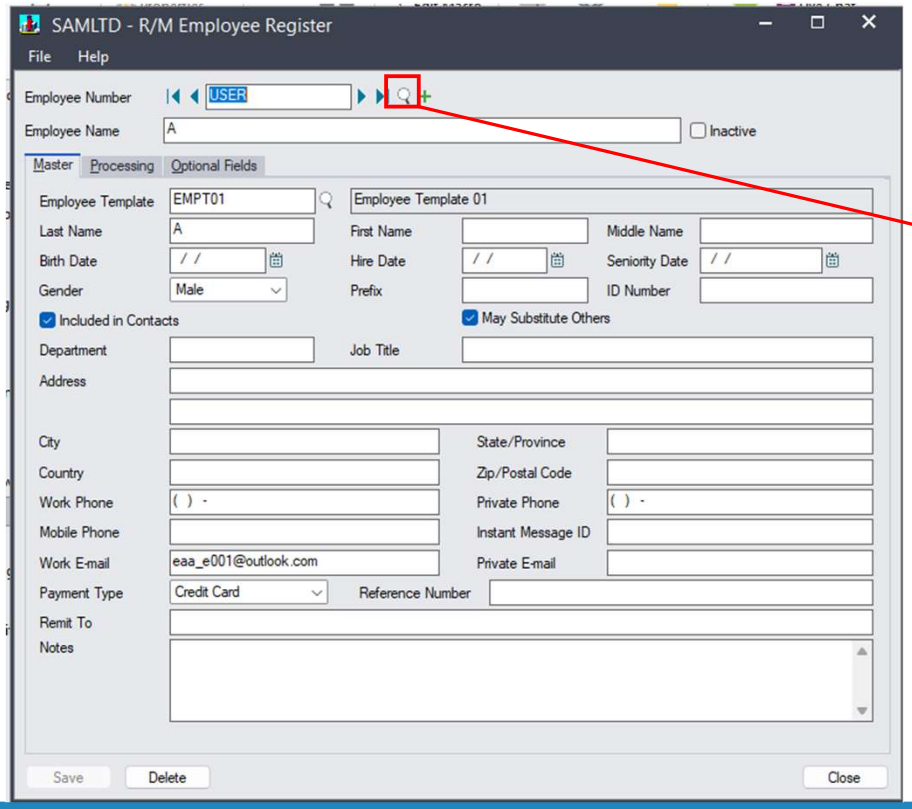
RM Back-end Setup

6. Configure settings in **Employees > Employee Templates** Screen

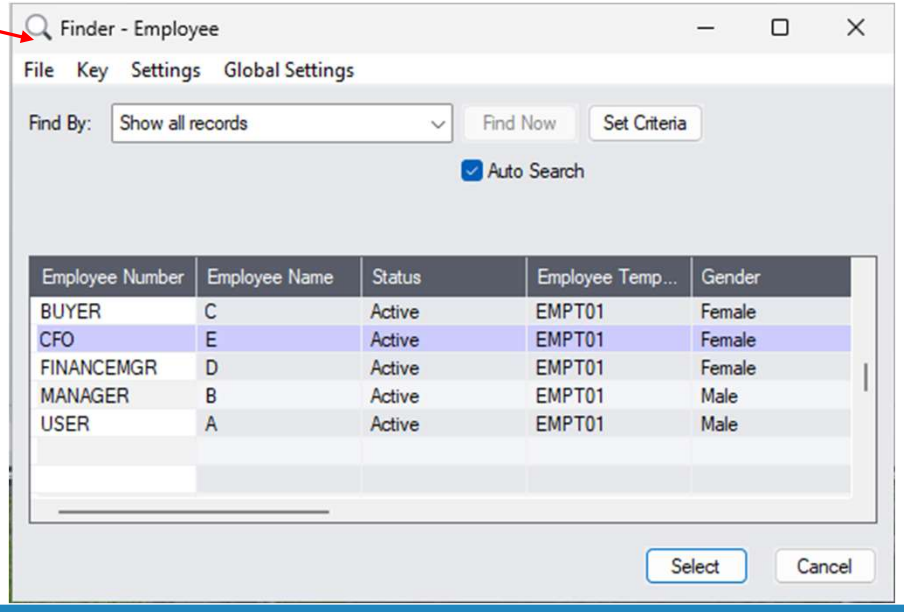


RM Back-end Setup

7. Configure settings in **Employees > Employee Registers** Screen

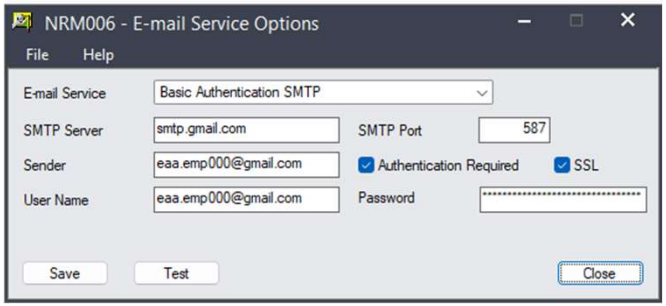


Employee Name	Department	Designation	Employee Number
A	MFG	Engineer	USER
B	MFG	Manager	MANAGER
C	Purchasing	Buyer	BUYER
D	Finance	Finance Manager	FINANCEMGR
E	Finance	CFO	CFO



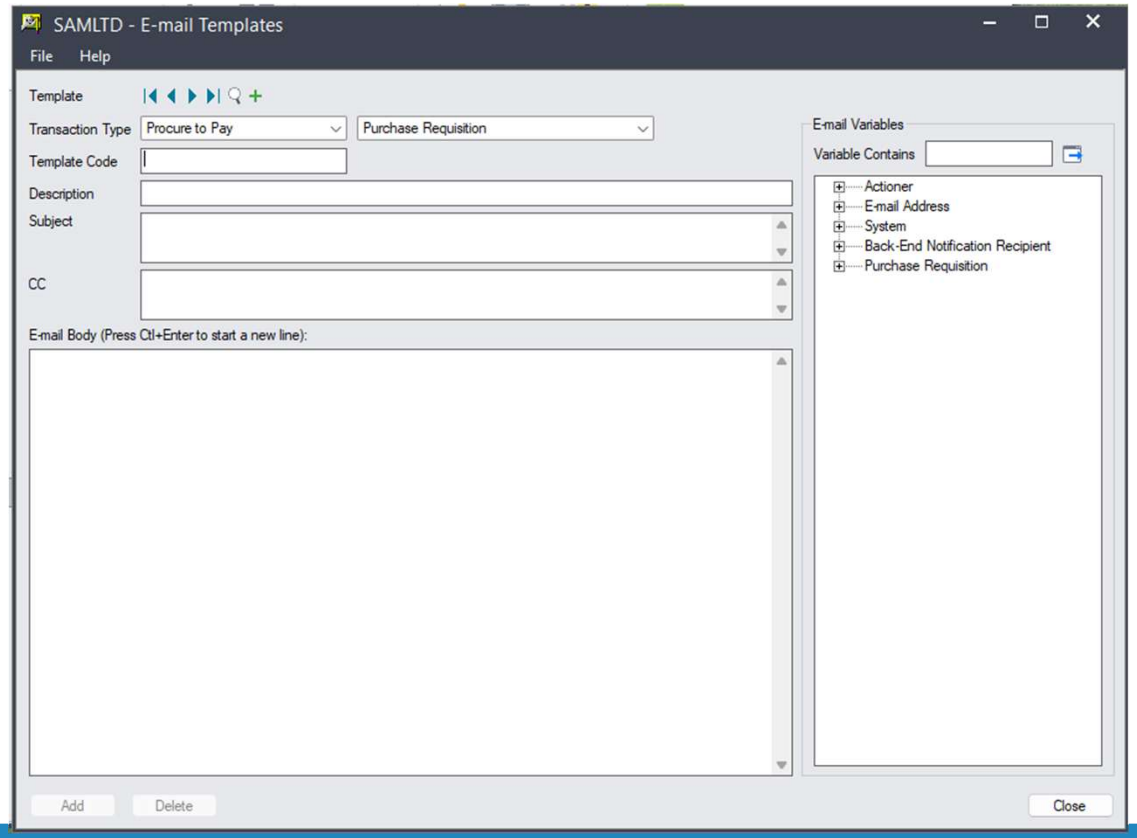
RM Back-end Setup

8. Configure settings in **Approval Workflows > Email Service** Screen



RM Back-end Setup

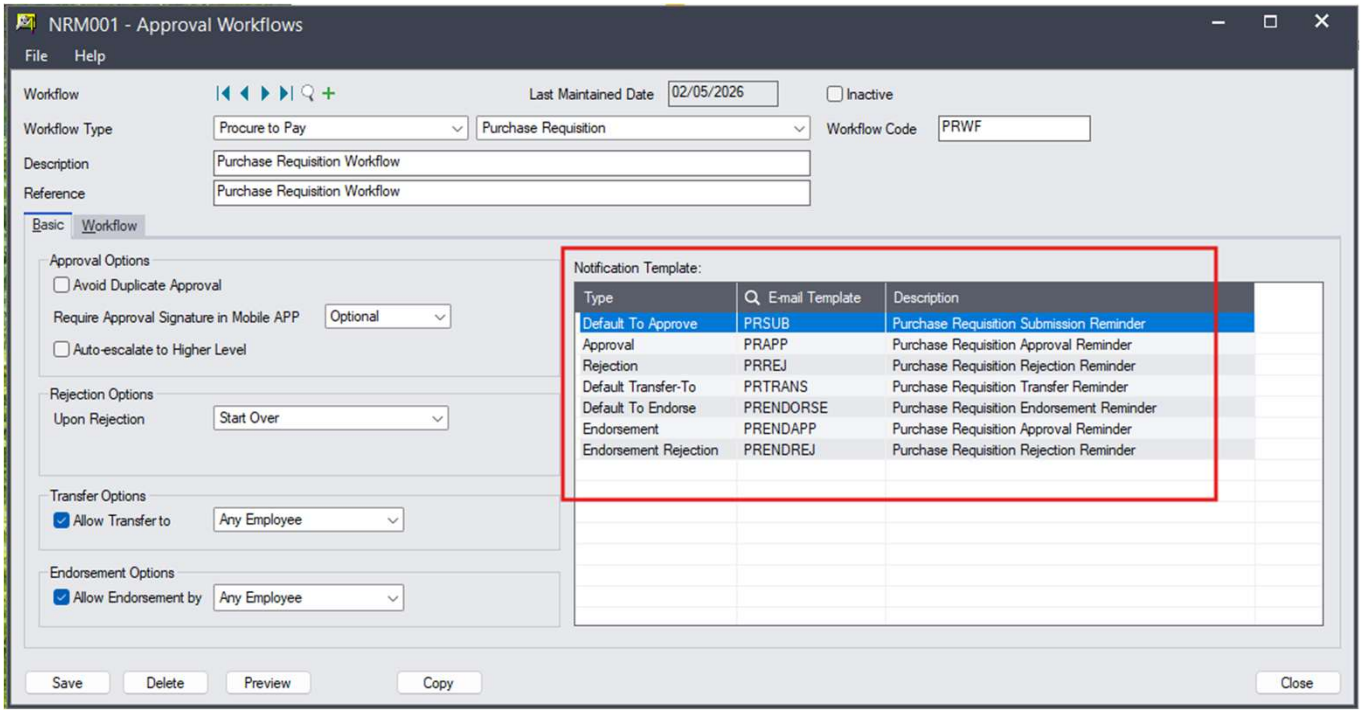
9. Create E-mail Templates using **Approval Workflows > E-mail Templates** Screen



RM Back-end Setup

9. Create E-mail Templates using **Approval Workflows > E-mail Templates** Screen

   9.1 List of Minimum required template



RM Back-end Setup

9. Create E-mail Templates using **Approval Workflows > E-mail Templates** Screen

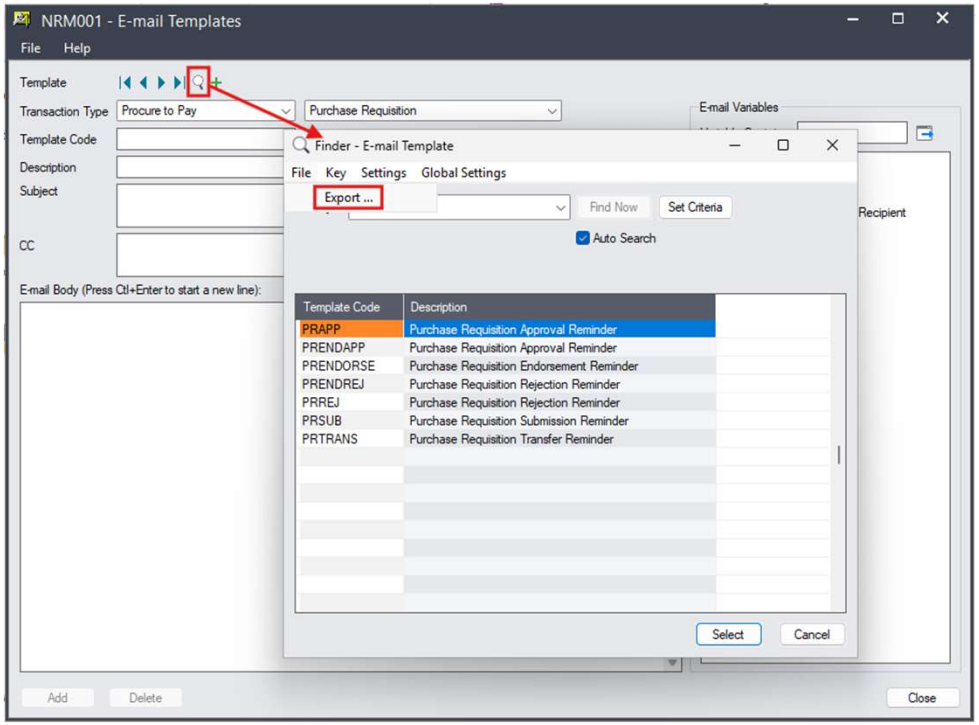
9.2 Meaning of each email template

1) **To Approve**: the email notification, which will be sent to the approver to remind the approver to approve the requisition;
2) **Transfer-to**: the email notification, which will be sent to the reassigned approver upon transfer of the requisition.
3) **To Endorse**: the email notification, which will be sent to the endorser when the requisition is forwarded for endorsement.
4) **Approval**: the email notification, which will be sent to the submitter to inform them that the requisition has been finally approved.
5) **Rejection**: the email notification, which will be sent to the submitter to inform them that the requisition has been rejected by approver.
6) **Endorsement**: the email notification, which will be sent to the actioner who requested endorsement from the endorser, informing the actioner that the endorsement has been granted.
7) **Endorsement Rejection**: the email notification, which will be sent to the actioner who requested endorsement from the endorser, informing the actioner that the endorsement has been rejected.

RM Back-end Setup

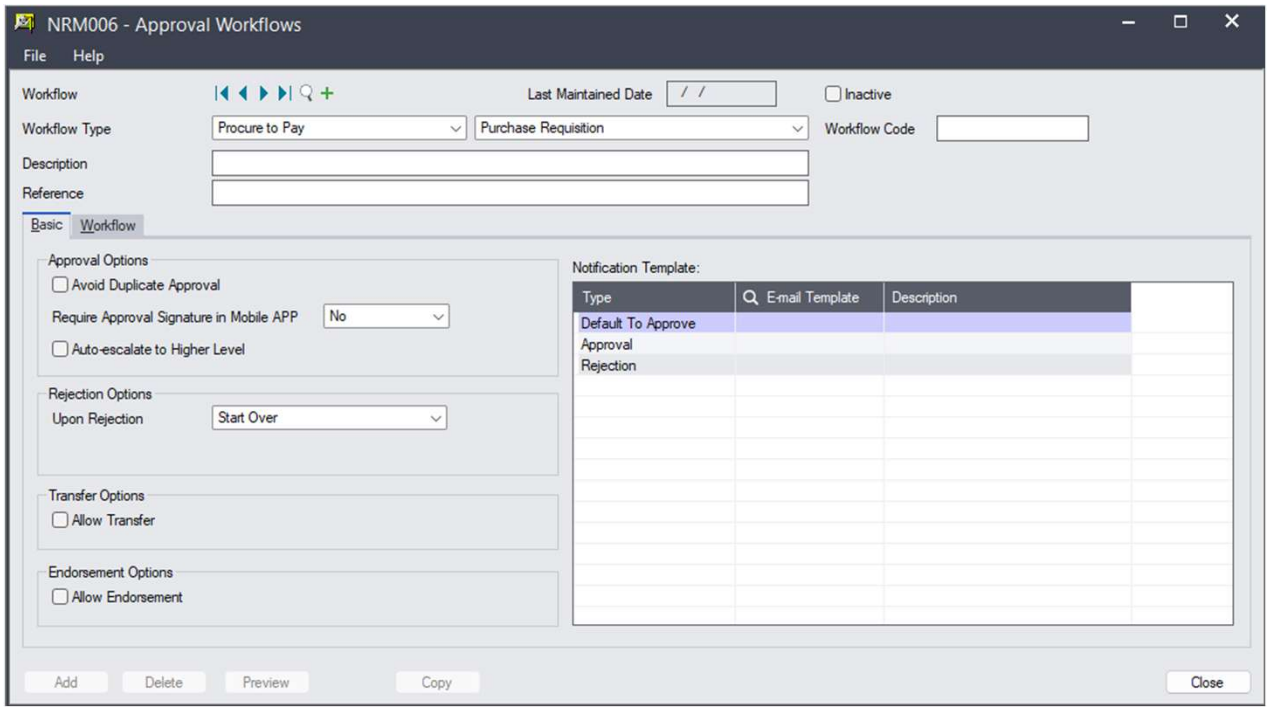
9. Create E-mail Templates using **Approval Workflows > E-mail Templates** Screen

9.3 Export and Import email notification templates from sample DB



RM Back-end Setup

10. Create approval workflow using **Approval Workflows > Approval Workflows** Screen



Training Overview

➢ **Hypothetical Example for Training**

Employee Name	Department	Designation	Employee Number
A	MFG	Engineer	USER
B	MFG	Manager	MANAGER
C	Purchasing	Buyer	BUYER
D	Finance	Finance Manager	FINANCEMGR
E	Finance	CFO	CFO

- A creates and submits Purchase Order Requisition -> route to B
- B reviews and approves/rejects the Requisition -> route to C if approved
- C gets quotations and confirms purchase price -> route to D
- D checks and approves to become PO if total PO amount <=5K, else routes E
- E checks and approves to become PO if total PO amount exceeds 5K

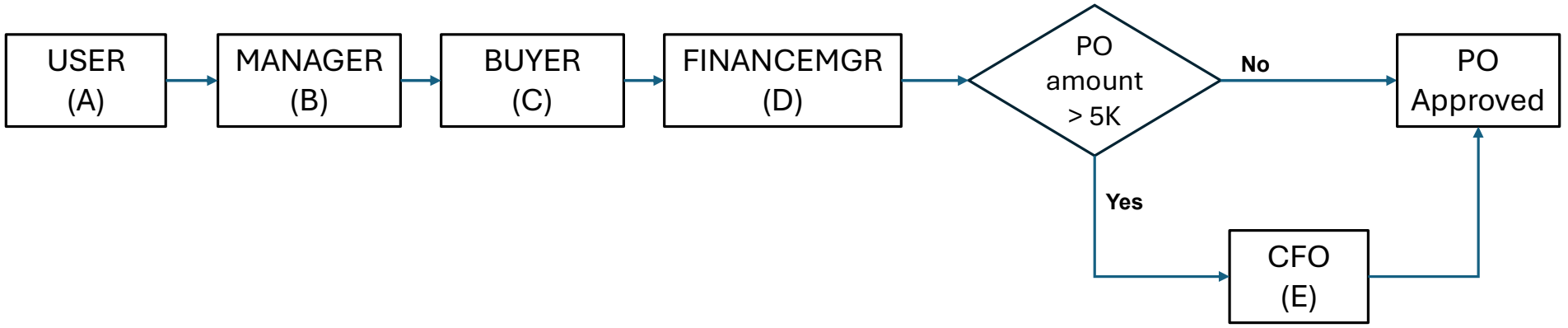
Training Overview

➢ Hypothetical Example for Training

- A creates and submits Purchase Order Requisition -> route to B
- B reviews and approves/rejects the Requisition -> route to C if approved
- C gets quotations and confirms purchase price -> route to D
- D checks and approves to become PO if total PO amount <=5K, else routes E
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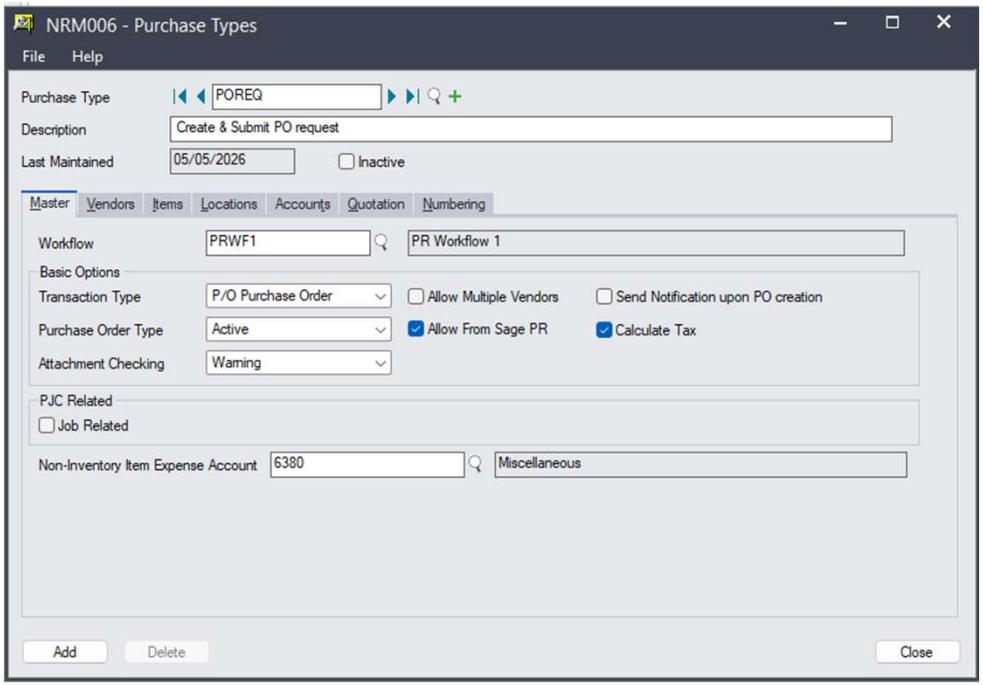
Employee Name	Employee Number
A	USER
B	MANAGER
C	BUYER
D	FINANCEMGR
E	CFO

▪ Flowchart of purchasing flow



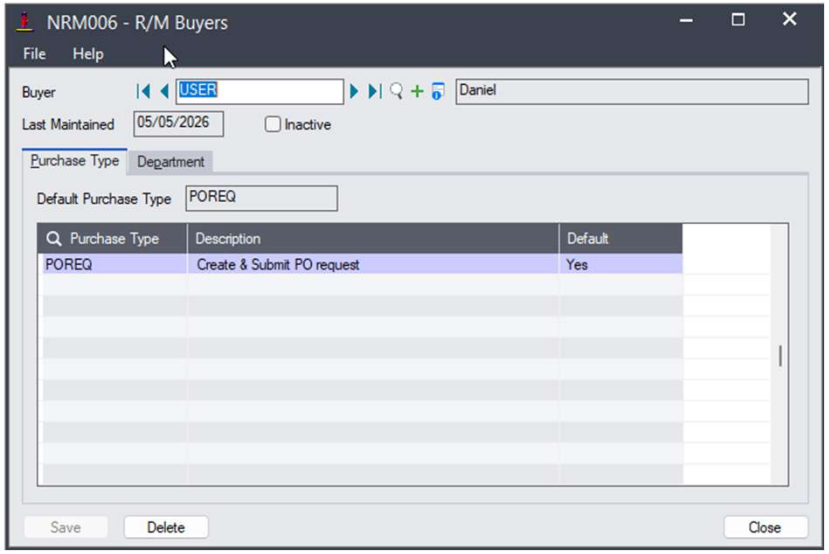
RM Back-end Setup

11. Create purchase type using **Procure to Pay > Setup > Purchase Types** Screen



RM Back-end Setup

12. Grant access right to employees using **Procure to Pay > Setup > Buyers** Screen

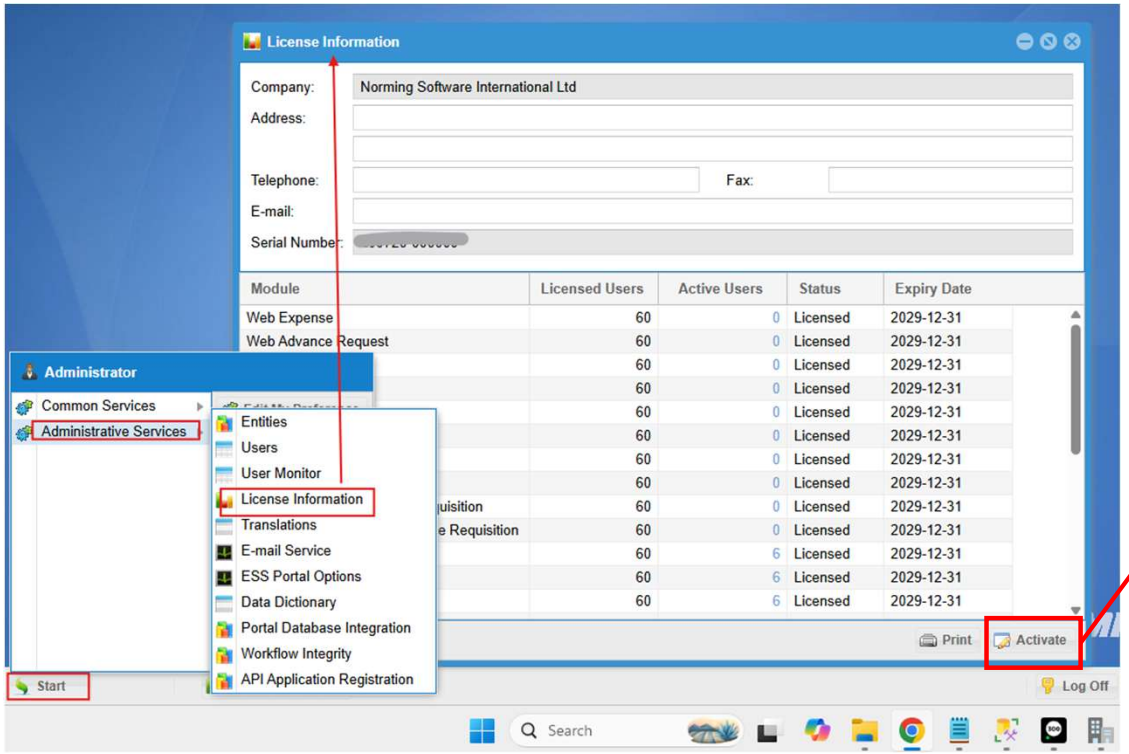


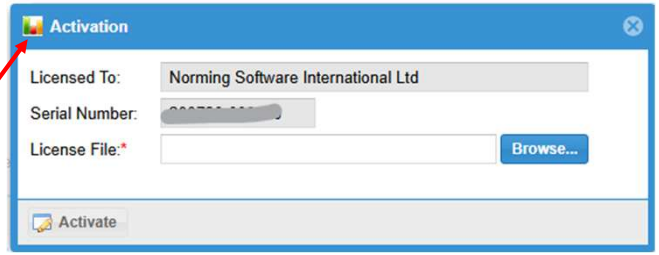
RM Web Admin Portal Setup

1. Activate License for RM Web Portal from Administrative Service>License Information Menu
2. Add Entity from Administrative Services>Entities Menu
3. Add ESS Groups from Common Services > ESS Groups Menu
4. Add ESS Users from Common Services > ESS Users Menu
5. Setup Attachment path from Administrative Services>ESS Portal Options menu. The attachment path is set under the ESS Applications tab. Please make sure that the configured path is the same as the path set in RM Backend.

RM Web Admin Portal Setup

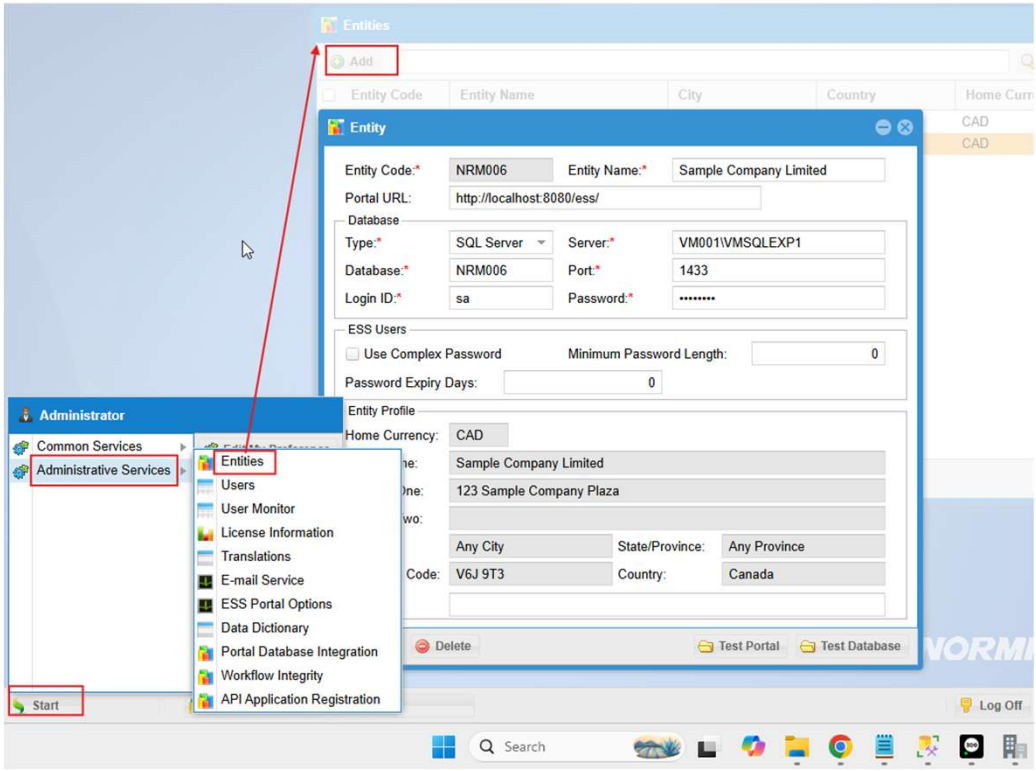
1. Activate License for RM Web Portal from Administrative Service>License Information Menu





RM Web Admin Portal Setup

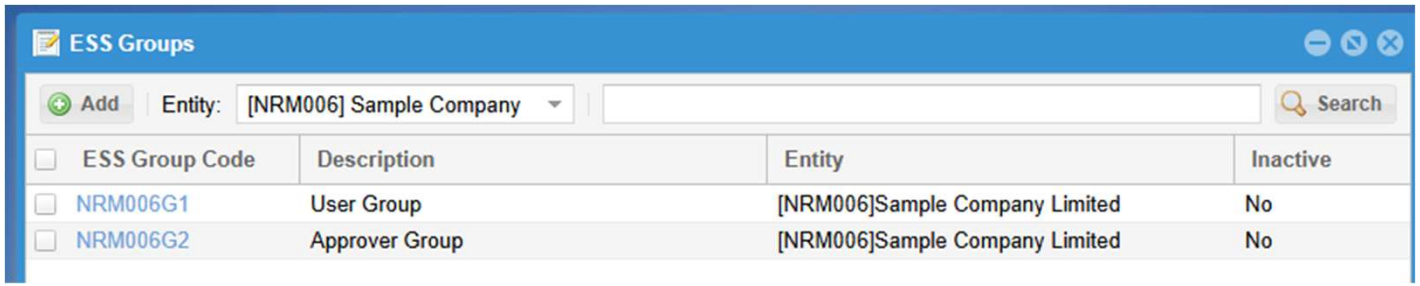
2. Add Entity from Administrative Services>Entities Menu



RM Web Admin Portal Setup

3. Add ESS Groups from Common Services > ESS Groups Menu

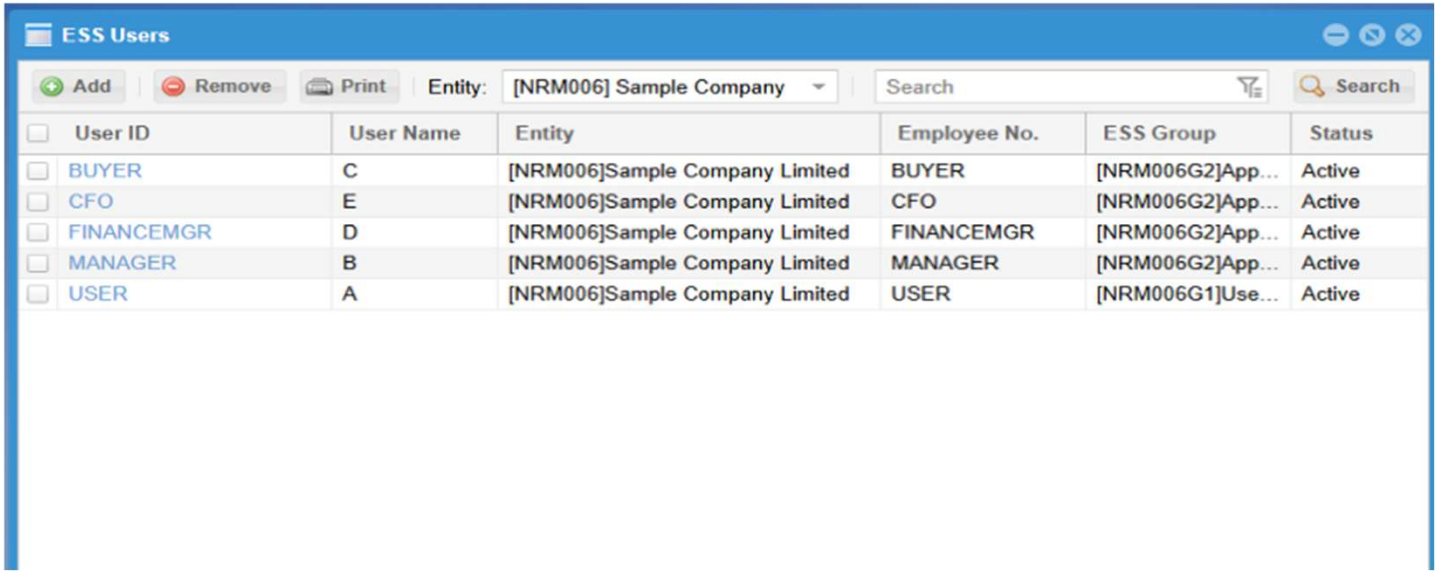
    1) At least one ESS Group must be created before adding ESS users;
    2) Two ESS groups are created for this training: one for users and another for the rest of the employees.
    3) Configure the Employee Portal UI display based on different employee groups.



RM Web Admin Portal Setup

4. Add ESS Users from Common Services > ESS Users Menu

   1) Add ESS users for 5 employees which are involving in the purchase requisition approval workflow;
   2) 1 employee are assigned to User ESS group, and 4 employees are assigned to Approver ESS group.



Create and Post Purchase Requisition

1. Walk through the process, starting from User creates and submits the PO request from RM Web UI.
2. Illustrate the feature of attaching supporting documents from Web UI.
3. Show posting the requisition from RM back-end.

Advance Topics

1. Configure User Entry Screen
2. Allow multiple vendors in one web purchase requisition
3. RFQ
4. Handle scenario when approver is on leave
5. Approval workflow – Advanced functions
6. G/L budget limit checking.
7. G/L account number override
8. Job-related Purchase Requisition
9. PJC budget/estimate checking
10. RM Item-level budget checking
11. Auto-send PO to vendor
12. Show auto posting the requisition by using task-scheduler

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Q&A